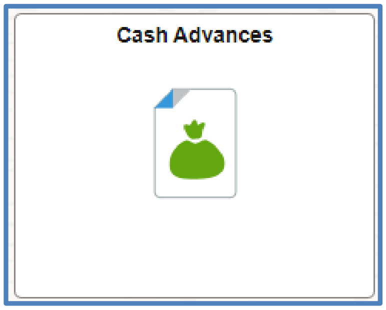
Entering Cash Advances as a Delegate

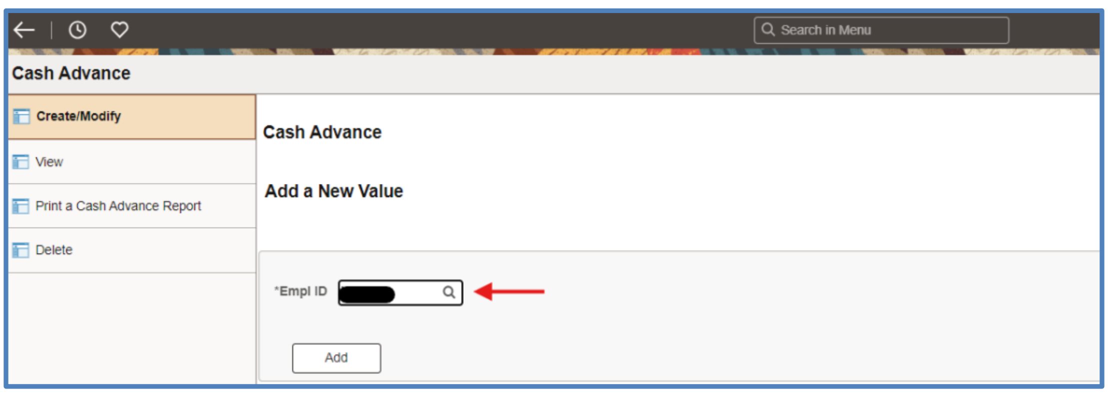
This job aid is designed to provide instructions on how to enter Cash Advance as a delegate using the Georgia*FIRST* PeopleSoft Financials Travel and Expense module. Fluid Navigation is shown first and Classic Navigation directions start on page 4.

Fluid Navigation

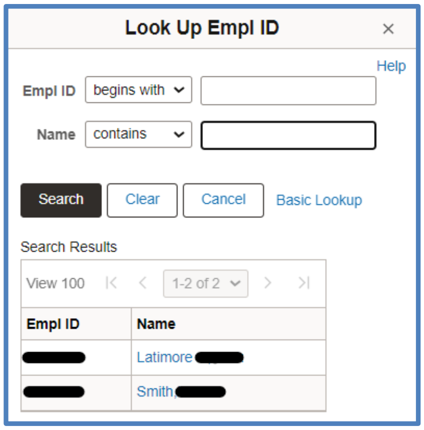
1. Select the **Cash Advances** tile found on your Employee Self Service homepage.



2. Select the magnifying glass next to the Empl ID field.



3. In the Employee Search box that appears choose an employee to create a Cash Advance on behalf of.
   Note: Only employees in which you are an authorized delegate will appear.



