

Expenses: Creating & Editing a Cash Advance Request

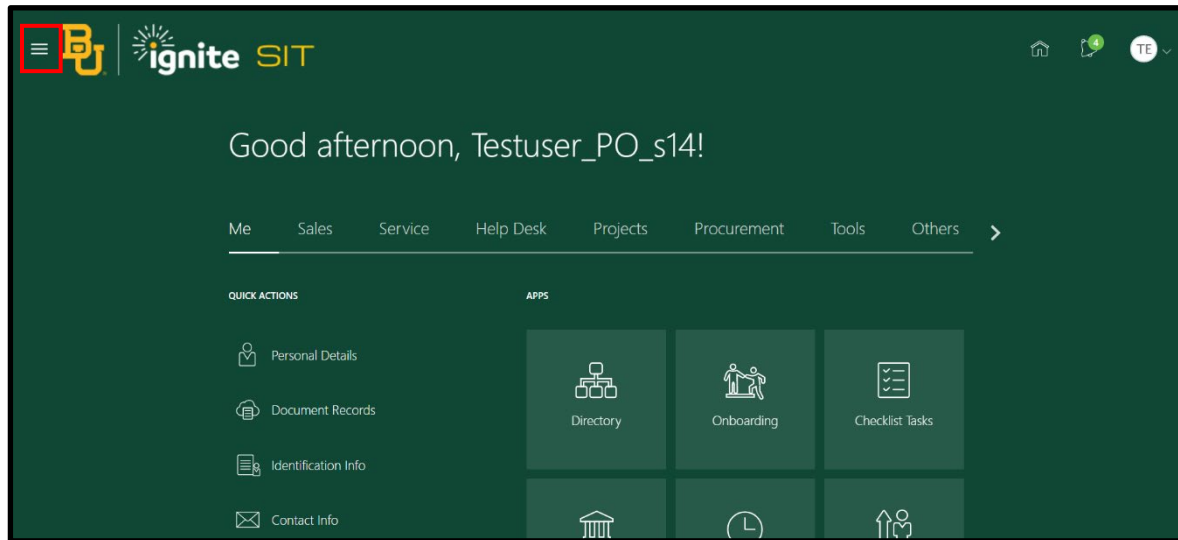
Overview

- Cash Advance requests can be submitted in advance of travel when travel meets the definition of group travel, and no alternate mean of payment exists.
- Documentation of the amount and purpose for the request is required information when submitting a Cash Advance request.
- Cash Advance requests can be saved and stored as “In Progress” to be submitted at later dates.
- A Cash Advance request can be withdrawn after it is submitted, while it is still pending approval.
 - After being withdrawn, the Cash Advance request can be deleted, edited, and re-submitted, or saved and kept as “In Progress”.
 - Instructions for withdrawing an advance are at the end of this job aid.
- Unused Cash Advance funds must be returned within 60 days via Miscellaneous Receipt and deposit processed by your Department’s AR Specialist.
- **Timing is critical:**
 - Care should be taken to ensure an advance is **not** returned before the expenses have cleared, and
 - The return of unused Cash Advance funds should be processed **before** any additional expense reports from unrelated trips are submitted.

