Travel Advances

How to Submit an Advance Request for Someone Else

Prepared by Jennifer Marleau

3 Types of Travel Advances

Out-of-Pocket in Advance of Trip

- The claimant is out-of-pocket for expenses they personally paid for in advance of the trip. Ex. Conference registration.
- Can be requested at any time (and in multiple instances as claimant prepays), with receipt and proof of payment.

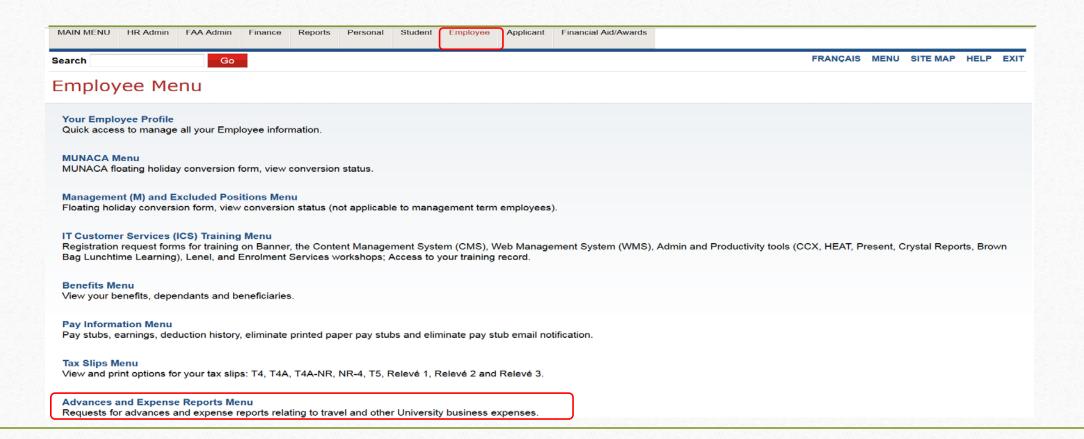
Cash Advances

- This payment to the claimant is to cover cash needs for anticipated expenses to be incurred during the trip.
- Can only be issued 30 days in advance of the trip.

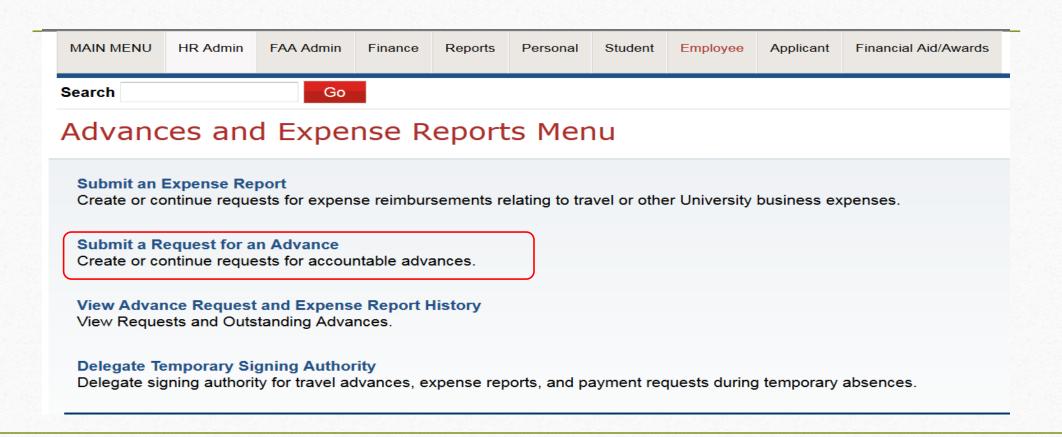
Third Party Prepayments

• These are payments made directly to third party supplies in advance of the trip. Ex. Travel agency

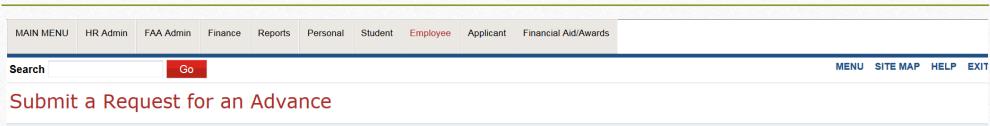
Employee Menu



Advances and Expense Reports Menu



Submit a Request for an Advance





- . Choose one of the following options to create an Accountable Advance request. Choose the last menu item when you wish to update or complete a previous request.
- Accountable Advance Requests are subject to the Reimbursement of Travel and Other Expenses Policy.
- For instructions on how to process an Accountable Advance request as well as support information, click **HELP** at the top right.

Submit an Advance Request for Yourself

Create an accountable advance where you are the responsible person.

