EX-08 Request Cash Advances

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Request Cash Advances in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of requesting Cash Advances. A Cash Advance is a request for payment made in advance by an employee to cover expenses that are expected to incur while traveling or conducting business.

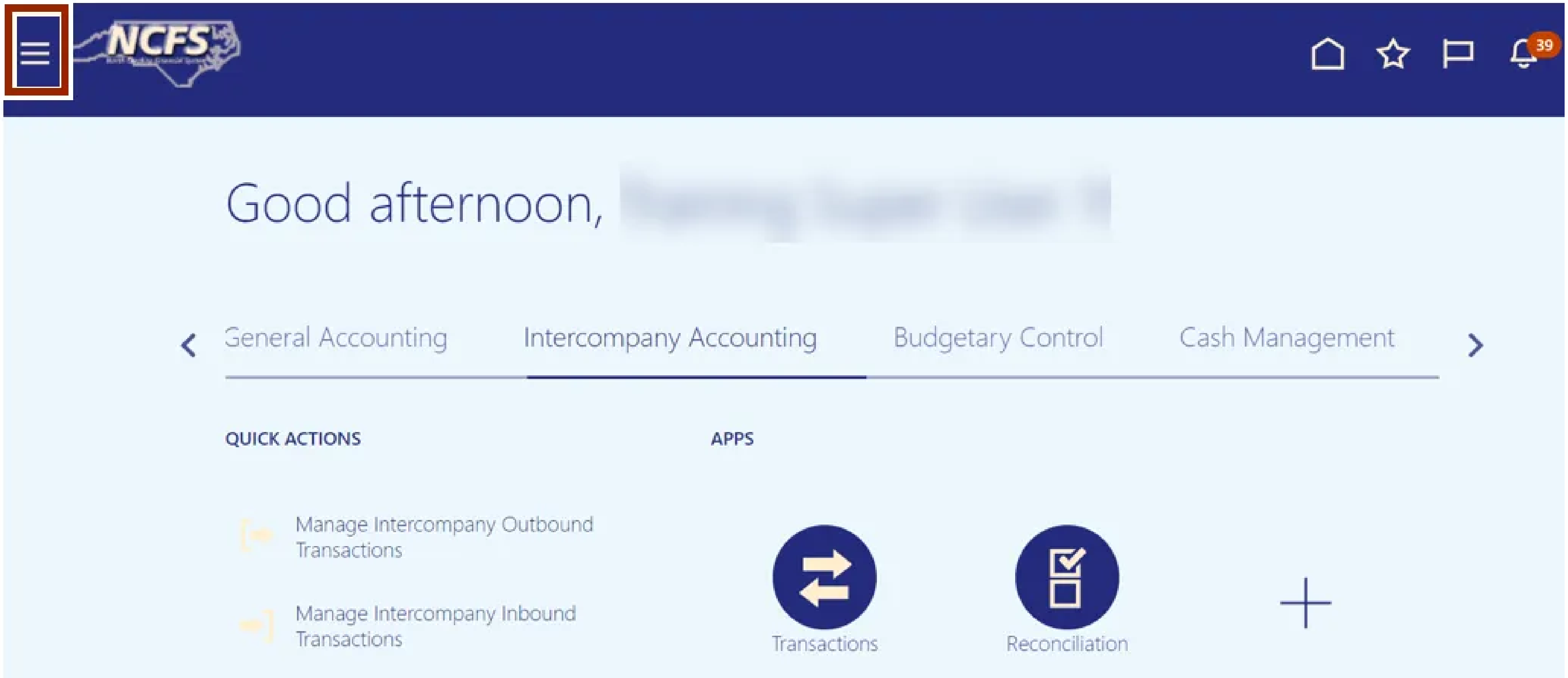
Request Cash Advances

To request Cash Advances, please follow the steps below. There are 15 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

