Research Cash Advance Request Process

- The researcher and/or unit staff complete the Participant Study Cash Advance Request Form, available at https://utexas.app.box.com/v/participant-study-cash-advance.
  - The recipient should be appointed through the end date of the cash advance. If not, the unit must confirm in writing that the recipient will be re-appointed through the end date.
  - Make sure the title of the study is legible. If needed, add additional text below the “Purpose of the study” section.
  - Verify that the account has adequate funds.
  - The end date must be no more than six months after the begin date.
    - If a grant is used, the end date must also be within the grant period.
  - The justification must clearly state the number of participants and the amount to be paid to each participant; the total must match the total amount requested.
  - “Person to notify when the check is ready” is the cash advance recipient.
  - “Departmental contact” is usually unit staff. It can also be the Principal Investigator (PI) if the recipient is a graduate student or postdoc.
  - Unit staff must provide the IRB Determination Letter and Initial Protocol Request to Dean’s Office staff in order to support their approval of the Cash Advance Request.

- Unit staff obtains the following signatures:
  - Principal Investigator of the grant
  - Authorized signer on the Account - NOTE: If the PI, or another authorized signer, is receiving the funds, a different authorized signer on the account must sign the request form.
  - Department Chair or Center Director signs in the “Additional Reviewer” signature block
  - Unit staff submits the completed, signed form and any attachments via PDF to COEApprovals@austin.utexas.edu.
  - Dean’s Office staff works with unit staff to resolve any inconsistencies or missing information.
  - Dean’s Office staff returns the approved form via email to unit staff.
  - Unit staff submits the approved form on letterhead to the Office of Accounting Cash Advance Desk, who will coordinate the promissory note and check distribution.