

Apply for an Advance Using T1

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1. Information about Advances

In some circumstances staff/students travelling overseas may be granted an advance to fund business expenses.

Typically, this applies to countries that do not have a developed financial services infrastructure in which funds cannot be used via normal payment channels.

Advances are subject to approval and must be approved for staff /students by the relevant Budget Holder prior to submission to Accounts Payable.

Within one month of the trip being completed, the receipts must be submitted and any unspent balance repaid or claimed.

Under no circumstances will a second advance be approved when the repayment of an earlier advance for an individual is still outstanding.

Expenses funded from an advance are subject to the same terms of the [Expenses Policy](#) as any other method of funding expenses.

Advances are not normally given for less than £100.

You cannot start to spend against an advance until it has been approved and you have received the funds.

Funds are always sent by BACS in GBP to coincide with the Advance date selected on the application form. If another currency is required, this will need to be purchased independently.

Before Applying

You will need to know:

- Who has given you permission to request this advance – you will need their name, department and contact details.
- Which member of University staff will be authorising the advance.
- Which budget centre or project code is to be used to reconcile this
- Approved advances are paid as GBP by BACS into the bank account details held on your University payroll records (staff)/ Student Statement (students). Check these records are correct before applying for an advance.
- Approved funds are issued each Wednesday and take around 2-3 working days to arrive in a UK bank but will take longer to a non-UK bank.
- If the advance is needed urgently, request a [Faster Payment](#)

Spending the Advance

You must retain all receipts for all items purchased with the advance. Receipt images will be required when reconciling it.

If it is not possible to obtain a receipt, you should keep a detailed log of what you have spent. On your return, sign and date the log and upload to T1 when reconciling the advance in place of attaching a receipt.

Reconciling the Advance

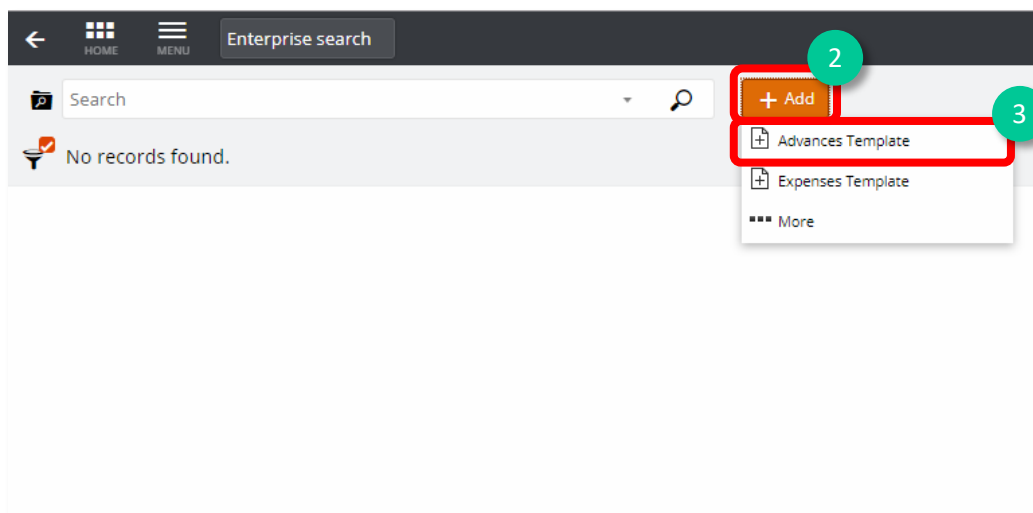
On your return, you must reconcile the advance in T1 within one month. This is done using the 'My Travel and Expenses' function in T1 with a special type of expense claim linked to your advance.

If the advance is underspent, you must return the remaining funds to the University.

If the advance is overspent, you can claim the additional amount is reimbursed to you when reconciling the advance.

2. Request a New Advance

1. [Login to T1](#) and open the 'My Travel & Expenses' function on the 'My' page.
2. Once open, click on the orange '+ Add' button and select the 'Advances Template' option.