4. Click **Add.**

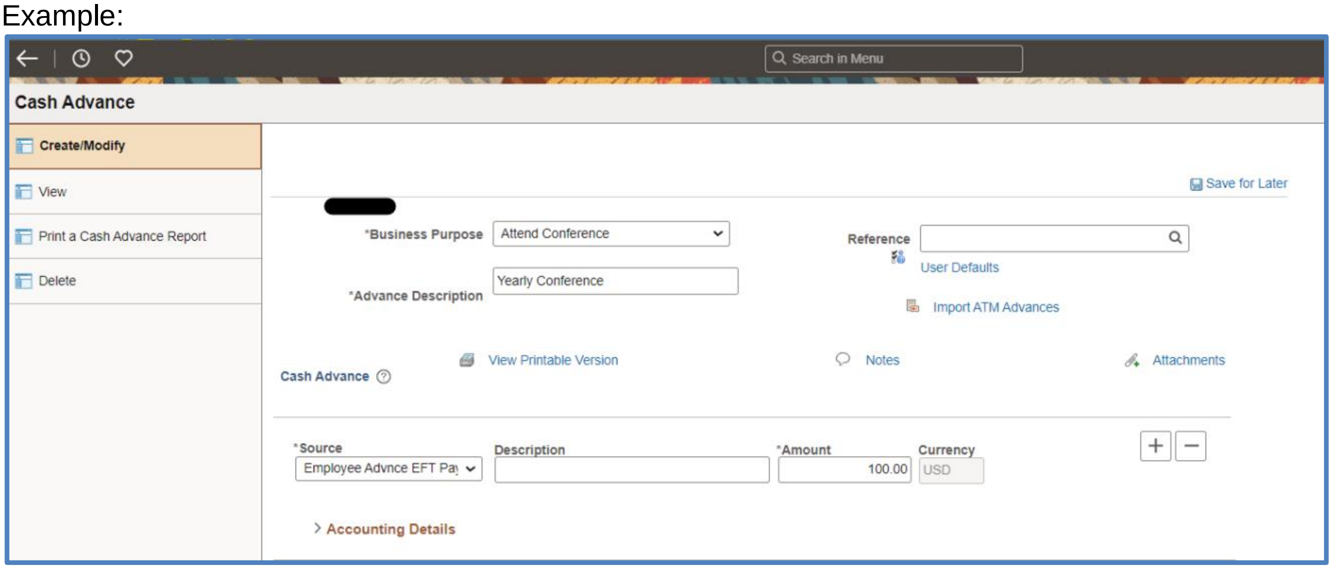
5. Enter the following information on the Cash Advance header:

   a. *Business Purpose
   b. *Advance Description

6. Next, enter the following information on the Cash Advance line:

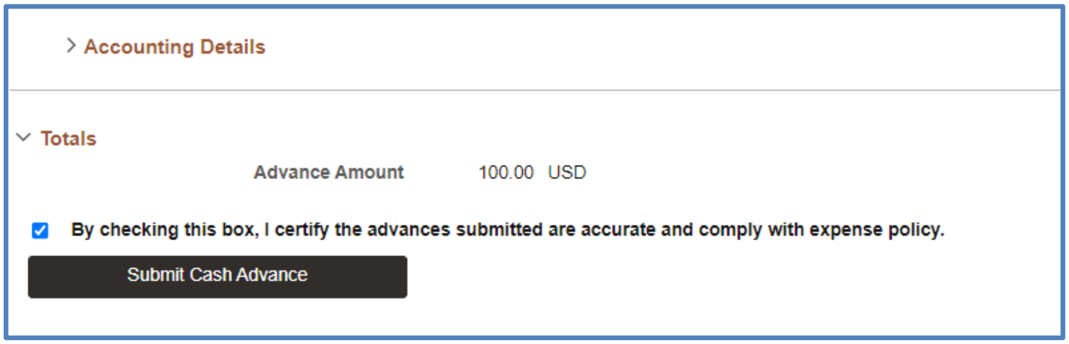
   a.*Source
   b.*Amount

Example:



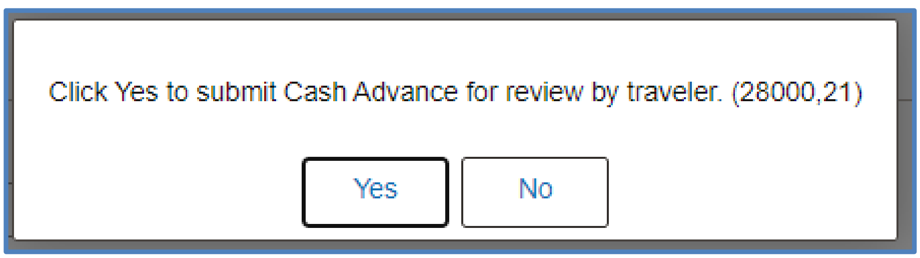
7. Add any other cash advance lines needed by selecting the + Add button.