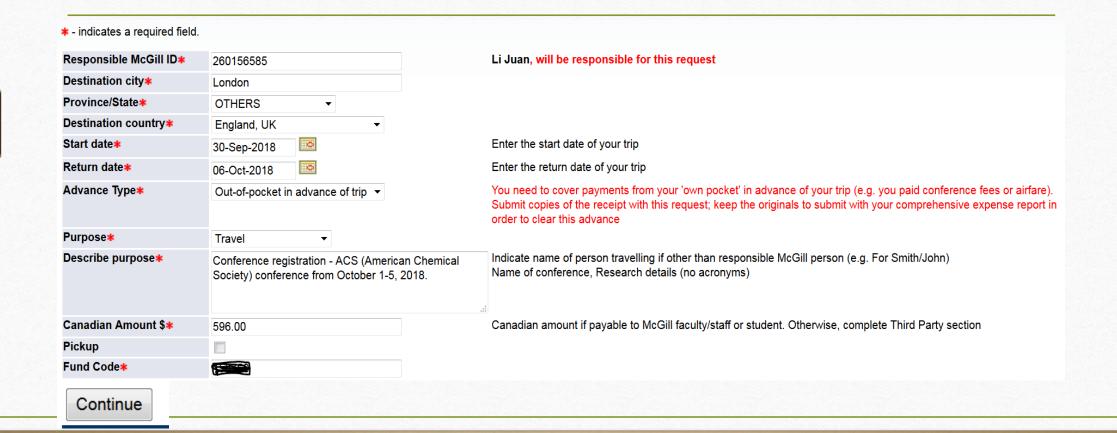
Submit an Advance Request for Someone Else

Create an accountable advance where another McGill person is responsible. If submitting an advance for a student, confirm that they have entered their Direct Deposit Bank Account information through the Student Menu in Minerva.

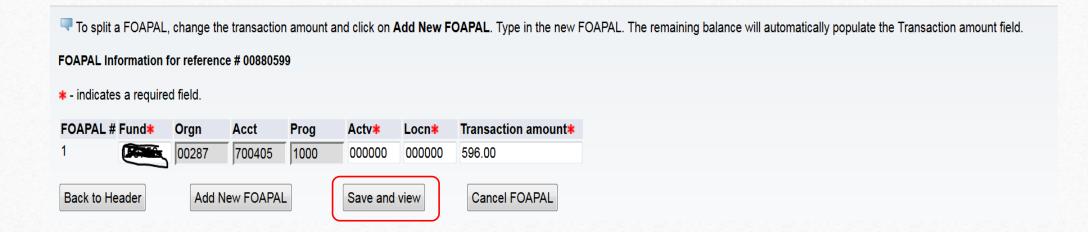
Open an Advance Request You Started and Saved

Continue, complete or correct an existing accountable advance request.

Submit an Advance Request for Someone Else



Save and View



Review for Accuracy

				est for Travel Advance Ference # 00880657					
			Paid to Re	sponsible McGill Pers	son				
McGill ID	Name		Departmental address					E-Mail	
260156585	Li Juan	Psychology Room 716 McGill	hology Room 716 McGill College 2001 QC *300				398-1883 juan.li@mcgill.ca		
			Pav	ment Information					
Request date	uest date Destination City		Return Date Advance Type				Purpose	Currency	Amount \$
13-Sep-2018	London	30-Sep-2018	06-Oct-2018	Out-of-pocket in a	dvance of trip		Travel	CAD	596.0
	· · · · · · · · · · · · · · · · · · ·	Conference registration -	- ACS (American Chemica	al Society) conference	from October 1-5, 20)18.			
Payment Details									
nvoice Number				Invoice Date					
				Requested by					
McGill ID Name		e	Departmental address				E-Mail		
	Marleau Jennifer		Chemistry 224 Maass Chemistry Bldg QC *119			398-6338	jennifer.marleau@mcgill.ca		
		Account		APAL Distribution					
Fund	-		Program Activity		-	Location		Tot	
	00287	700405	1000	0	000000	000000			596.0
								Total	596.0
			F	und Information					
Fund Fund	Title	ID#	FST Manager	ID#	Fund Admin.		ID#	Financial	Manager
	istry Operating Fund		Marleau Jennifer	2012	Di Cecco Gina	UFT Perepichka Dmytro			

Complete – Submit Request

Edit Request

Edit Header or FOAPALS

Return to Advance Menu

Saves request but does not complete/submit

Complete - Submit Request

The request will be submitted for approval and can not be modified

Print and Mail Hard Copy to Above Address



Attention: Marleau/Jennifer

Chemistry

Maass Chemistry Bldg Phone: 5143986338

Print and mail hard copy to above address

See Checklist

Print this page, attach all supporting documents AND forward to your Financial Service Team (FST) at above-mentioned address. Don't forget to obtain the appropriate signatures. Your FST will forward to the Travel Desk for payment.

This request will not be processed until all documents have been received and approved by your FST.

Let's Review

- Enter the McGill ID of the responsible person (your student)
- Enter the Destination and Start and End dates
- Select the Advance Type and Purpose
- Enter the amount being requested and the Fund code to charge
- Enter a detailed Description for the advance
- Click on Continue to proceed to the next screen
- Verify FOAPAL information
- Click on Save and View to verify the request
- Click on Complete Submit request
- Click on Print and mail hard copy to above address
- Ensure the appropriate individuals sign the request
- Attach all receipts and give the request to Doris in OM 224