

Request an Advance for HHS Contracts

After receiving approval from their funding agency, organizations can request an advance payment ahead of providing HHS services.

Important: Provider submitted advance requests are accepted based on the contracting agency's discretion. Please reach out to your contracting agency to confirm they accept advance requests before performing the steps in this guide.

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Before We Begin

The steps below can be completed by users provisioned with any of the roles below:

- **Vendor Admin**
- **Vendor Financials L2**

Overview

An **advance** payment is any revenue received before services are provided and payments earned. A **recoupment** is the repayment of an advance.

City agencies are required to issue advances on Health and Human Services (HHS) contracts equal to at least 25% of the fiscal year annual budget. If you do not have an HHS contract with the City, an advance cannot be requested. To determine whether a contract is an HHS contract, check if the Industry field (listed on the contract Header page) displays **Human/Client Service**.

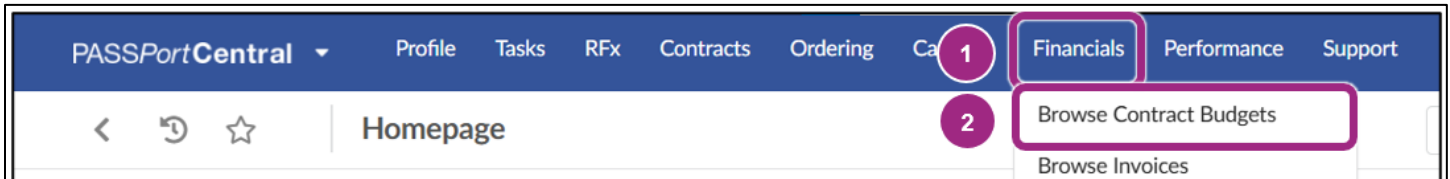
Important: It is at the discretion of the contracting agency to determine the advance and recoupment amounts and terms. Please contact your Contract Manager for more information.

Create an Advance Request

1. [Log in to PASSPort](#).

Click **Financials** in the top navigation menu.

2. Select **Browse Contracts Budgets** from the drop-down.



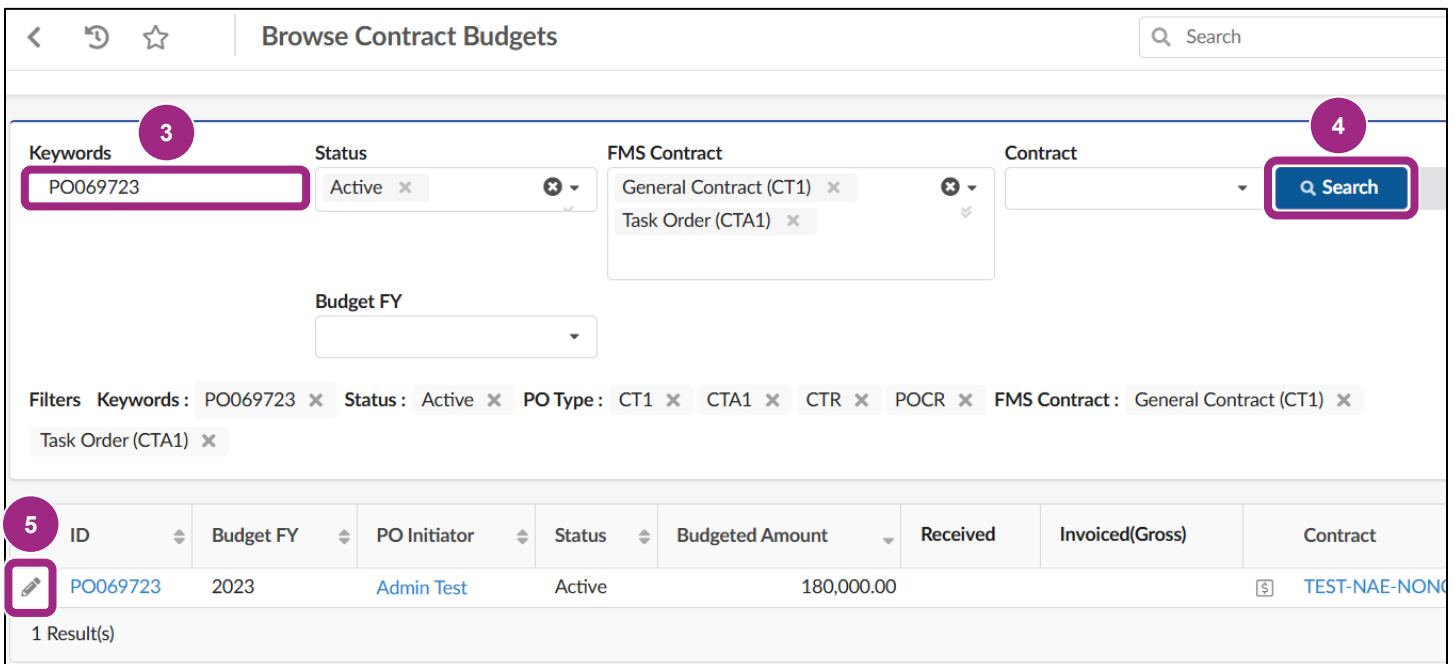
3. In the **Keywords** field, enter the Purchase Order (PO) ID number containing the budget for which you want to request an advance.

