Smart Internal Billing Manual
# Smart Internal Billing

Office of the Controller

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Overview

This manual will introduce you to the Smart Internal Billing process within PantherSoft Financials. Many departments across FIU provide services to each other for a specified fee. To properly collect revenue and process billing, the Smart Internal Billing tool serves as an electronic invoicing tool. It assists in facilitating revenue collection from internal customers.

Benefits of the tool include:

✓ Improved revenue collection by the enterprise (department) performing the service.
✓ Reduction of data-entry errors and labor costs by eliminating the need for double entry into the units’ software (Excel) and PantherSoft.
✓ Automated approval workflow process

Smart Internal Billing Process

The Receiving Department “customer” will contact a Billing Department “seller” to purchase a good or service for their area. The Billing Department “seller” will provide the service or good and initiate the billing process. This department will have to define the items in the PantherSoft Financials system. The item needs to be approved and activated by the Office of Auxiliary and Enterprise Development before it can be used to create an invoice for billing. The Billing Department’s approver reviews and approves the invoice. The Receiving Department’s approver reviews and approves the invoice and finally a journal is created posting expenses.
Security and User Roles

The current roles and their definitions for Smart Internal Billing are:

**018 Smart Billing Item Creator:** Allows a user to create items for specific activity numbers in which they have access and to update existing items on those activity numbers.

**017 Smart Billing Bill Creator:** Allows user to be able to bill other activity numbers from those activity numbers in which the user has access.

Expense Managers for both the Billing and Receiving Departments automatically have access to the Smart Internal Billing tool for creating invoices (Role 017) and the ability to approve. Other users must fill-out an access request form in-order to gain access to a specific billing departments items and/or invoices.

**Note:** The default roles assigned dynamically to an organizational department approver are to approve and create invoices only. These roles allow departmental approvers to be able to bill for services performed. If the approver wishes to add or update items in the system, they must fill-out an Access Request Form for role 018 Item Creator. Also, it is up to these approvers to decide who in their organization (department) will be allowed to bill and modify/add items.

Individuals within the Receiving Department or customer do not need any special roles, except for the Receiving Department Approver(s). Those individuals are the expense/project managers for the activity number or project number receiving the good or service.

**To request access:**

1. Go to [http://financials.fiu.edu](http://financials.fiu.edu) and follow the navigation Main Menu> Access Request System> Access Request.

2. Click the Add a New Value tab. The default Employee ID is that of the user who is logged in. If requesting on behalf of another FIU employee enter their PID in this field.
3. Enter the business reason the role(s) are being requested into the **Description** box. Then select either Access Role 017 for Smart Billing **Bill Creator** and/or 018 Smart Billing **Item Creator**.

4. Enter the Department Number associated with the billing department. Users will get access to all Activity Numbers that belong to that department. Additional departments can be added by clicking the plus sign to add a new line and enter the department number.

5. Click **Submit**. Access Request forms route to an employee’s HR supervisor for approval and then to Financial Systems and Support Services for processing.
Defining an Item

Items represent the product or service offered by a department for a fee. **Items must be defined by the selling department and approved by the Office of Auxiliary and Enterprise Development to be active as an option when creating a bill.** Some of the attributes that need to be defined for each item offered include the description, the accounting information (accounts for revenue and expenses), unit of measure and most importantly, price. As previously mentioned, the ability to define items is controlled through security role 018 Smart Bill Item Creator.

**Smart Internal Billing is used for department-to-department billing only (revenue collection) and only with business unit FIU01.**

1. Click the **Add a New Value** tab.

---

**Define Items** page. This page can be accessed through PantherSoft Financials by using the following navigation:

**Main Menu> Smart Solutions>Smart Documents>Smart Internal Billing>Define Items**
2. Enter the Billing Activity Number for which the item will be created, then click Add.

3. Enter a short description for the item in the open text field. After entering it, the Long Description will auto-populate. This field can be modified with a longer description for the item.

4. Leave the default of 01/01/1901 as the effective date, Eff Date.
5. Select an appropriate unit of measure (**UOM**) using the lookup glass as well as the **Price** per unit. The unit of measure represents how units of the item/service will be billed.

![Image of Define Items window]

6. Enter the **Billing Account**, the General Ledger (GL) account of the seller in which money will be received or deposited. Then add the **Customer Account**, the GL account of the customer in which the money will be paid from. The billing department determines the accounts related to what they are selling when completing an item.