8. Once you are finished with the Cash Advance select the check the box as shown below to enable the submit button.



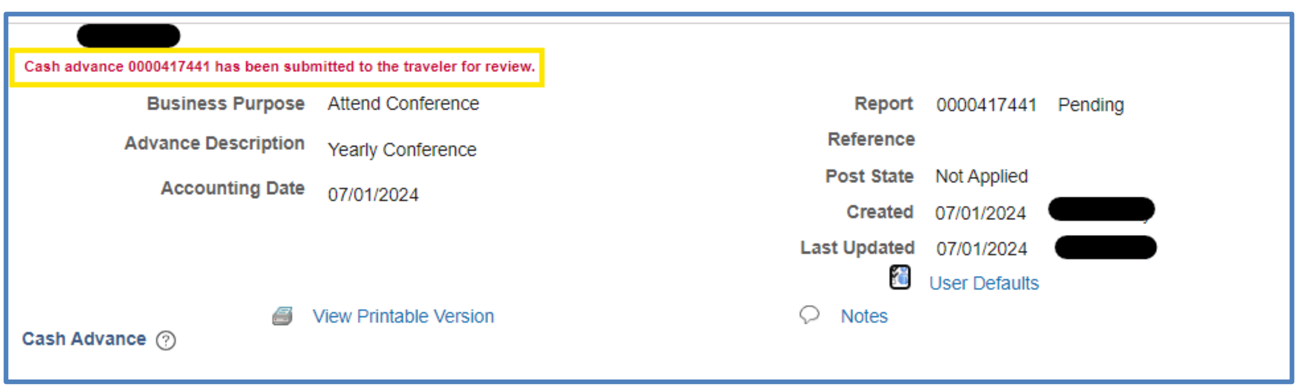
9. Select the Submit Cash Advance button.

10. A message will appear verifying you would like to submit the report for the traveler to review.



11. Click **Yes** to send an email notification to the traveler.

12. The Following message will appear in the top left corner of the page.



13. The Traveler will receive the following email notification.

Cash Advance 0000417441 created by [redacted] is available for your review

DN

donotreply@usg.edu

To Brooklyn Davis

Cash Advance 0000417441 created by [redacted] is available for your review.

Employee ID:[redacted]

Employee Name:[redacted]

Creation Date:2024-07-01

Transaction Description:Yearly Conference

Business Purpose:Attend Conference

Reimbursement Amount:100

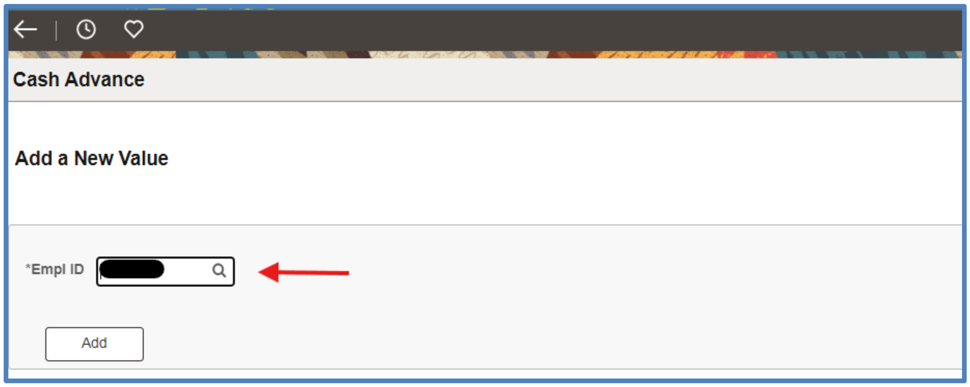
To review and submit this transaction, login to PeopleSoft Financials.

14. The traveler will then log in and review and submit the Cash Advance themselves.

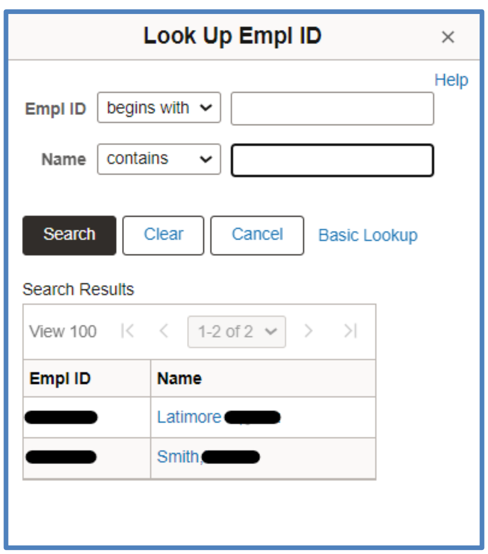
Classic Navigation

1. Navigate to **Employee-Self Service > Travel and Expenses > Cash Advances > Create/Modify**

2. Select the magnifying glass next to the Empl ID field.



3.In the Employee Search box that appears choose an employee to create a Cash Advance on behalf of.
Note: Only employees in which you are an authorized delegate will appear.