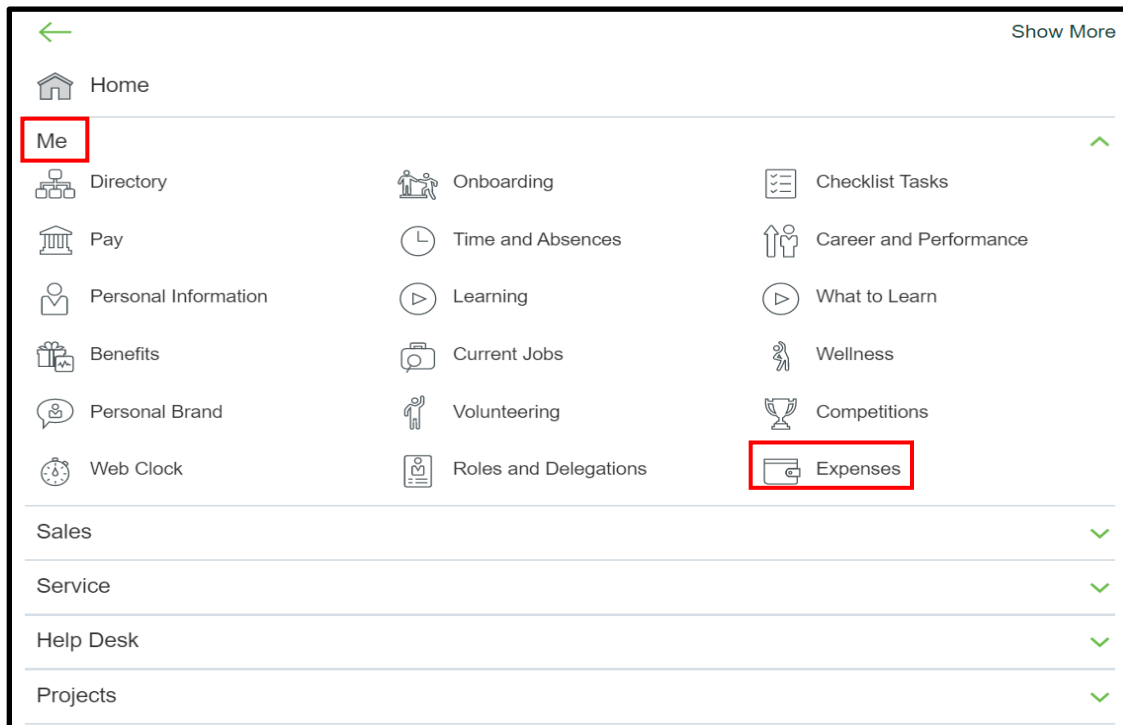
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I. Navigating to the Self-Service Module

- I. You can access the **Expense Module** in two ways:
 - a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



- b. (Option 1) Under the **Me** section, click the drop down arrow, and select **Expenses** from the drop down list.



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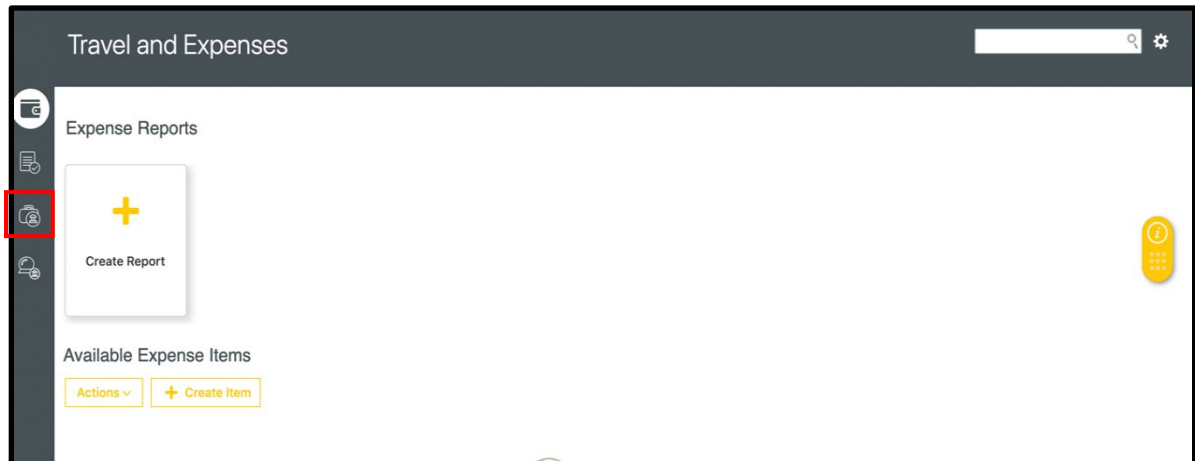
- c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Expenses** tile on the Main Page.

