

Course Name	Delphi eInvoicing System Training: Grant Recipient
Agency	PHMSASP



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: Refer to agency Policies and Guidelines for specific instructions	
Agency Policies and Guidelines: Refer to your Base Grant Payment Agreement for the agreement number, ie: DTPH56-YY-G-PHPL## or DTPH56-YY-G-PHPG##. Use the Year as the first part of your invoice number, ie: 11. Use the last 6 characters of this agreement number as the first part of your invoice number, ie: PHPL04. For the third part of your invoice number, put a dash (-) and either MYP for Mid Year Payment, or YEP for Year End Payment. Your invoice number should look something like this: 11PHPL04-MYP.	
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: Refer to agency Policies and Guidelines for specific instructions	
Agency Policies and Guidelines: Attach the signed/scanned request document that you printed from FedSTAR.	
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: Refer to agency Policies and Guidelines for specific instructions	
Agency Policies and Guidelines: Refer to the SF-270 for the period covered for this invoice.	

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: The grant recipient will NOT use the SF270 or SF271 forms	
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.
OA Process Recommendation: Refer to agency Policies and Guidelines for specific instructions	
Agency Policies and Guidelines: The SF-270 will be filled out in FedSTAR and then printed, signed, scanned and uploaded as an attachment to the invoice.	
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: Refer to agency Policies and Guidelines for specific instructions	
Agency Policies and Guidelines: If you need to make modifications to the submitted invoice please contact the PHMSA State Program for assistance.	
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: Refer to agency Policies and Guidelines for specific instructions	
Agency Policies and Guidelines: If you need to make modifications to the submitted invoice please contact the PHMSA State Program for assistance.	