



Step	Action
1	As a general rule, departments should not create invoices to facilitate payments. The vast majority of suppliers paid by the university will provide an invoice for their goods or services.
2	However, there are some suppliers, mainly individuals, who will be unable to create an invoice or, due to the type of relationship with the individual, asking them to provide an invoice would be inappropriate. Examples may include payments to research participants, payments to athletic officials, payments to advisory board members, etc. In these instances, a department-generated invoice may be required to facilitate payment.
3	An invoice is a formalized agreement of payment between two parties detailing the goods/services rendered, the amount to be paid, and where the payment should be sent. To prevent duplicate payments and/or to apply payments correctly, a specific invoice date and invoice number should also be present on an invoice.
4	The Scholarship Payment Form , used to facilitate scholarship payments to students, is an example of a standardized department-generated invoice . Students would not be aware of how to create an invoice nor why one would be necessary for a scholarship payment, so this form was created to identify the student, their current address, the amount being paid to them, and the reason for payment. When the student signs the Scholarship Payment Form , they are confirming the information on the form and agreeing to the payment. This form serves as a valid department-generated invoice .
4	When creating a department-generated invoice , the content of the document and the agreement to the payment details is of the utmost importance. A department-generated invoice must document the acceptance of the payment details from the supplier.
5	<p>For example, a department could create a department-generated invoice for an individual to facilitate payment in a research study. However, if the participant doesn't sign off on the department-generated invoice or if there isn't backup documentation, like an email to the participant or a program brochure, to note that the participant was made aware of all the payment details, the participant could dispute the amount being paid. To ensure that there is no question of the payment details that could cause an issue with the payment, department-generated invoices should be signed or otherwise acknowledged by the supplier before payment is submitted.</p> <p>Hint: Please refer to the Participant Payment Policy for more information on how participants can be paid.</p>
6	<p>For one-time payments, the Individual Supplier Form can be used to both setup the supplier in PeopleSoft and to serve as the payment agreement/invoice for voucher payment. (It would be cumbersome for the supplier to complete the full form for repeated payments, but the Individual Supplier Form can be utilized more than one time, if necessary.) Please note that the payment information listed in the Department Use Only section should be completed by the department – not the supplier, before the supplier signs the form. That ensures that the payment amount was agreed to by the supplier and the department. This completed form should be submitted as the invoice when creating a voucher, utilizing the supplier's last name and date the supplier signed as the invoice number and the signed date as the invoice date. Example: Invoice Number = SMITHSEP2923, Invoice Date = 09/29/23.</p> <p>Hint: The Social Security Number should be redacted if the document is used as the invoice. However, Suppliers@ouhsc.edu does need the SSN initially for supplier setup purposes.</p>



	<p>i. This can come in the form of the supplier's signature on the department-generated invoice, a participation brochure listing the payment amount with the supplier's name and address, a training certificate listing the amount per course, the supplier's information, and the training completion date, or any other documents listing the necessary payment elements.</p>
10	<p>A combination of documents can be submitted with the department-generated invoice to facilitate payment however, it may be more efficient for the department to utilize an existing form, like the Individual Supplier Form or the Form 3, or to create their own standardized department-generated invoice which lists the required payment details and collects a signature from the supplier.</p>