Invoicing Guidelines Using DSO Template

Instructions for Submitting Invoices:

• Invoices and related communications must be sent to DSOinv@uw.edu. Sending to alternative email addresses will cause delays in processing.

• Include your invoice number(s) in the subject line of your email and attach invoice.

• The contractual 30 day payment term begins when an accurate invoice is received.
  o An accurate invoice will include all the information outlined in the “Invoice Completion by Vendors” section below. (This information is captured in your Individualized Template provided by DSO.)
  o DSO cannot amend invoices in any way due to legal restrictions. Invoices requiring changes will be returned. If DSO returns an invoice due to a discrepancy, the contractual 30 day payment term resets and will begin upon submission of an accurate invoice.
  o It is the sole responsibility of the service provider to submit accurate invoices.

• For prompt payment, invoices should be submitted to DSO on a regular and timely basis (no greater than once a week and no longer than once a month). Service providers should submit invoices within a month of completing an assignment. Invoices received 30 days after the assignment may be subject to delay.

Invoice Completion Instructions:

• Individualized Template: Service providers shall use the individually populated templates provided by DSO. Any locked portions of the individually populated template shall not be edited. DSO will edit locked portions accordingly.

• Each invoice requires a unique invoice number generated in the Invoice Number Field. Unique invoice numbers may only be numeric values and are limited to 10 characters.

• Each Row should include the following information:
  o Name of client or event (e.g. “John Smith” or “Do-It Luncheon”) – Include as much detail as possible.
  o Service description (e.g. ASL- Psych 101a, or CART- Anthro 309).
  o Start and end time of the assignment activity (e.g. 8:40 AM, 10:35 AM).
  o Choose the pre-established hourly rate for assigned or retained time from the dropdown list.

• Retained Time:
  o Billable time not part of the assigned activity time must be labeled and identified as “Retained time” in the Service/Description column, which must be on a separate row from the designated assignment time.

• Each row will include information for only one segment of assigned activity or retained time. Note: One service date may include multiple assignments and/or multiple requests for retained times

• NOTES ABOUT TEMPLATE FEATURES:
  o Once populated with assigned activity or retained time, each row auto-calculates the total and the grand total will be updated after addition of each row.
  o Miscellaneous charges should be listed separately in the “Pre-Approved Charge” section.
  o The INVOICE TOTAL line auto-calculates to include the assigned time, retained time, and pre-approved charges.