The screenshot displays the Ignite BPT home page. At the top left, there is a navigation menu with the 'Me' option highlighted by a red box. Below the navigation menu, the user is greeted with 'Good afternoon, Smith!'. The main content area is divided into two sections: 'QUICK ACTIONS' on the left and 'APPS' on the right. The 'QUICK ACTIONS' section lists various user-related tasks such as 'Personal Details', 'Document Records', 'Identification Info', 'Contact Info', 'Family and Emergency Contacts', 'My Organization Chart', 'My Public Info', 'Change Photo', 'Information Sharing', 'Employment Info', and 'Additional Assignment Info'. The 'APPS' section features a grid of application tiles. The 'Expenses' tile, located in the bottom row of the grid, is highlighted with a red box. Other tiles include 'Directory', 'Onboarding', 'Checklist Tasks', 'Pay', 'Time and Absences', 'Career and Performance', 'Personal Information', 'Learning', 'What to Learn', 'Benefits', 'Current Jobs', 'Wellness', 'Personal Brand', 'Volunteering', and 'Competitions'. A plus sign (+) is visible at the bottom right of the 'APPS' grid.

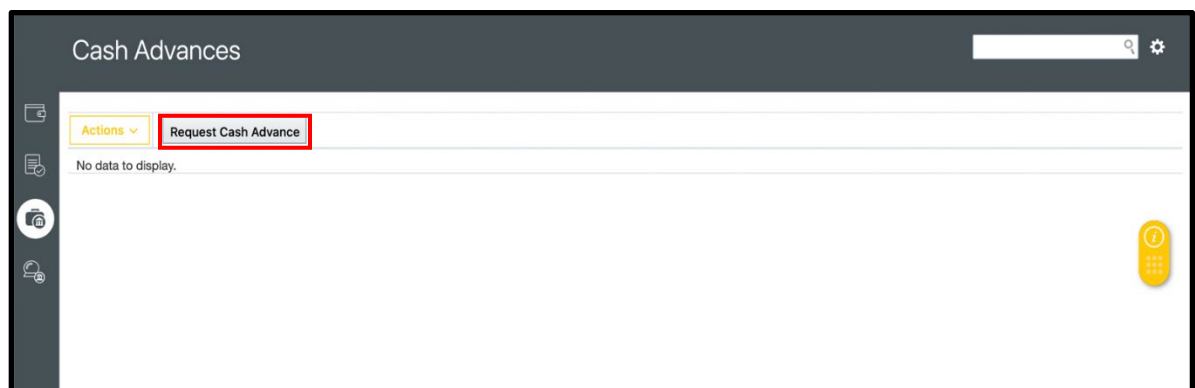
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2. Create a Cash Advance Request

1. Upon entering the **Expenses** tile, click the **Cash Advances** icon (left side of screen.)



2. Select **Request Cash Advance**



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The screenshot shows the 'Request Cash Advance' form. At the top right, there are buttons for 'Save', 'Submit', and 'Cancel'. The form fields are as follows:

- * Advance Amount: [text input] USD - US Dollar
- * Purpose: [text area]
- Advance Type: Travel (dropdown)
- Trip Start Date: mm/dd/yyyy (calendar icon)
- Trip End Date: mm/dd/yyyy (calendar icon)
- Attachment: None (+ icon)
- Location: [text input]
- Supporting Documentation: <https://www.baylor.edu/procurement/doc.php/363633.pdf>
Copy the URL into a new tab and attach the form to the request.

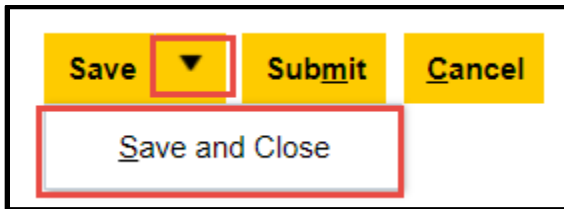
3. Enter the following (All fields are required on cash advances)
 - a. **Advance Amount** – Enter the requested amount in U.S dollars.
 - b. **Purpose** – Write in the purpose for the cash advance.
 - c. **Advance Type** – Select travel or other.
 - d. **Trip Start Date** – Select the date that the cash advance is needed from the calendar.
 - e. **Trip End Date** – Select the date that the cash advance is needed from the calendar.
 - f. **Attachment** – Click on attachment icon “+” to attach a completed Travel Advance Form. The form must be attached (URL link to form is located adjacent to **Supporting Documentation** field).
 - g. **Location** – List the location where the travel/event will take place.
 - h. **Supporting Documentation** – Copy the URL address into a new tab and attach the completed Travel Advance Form to the request.