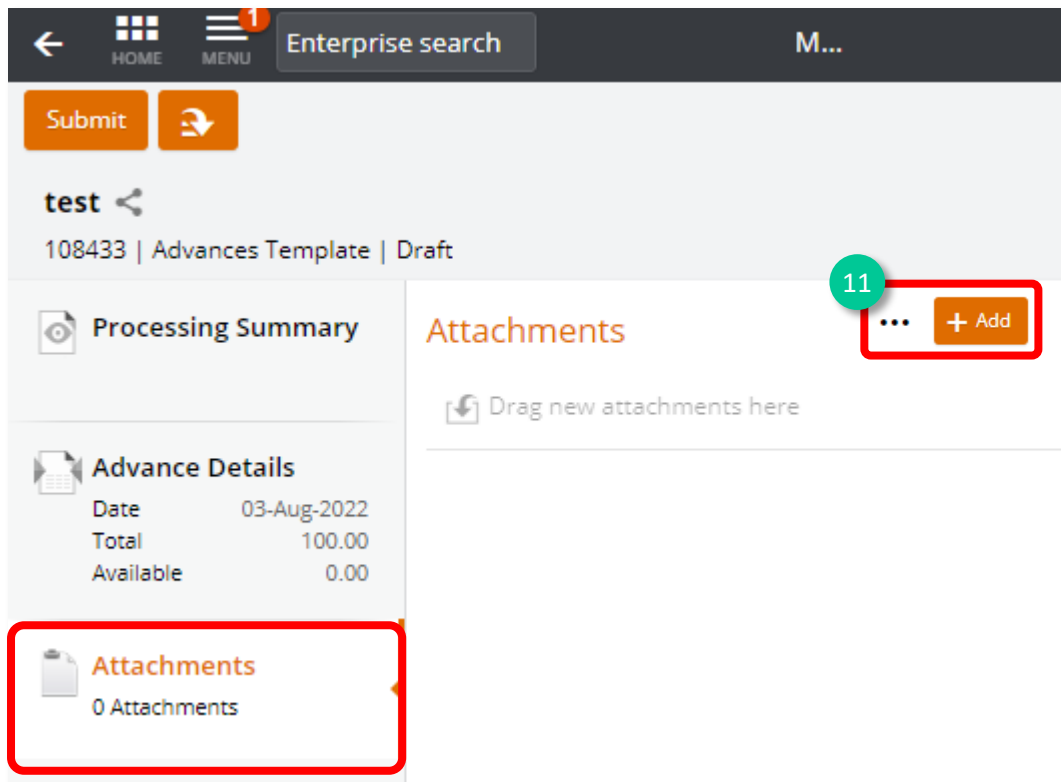


3. Once the form opens, a warning message may appear at the top of the screen about exchange rates - this can be ignored.

The screenshot shows a web form titled 'Document Details'. At the top right, there are 'Cancel' and 'Save' buttons, with a green circle containing the number '10' next to the 'Save' button. Below the title is a section header 'Details' with an upward-pointing arrow. The form contains several fields: a 'User' dropdown menu with 'AB806' selected and a green circle '4' next to it; 'Advance Date' and 'Return Date' fields, each with a calendar icon and a green circle '5' next to the 'Advance Date' field; a large 'Narrative' text area with a green circle '6' next to it; a 'Currency Code' field with 'GBP (British Pounds Sterling)' selected; a 'Total (Gross)' field with a green circle '7' next to it; a 'Manager approving advance' dropdown menu with a green circle '8' next to it; and 'From Date' and 'To Date' fields. At the bottom of the form is a section header 'Additional Information' with a green circle '9' next to it.

