



Quick Guide: Information needed beforehand to fill in a Project Invoice eForm

- Purpose:** List the information/details users will need to fill out a *Project Invoice eForm* in PeopleSoft.
- Audience:** UCalgary staff and general associates submitting Invoice (Billing) Requests for Projects
- Prerequisites:** Must be logged in to [My UCalgary](#).
- Finance eForms are available to individuals with access to the PS Finance & Supply Chain module.

The following information should be obtained from the Project Owner prior to initiating a Project Invoice eForm:

- **Is this for a clinical trial / research trial? Y/N**

If Yes - Clinical Trial / Clinical Research invoices (billings) are not processed through PeopleSoft eForms. To request a billing invoice please see the following link. [Clinical Trial / Clinical Research Invoice Request](#)

If No - You can proceed to use the Project Invoice eForm.

- **Does your project have a contract to provide services to an external entity?**

For university projects wanting to provide services to an external entity, a contract or agreement must first be in place. The specific type of contract will depend on the nature of the project, the service provided and the expectations of both the university and the external entity.

Please consult with the appropriate legal group for assessing and securing the required contracts. Legal will advise if invoicing can proceed without an agreement.

Cumming School of Medicine:

- [CSM Legal | Home | CSM Legal | Cumming School of Medicine | University of Calgary \(ucalgary.ca\)](#)

All other projects:

- [Research agreements | Conduct Research | Research at UCalgary | University of Calgary](#)

- **Customer information (who you are invoicing / billing):**

- Customer name
- Address
- Contact email

Utilize the lookup function (magnifying glass icon) on the eform to find the correct customer.



Once the customer is selected, the Address and Contact email will auto populate in the form. Verify the correct address and email ID has populated. If not, you can search for a different “location” utilizing the lookup (magnifying glass icon) feature.

- **Currency** – the default is Canadian Dollars. Select the desired currency from the drop-down list.
- **Purchase Order Reference** – enter the relevant PO number if applicable.
- **Invoice Header information** (This will show on the invoice). Mandatory items to include in the header are:
 - PI Name
 - Project Name (expanded name)
 - Reference or Contract Number
- **Is this for an expense reimbursement?** – Y/N
 - If yes, you will need copies of screen shots of the expense in eFin as part of the audit supporting documentation.
- **For each line to be included in the invoice, you will need to know:**
 - Line Description (describe what the charge is for – this will show on the invoice)
 - Line \$ amount
 - Is GST applicable? – Y/N (default is No)
 - Project Code
 - Activity Code
 - Internal Code (if required by the PI)
 - Program Code (if required by the PI)
- **File attachments**
 - All invoice requests must have documentation that supports the items being billed for audit purposes. Document requirements is dependent on the invoicing transaction type (fee for service, cost reimbursement, etc.).
 - [Document Requirement Matrix](#)

Additional Resources

- For the full step by step job aid please see: [Project Invoicing Job Aid](#)
- Link to the eForm: [Project Invoice eForm Link](#)