4. If you are ready to submit your **Cash Advance Request**, click the **Submit** button in the top right corner of the screen. If you are not yet ready to submit, you can also save and submit later.

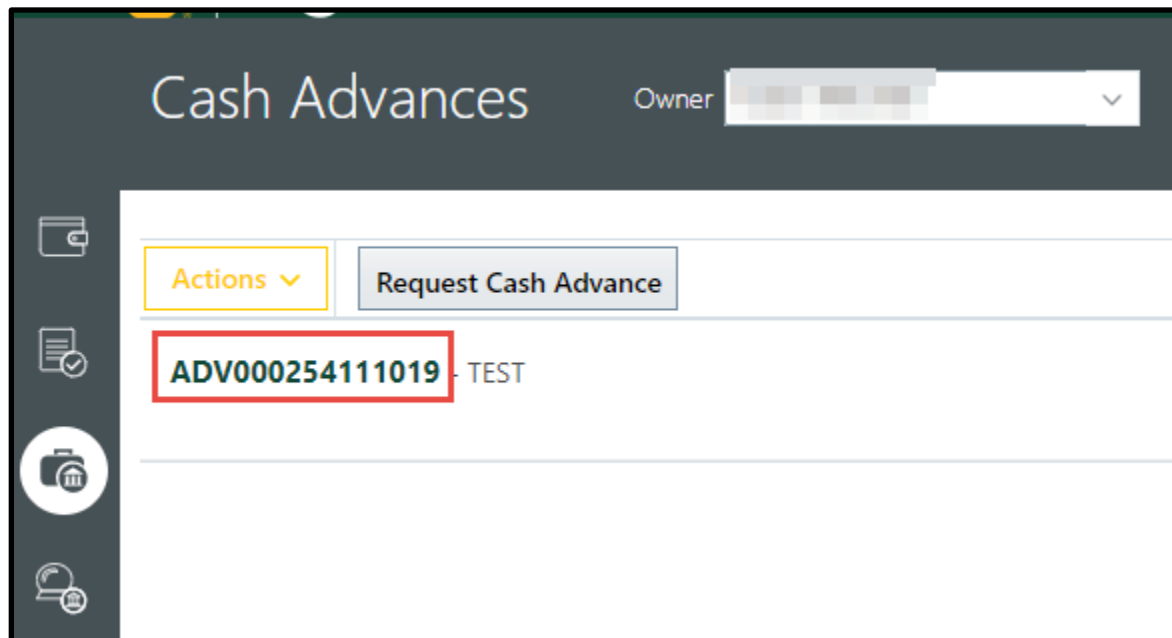


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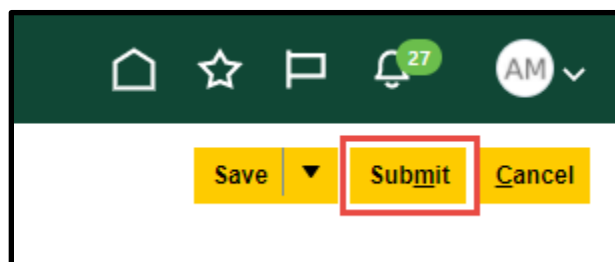
5. If you would like to save your request to submit later, click on the “**Save**” drop down in the top right corner of the screen and select “**Save and Close**”.



6. To submit a saved Cash Advance Request, navigate to the Cash Advance screen and click the **Cash Advance** number to open it.



