

Course Name	Delphi eInvoicing System Training: Grant Recipient
Agency	



AGENCY Process Recommendations:

At various points within the Delphi eInvoicing System training, you will see yellow boxes containing the caption "Agency Process Recommendation". These captions highlight functionalities and processes within the system that may be used differently by each agency.

1	Invoice: Please refer to the agency that you are invoicing regarding how you should populate the Invoice Number field, as well as what information should be added in the Invoice Description field.
Agency Process Recommendation:	
Agency Policies and Guidelines:	
2	Attachment: Please refer to the agency that you are invoicing regarding what should be included in the attachment Description field, as well as what should be uploaded and populated in the Define Attachment section. This may include the agency's desired attachment type (File, URL, or text), format (Word, Excel, or PDF) and naming convention.
Agency Process Recommendation:	
Agency Policies and Guidelines:	

3	Period of Performance: Please note that Period of Performance is not a system required field; however, the agency that you invoice may require that you include it. Refer to the contract your organization has with the agency to know what to input for the Period of Performance fields. If the period of performance is outside of the contracted dates, this must be noted to the reviewer/approver.
Agency Process Recommendation:	
Agency Policies and Guidelines:	
4	SF270/271: Please refer to the agency that you are invoicing regarding which form (if any), the SF270 or SF271, you should complete.
Agency Process Recommendation:	
Agency Policies and Guidelines:	

5	SF270/271: If the agency that you are invoicing requires you to fill out the SF270 or SF271, please refer to that agency regarding how to populate each field.
Agency Process Recommendation:	
Agency Policies and Guidelines:	
6	Credit Memo: Unless otherwise noted, you have 29 days to offset the credit memo with another invoice; however, some agencies may set the offset threshold to a different number of days. Please refer to the agency to which you are submitting a credit memo to confirm the 29-day offset.
Agency Process Recommendation:	
Agency Policies and Guidelines:	

7	Credit Memo: Please refer to the agency to which you are submitting the credit memo regarding how you should populate the Invoice Number field and for specific guidance on what should be included in the Invoice Description field, as well as any required backup documentation.
Agency Process Recommendation:	
Agency Policies and Guidelines:	