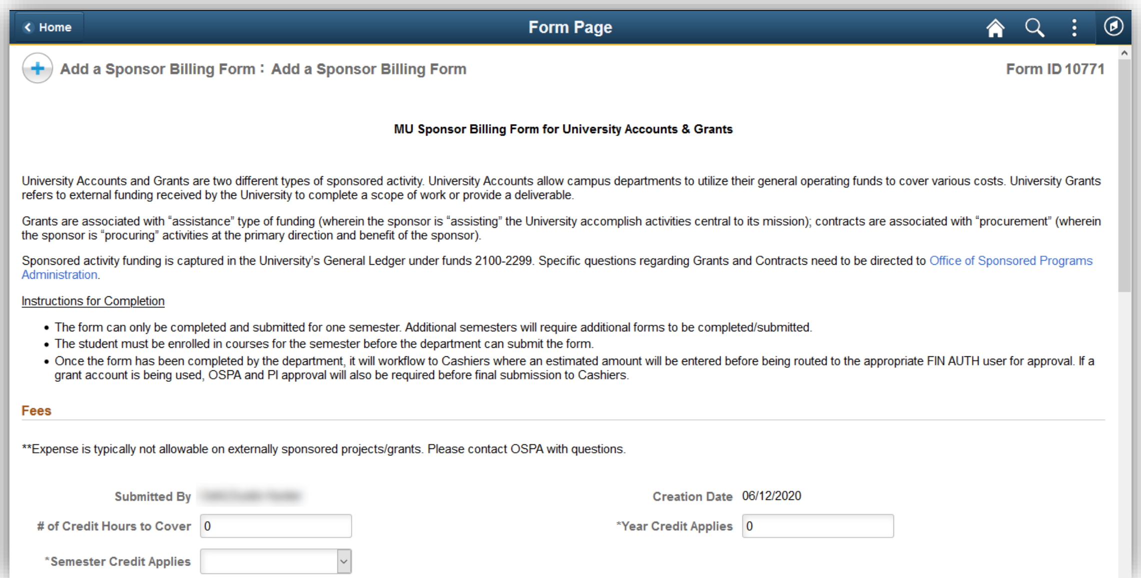
Sponsor Billing Form Guide

Enter a Sponsor Billing Form

1. Navigate to the Sponsor Billing Form.
    a. Use the link from the MU Office of Cashiers website or
    b. In the PeopleSoft Finance system select myForms WorkCenter from the Main Menu and then click **Add Sponsor Billing Form**.
2. Enter the number of credit hours, year, and semester for the form.


Home   Form Page

Add a Sponsor Billing Form : Add a Sponsor Billing Form   Form ID 10771

MU Sponsor Billing Form for University Accounts & Grants

University Accounts and Grants are two different types of sponsored activity. University Accounts allow campus departments to utilize their general operating funds to cover various costs. University Grants refers to external funding received by the University to complete a scope of work or provide a deliverable.

Grants are associated with "assistance" type of funding (wherein the sponsor is "assisting" the University accomplish activities central to its mission); contracts are associated with "procurement" (wherein the sponsor is "procuring" activities at the primary direction and benefit of the sponsor).

Sponsored activity funding is captured in the University's General Ledger under funds 2100-2299. Specific questions regarding Grants and Contracts need to be directed to Office of Sponsored Programs Administration.

