



PREPARING BILLING REQUEST FORM

QUICK REFERENCE GUIDE

Version 0.1

Related Document: *SOPs*

- Processing Billing Requests

DOWNLOADING THE BILLING REQUEST FORM



Step A – Download and fill the Billing Request Form:

1. Download the Billing Request Form [here](#)
2. Complete the mandatory fields
3. Fill out the products/services which service users are being billed for and provide the price per unit
4. List the service users who are being billed
5. Specify the dates/period of time:
 - a) If this is a billing request for a period of time, complete the “For period” section
 - b) If this is a billing request for service usage on specific dates, provide a date for each service user
6. For each user, specify the quantity of units per product/service to bill
7. Specify how the billed amount will be recovered
 - a) If service user will be paying via a grant, provide the Grant/Project # and the designate authority for the funding source
 - b) If service user will be paying via an external payment (ie cheque or cash) then provide the user’s physical address (including city and postal code) and email address

Mandatory fields
 Input fields

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Submitted by:	<input type="text"/>	(Name, Title)
Department:	<input type="text"/>	
Service Name:	<input type="text"/>	
Service Description:	<input type="text"/>	
Deposit to Grant #:	<input type="text"/>	
Grant Leader:	<input type="text"/>	

BILLING SUMMARY	(If applicable)				Product A		Product B	
	Designate Authority	Grant/Project #	Date (YYYY-MM-DD)	Units	TOTAL	Units	TOTAL	
PRICE PER UNIT >>>>					0		0	
SERVICE USERS					0		0	

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For period	
From:	<input type="text"/> (YYYY-MM-DD)
To:	<input type="text"/> (YYYY-MM-DD)

BILLING SUMMARY	(If applicable)				Product A		Product B	
	Designate Authority	Grant/Project #	Date (YYYY-MM-DD)	Units	TOTAL	Units	TOTAL	
PRICE PER UNIT >>>>					0		0	
SERVICE USERS					0		0	

5b

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BILLING SUMMARY	(If applicable)				Product A	
	Designate Authority	Grant/Project #	Date (YYYY-MM-DD)	Units	TOTAL	
PRICE PER UNIT >>>>					0	
SERVICE USERS					0	

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Users external to University of Guelph

Address	Email	Additional Notes (Optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>

7b

CREATING A BILLING REQUEST TICKET IN FOOTPRINTS



Step B - Open a FootPrints ticket via the Online Request Form [here](#).

1. Fill the following mandatory fields:

- a) Provide your information
- b) Select the type of request:
 - o Billing Request
- c) A meaningful title and description with any necessary details to help the Financial Clerk to understand potential specificities for this billing request
- d) Attach the completed Billing Request form
- e) Click on “Submit”

A screenshot of the online request form in FootPrints. The form is divided into several sections: 'Contact Details', 'Request', and 'Attachments'. Annotations 'a' through 'e' are placed over specific fields to indicate where to enter information. 'a' is over the contact information fields (Email Address, First Name, Last Name). 'b' is over the 'Request' dropdown menu, which is currently set to 'Billing Request'. 'c' is over the 'Title' and 'Additional Comments' text areas. 'd' is over the 'Attachment 1' section, which has a 'Drop files or click here to upload' button. 'e' is over the 'Submit' button at the bottom right of the form.

Contact Details
(Primary Contact Person)

Email Address
First Name
Last Name

Request

Billing Request

Please ensure you attach the following:

1. [Billing Request Form](#)

Important Information:

- It is the billing requester's responsibility to retain sufficient supporting documentation to address potential charge disputes

Title

Additional Comments

Attachment 1

Drop files or click here to upload

Submit

CONTACT INFORMATION



In case of doubt, contact Financial Clerks for help

	<u>Contact Details</u>
General Enquiries	ovcsas@uoguelph.ca OVCE Rm: 2631