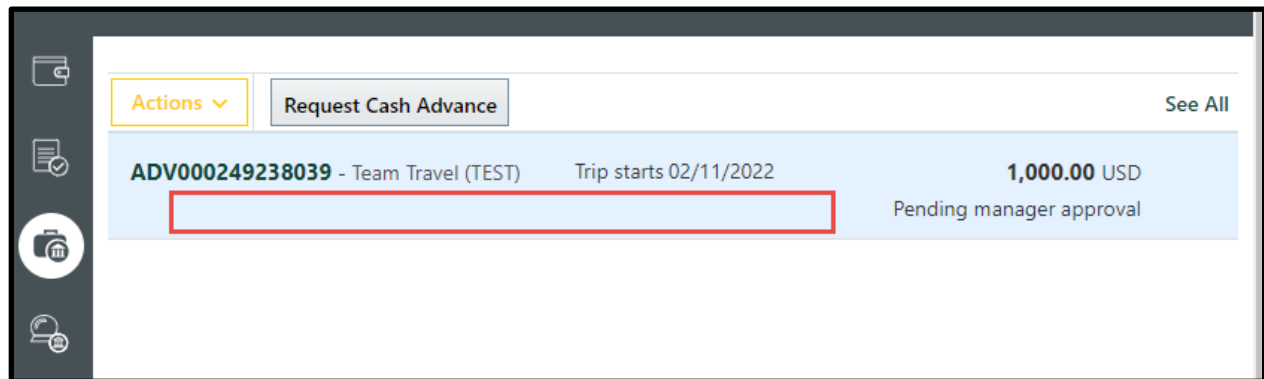
7. The request can be edited before submitting. To submit, click the “**Submit**” button in the top right corner.



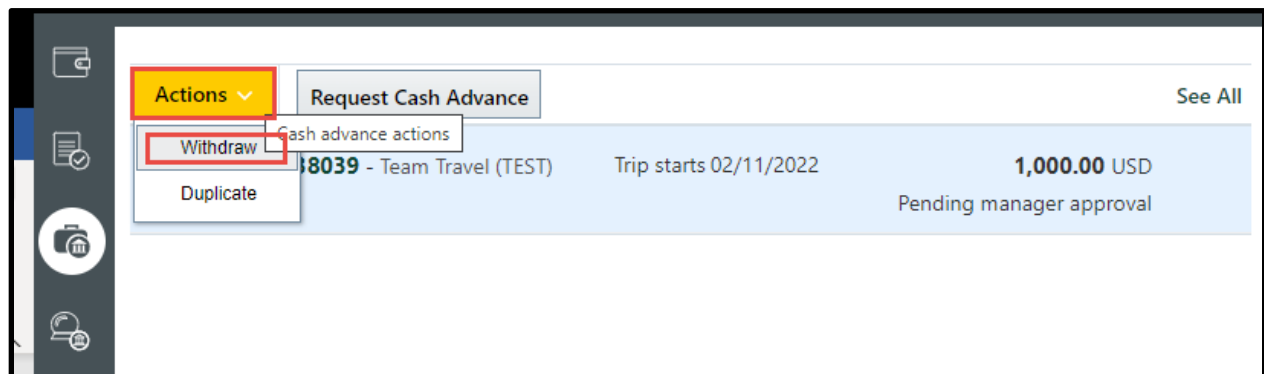
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3. Withdraw a Cash Advance Request *(only if not approved)*

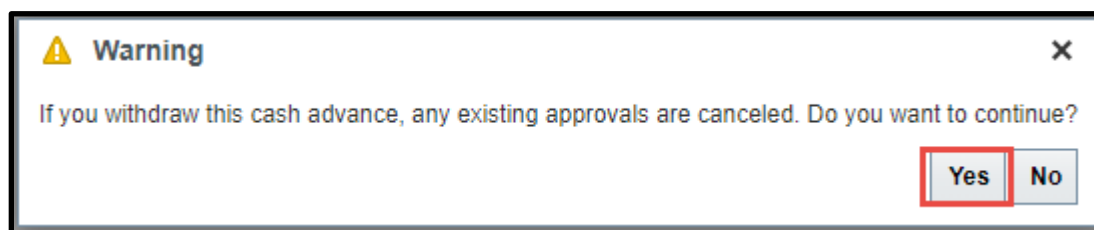
1. To withdraw a **Cash Advance** request after submission, navigate to the cash advance screen.
2. Find the Cash Advance number and select the row by **clicking the row** (the white next to the text). The row will turn light blue to indicate the row is selected. **Do not open the advance by clicking on the Cash Advance number.**



3. Click on the “**Actions**” drop down on the left of the screen and click “**Withdraw**”.



- a. *Click “**Yes**” when the warning message appears.



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4. Once the request is withdrawn, you can now edit and resubmit the **Cash Advance** request. Open the request by clicking the number, and resubmit.
5. If the request needs to be deleted, click the “**X**” on the lower right side of the **Cash Advance** request row.