Instructions for Completion

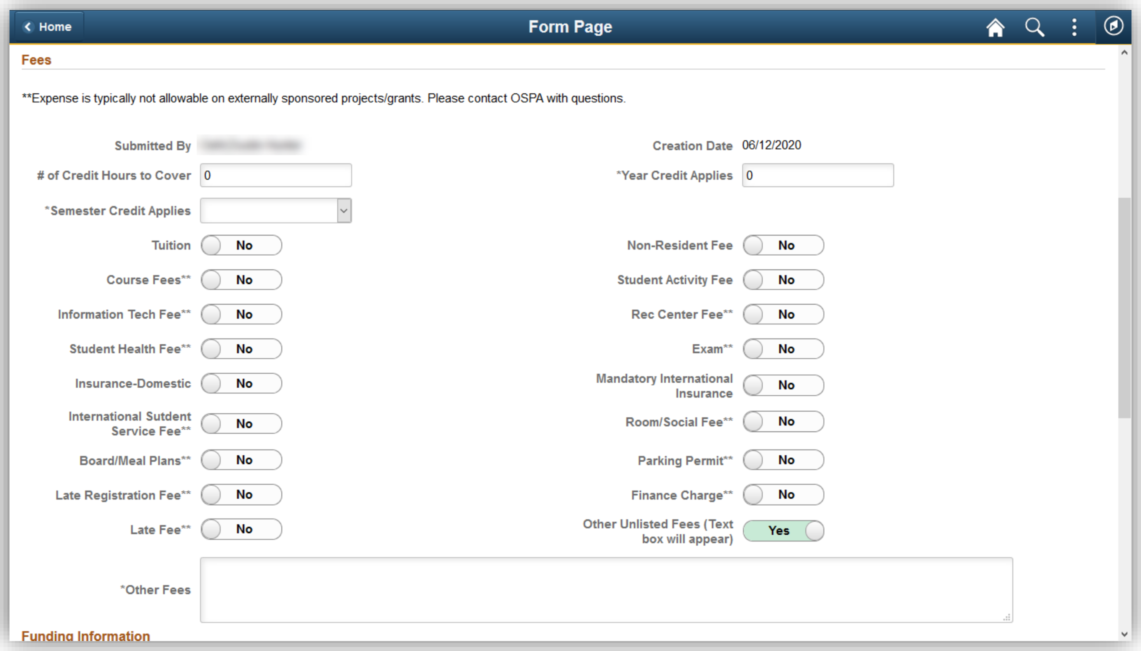
- The form can only be completed and submitted for one semester. Additional semesters will require additional forms to be completed/submitted.
- The student must be enrolled in courses for the semester before the department can submit the form.
- Once the form has been completed by the department, it will workflow to Cashiers where an estimated amount will be entered before being routed to the appropriate FIN AUTH user for approval. If a grant account is being used, OSPA and PI approval will also be required before final submission to Cashiers.

Fees

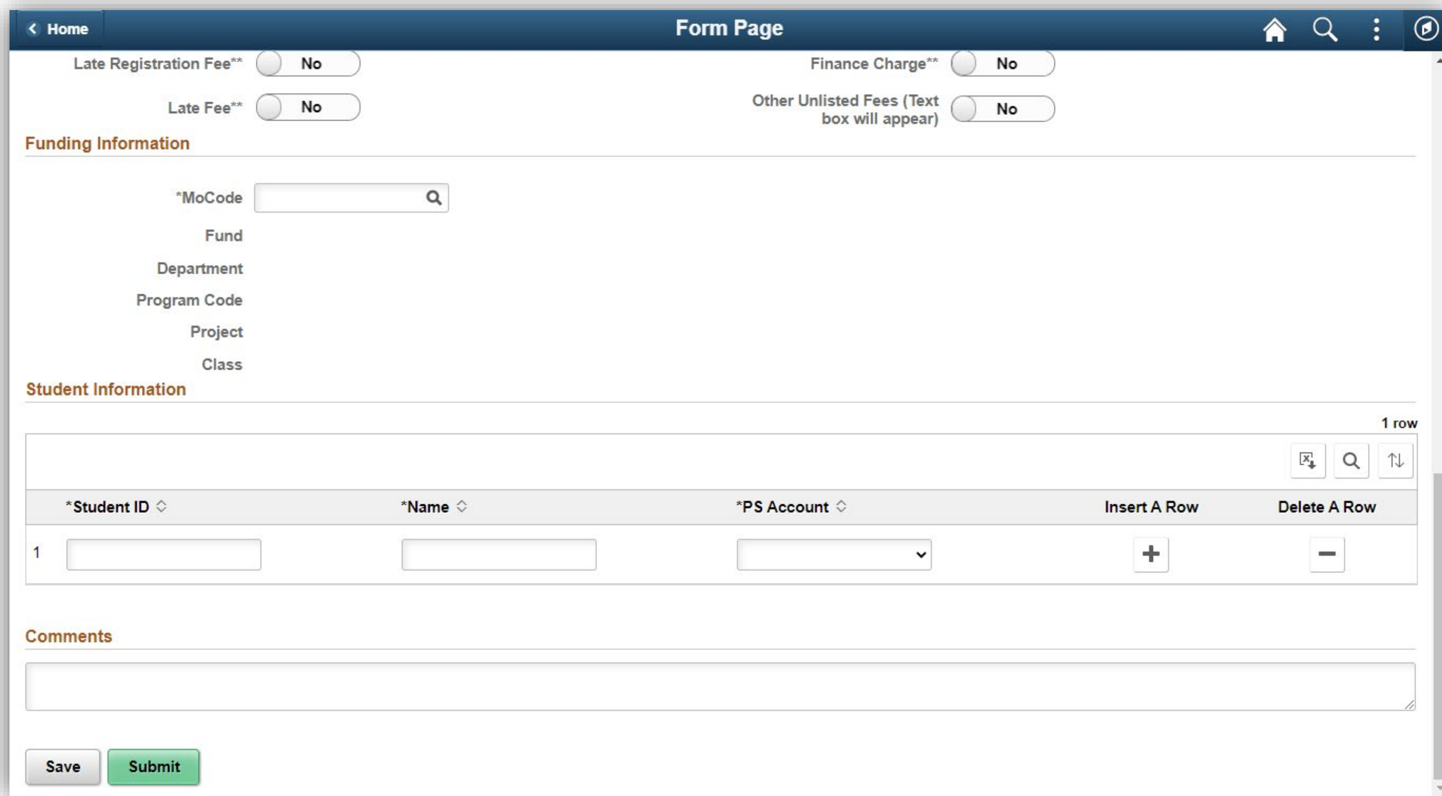
**Expense is typically not allowable on externally sponsored projects/grants. Please contact OSPA with questions.

