

FAQ – Billing Workflow Updates

1. How do I add attachments to my billing?

Step 1 - In express billing, click on the Attachments Hyperlink.

Billing General

Unit UCALG Invoice FINSV0000003007 Pretax Amt 1.00 CAD

Bill Status: HLD Invoice Date:

*Bill Type: FSR Bill Source: GENONL

Cycle ID: DAILY *Frequency: Once

*Invoice Form: STANDARD

Customer Information

*Customer: 00106011 SubCust1: [View Customer Activity](#)

Alberta Health Services SubCust2:

Address

Payment Information

Header Detail

Lines to Add: 5 Max Rows: 30

Bill Lines Personalize | Find | View All | 1 of 1 | Last

Charge Details	Net Amount	Line Information	Product	Order	Shipment	Miscellaneous	Project/Contract	Service	User Fields	
Sel	Seq	Line Table	Identifier	Description	Quantity	UOM	Unit Price	Gross Extended	AR Account	Revenue Account
<input type="checkbox"/>	1			test	1.0000	EA	1.0000	1.00	AR Account	Revenue Account

Go to: Copy Address Header Notes Accounting Distributions
 Summary Standard Entry Bill Search Line Search **Attachments**

Step 2 – Click on the Upload button.

Favorites | Main Menu | Billing | Maintain Bills | Express Billing | Supporting Documentat

UNIVERSITY OF CALGARY Hello 10179629 (Gill,Don) on FSUA from FSPRD on 2018-01-28 @ 08:59

Header Documentation | **Line Documentation**

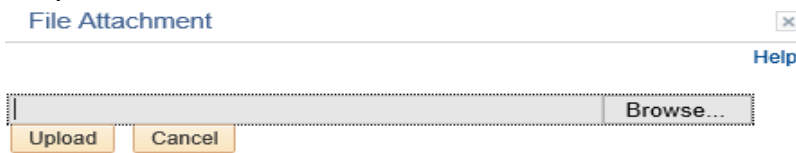
Business Unit UCALG Invoice FINSV0000003007

Invoice Documents Personalize | Find | 1 of 1

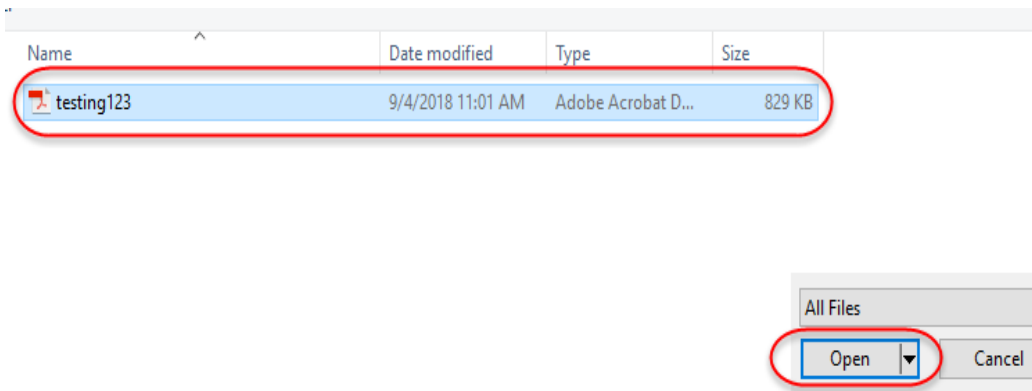
Documents | Additional Info

Document Description	Attached File	Internal Only	Upload	View
		<input checked="" type="checkbox"/>	Upload	View

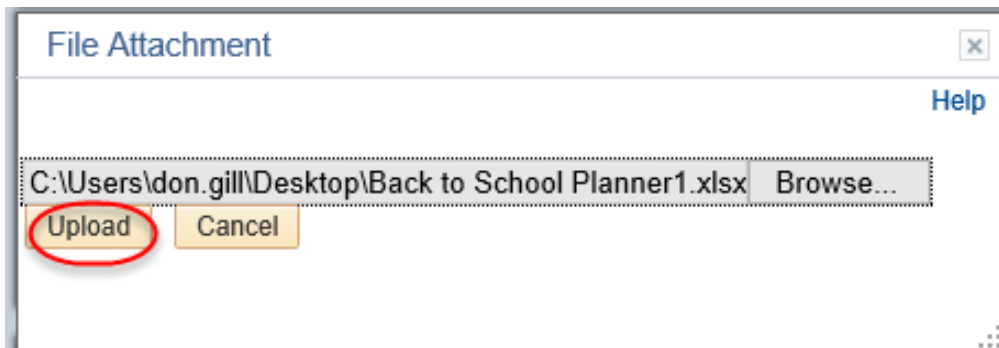
Step 3 – Click on the Browse Button.