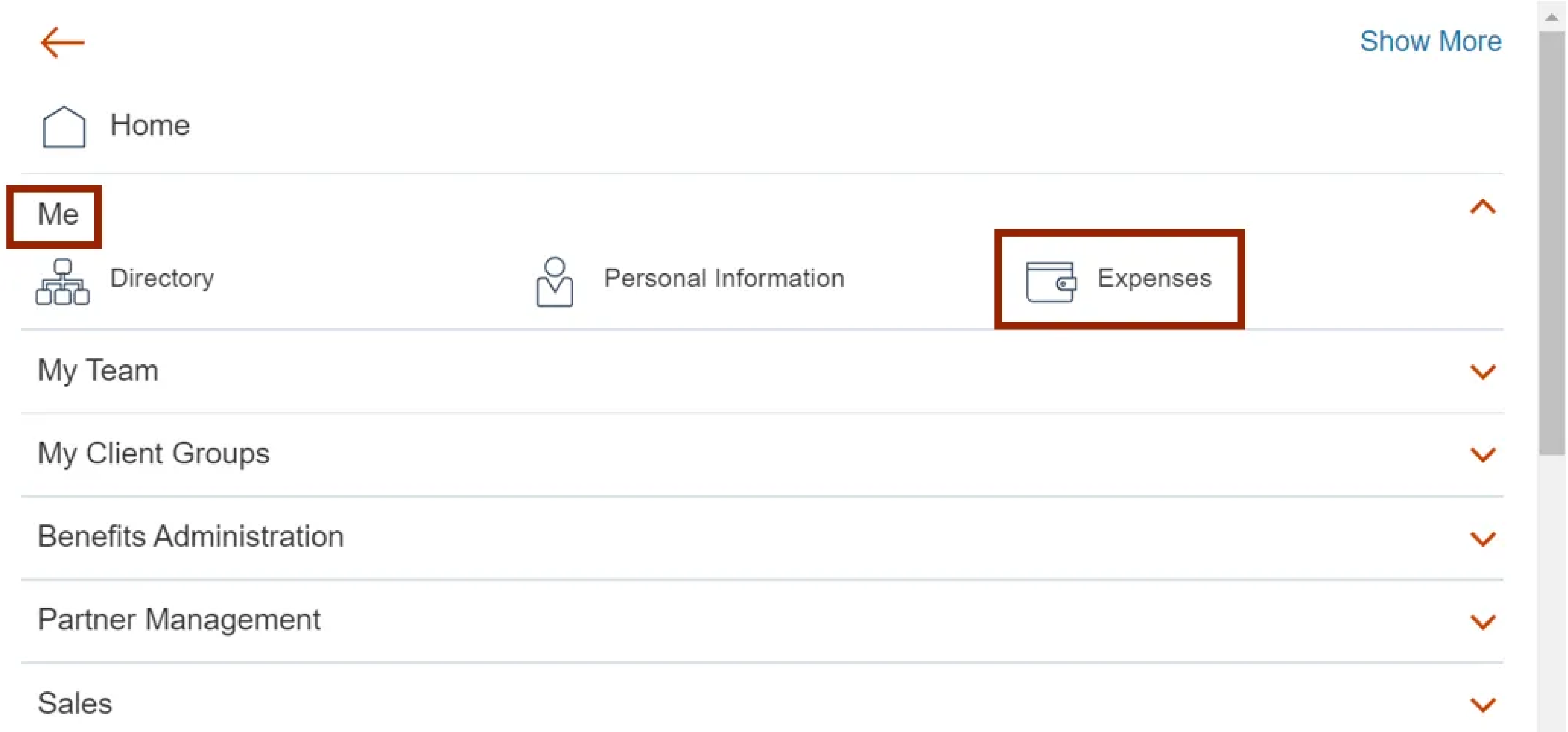
Step 2. On the **Home** page, click the **Navigator** icon.

Image



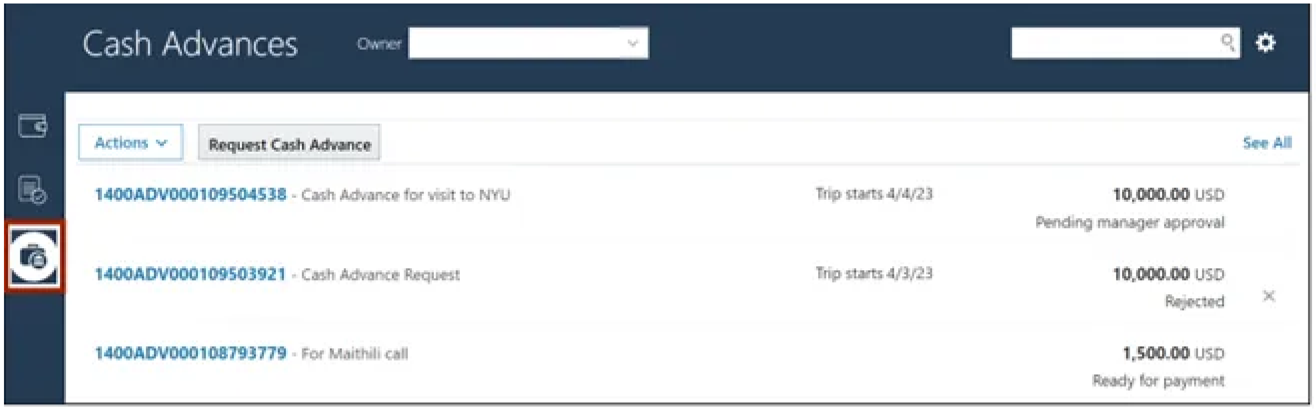
Step 3. Click the **Me** option and select **Expenses**.

