

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.

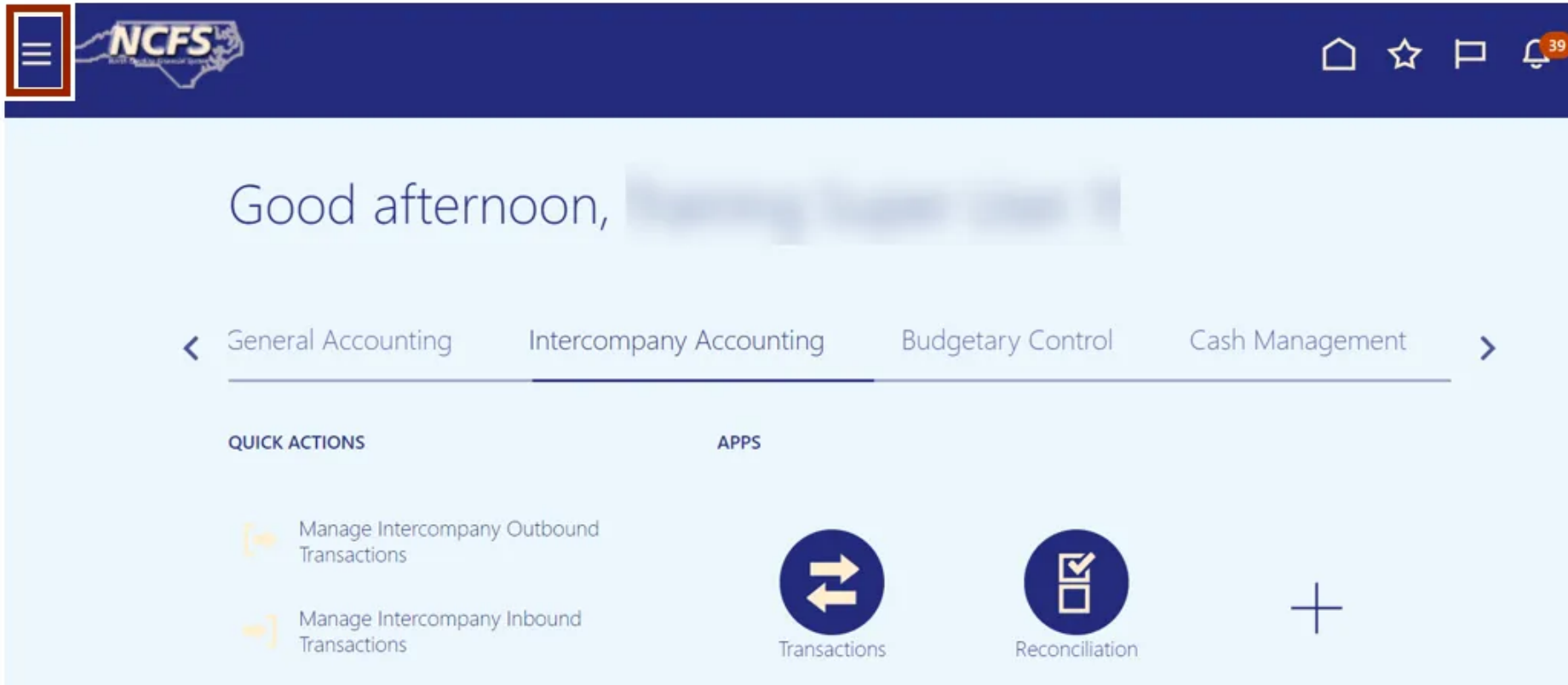
Request Cash Advances

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.