Step 4 – Select your attachment file and click Open.



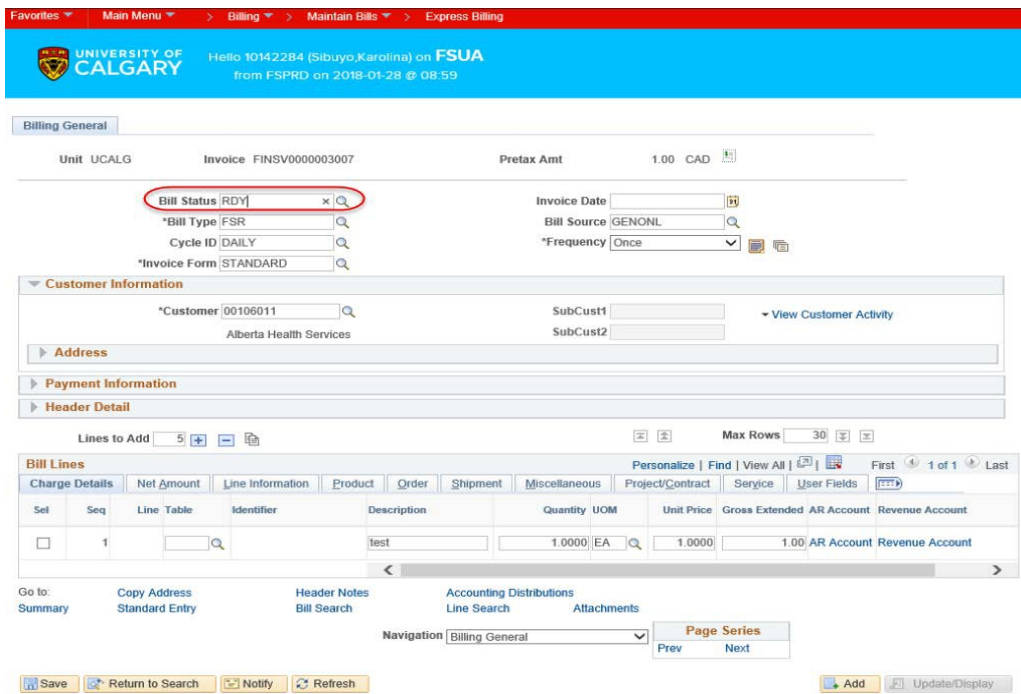
Step 5 -- Click the Upload button



Step 6 – Click the Save button.



Step 7 - Click the Express Billing tab and change Bill Status to RDY.



The screenshot shows the 'Billing General' tab in the University of Calgary Billing System. The 'Bill Status' field is highlighted with a red circle and contains the value 'RDY'. Other fields include 'Unit UCALG', 'Invoice FINSV0000003007', 'Pretax Amt 1.00 CAD', 'Invoice Date', 'Bill Source GENONL', 'Cycle ID DAILY', and 'Frequency Once'. The 'Customer Information' section shows 'Customer 00106011' and 'Address Alberta Health Services'. The 'Bill Lines' table has one line with 'Description test', 'Quantity 1.0000', 'Unit Price 1.0000', and 'Gross Extended 1.00'. Navigation buttons like 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display' are visible at the bottom.

Step 8 – Click the OK button



The screenshot shows a 'Message' dialog box with the following text: 'Approval Required. (32000,46)' and 'Approval is required for all Invoices. Select the Approvals hyperlink and Submit for Approval.' Below the text is an 'OK' button.

2. How do I submit an invoice for approval?

Step 1 – Navigate to your billing general tab and click on Approvals.

Billing General

Unit UCALG Invoice FINSV0000003007 Pretax Amt 1.00 CAD

Bill Status RDY Invoice Date
 *Bill Type FSR Bill Source GENONL
 Cycle ID DAILY *Frequency Once
 *Invoice Form STANDARD

Customer Information
 *Customer 00106011 SubCust1
 Alberta Health Services SubCust2 View Customer Activity

Address

Payment Information

Header Detail

Lines to Add 5 Max Rows 30

Bill Lines Personalize | Find | View All | First 1 of 1 Last

Charge Details	Net Amount	Line Information	Product	Order	Shipment	Miscellaneous	Project/Contract	Service	User Fields	
Sel	Seq	Line Table	Identifier	Description	Quantity	UOM	Unit Price	Gross Extended	AR Account	Revenue Account
<input type="checkbox"/>	1			test	1.0000	EA	1.0000	1.00	AR Account	45020

Go to: Summary Copy Address Standard Entry Header Notes Bill Search Accounting Distributions Line Search Attachments **Approvals**

Step 2 – Click on the Submit for Approval button.

