Volume Based Billing Events - Credits and Rebills

1) **Scenario 1: Invoice needs to be re-sent with different address, date, etc**
   a. **Action Item:** Credit / Rebill
   b. **Dept responsibility**
      i. Check to see if payment was applied to invoice (please be sure this invoice is related to the correct event; milestone) & (if this is a conversion invoice, skip this step, be sure to notify SPAC in the OSN message that invoice to be credited is an eUMB PeopleSoft conversion invoice)
      ii. If no payment has been applied
         1. **Create an OSN conversation:** “Award #, CR/RB- reason (invoice date or address change), Original Invoice # & Associated event: Ex: 1802906 CR/RB- address change, inv 11838 event #5”
            a. **Note the reason for the re-bill**
               i. If address change, provide the correct address to send to (must include email address while telework is still in place)
            b. Same backup requirements as per usual, based on the Event Billing Instructions
   c. **SPAC Responsibility**
      i. Credit original invoice and create new invoice for revised address, date, etc.

2) **Scenario 2: Invoice needs to be re-sent for adjusted amount**
   a. **Action Item:** Credit / Rebill
   b. **Dept responsibility**
      i. Check to see if payment was applied to invoice (please be sure this invoice is related to the correct event; milestone) & (if this is a conversion invoice, skip this step, be sure to notify SPAC in the OSN message that invoice to be credited is an eUMB PeopleSoft conversion invoice)
      ii. If no payment has been applied:
         1. **Create an OSN conversation:** “Award#, CR/RB2- reason (change in invoice amount), Original Invoice # & Associated event ** New Event # & Amount: Ex: 1802906 CR/RB2- Change in invoice amount, inv 11838 event #5 ** New Event # 6 $1000”
            a. Note which Event#/Invoice # needs to be adjusted
            b. Provide appropriate backup
         2. **Create Billing Event for Correct Amount**
            a. Same backup requirements as per usual, based on the Event Billing Instructions
   c. **SPAC Responsibility**
      i. Credit original invoice and create new invoice for revised amount

3) **Scenario 3: Invoice needs to be credited (was created in error)**
   a. **Action Item:** Credit
   b. **Dept responsibility**
      i. Check to see if payment was applied to invoice (please be sure this invoice is related to the correct event; milestone) & (if this is a conversion invoice, skip this step, be sure to notify SPAC in the OSN message that invoice to be credited is an eUMB PeopleSoft conversion invoice)
ii. If no payment has been applied
1. **Create an OSN conversation:** “Award#, CR, Original Invoice # & Associated event: Ex: 1802906 CR, inv 11838 event #5”
   a. Note which Event # /Invoice # needs to be adjusted
   b. Provide appropriate backup
   c. Body of OSN message should contain reason why credit is necessary

c. **SPAC Responsibility**
   i. Credit the invoice