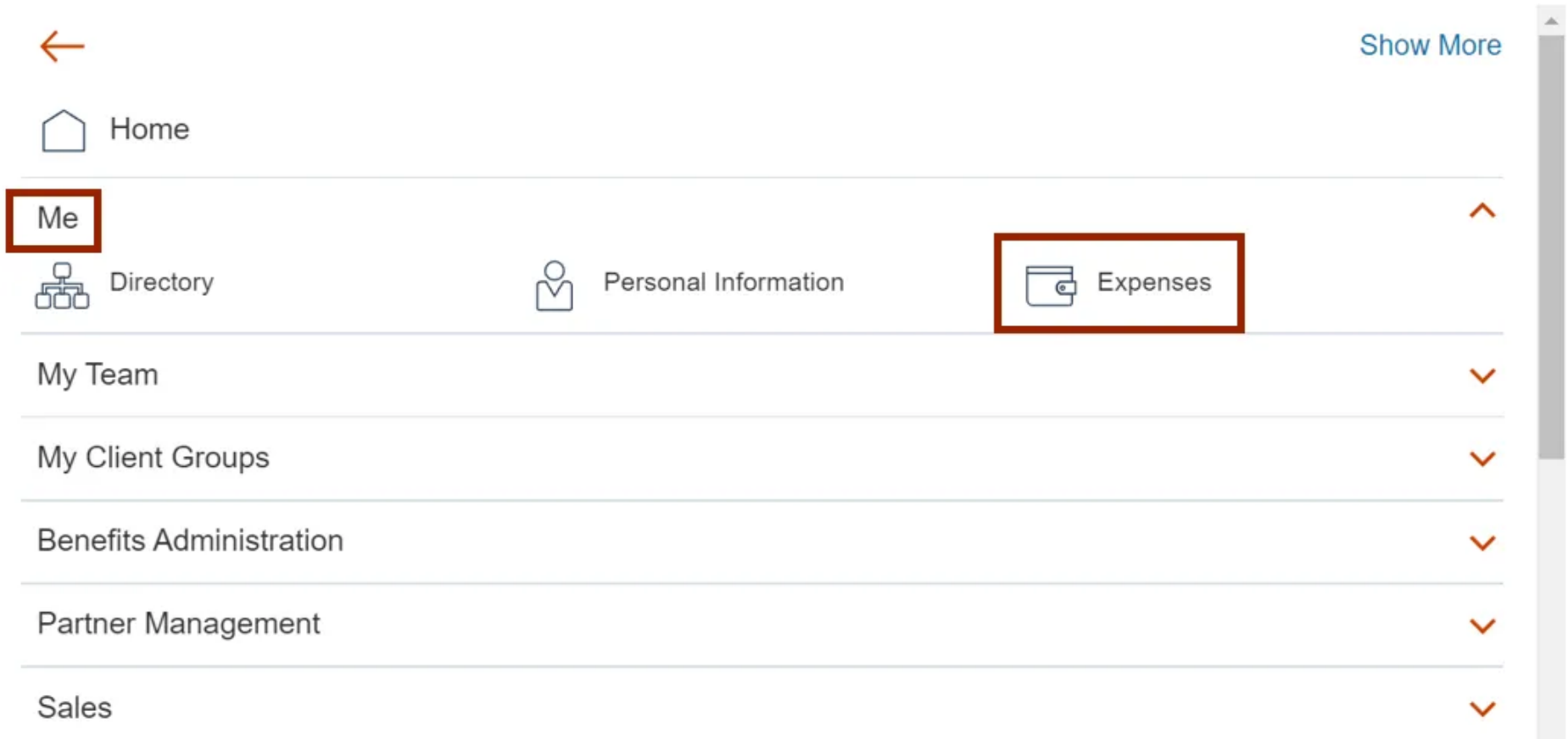
Step 2. On the **Home** page, click the **Navigator** icon.

Image



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

Image



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

Image

Cash Advances			Owner		
Actions Request Cash Advance			See All		
	1400ADV000109504538 - Cash Advance for visit to NYU	Trip starts 4/4/23	10,000.00 USD	Pending manager approval	
	1400ADV000109503921 - Cash Advance Request	Trip starts 4/3/23	10,000.00 USD	Rejected	
	1400ADV000108793779 - For Malthili call		1,500.00 USD	Ready for payment	

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

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

Image

Travel and Expenses

Owner **DAQUILLA LADA**



Expense Reports

[See All](#)

+

Create Report

Canceled

1400ER000097378373+1

Airfare w/ Description

Canceled 194 days ago

1 item

2,000.00 USD

Approval

0166882

ent

Assigned to DAQUILLA STEPHENSON ...

1 item

10.00 USD

Pending Approval

1400ER000110166878

Travel

Assigned to DAQUILLA STI

1 item

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

Image

The screenshot shows a web application interface for 'Cash Advances'. At the top, there's a header with the title 'Cash Advances', an 'Owner' dropdown menu set to 'DAQUILLA LADA', a search bar, and a settings gear icon. On the left, a sidebar contains three icons: a wallet, a document with a checkmark, and a banknote. The main content area features a table of cash advance requests. The table has three columns: 'Request ID - Description', 'Trip Start Date', and 'Amount / Status'. The first row shows a request for 10,000.00 USD for a visit to NYU, pending manager approval. The second row shows a rejected request for 10,000.00 USD for a cash advance request. The third row shows a request for 1,500.00 USD for a Maithili call, ready for payment. A 'Request Cash Advance' button is highlighted with a red box in the top left of the table area.