Submitted By   Creation Date 06/12/2020
# of Credit Hours to Cover 0   *Year Credit Applies 0
*Semester Credit Applies

3. Select the fees to be covered. If a specific fee is not listed select Other Unlisted Fees and a text box will appear.

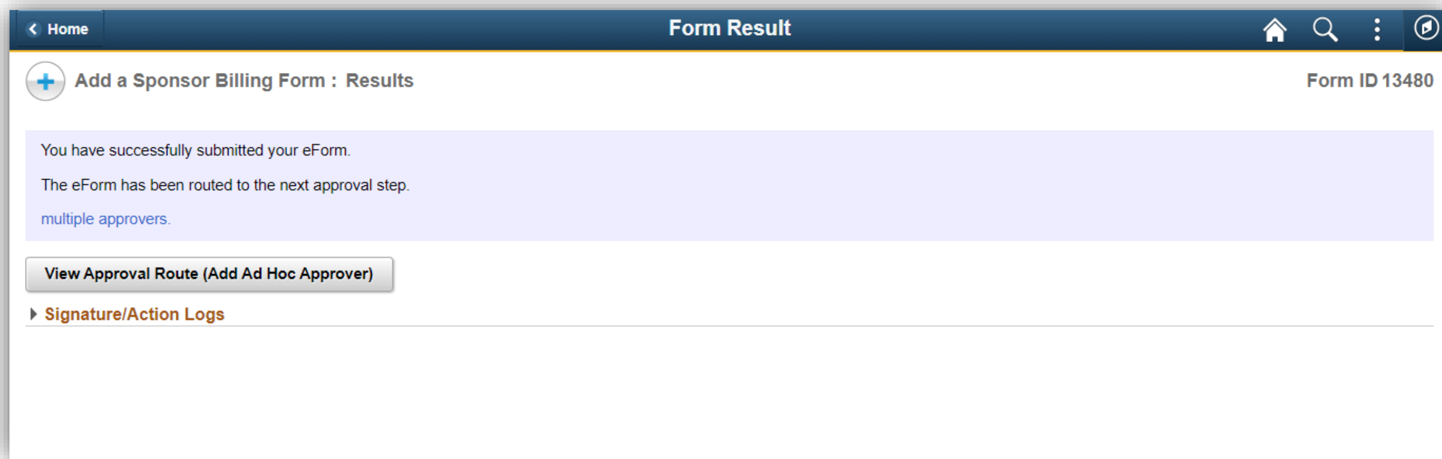


4. Enter the MoCode to be charged. If a grant MoCode is entered an additional section will appear and display information relevant to the grant.
5. Enter the ID, Name (First, Last), and PS Account for each student. Add or remove rows as necessary.



