

CU I&E Submission: Subcontract Invoices ^[1]

Category

Customer Service
Finance & Accounting
Sponsored Projects/Research

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Project Description

This is a multi-step process to pay subcontract invoices that decreases mistakes, allows for proper subcontract monitoring, and increases transparency. This process integrates multiple systems as follows:

1. Subcontract sends the invoice to shared inbox.
2. Invoice is reviewed and if approved, it is moved into the Fiscal Assistant's (FA) folder.
3. FA uses Trello to track the invoice movement through the following steps: a. FA sends the invoice through DocuSign to the PI(s) to review. The PI either signs it or sends it back with questions. b. Once signed, FA inputs it into the tracking spreadsheet. This spreadsheet integrates tracking for Marketplace SPOs, OGC Contract Amendments, and individual invoices. c. FA sends it into APInvoice
4. The Manager reviews and approves the invoice through Marketplace and update the tracking spreadsheet.
5. FA checks monthly to ensure invoices are processed and marks those invoices as "paid" on the tracking spreadsheet.

Project Efficiency

The use of Trello and the precision of the tracking spreadsheet are both innovative aspects of this project. They allow the team to process invoices with ease and to communicate in automated ways that make everyone on the same page without excessive back and forth. By using all of these tools, any one of our team members can see the status of an invoice without having to ask the other.

Project Inspiration

This process was developed and perfected over time. We needed a process that allowed for multiple steps of approval, PI Transparency, balance of work across team members, and no bottlenecks. Over time, we found solutions to each step to create an efficient yet accurate process that helped everyone succeed.

What Makes You Happiest about this Project?

This project is a good example of trial and error and collaboration. We iterated on the process until it worked for each team member. It is great to see something that combines efficiency, compliance, and transparency - and this process does just that!

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Links

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