Actions	Request Cash Advance	See All
1400ADV000109504538 - Cash Advance for visit to NYU	Trip starts 4/4/23	10,000.00 USD Pending manager approval
1400ADV000109503921 - Cash Advance Request	Trip starts 4/3/23	10,000.00 USD Rejected
1400ADV000108793779 - For Maithili call		1,500.00 USD Ready for payment

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

Request Cash Advance

Save Submit Cancel

* Advance Amount100.00USD - US Dollar

* PurposeMeals for work trip

Advance TypeTravel

Trip Start Datem/d/yy

Trip End Datem/d/yy

AttachmentNone

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

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

Image

Request Cash Advance

Save Submit Cancel

* Advance Amount100.00USD - US Dollar

* PurposeMeals for work trip

Advance TypeTravel

Trip Start Datem/d/yy

Trip End Datem/d/yy

AttachmentNone

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

The screenshot shows a web form titled "Request Cash Advance". In the top right corner, there are three buttons: "Save" with a dropdown arrow, "Submit", and "Cancel". The form contains the following fields:

- * Advance Amount:** A text input field containing "100.00" and a label "USD - US Dollar".
- * Purpose:** A text area containing "Meals for work trip".
- Advance Type:** A dropdown menu currently showing "Travel".
- Trip Start Date:** A date picker field showing "6/21/23". This field is highlighted with a red border.
- Trip End Date:** A date picker field showing "6/23/23". This field is also highlighted with a red border.
- Attachment:** A field showing "None" with a plus icon to its right.

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

Image

Request Cash Advance

Save Submit Cancel

* Advance Amount100.00USD - US Dollar

* PurposeMeals for work trip

Advance TypeTravel

Trip Start Date6/21/23

Trip End Date6/23/23

AttachmentNone

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

Image

Request Cash Advance

Save Submit Cancel

Attachments

Actions View + X >>

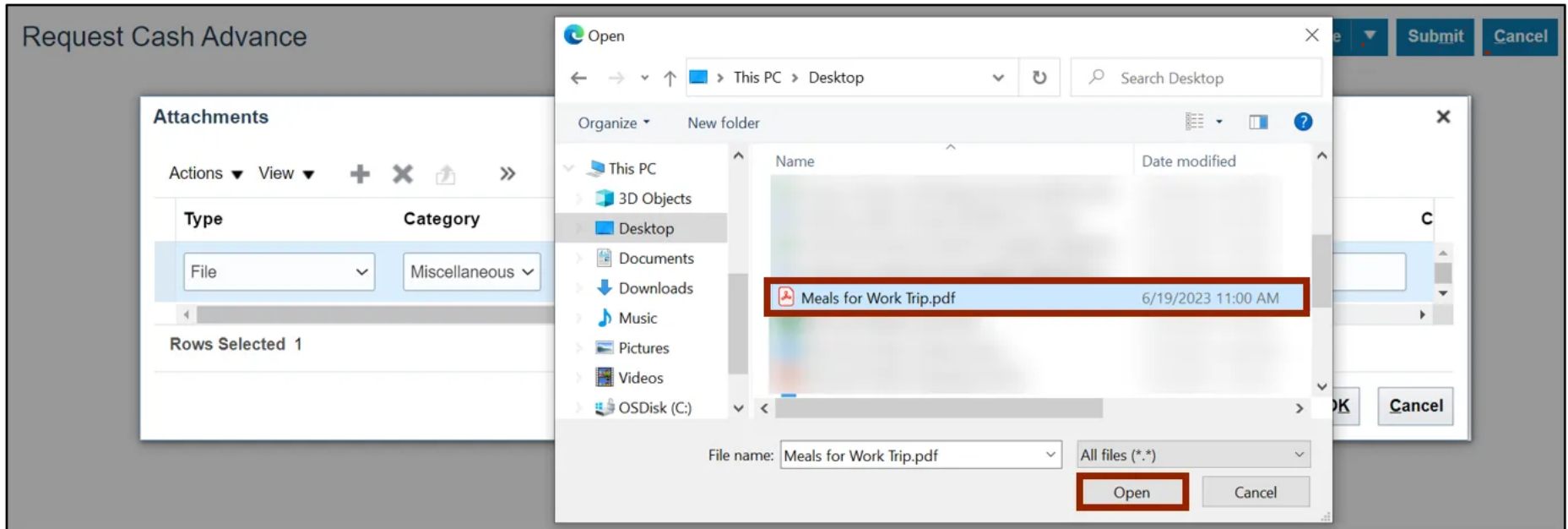
Type	Category	* File Name or URL	Title	Description	C
File	Miscellaneous	Choose File No file chosen			

Rows Selected 1

OKCancel

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

Request Cash Advance

Save Submit Cancel

Attachments

Actions View + X >>

Type	Category	* File Name or URL	Title	Description	C
File	Miscellaneous	Choose File Meals for Work Trip.pdf			

Rows Selected 1

OK Cancel

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

Request Cash Advance

Save Submit Cancel

* Advance Amount

100.00

USD - US Dollar

* Purpose

Meals for work trip

Advance Type

Travel

Trip Start Date

6/21/23

Trip End Date

6/23/23

Attachment

Meals for Work Trip.pdf

+ X

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

Image

Cash Advances			Owner			
Actions			Request Cash Advance		See All	
1400ADV000110166918 - Meals for work trip			Trip starts 6/21/23		100.00 USD	
					Submitted	

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](#)

First Published

Mon, 07/24/2023

Last Updated

Wed, 08/13/2025

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