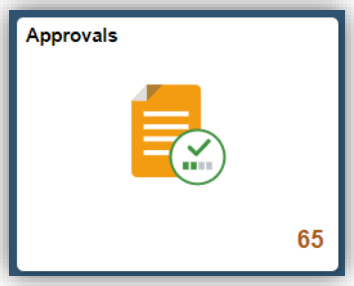
6. Enter any applicable comments and click **Submit**.

7. Upon submission the Results page will display. From this page you can click **View Approval Route** to view the form approvers or add ad-hoc approvers.

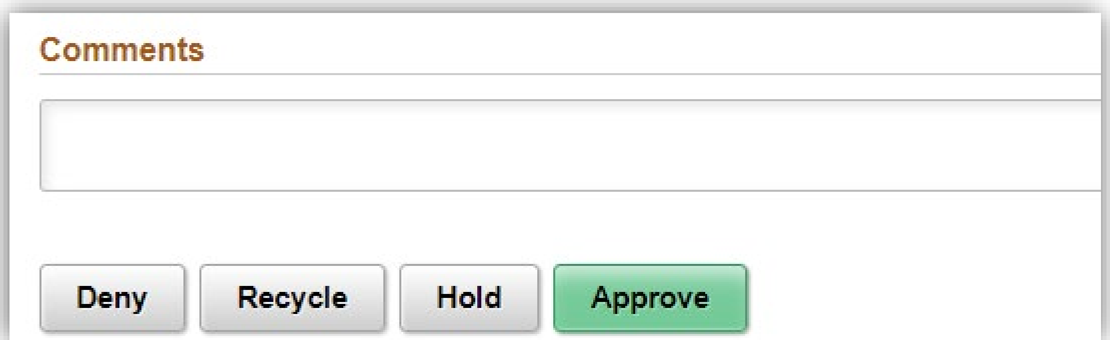


Approve a Form (OSPA, Project Manager, and Fiscal)

1. Navigate to the Sponsor Billing Form.
    a. Use the link in the approval email or
    b. Use the Approvals tile on the PeopleSoft Finance homepage.

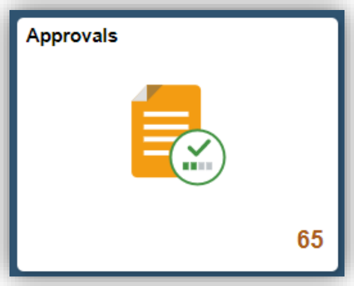


2. Review the form information.
3. Enter any applicable comments and then take one of the following actions:
    a. Click **Approve** to indicate your approval and send the form to the next approval step.
    b. Click **Deny** to cancel the form and prevent it from being resubmitted.
    c. Click **Recycle** to send the form back for revision
    d. Click **Hold** to prevent any other approvers from approving the form. This will remove the form from their Approvals tile and only you will be able to take action on the form.

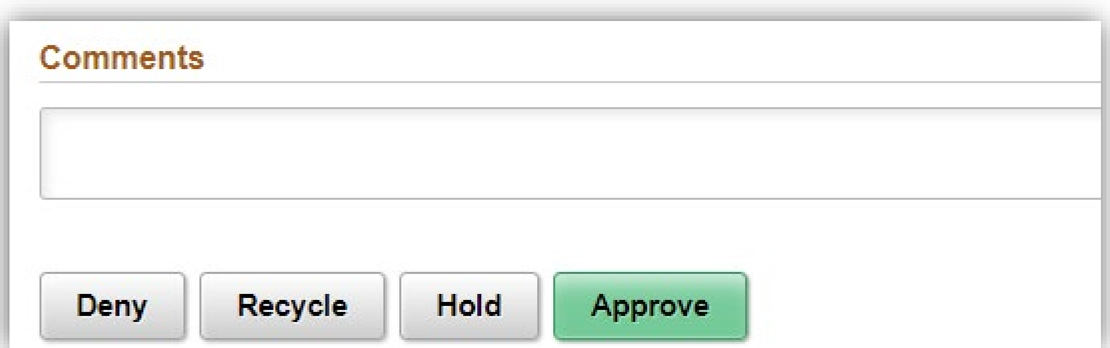


Approve a Form (Cashier's Office)

1. Navigate to the Sponsor Billing Form.
    a. Use the link in the approval email or
    b. Use the Approvals tile on the PeopleSoft Finance homepage.



