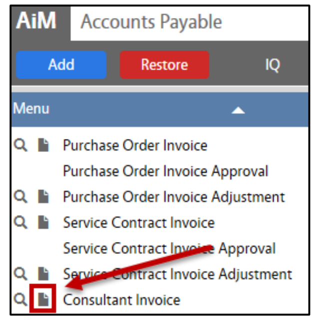
Consultant Invoice Definition

The **Consultant Invoice** Screen enables the user to process invoices to be applied as expenses against the contract and capital project. Invoices can only be processed if the consultant invoice is in an awarded status. Consultant Invoices are processed by contract line item, each of which is associated to a capital project component. Workflows are helpful for managing the routing throughout the consultant invoice approval process. The project team must be updated and the INVOICE ADMIN and INVOICE APPROVER responsibilities must be populated in order for the workflows to work in accordance with the SOP.

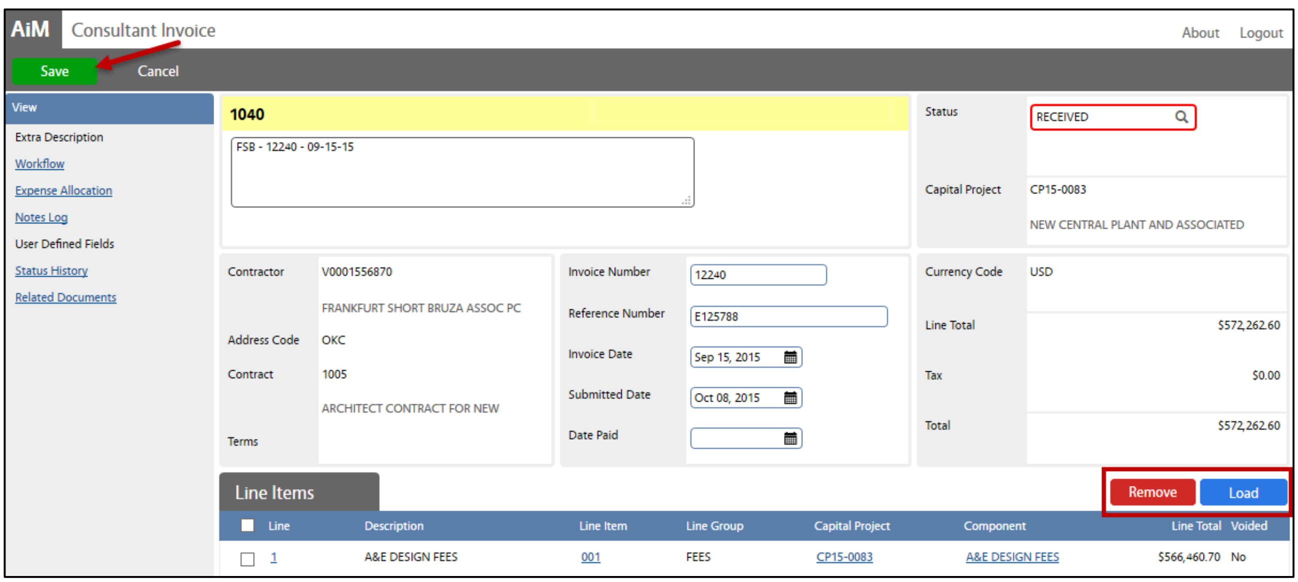
Responsibility: PROEJCT MANAGER / CONTRACT SPECIALIST / ETC.

The PROJECT MANAGER or the CONTRACT SPECIALIST will perform the following procedures in AiM for entering a Consultant Invoice, however there are many others who might perform this task (i.e. ADMIN ASST, ADMIN ASSOC, etc.). The INVOICE ADMIN and INVOICE APPROVER responsibilities must be loaded to ensure the SOP is followed.



Create a Consultant Invoice:

1. From the WorkDesk, click: **Accounts Payable**
2. Click: **NEW** (*Next to **Consultant Invoice***)
3. Search for the Consultant Contract. If you know the contract number, you can enter it into the Contract Query Field.
4. Select the Consultant Contract.



5. Enter a complete **description** of the Invoice.
6. Enter **Invoice Number**.
7. Fill in the Following dates:
    a. Invoice Date
    b. Submitted Date
    c. Date Paid (*if available*)
8. Select **Load** from the Line Items field.
9. Select the appropriate line item from the contract and click: **Next** to move forward.
    a. Fill in the Invoiced Amount, and click: **Done**
10. Click: **Save**