

Volume Based Billing Events - Credits and Rebills

1) Scenario 1: Invoice needs to be re-sent with different address, date, etc

- a. **Action Item:** Credit / Rebill
- b. **Dept responsibility**
 - i. Check to see if payment was applied to invoice (please be sure this invoice is related to the correct event; milestone) & (if this is a conversion invoice, skip this step, be sure to notify SPAC in the OSN message that invoice to be credited is an eUMB PeopleSoft conversion invoice)
 - ii. If no payment has been applied
 1. **Create an OSN conversation:** "Award #, CR/RB- reason (invoice date or address change), Original Invoice # & Associated event: Ex: 1802906 CR/RB- address change, inv 11838 event #5"
 - a. **Note the reason for the re-bill**
 - i. If address change, provide the correct address to send to (must include email address while telework is still in place)
 - b. Same backup requirements as per usual, based on the Event Billing Instructions)
- c. **SPAC Responsibility**
 - i. Credit original invoice and create new invoice for revised address, date, etc.

2) Scenario 2: Invoice needs to be re-sent for adjusted amount

- a. **Action Item:** Credit / Rebill
- b. **Dept responsibility**
 - i. Check to see if payment was applied to invoice (please be sure this invoice is related to the correct event; milestone) & (if this is a conversion invoice, skip this step, be sure to notify SPAC in the OSN message that invoice to be credited is an eUMB PeopleSoft conversion invoice)
 - ii. If no payment has been applied:
 1. **Create an OSN conversation:** "Award#, CR/RB2- reason (change in invoice amount), Original Invoice # & Associated event ** New Event # & Amount: Ex: 1802906 CR/RB2- Change in invoice amount, inv 11838 event #5 ** New Event # 6 \$1000"
 - a. Note which Event # /Invoice # needs to be adjusted
 - b. Provide appropriate backup
 2. **Create Billing Event for Correct Amount**
 - a. Same backup requirements as per usual, based on the Event Billing Instructions)
- c. **SPAC Responsibility**
 - i. Credit original invoice and create new invoice for revised amount

3) Scenario 3: Invoice needs to be credited (was created in error)

- a. **Action Item:** Credit
- b. **Dept responsibility**
 - i. Check to see if payment was applied to invoice (please be sure this invoice is related to the correct event; milestone) & (if this is a conversion invoice, skip this step, be sure to notify SPAC in the OSN message that invoice to be credited is an eUMB PeopleSoft conversion invoice)

- ii. If no payment has been applied
 - 1. **Create an OSN conversation:** “Award#, CR, Original Invoice # & Associated event: Ex: 1802906 CR, inv 11838 event #5”
 - a. Note which Event # /Invoice # needs to be adjusted
 - b. Provide appropriate backup
 - c. body of OSN message should contain reason why credit is necessary
- c. **SPAC Responsibility**
 - i. Credit the invoice