

Course Name	Delphi eInvoicing System Training: Grant Reviewer/Approver
Operating Administration (OA)	PHMSA/OHMS/HMEP Grant Program



OA Process Recommendations:

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

1	Auto-Approval: Most OAs will not use auto-approval. For OAs that do use auto-approval, the predefined auto-approval percentage thresholds can vary across OAs and grant programs; refer to the OA for which you review invoices for more information on their policies and procedures.
OA Process Recommendation: OA will NOT use the auto-approval function	
OA Policies and Guidelines: Auto-Approval function does not apply to PHMSA/OHMS/HMEP Grants Program.	
2	SF270/271: Please refer to the OA for which you review invoices to determine whether the grant recipient is required to submit the SF270 or SF271 Form (or other form), as well as how to populate the fields within the applicable required form.
OA Process Recommendation: The grant recipient should submit the SF270 form	
OA Policies and Guidelines: Correct guidance.	
3	Attachments: Please refer to the OA for which you review invoices to determine which types of attachments the grant recipient is required to submit as backup documentation in order for the invoice to be approved.
OA Process Recommendation: Refer to agency Policies and Guidelines for specific instructions	
OA Policies and Guidelines: Grant recipients may submit any of the attachments type (File, URL, or Text), format (Word, Excel, or PDF) to substantiate their invoice request.	
4	Rejection Comments: Please refer to the OA for which you review invoices for specific guidance regarding what to include in the Comments section for invoice rejections.
OA Process Recommendation: No preference regarding information entered by the reviewer/approver	
OA Policies and Guidelines:	

5	Redistribution: Please refer to the OA for which you review invoices for specific guidance regarding the use of redistribution of funds on an invoice; some OAs will opt not to use this functionality.
OA Process Recommendation: OA will NOT use the redistribution function	
OA Policies and Guidelines:	