Image



Step 4. Click the **Cash Advances** icon on the left.

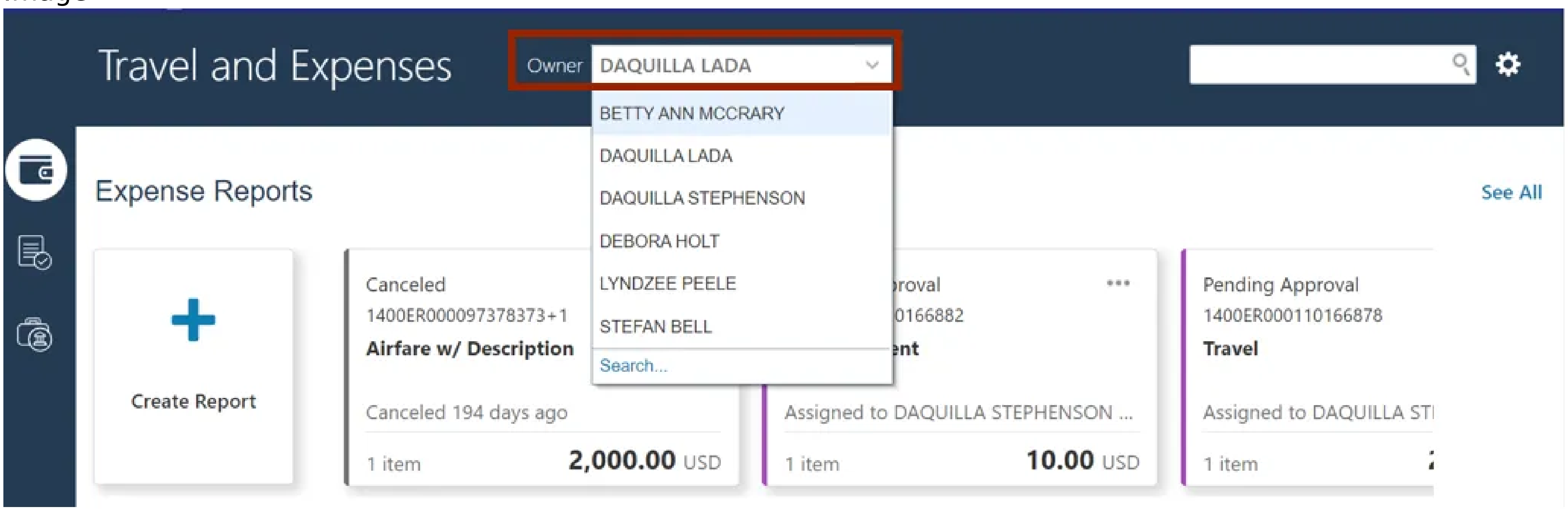
Image



Step 5. Select the Owner from the drop-down choice list.

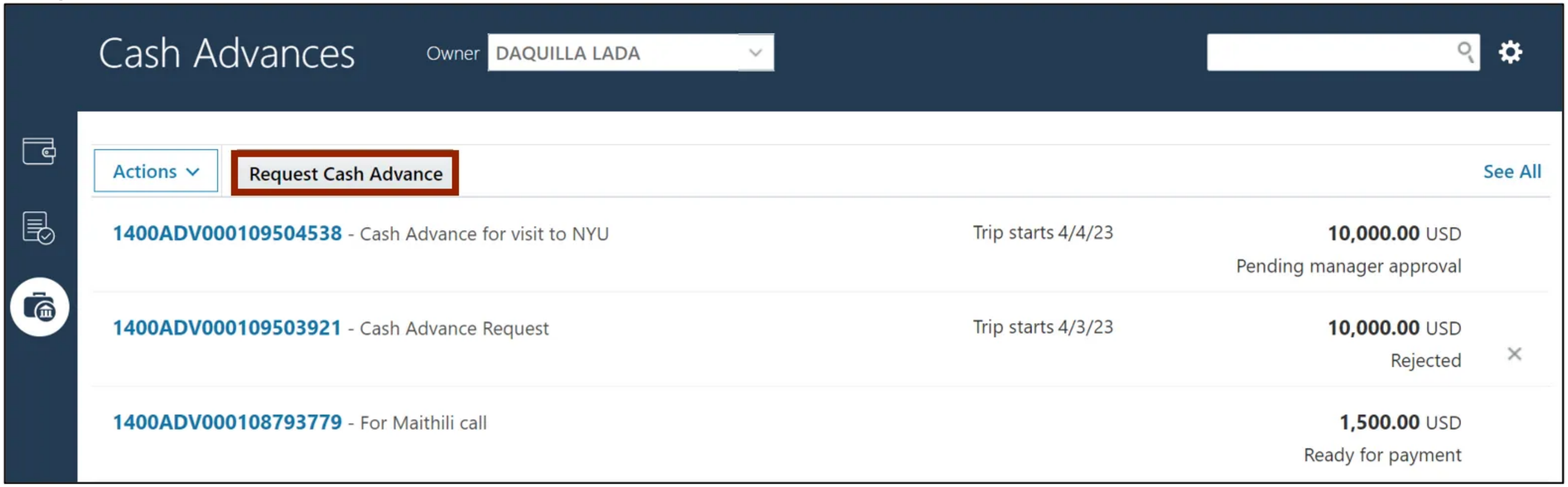
In this example, we choose **DAQUILLA LADA**.