4.Click **Add.**

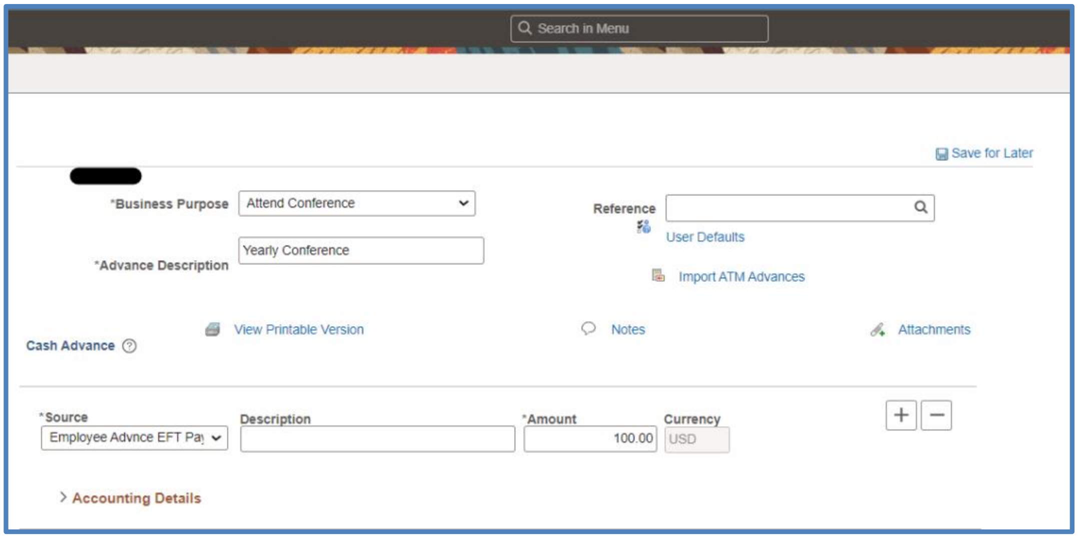
5. Enter the following information on the Cash Advance header:

   a. *Business Purpose
   b. *Advance Description

6.Next, enter your Projected Expenses. Enter the following information on the Expense line:

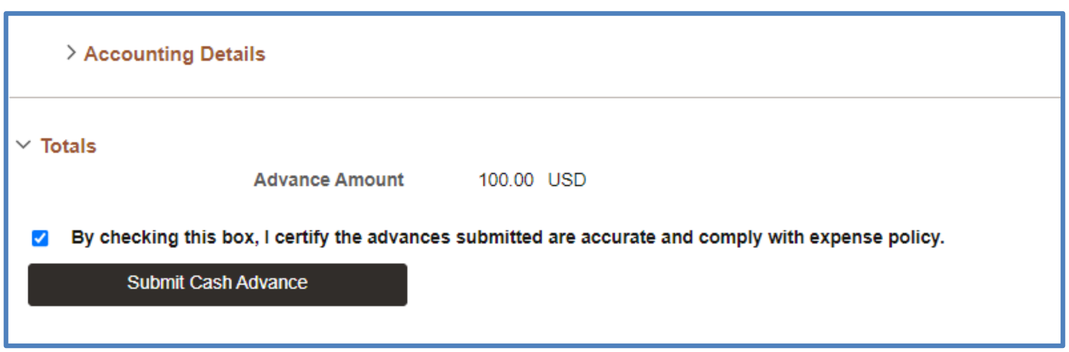
   a.*Source
   b.*Amount

Example:



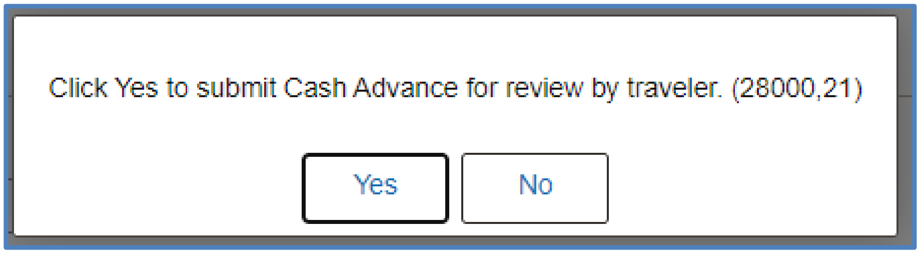
7. Add any other Advance lines needed by selecting the + Add button

8. Once you are finished with the Cash Advance select the check the box as shown below to enable the submit button.



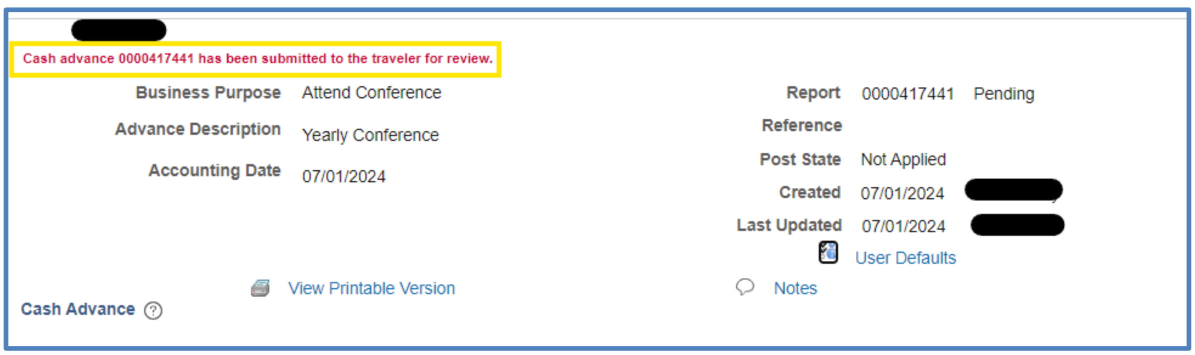
9. Select the Submit Cash Advance button.

10. A message will appear verifying you would like to submit the Cash Advance for the traveler to review.

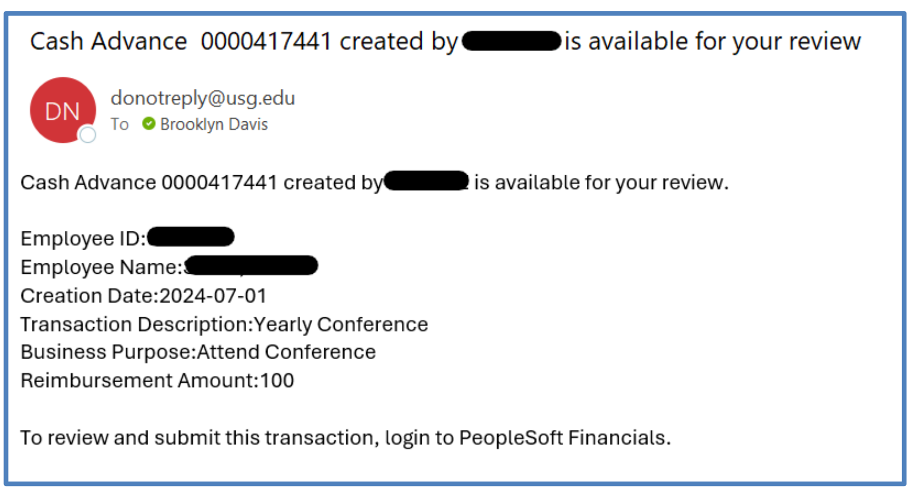


11. Click **Yes** to send an email notification to the traveler.

12. The Following message will appear in the top left corner of the page.



13. The Traveler will also receive the following email notification.


Cash Advance 0000417441 created by [redacted] is available for your review

DN donotreply@usg.edu
To Brooklyn Davis

Cash Advance 0000417441 created by [redacted] is available for your review.

Employee ID: [redacted]
Employee Name: [redacted]
Creation Date:2024-07-01
Transaction Description:Yearly Conference
Business Purpose:Attend Conference
Reimbursement Amount:100

To review and submit this transaction, login to PeopleSoft Financials.

14. The traveler will then log in and review and submit the Cash Advance themselves.