Accounts will either be Revenue or Expense accounts based on the type of budget(s) a department has. Revenue-based budgets have auxiliary funding sources and revenue accounts that begin with a ‘6’. Expense-based budgets have mostly E&G funding sources and expense accounts that begin with a ‘7’.

The **Billing Account** is either Revenue or Expense. However, if Expense is chosen as the type of account from the **Billing Account** or billing department, the **Customer Account** automatically greys out to expense.

The account signifies the type of good/service such as **sale of services**, **event revenue**, **clothing and uniforms**, **airfare- in state**.

Sample for Revenue-Based Budgets (Billing Account = Revenue, Customer Account = Expense)

![Image of Accounting Distribution]

Sample for Expense-Based Budgets (Billing Account = Expense, Customer Account = Expense)
7. Click **Save**. An Item ID will generate with a status of Pending & Inactive until submitted for approval.

As of July 1, 2022, all new items and those modified will need to be approved by the Office of Auxiliary & Enterprise Development before they may be used on an invoice.

8. Submit the Item for Approval by clicking on the **Submit** icon
The Office of Auxiliary and Enterprise Development will approve or deny the and the submitted will receive a notification via email once the decision is made.

Once the item is approved, its statuses change to **Approved** and **Active** and it is ready to be applied to an invoice.

If the item’s status is **Denied**, the submitter may make corrects following the steps outlined in the [Modifying an Existing Item] section of this document.
Modifying an Existing Item

Approved, or Denied items can be modified by adding a new effective-dated row to the item.

To modify an existing item, navigate to:

**Main Menu> Smart Solutions>Smart Documents>Smart Internal Billing>Define Items**

1. Click the **Find an Existing Value** tab and search using either the **Activity Number** or **Item ID**.

2. Select the item to be modified from the results.
3. Add a new effective-dated row by clicking the **plus (+)** sign.

![Image of Define Items screen with plus sign highlighted]

**Note**: The effective date of the new row defaults to the current system date. It is recommended to change this to the first day of the current fiscal year when modifying the item, ex: 07/01/2022.

4. Click the **Save** button to confirm changes. The item will be in Pending & Inactive status until it is submitted for approval.

![Image of Define Items screen with saved item]
5. Submit the Item for Approval by clicking on the **Submit** icon.

The Office of Auxiliary and Enterprise Development will approve or deny the item and the submitter will receive a notification via email once the decision is made.

Once the item is approved, its statuses change to **Approved** and **Active**, and it is ready to be applied to an invoice.
Creating an Invoice

After items are created, a smart internal bill or invoice can be created. Creating the invoice is done through the **Smart Internal Billing** page. This page can be accessed through PantherSoft Financials by using the following navigation:

**Main Menu > Smart Solutions > Smart Documents > Smart Internal Billing > Smart Internal Billing.**

1. Click the **Add a New Value** Tab. Enter the **Billing Activity** (the Activity Number that will collect the revenue or that is providing the good/service) and the **Receiving Activity** (the activity number of the customer or receiving department/project that will pay for the provided good/service). Then click **Add**.

Please note, that only those Activity Numbers within the Department(s) the requester has been granted access are available. To request access to additional Activity Numbers (an additional Department), a requester must submit an Access Request Form for the Department. See the **Security Roles** section for instructions.
2. Enter the date the good/service was or will be performed/delivered in the **Date From** field. If the good/service is over a period of time, date can also be entered into the **Date To** field, but it is not required.

3. Enter any additional information into the **Descr** field. This should be more specific information regarding the good or service. Also, if a department has an Internal Reference numbering system, that can be entered into the **Internal Ref** field. Some billing departments use this field for internal record keeping in case the invoice number is insufficient or not descriptive enough.
4. In the **Item Details** section click the search glass next to the **Item ID** field.

5. Only items already created and approved for that billing activity number will appear. Select the intended **Item ID**.

6. After selecting an item, the associated information will populate within the item details section. Next, add the quantity to be billed. Additional items can be added by clicking the **Add** link. Items can also be deleted with the **minus button**.
7. Details about the chartfields or account distribution can be viewed by the **Tabs** or **Show All Columns**

![Item Details](image)

8. Once the basic information for the smart bill is entered within the fields, click the **Save** icon at the top.

![Employee Self Service](image)

9. After saving the invoice, a unique number will be assigned to the invoice as the Bill ID. Click the checkbox icon to return.