Image



Step 6. Click the **Request Cash Advance** button.

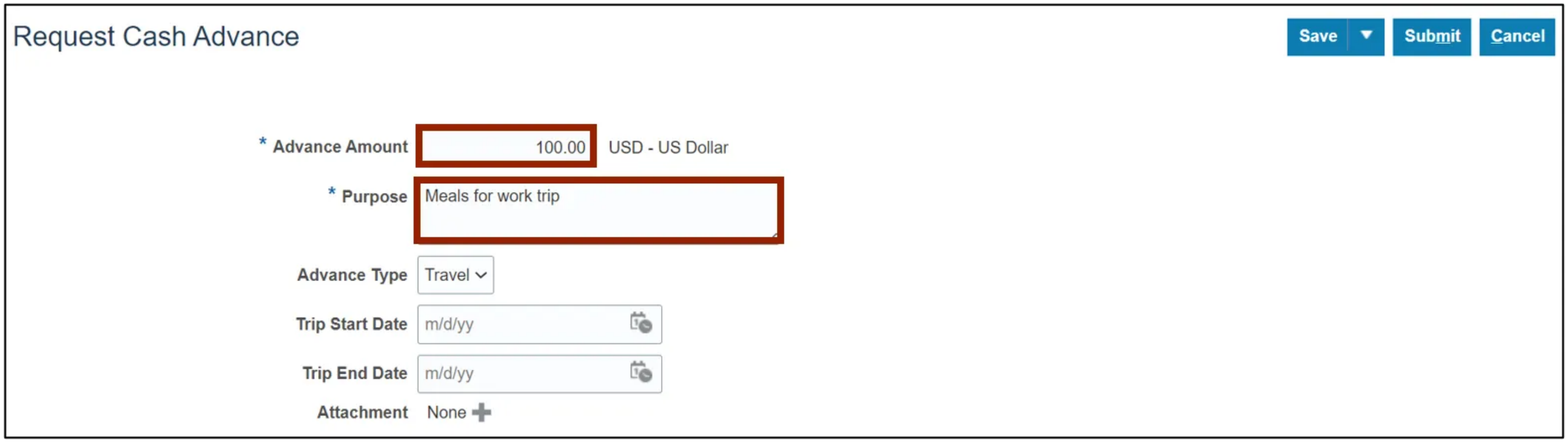
Image



Step 7. On the **Request Cash Advance** page, enter the ***Advance Amount*** number and the ***Purpose***.

In this example, choose **100** for ***Advance Amount*** field and **Meals for work trip** for ***Purpose*** field.

