E-Mail Form

UNIVERSITY OF CALGARY

Clinical Trials/Clinical Research Invoice Request Form

V1.0

Calgary Centre for Clinical Research
3280 Hospital Drive NW
Calgary, AB, T2N 4Z6
CCCRinvoicing@ucalgary.ca

The Process

Step 1: Requestor completes and submits this form to CCCRinvoicing@ucalgary.ca. along with supporting documentation (see guidelines on page 2 for further detail).
Step 2: CCCR creates the invoice.
Step 3: CCCR sends the original invoice to the customer and a courtesy copy to the requestor.
Step 4: Accounts Receivable processes payment or follows up with customer/sponsor and requestor re: late or partial payments.

Clear all form data

SECTION 1 Requestor Info

* Date of Request:	* Requested By:	* Phone Number:
* E-mail Address:		

Section 2 For Fund 11, 12, 18, 19, 60, 70

*Project Investigator (PI) Name:	*Project Name:
*PI Signature:	*Other Signature:

SECTION 3 Customer Info

* Customer/Sponsor Name:	Customer's Purchase Order Number (if known):	
PeopleSoft Customer Number (if known):	PeopleSoft Location Number (if known):	
* Address:		
* Contact Name:	Phone Number:	*E-mail:

SECTION 4 Accounting Information

Purpose of Invoice (note: your customer will see this description)	Fund	Dept ID	Revenue Account	Internal	Project	Activity	* Subject to Overhead? Y/N	Overhead Percentage	Amount
							No		
							No		
							No		
							No		
							No		

Clear Section 5 Data

Currency	Subtotal	GST Amount	Invoice Total
CAD	$ 0.00		$ 0.00

SECTION 5 Special Notes or Instructions

Guidelines for Completing this Form:

IMPORTANT - All invoice requests must have supporting documentation that supports the revenue items being billed. Supporting documentation examples are:
*** Work Order** *** Purchase Order** *** Customer communication** *** Contract**

The following is a guideline for completing each section of the Invoice Request Form. If you need additional information or assistance, please contact CCCRinvoicing@ucalgary.ca.

All fields marked with an asterix * are required. Incomplete requests will be returned to the requestor for completion.

SECTION 1	Requestor Info

* **Date of Request**: This is the date you submit your request to CCCRinvoicing@ucalgary.ca.
* **Requested by:** The name of the person submitting the request (the Requestor).
* **Phone Number:** The Requestor's phone number.
* **E-mail Address:** The Requestor's e-mail address.

SECTION 2	PI information

*** Project Investigator (PI) Name** - enter the PI's name.
*** Project Name** - enter the name of the project (project title in EFIN).
*** PI Signature** - PI must sign to approve the request

SECTION 3	Customer Info

* **Customer /Sponsor Name:** Must be a company or organization; cannot be an individual.
PeopleSoft Customer Number: PeopleSoft customer number.
PeopleSoft Location Number: Specific address in PeopleSoft customer account.
* **Address:** (Required unless customer number and location provided). Address of customer's Accounts Payable department.
* **Contact Name:** Contact person at customer/sponsor organization.
Phone Number: phone number for the listed contact.
* **E-Mail Address:** e-mail address for the listed contact.
Customer's Purchase Order Number: Enter the customer PO# provided by the customer.

SECTION 4	Amount and Purpose of the Invoice

At least one line item REQUIRED. If more than 5 lines are needed, provide a second page listing additional information.

*** Purpose of the invoice:** Describe the line item in a way that will make sense to your customer.
* **Fund** - the fund code for the revenue.
* **Dept** - Department ID .
*** Account** - If unknown leave blank.
*** Internal** - if required by department.
* **Project:** Project Number.
* **Activity Code:** If activity is different than 00000, enter the code. If field is left blank, 00000 will be used.
*** Amount:** The total amount for the line item.
***Subject to Overhead:** Select from drop down list.

Yes - Inclusive: Amount is inclusive of overhead; overhead is included in the amount.
Yes - Exclusive: Amount is exclusive of overhead; overhead will be added to the amount.
No: Overhead is not applicable.

Overhead Percentage: The percentage of overhead for the line item.
Subtotal - enter the total amount before taxes
GST Amount - enter the total GST amount for the invoice.
Invoice Total - the subtotal + GST amount.
* **Currency:** Enter the Currency as CAD or USD.

SECTION 5	Special Notes or Instructions

If additional information needs to be included on the invoice, or if you have specific instructions for the biller, include them here.