RASR INVOICE TIP SHEET

Navigate to RASR
Click link for Clinical Contracts - Invoice/Billing

1. Form Name is used to Search for forms in RASR. Format should include Contract #, Period of Invoice, and anything else you need to remember what the contract is for (description, etc.). The better you name this field, the easier it will be to replicate the invoice from month to month.

2. RASR ID is the automatically generated unique number for each form. This number will be used in the deposit chartfield.

3. Department ID must be filled out in order for the form to route correctly.

4. Counterparty is the organization being invoiced. If it is one of the UNC entities (managed or owned), it will be in the drop down list. If it is an external party, choose “OTHER” and type the name in the next field.
The payment information section will be used when checks or wires are received. If the check is received in the department, the department is responsible for including the RASR Invoice ID in the deposit and then adding the deposit #/journal ID to RASR and marking it paid. If it is a contract that FP receives centrally, we will use your information in RASR to apply to a chartfield. FP will then log into RASR and add the wire journal ID and mark whether it was full/partial/over payment.

Attachments are required. If you have a finalized invoice, you should attach that. If you are using an estimate for accruals, attach something justifying your figure.

Copying Forms:
It will become very helpful to copy forms as you replicate invoices monthly/quarterly. To do so:

1. Go to your previously submitted forms
2. Find the form that you wish to copy and click the 2 pieces of paper in the right corner
3. Click “OK” to duplicate the form.
4. It will automatically open a copied version of the form. Edit as needed and submit
Invoice Routing:
The routing for invoicing is different than the routing for contracts. For contracts, we want visibility across multiple roles. For invoicing, we want different stops for accruing.

- **Submitter ->**
  - School of Medicine: Approver ->
    - School of Medicine: Contracts Processor ->
    - School of Medicine: Finance ->
      - School of Medicine: FP Finance

***The type of contract and invoice timing depends on where contracts sit for accruals.***

- **Submitter:** Person who submits contract and usually the individual who puts invoice together
- **Contracts Processor:** Stopping point for invoices without actual data. Used to estimate contracts. Will accrue from this role
- **Finance:** Actual data is available and has been used to generate an invoice. Invoice is sent but no payment has been received yet (or not in full). Will accrue from this role.
- **FP Finance:** Marked complete when paid in full and invoice becomes un-editable

Monthly/quarterly/annual invoices where actuals are not yet available and you are using an estimate:
- Beginning of period, submit an invoice for estimate of period. Approval to SOM: Contracts Processor
- At end of period, edit form to correct amount and add real, calculated invoice as attachment and submit. Approval to SOM: Finance
- Copy prior period form to create Invoice form estimate for next period. Approval to SOM: Contracts Processor
- Repeat

Invoices where actual data is available and NOT a flat amount
- Calculate invoice amount
- Submit invoice form with invoice attached by 2nd business day of the month by 12 pm
- Approval to SOM: Finance

Flat dollar contracts (medical director, service leader, clinical director, etc.)
- No invoice form is needed **AS LONG AS YOU MARKED “MONTHLY NO INVOICE” IN CONTRACT FORM IN RASR**

Contracts with annual payments and settlement (Pre-Transplant, 1605, etc.)
- Submit 1 invoice form for annual amount at beginning of fiscal year with no attachment. Approval to SOM: Contracts Processor
- Once settlement has been completed, edit form to correct amount and add real, calculated invoice as attachment and submit. Approval to SOM: Finance

Once you receive payment, add wire #, journal ID, etc. to form. Approval to FP Finance. FP Finance will only mark as complete once “Paid in Full”.
Check Depositing:
*When depositing a check, please include the Invoice Form RASR ID in the “Reference 1” Field. This is achieved by selecting “Journal Reference Information” in the deposit in Connect Carolina and editing the “Ref” field. Please only include the RASR ID in this field.

Next Steps:
The Contract Committee has set a goal of September 30th to have all invoices in RASR. That means that all Quarter 1 invoices should be in RASR and all invoices for September 1 – 30th should be in RASR.