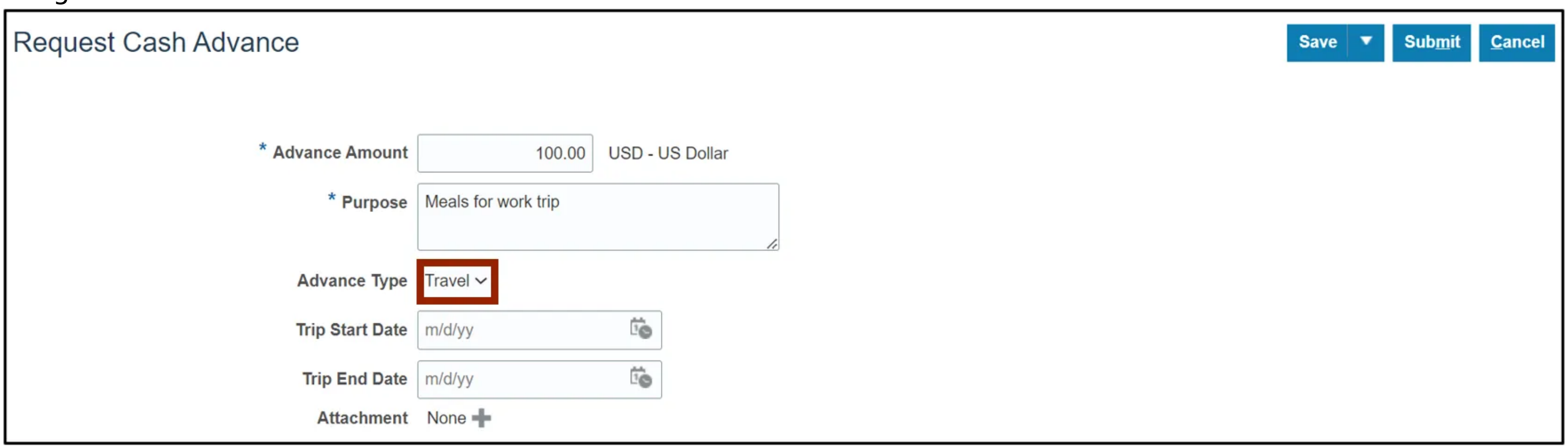
Image



Step 8. From the *Advance Type* drop-down choice list, select the appropriate Cash Advance option.

In this example, we choose **Travel**.

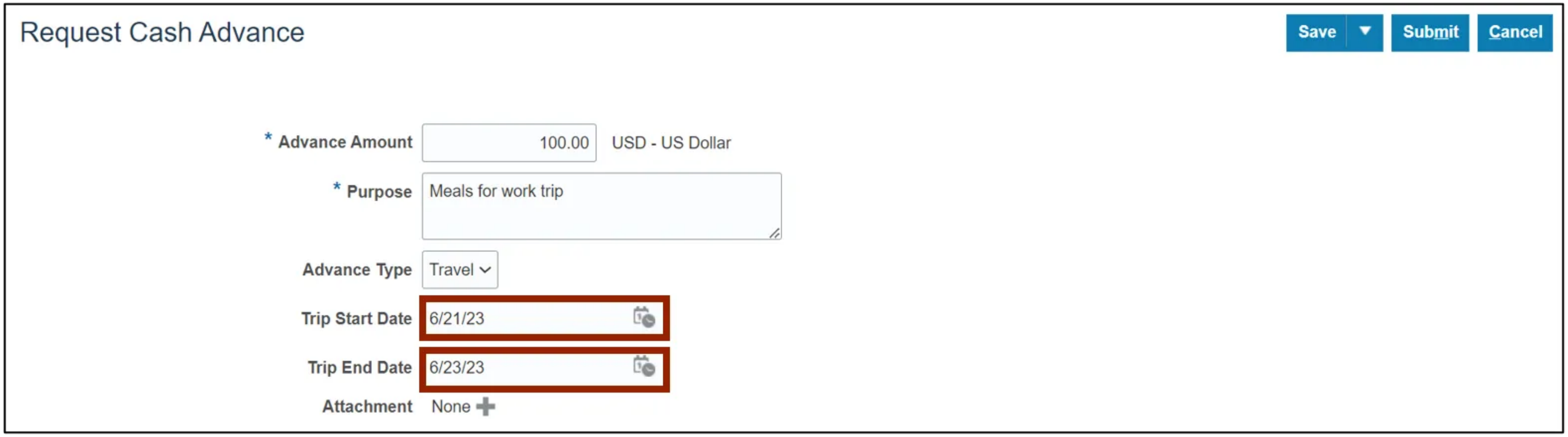
Image



Step 9. Select the ***Trip Start Date*** and ***Trip End Date***.