Note: Advances are typically requested for **Active** POs only. However, advances may also be requested for **In Progress** current and prior FY POs if the below conditions are met:

- Contract Type is CT1 or CTA1
- Industry is Human/Client Services
- At least one registered accounting line exists on the current FY PO

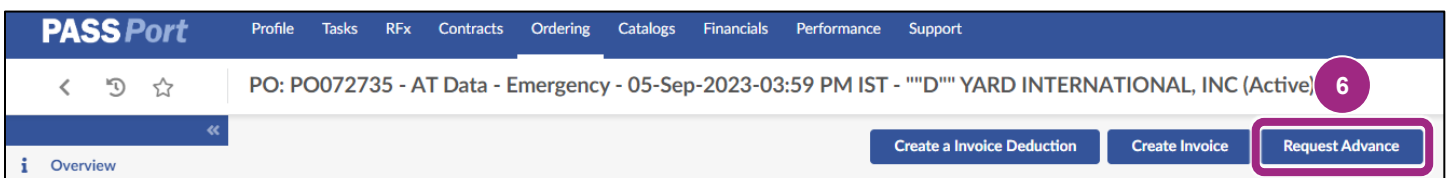
4. Click the **Search** button. Search results appear in a table below the search filters.

5. Click the **pencil** icon in the left-most column of the table to open the PO.



6. In the Purchase Order, click the **Request Advance** button near the top of the page.

Note: This button will not be available if the budgeted amount is missing on the PO.



The Request Advance page opens into the Overview tab.

Note: The Advance Header section will display empty fields, except for the Status and Link to PO fields. The empty fields will automatically populate after filling out the required fields in the Advance Request section and saving the work.

7. Scroll down to the **Advance Request** section and fill in the required fields:

- **Advance Label**
- **Advance Amount Requested**
- **Advance Reason**

Important: The standard advance rate for providers meeting all required criteria is 25%. Agencies may, at their discretion, issue an additional 25% advance. Multiple requests may be submitted.

8. Click the **Save** button.

The screenshot shows the 'Request Advance' interface. At the top, there are navigation tabs: 'Overview' (selected) and 'Linked Advances'. A 'Doc ID' field is visible. On the right, there are three buttons: 'Save' (highlighted with a blue circle and the number 8), 'Save and Close', and 'Close'. The main section is titled 'Advance Request' and contains several fields: 'Advance Creation Date' (10/27/2023, 12:00:00 AM), 'Advance Submission Date' (12:00:00 AM), 'Created By' (XA Ale), 'Advance Label*' (empty), 'Advance Amount Requested*' (empty), and 'Advance Reason*' (empty). A blue sidebar on the left has a '7' in a circle pointing to the form fields.

An Advance Request in **Draft** status has been created.

The screenshot shows the top navigation bar of the 'Request Advance' interface. The title is 'ADV000620 - Advance Request 10/27/2023 - (Draft)'. A red arrow points to the title. The navigation bar includes buttons for 'Save', 'Cancel Advance', 'Save and Close', 'Close', 'Forward', and 'Submit Advance'. A note at the bottom states 'Fields marked by an asterisk * are mandatory'.