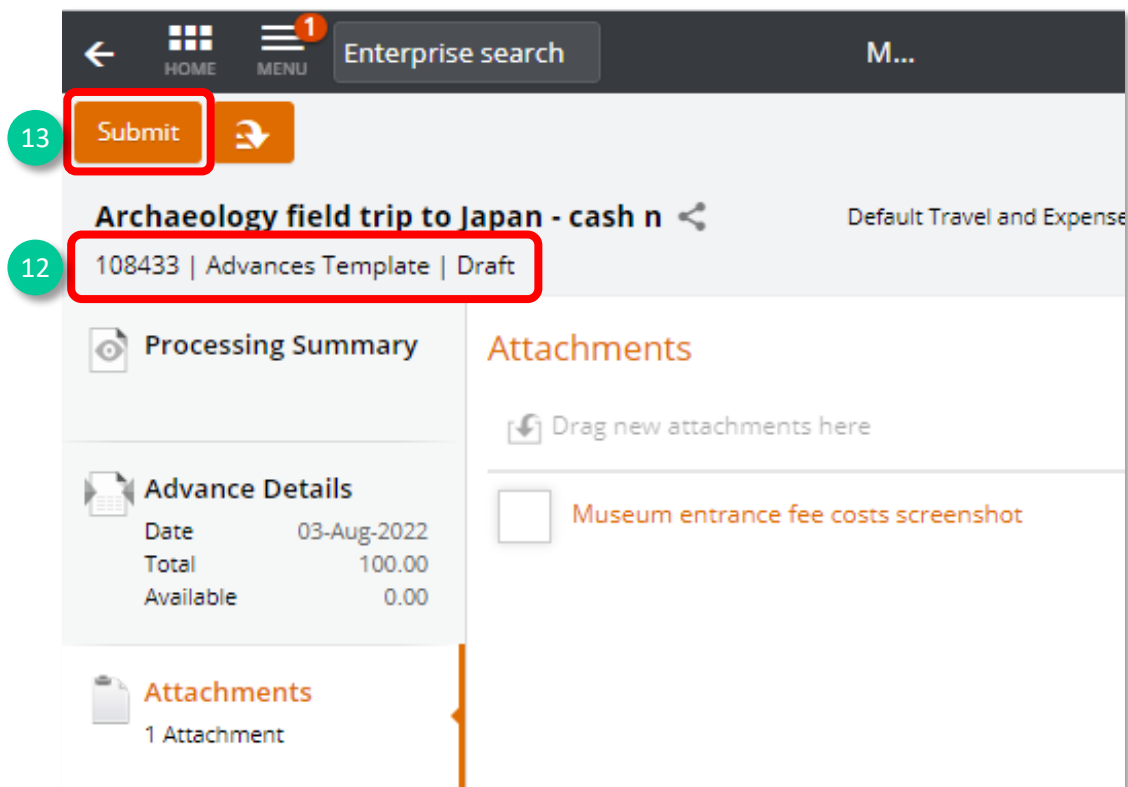
4. User - enter the name of the person requesting the advance
5. Advance date - date the funds are required, NOT the date leaving for the trip/event.
Return date - date of end of trip/event.
6. Narrative - give as much information as possible, including:
 - The name of the event/trip
 - The location of the event/trip
 - The name and contact details of the member of staff organising/leading the event
7. Total - enter the total amount requested.
8. Manager approving advance - choose which staff member will be approving this request from the drop-down list. Start typing any part of their first or last name and the system will narrow down the list to match what you've typed.
9. Do not add or change any details in this section.
10. Once all information has been entered, click 'Save'.

11. Add any relevant attachments e.g. quotes or screenshots of ticket prices.

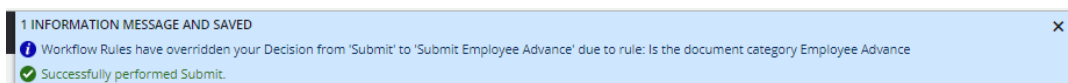


12. Once saved, your request will be allocated a number and will show as 'Draft'.

13. Once the details are completed, click the 'Submit' button.



14. This system notification appears at the top of your screen to confirm that the form has successfully been submitted to the manager selected on the form.