Approvals Help

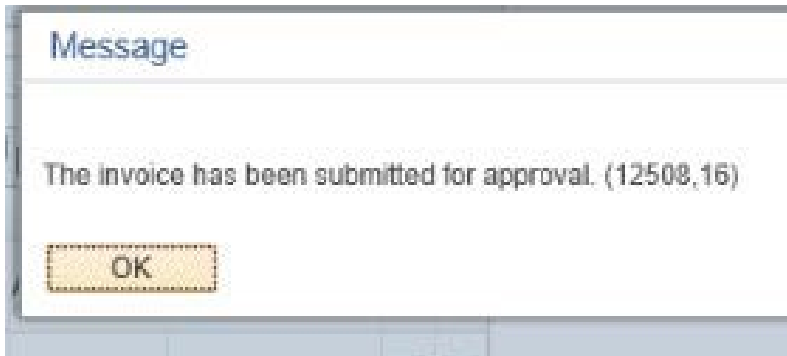
Business Unit UCALG
 Invoice FINSV0000003007
 Pretax Amount 1.00
 Approval Status Initial
 Comment

View Supporting Documentation

Submit for Approval Preview Approvals

OK Cancel Refresh

Step 3 – Click on the OK button.



3. I received an email stating my invoice approval was denied, what do I do now?

Step 1 - To correct the invoice, go to express billing, type in your invoice # and click search.



Express Bill Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Business Unit

Invoice

Bill Status

Customer

Contract

Bills in Business Unit

Template Invoice Flag

Case Sensitive

Step 2 – Navigate to the Approvals hyperlink.

Billing General

Unit UCALG Invoice FINSV0000003007 Pretax Amt 1.00 CAD

Bill Status RDY Invoice Date []
 *Bill Type FSR Bill Source GENONL
 Cycle ID DAILY *Frequency Once
 *Invoice Form STANDARD

Customer Information

*Customer 00106011 SubCust1 [] View Customer Activity
 Alberta Health Services SubCust2 []

Address

Payment Information

Header Detail

Lines to Add 5 Max Rows 30

Bill Lines Personalize | Find | View All | First 1 of 1 Last

Charge Details	Net Amount	Line Information	Product	Order	Shipment	Miscellaneous	Project/Contract	Service	User Fields	
Sel	Seq	Line Table	Identifier	Description	Quantity	UOM	Unit Price	Gross Extended	AR Account	Revenue Account
<input type="checkbox"/>	1	[]	[]	test	1.0000	EA	1.0000	1.00	AR Account	45020

Go to: Copy Address Header Notes Accounting Distributions **Approvals**
 Summary Standard Entry Bill Search Line Search Attachments

Step 3 – Click on the Approval Monitor.

Approvals

Business Unit UCALG
 Invoice ALMA0000000455
 Pretax Amount 500.00
 Approval Status Pending
 Comment [Please attach appropriate documentation]

View Supporting Documentation **Approval Monitor**

Approve Deny

OK Cancel Refresh

Step 4 - Click on the arrow shown below, and click **View/Hide Comments**. Review the comments for correcting action.

Approvals H


Requested For
 Business Unit UCALG
 Invoice ALMA0000000455
 Pretax Amount 500.00

Approve Invoices

1 **BUSINESS_UNIT=UCALG, INVOICE=ALMA0000000455:Denied** [View/Hide Comments](#)

Approve Invoices Path 1

Denied

 Gill,Don
 UCAR Invoice Approver
 18/08/28 - 11:49 AM

2 **Comments**

Gill,Don at 18/08/28 - 11:49 AM
 Please attach appropriate documentation

West,Elaine at 18/08/28 - 11:40 AM
 Please Approve

[View Supporting Documentation](#)

OK Cancel Refresh

Step 5 – Make the necessary changes to your invoice and resubmit the invoice for approval. Select the Approval hyperlink.