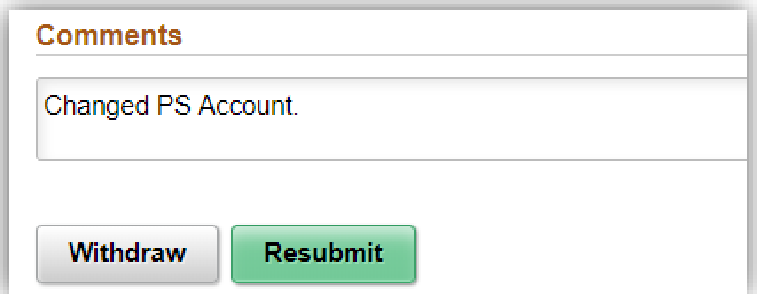
2. Review the form information. Calculate or verify the amounts for each student.
3. Enter or update the total fees per student in the Student Information section.
4. Enter a date in the Date of Estimate Field if one has not already been entered.
5. Enter any applicable comments and then take one of the following actions:
    a. Click **Approve** to indicate your approval and send the form to the next approval step.
    b. Click **Deny** to cancel the form and prevent it from being resubmitted.
    c. Click **Recycle** to send the form back for revision
    d. Click **Hold** to prevent any other approvers from approving the form. This will remove the form from their Approvals tile and only you will be able to take action on the form.
6. If you are the final approver a journal entry will be created automatically and an email will be sent back to the original requestor.



Update a Form

If a form is Recycled (send back for revision) by an approver the original requestor will receive an email.

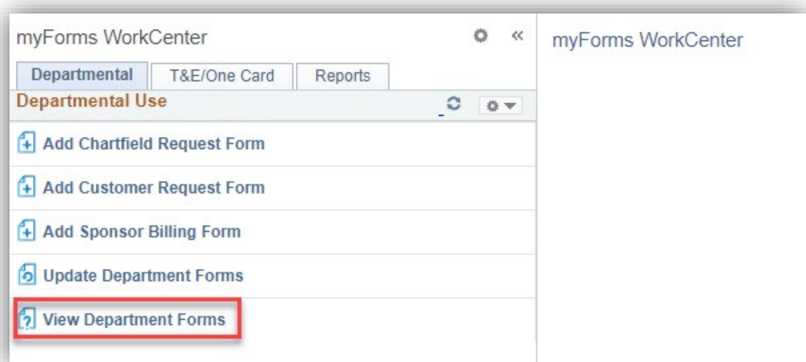
1. Use the link in the sent back for revision to open the form.
2. Make any necessary updates to information.
3. Enter any applicable comments and then take one of the following actions:
    a. Click **Resubmit** to submit the form back into workflow.
    b. Click **Withdraw** to cancel the form. This will archive the form and it cannot be resubmitted.



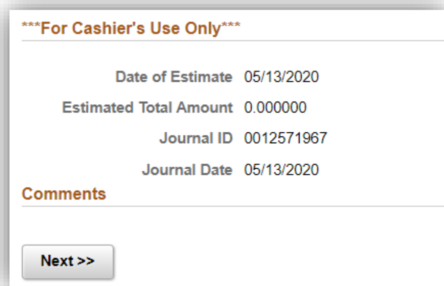
View a Form

Sponsor Billing forms can be viewed at any stage. This can be useful in monitoring approvals or viewing historical information.

1. Navigate to the Sponsor Billing Form. In the PeopleSoft Finance system select myForms WorkCenter from the Main Menu and then click **View Department Forms**.



2. Filter for the form type of "SPONSBILL" and add any other search criteria.
3. Open the form you wish to view.
4. Review the form information and click **Next>>** to view pending and completed approvals.


For Cashier's Use Only
Date of Estimate 05/13/2020
Estimated Total Amount 0.000000
Journal ID 0012571967
Journal Date 05/13/2020
Comments
Next >>