UIS Billing Automation initiative delivers CU Grants billing efficiencies

May 13, 2020 by UIS Communications

Billing Automation will yield the University of Colorado grants offices significant time savings in generating and delivering grant invoices – in some cases shrinking grants billing processes from a week down to a single day.

Efficient billing processes help CU ensure it receives timely payments from sponsors for sponsored projects costs CU has incurred. It is part of a multi-phased UIS initiative to simplify, refine and enhance the billing process campus grants offices.

For 20 years, the PeopleSoft invoice processes for crediting and billing grants and projects-related charges remained largely unchanged. Invoices were sent one at a time, email by email. The grants biller generated the invoice, signed it, attached it to a Microsoft Outlook email and sent it the sponsor. Overall, CU sends nearly 1,000 monthly invoice emails.

At the click of a button, Billing Automation allows invoices to be electronically signed and emailed as an attachment from within PeopleSoft. The UIS Grants IT Services team has been working with the UIS Finance Development team and campus Office of Grants & Contracts and Campus Controllers Office teams to make this a reality.

Planning began in May 2019, cross campus design sessions captured the billing automation needs for each campus. Phased releases will allow for adoption of the most value-added features as quickly as possible. Campuses are currently adopting billing automation in a pilot mode, increasing the pilot population as they see continued successes.

The automation project is set to finish in late 2020. With Phase 1’s completion in September 2019, campus grants billers no longer needed to manually sign their invoices. In Phase 2, which completes in May 2020, UIS created a custom email program that creates a PDF invoice called an e-Bill, attaches it to the email, and sends it all at once. Phase 3 will allow for supplemental attachments to be included with the e-Bill. As of end of April 2020, 132 e-Bills have been emailed automatically from the system using this more efficient process.

“The Sponsored Projects Accounting office at UCCS always enjoys collaborating with the Grants team at UIS. We are excited about the possibilities the Billing Automation initiative provides us and have seen positive results in the first two phases while sending invoices electronically with our pilot population,” said Melinda Hamilton, program director of Sponsored Projects Accounting at UCCS Controller’s Office.

**Project benefits**
Efficient billing is key to ensuring cash flow for CU, which fronts the expenses for several sponsored projects and receives payment after the fact for costs incurred. By reducing the number of manual steps a biller needs to take, Billing Automation helps with timely billing.

As of Phase 2 completion, the following benefits have been delivered to the campus billing teams:

- Campus billers have their signatures automatically added to their PDF invoices.
- Campus billers can quickly and confidently track and verify that emails were delivered through a custom log table and query.
- Emails include campus-specific subject lines, bodies and email signatures, reducing time spent building emails while allowing each campus to customize their messaging.
- Emailed invoices automatically copy the biller, allowing them to forward emails to others with ease.
- Invoice PDFs are now sent to a system report manager repository, providing added security and a centralized location for easy access and review.

Future phases will increase efficiencies by covering a larger population of invoices involving more complex billing scenarios.

The feedback from across campuses has been very positive.

“The collaboration with UIS has been great for this project. We have great support from UIS that we greatly appreciate,” said Koffi E. Gnatsidji, billing manager at the Office of Grants and Contracts for University of Colorado Denver.

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