How to Request a Travel Cash Advance in Compass

The following are instructions on how to request a travel cash advance.

**Steps:**

1. **Log into Compass Financials**

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Description automatically generated with low confidence**On the Emory Finance home page ([Emory Finance | Finance | Emory University](https://finance.emory.edu/home/index.html)), click on the Compass Financials Tile.

1. **Click on Travel and Expense Center Tile**

On the Compass Dashboard, click on the **Travel and Expense Center** tile.

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1. **A screenshot of a computer

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* Click on the **Create/Modify** under the Cash Advances folder.

1. **Add a New Value**

Your Employee ID will automatically default in the \***Empl ID** field. If you are submitting for someone else, please be sure to enter their employee identification number.

* Click the **Add a New Value** tab.
* Click **Add**.

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1. **Create a Cash Advance**

Complete the fields on the Cash Advance Form:

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1. **Select your Business Purpose**

* Click on the down arrow next to the Business Purpose to retrieve a list of business purposes.

**Business Purpose Options:**

* Athletics – General
* Athletics – NCAA
* Athletics – UAA
* Clinical/Site Visits
* Conference/Seminar
* Departmental Expenses
* Donor Visit
* Faculty/Staff Recruiting
* Fundraising
* Meeting
* Professional Development
* Research/Fieldwork
* Special Events
* Student Recruiting
* Select the business purpose that meets your request.

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1. **Advance Description Field**

* In the **Advance Description** field, add more information regarding your request.

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1. **Reference Field**

* Click on the Search icon next to the Reference field to select the type of advance this pertains to, i.e., **Non-Travel** or **Travel**.

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1. **Source Field**

* When you click on the drop-down arrow in the **Source** field, only one option is shown – Check. **This is for default purposes only.** The cash advance will be delivered to you in the same form of payment as you receive your paycheck, which is normally a direct deposit.

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1. **Description Field**

* The **Description** field is not mandatory to be completed.

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1. **Amount Field**

* A screenshot of a computer

  Description automatically generated with medium confidenceIn the **Amount** field, enter the amount of the travel cash advance that you need. All funds are issued in U.S. currency.

1. **Attachments**

* Click on the **Attachments** Link to upload the two required travel cash advance documents:
  1. **Travel Cash Advance Request Form**
  2. **Travel Cash Advance Request Agreement**

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After you click on **Add Attachments**, the **File Attachment** box will be retrieved.

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* Find the files you need on your computer and then click **Upload** to attach them to your travel cash advance request.
* When you are finished, click **OK**.

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1. **Certify the Advance Request is Accurate**

* When you are ready to submit your travel cash advance request, check the box in front of the statement “*By checking this box, I certify the advances submitted are accurate and comply with expense policy*.”
* Once you click on the box, it activates the Submit Cash Advance button.

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1. **Submit Cash Advance**

* Click the **Submit** **Cash Advance** button.

Your cash advance request is placed in an Accounts Payable queue for review and approval.

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