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## 2124 DIRECT BILLING

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**Subject: SPONSORED PROJECTS**

**Effective: December 1986**

**Last Revision: May 2017**

**Last Reviewed: April 2018**

**Resp. Office: Research Services**

**Approval: Research Services**

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### PURPOSE:

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To establish responsibility for the direct billing of sponsored project expenses.

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### POLICY:

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1. Research Services is responsible for issuing requests for advance payment, payment by schedule, invoices, vouchers and any other financial instrument required to effect funding under sponsored project agreements. Exceptions to this responsibility must receive the prior approval of Research Services.
2. Research Services is authorized to issue a payment request, if necessary, to legally execute an agreement between the University and a sponsor.
3. The financial accounting system represents the official record supporting any invoice or voucher issued.
4. Research Services is authorized to conduct reviews to ensure that expenditures billed to a sponsor are authorized and allowable under terms and conditions of awards and are in accordance with University and sponsor policy.

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### ROLES AND RESPONSIBILITIES:

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#### OFFICE OF RESEARCH SERVICES

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- Reviews Monthly Invoicing Report to determine FUNDS that require an invoice to be generated for the billing cycle
- Generates invoices in ORS billing system (BBR), reconciles expense with the general Ledger (BEN)
- Reviews and approves invoices
- Coordinates with Business Administrator to provide supporting documentation for invoices

#### BUSINESS ADMINISTRATOR

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- Generates invoices for clinical trial projects
- Generates invoices for projects with unusual billing terms
- Provides copies of invoices to the Office of Research Services. Copies of invoice should be emailed to [GCINVOICING-L@lists.upenn.edu](mailto:GCINVOICING-L@lists.upenn.edu) ). Such invoices include the following:

- Any invoice generated by department Business Administrator / Grants Manager / Clinical Coordinator (including but not limited to clinical trial agreements and sponsored research agreement)
- Completion of a milestone(s) associated with a 5-FUND that will result in payment.
- Any technical reports that have been submitted that will result in payment being sent to the University.
  - o Note: The use of the [GCINVOICING-L@lists.upenn.edu](mailto:GCINVOICING-L@lists.upenn.edu) e-mail address does not replace the interaction between department BA/grants managers with the ORS Post Award group related to invoicing. If the department BA/grants manager is supplying information to an ORS desk accountant to facilitate the submission of an invoice to a sponsor by ORS then that should continue. This e-mail address should only be used to forward an invoice or other documents to ORS when the department BA /grants manager responsible for a 5 FUND is submitting documents or information directly to a sponsor that will result in payment.
- Coordinates with Office of Research Services to provide supporting documentation for invoices

The source of this document is Research Services.