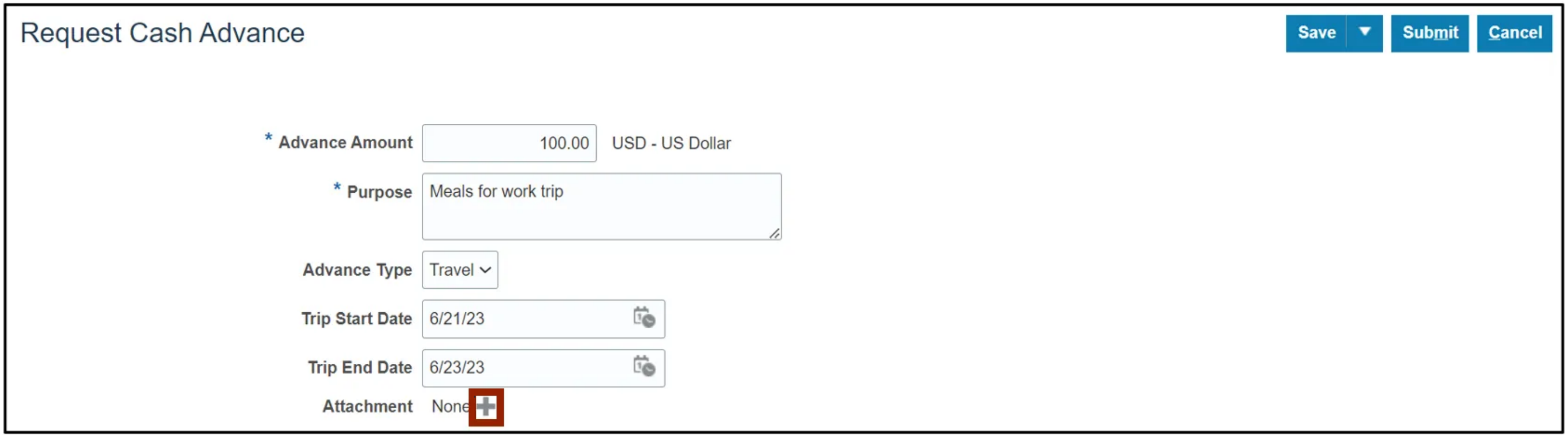
Note: These should be provided if requesting a Temporary Cash Advance, or they can be left blank if requesting a Permanent Cash Advance.

Image



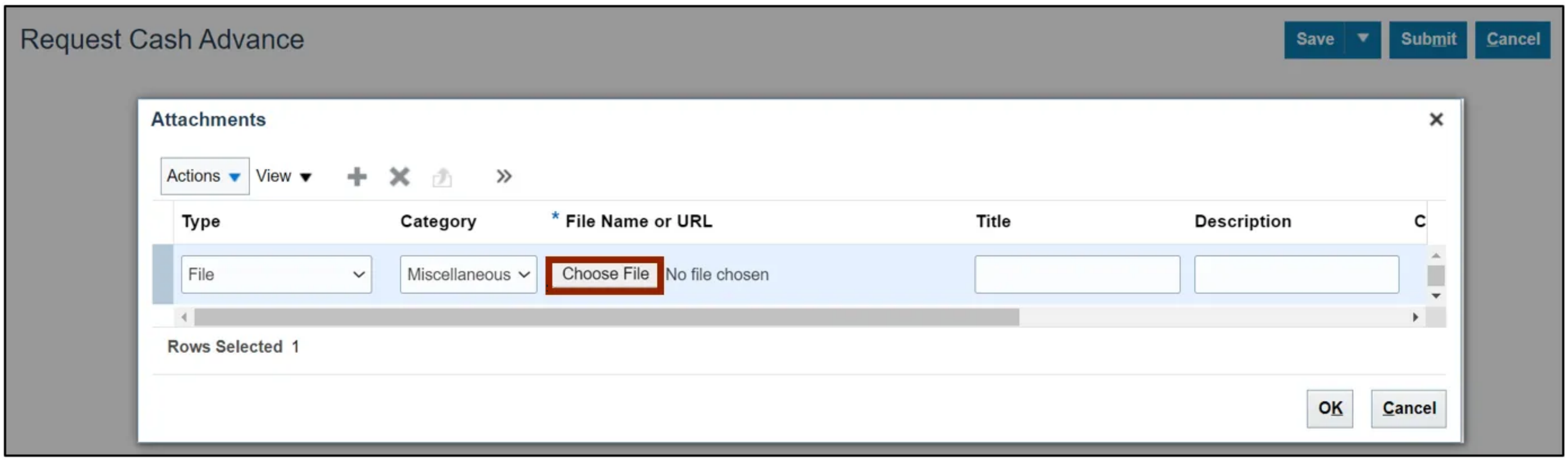
Step 10. On the ***Attachment*** field, attach files as supporting documentation by clicking the **Manage Attachments** icon.