If needed, the Advance Request can be canceled by clicking the **Cancel Advance** button or forwarded to anyone at your organization by clicking the **Forward** button.

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Alert Messages

The following alerts may display after the Advance Request is created:

- **Alert 1:** The total advance amount on the linked PO is not at least 25% of the FY Budgeted Amount.

This **caution alert** displays when the Advance Amount Requested is below 25% of the budget. This alert does not block the user from submitting the Advance Request.

ADV000620 - Advance Request 10/27/2023 - (Draft)

Overview

Linked Advances

Save Cancel Advance Save and Close Close Forward Submit Advance

Fields marked by an asterisk * are mandatory

Alert

- The total advance amount on the linked PO is not at least 25% of the FY Budgeted Amount.

A purple arrow points to the alert message.

- **Alert 2:** The Advance Amount Requested must be less than or equal to the Remaining Amount minus the total Remaining Recoupment Amount on the linked PO Budget item.

This **blocking alert** displays if the Advance Amount Requested **exceeds** the remaining budget amount.

Update the advance amount and click **Save**.

ADV000620 - Advance Request 10/27/2023 - (Draft)

Overview

Linked Advances

Save Cancel Advance Save and Close Close Forward Submit Advance

Fields marked by an asterisk * are mandatory

Alert

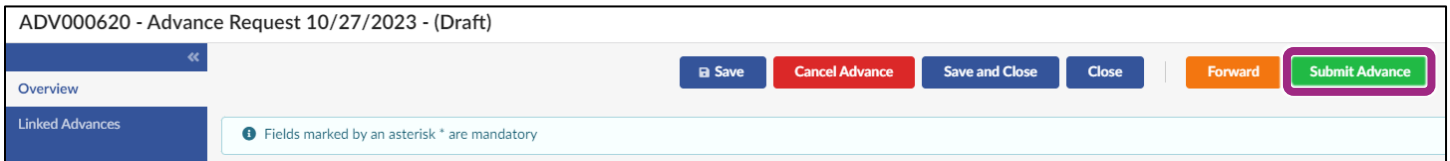
- The Advance Amount Requested must be less than or equal to the Remaining Amount minus the total Remaining Recoupment Amount on the linked PO Budget item.

A purple arrow points to the alert message.

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Submit an Advance Request

To complete the advance request, click the **Submit Advance** button near the top of the page.



ADV000620 - Advance Request 10/27/2023 - (Draft)

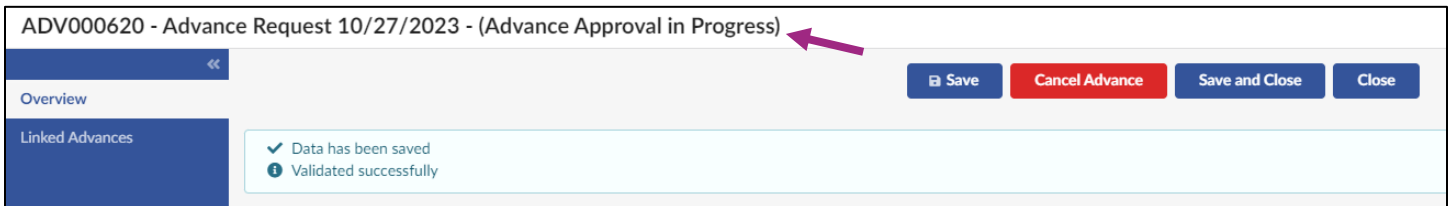
Overview

Linked Advances

Fields marked by an asterisk * are mandatory

Save Cancel Advance Save and Close Close Forward Submit Advance

Upon successful submission, the Advance Request status will update to **Advance Approval in Progress** status.



ADV000620 - Advance Request 10/27/2023 - (Advance Approval in Progress)

Overview

Linked Advances

Data has been saved
Validated successfully

Save Cancel Advance Save and Close Close

Next Steps

Once the Advance Request has been approved, the status will update to **Approved** and eventually **Disbursed**. It is at the discretion of the contracting agency to determine the advance and recoupment amounts and terms. Please contact your Contract Manager for more information.

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