How to Request a Field Advance
Updated August 2018

1. Go to the Field Advance Dashboard:
   https://web.fmdata.uw.edu/BankingAccounting/Field_Advances/
2. Select “Requestor/Custodian” in the upper left corner of the screen.
3. Click the “New FA” button.
4. Note the Field Advance Number. This will be used to identify the advance.
5. Answer the Yes/No questions to make sure that a Field Advance is appropriate for your department/situation.
6. Provide a detailed “Purpose Statement” of what the Field Advance will be used for, and why a Field Advance is necessary (rather than using other procurement methods).
7. Identify the Custodian of the Field Advance. This must be a permanent and active UW employee.

8. Identify the Approver of the Field Advance. This must be someone with budget charging authority (such as a department administrator or budget manager).

**Custodian Information**
- Name: Please select from list
- Net ID:
- Email:

**Approver Information**
- Name:
- Net ID:
- Email:

9. Enter the amount for the Field Advance. You may want to include a small cushion for bank/ATM fees.

10. Enter in a budget number related to the project. An encumbrance will be placed on this budget for the duration of the advance. The budget will not be charged until you reconcile the advance. At that time, you will have the ability to split the charges across multiple budgets.

11. Enter in the start date (usually today’s date), and the end date. Field Advances can be open for a maximum of 6 months. Final accounting is due within 1 month of the end date.

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**Field Advance Detail**
- **Amount Requested:** $0.00

**Budget Information**
- Number:
- Name:
- Start:  
- End:

**Field Advance Dates**
- Required (Start): yyyy-mm-dd
- End: yyyy-mm-dd
- Final Accounting Due: yyyy-mm-dd

13. Select the country in which the Field Advance will be spent.

14. Currency should always be listed as “US Dollar”

15. Choose whether the Field Advance will be issued via ACH/Wire or via Debit Card.
   - ACH/Wire payments may require further approvals

16. If choosing debit card, provide the card holder’s name and birthdate.
   - The cardholder does not have to be the same person as the Custodian. However, the Custodian is ultimately responsible for the funds disbursed.

**Banking Information**
- Country: UNITED STATES
- Currency: US Dollar
- Payment type: ACH
- Card Holder Name:
- Card Holder Birth Date: MM/DD/YY
- Existing Cards:

[Save Banking Changes]
17. Optional: Add any additional notes or information pertinent to the advance request

18. Agree to the custodianship agreement

19. Save changes

20. Submit for Approval
   a. This will go to the dashboard of the person listed as the “Approver”

I certify that I have read and agree to comply with the field advance policies and procedures. UW field advances are subject to UW purchasing policies and procedures. I understand that any unauthorized expenditures generated from funds advanced may be considered misappropriation of public funds. Furthermore, if I am assuming custodianship of another individual’s field advance or directing that the field advance be payable to an individual other than myself, I understand that myself and/or my department are responsible for properly reconciling the entire amount of the field advance outstanding. Field advances will not be issued to a custodian that is past due on a field advance or revolving fund reconciliation.

(All errors must be corrected and changes Saved before submitting the request.)