Image



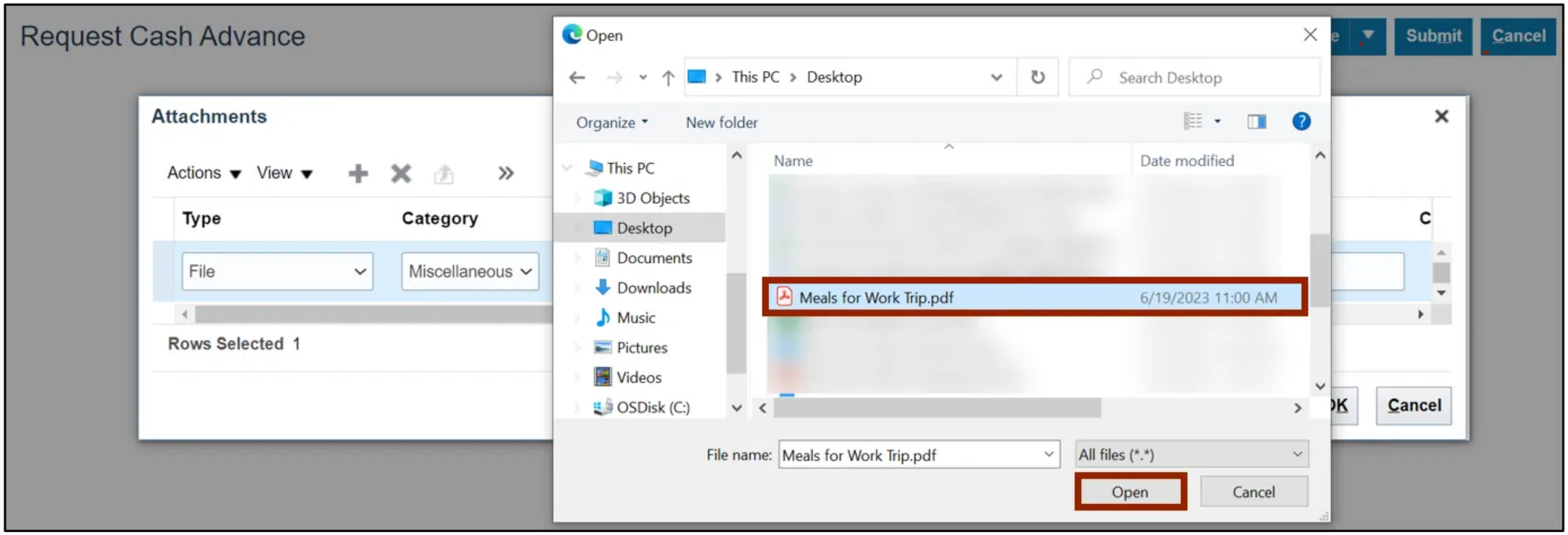
Step 11. The *Attachments* pop-up appears. Click the **Choose File** button.

Image



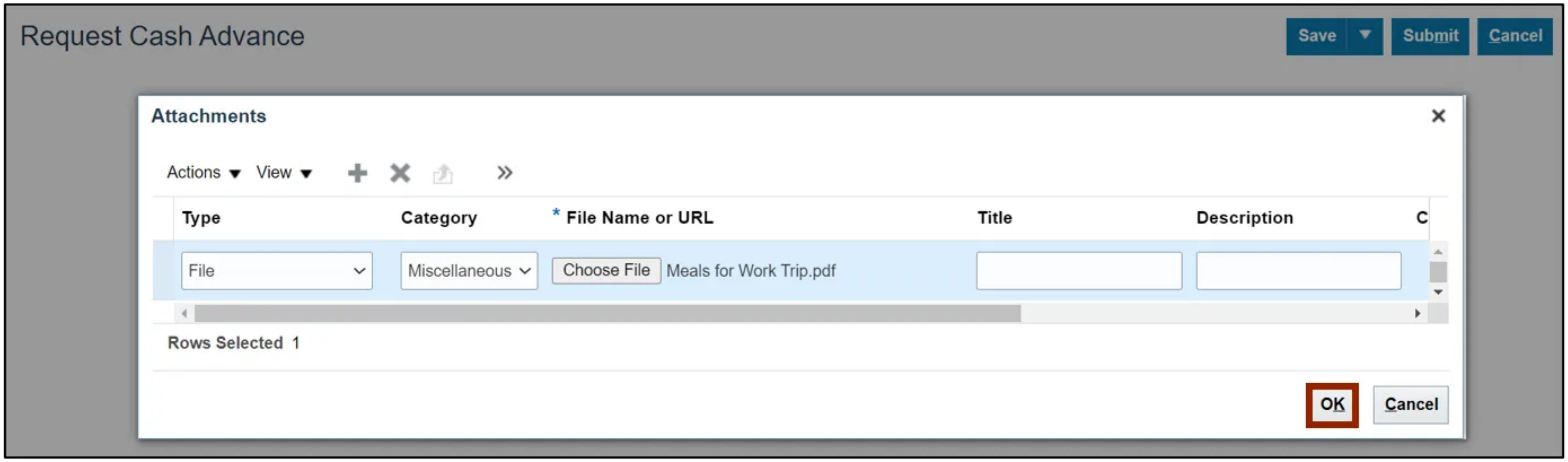
Step 12. The *Open* pop-up appears. Select the required attachment from the local device and click the **Open** button.