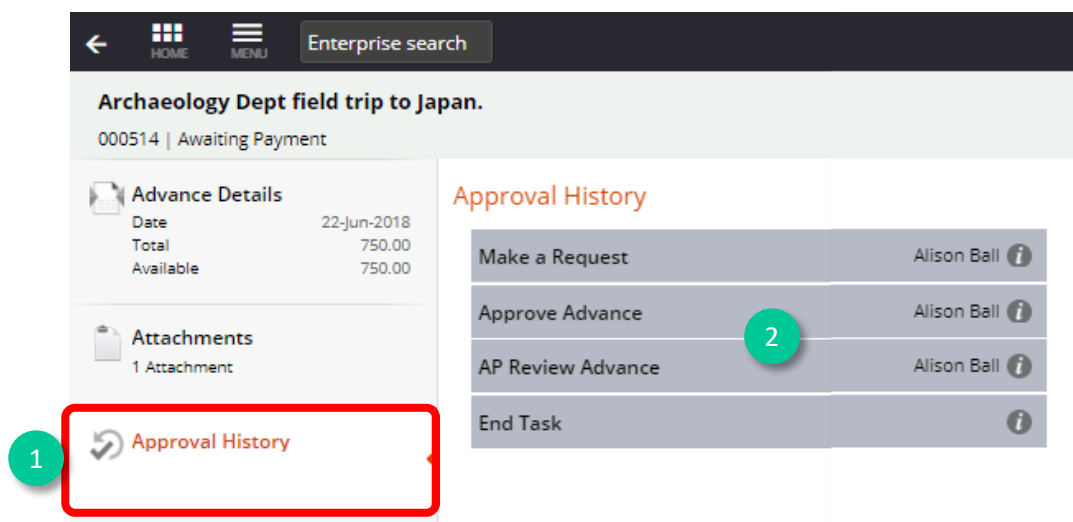


3. Approval of Your Advance Request

Your Advance request will appear in the named manager's task list within T1 immediately. They will also be notified of your request by email.

Once they have approved your request, it will be sent to the Accounts Payable team for a final review.

You can check the status of your request within T1:



1. Click the 'Approval History' tab that appears after it has been submitted.
2. Click the banners to expand them and see who has been dealing with that stage of your request.

If your advance is approved by AP, you will receive a confirmation email. The advance will be paid into:

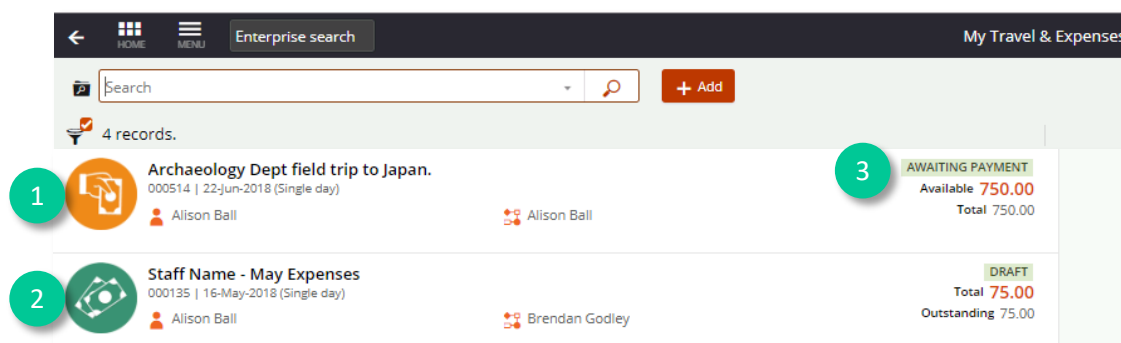
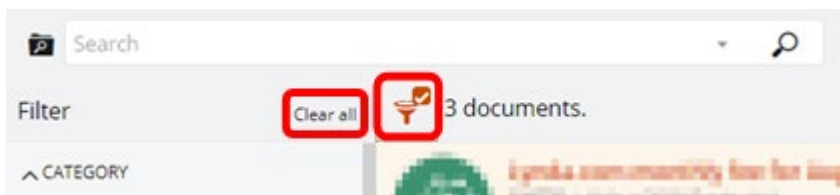
- Staff - your salary bank account
- Students - the bank account in your SITS record/Student Statement.

4. Track the Status of Your Application

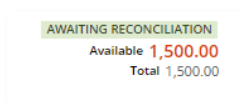
The main page of your 'My Travel & Expenses' function will list all advance requests and expense claims and what stage each is at.

Remove the filter to view previous completed advances/claims:

- Click the filter icon
- Select 'Clear all'
- Click to filter icon again to close it.



1. Advance requests have a yellow icon.
2. Expense claims have a green icon.
3. The right side of each item shows its status:
 - DRAFT form started but not yet submitted for approval
 - APPROVE ADVANCE = form submitted for approval
 - AWAITING PAYMENT = request approved and will be paid in the next weekly payment run
 - AWAITING RECONCILIATION = 'Available' is amount yet to be reconciled, 'Total' is full amount that was advanced.



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- COMPLETED = advance has been fully reconciled
- REJECTED = rejected by the approver – form can be edited and resubmitted, if needed.