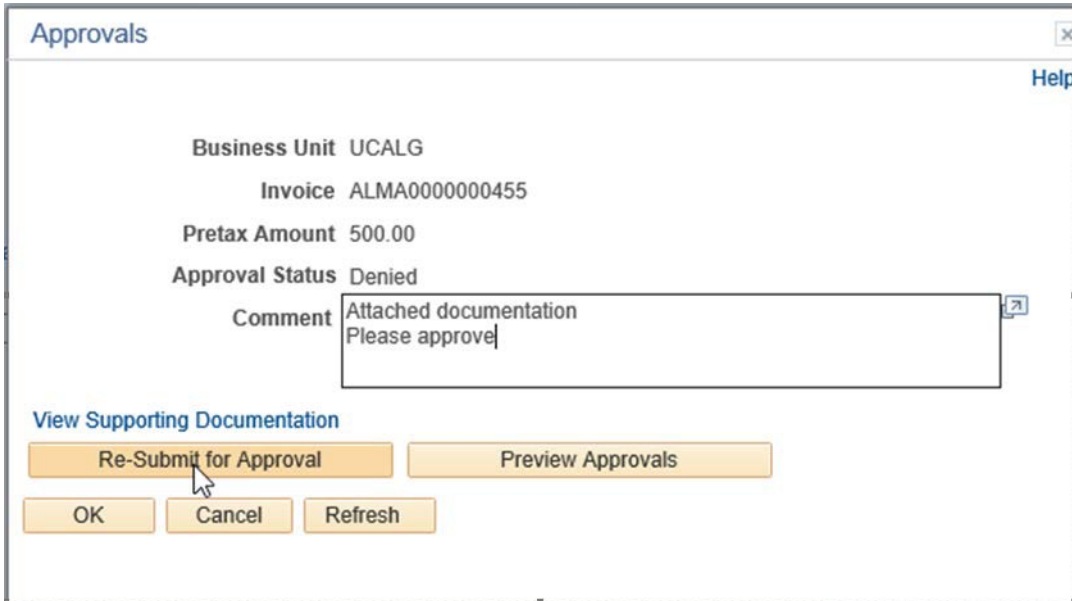
Lines to Add [+](#) [-](#) [📄](#) Max Rows [+](#) [-](#)

Bill Lines [Personalize](#) | [Find](#) | [View All](#) | [📄](#) | [📄](#) First 1 of 1 Last

Charge Details	Net Amount	Line Information	Product	Order	Shipment	Miscellaneous	Project/Contract	Service	User Fields	
Sel	Seq	Line Table	Identifier	Description	Quantity	UOM	Unit Price	Gross Extended	AR Account	Revenue Account
<input type="checkbox"/>	1	<input type="text"/>		test	1.0000	EA	1.0000	1.00	AR Account	45020

Go to: [Summary](#) [Copy Address](#) [Header Notes](#) [Accounting Distributions](#) [Approvals](#) [Standard Entry](#) [Bill Search](#) [Line Search](#) [Attachments](#)

Step 6 – Click Re-Submit for approval.



Approvals

Business Unit UCALG
Invoice ALMA0000000455
Pretax Amount 500.00
Approval Status Denied
Comment Attached documentation
Please approve

[View Supporting Documentation](#)

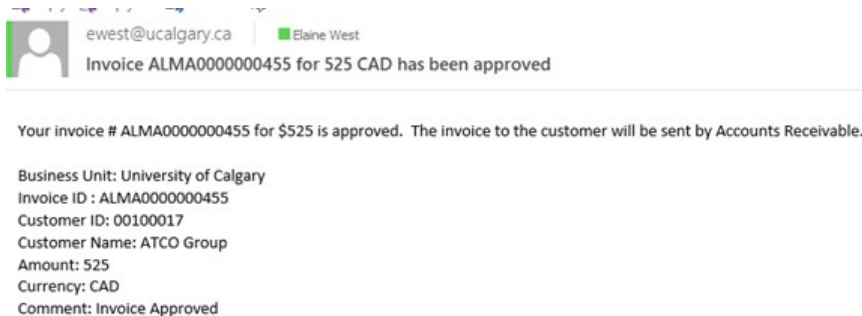
Re-Submit for Approval Preview Approvals
OK Cancel Refresh

4. What is supporting documentation?

Supporting documentation is 3rd party confirmation for the items that are being billed. For example, the documentation could be a contract, agreement, PO, work order customer communications.

5. How will I know if my invoice is approved?

The biller will receive an email that the invoice has been approved.



6. What is the expected turnaround time on invoice approvals?

We understand the importance of processing these invoices in a timely manner and that the review process will extend the turnaround time for invoice processing. We are unable to provide an expected turnaround at this time, but if you have not heard back on your request within 5 business days, please reach out to the AR team – finance@ucalgary.ca.

7. I need further assistance with the workflow updates, who do I contact?

Contact finance@ucalgary.ca for anything billing related. We are here to help!