Image



Step 13. On the *Attachments* pop-up, click the **OK** button.

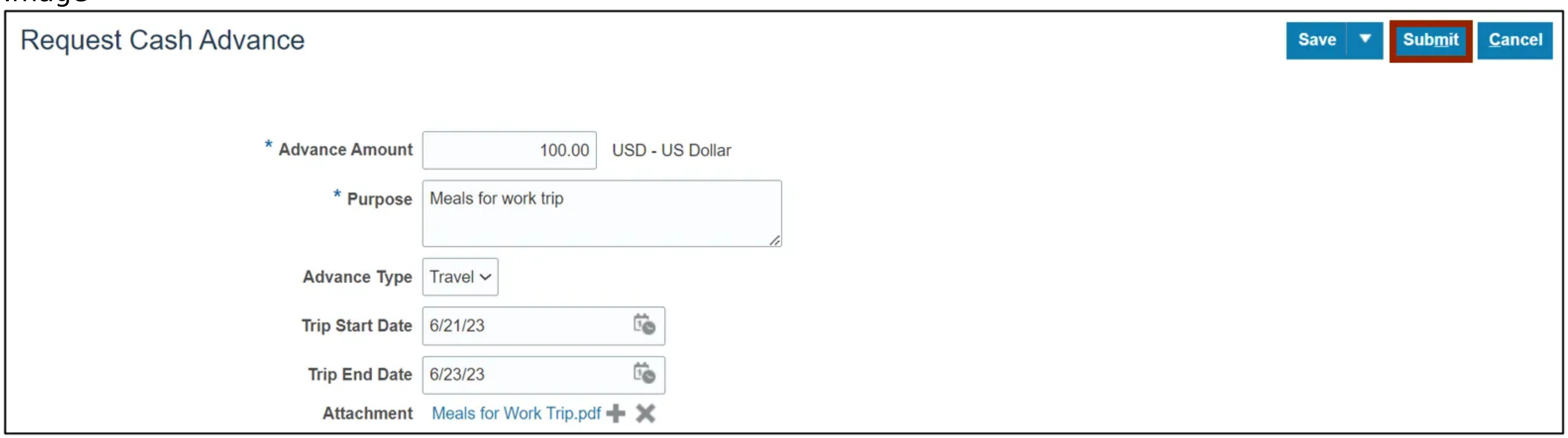
Image



Step 14. Click the **Submit** button.

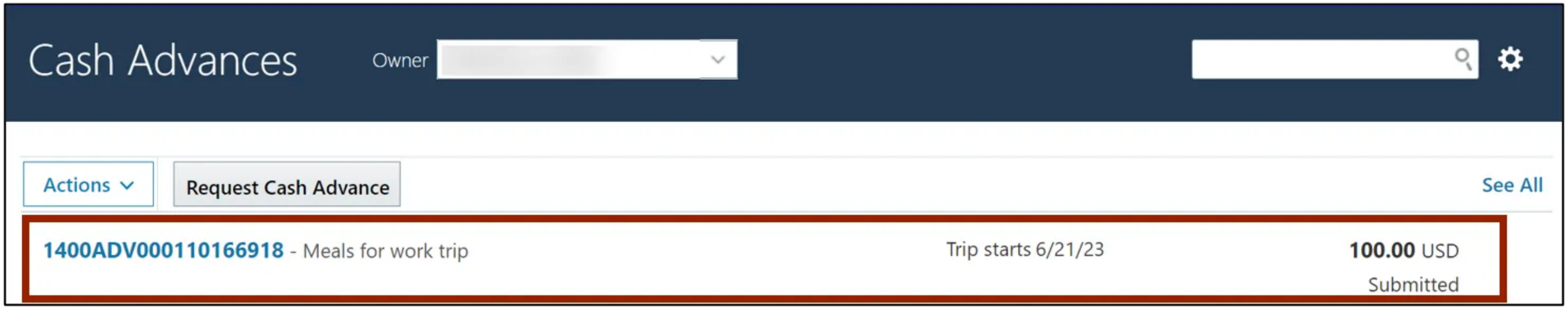
Note: Cost distribution will automatically come from the Employees HR payroll record. There is no way to change that when creating a cash advance.

Image



Step 15. The **Request Cash Advance** page is redirected to the **Cash Advances** page. Review the created Cash Advance here.

Image



Wrap-Up

Request Cash Advances to cover expenses that are expected to occur while travelling or conducting business using the steps above.

Additional Resources

- Instructor-Led Training (vILT)
  - EX100: Expense Reports and Cash Advances

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