![Employee Self Service](image)
10. Once the bill is saved, the bill can be submitted for approval workflow. Click on the **Submit Transaction** icon in the top of the page.

![Submit Transaction Icon]

The submit screen will open displaying the approval workflow. After submission Smart Bills go to the billing department’s expense approver(s). After the billing department approves, it routes to the receiving department’s expense/project approver(s). Users can click on the **Multiple Approvers** link to view the names and contact information for the actual approvers.

![Submit Screen]

The submit screen will open displaying the approval workflow. After submission Smart Bills go to the billing department’s expense approver(s). After the billing department approves, it routes to the receiving department’s expense/project approver(s). Users can click on the **Multiple Approvers** link to view the names and contact information for the actual approvers.
11. Other options and icons are also available prior to submission. See the Smart Gadgets (icons) section.

**Collaboration:** Allows users to submit comments to their approvers.

**Attachments:** Users can attach any support documents such as quotes or emails.

**Preview Workflow:** Users are able to see the approvers listed for both the billing and receiving side.

**Cancel Bill:** Allows users to cancel or delete the smart bill if it is not needed.
Re-submit Denied Smart Bills

In the circumstance that either approver (billing or receiving) denies a smart bill, it returns to the creator for editing. The workflow status will be “Denied”, and the bill status will be “invoiced.” The creator can make changes to the smart bill such as updating quantity, changing the item, adding attachments etc. The creator should search for the smart bill, open it and make changes.

1. After changes are made the first step is to **Save**.

2. The Bill ID Status page opens. To re-submit the smart bill again to approval workflow, click the **Resubmit** icon.
The smart bill page opens again with the Workflow status updated to “Pending.”

![Image of Smart Internal Billing page]

**Smart Bill and Workflow Statuses**

The Bill Status and the Workflow Status are interrelated. The Bill Status dictates the workflow status.

<table>
<thead>
<tr>
<th>Bill Status</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>None</td>
</tr>
<tr>
<td>Invoiced</td>
<td>Pending/Denied</td>
</tr>
<tr>
<td>Completed</td>
<td>Approved</td>
</tr>
<tr>
<td>Cancelled</td>
<td>None</td>
</tr>
</tbody>
</table>

**Bill Status**
- **Open**: The default status of an invoice after it has been created and when saved.
- **Invoiced**: The tool changes the status to “invoiced” once the invoice has been submitted to workflow.
- **Completed**: A status of “completed” indicates that the invoice has been fully approved by both the receiving and billing approvers and it is ready for journal generation.
- **Cancelled**: A status of “cancelled” indicates that the invoice has been cancelled by either the person who initially entered the invoice or by a billing Activity Number approver. An invoice can never be deleted, just “cancelled.”

**Workflow Status**: The current status of an invoice for approval.
- **None**: The default workflow status of the invoice, before submission or if a bill was cancelled.
- **Pending**: Workflow status after the invoice has been submitted and is waiting for approval.
- **Approved**: Workflow status after the invoice has been fully approved by both billing and receiving.
- **Denied**: Workflow status that indicates the invoice has been denied by an approver in either party, billing or receiving.
Smart Bill Workflow Approval Process

Once the invoice has been submitted, it routes through the workflow approval process. Invoices will route first to the **Billing Approver**. The Billing Approver is the individual responsible for approving expenses related to the Billing Activity Number (Department initiating the Bill). Once approved by the Billing Approver, it routes to the **Receiving Approver**. The Receiving Approver is the individual responsible for approving expenses for the activity/project number receiving the good/service. Approvers are the *Expense or Project Managers* for specific Activity/Project numbers.

### Smart Bills posting to sponsored projects that require Project Manager supplemental approval:

- If the Smart Bill is **less than $10,000 and outstanding for 90 days**, then the project manager, i.e. receiving department approver, will be notified and the Smart Bill will be auto approved and posted.

- If the Smart Bill is **greater than $10,000 and outstanding for 90 days**, then the project manager will be notified, and the Smart Bill will be auto approved.

  The Smart Bill will then be routed to the grant's manager in ORED for final approval. The grants manager will be given 30 days to approve. If the Smart Bill is still pending grants manager approval after 30 days, then it will be auto approved and posted with e-mail confirmations to the grant's manager and Smart Bill creator. A comment to this effect will be added to the Smart Bill as well.

Once approved by both the Billing and Receiving departments, a journal is automatically created and posted to the general ledger.

### Smart Bills Not Approved

If a Smart Bill is **created and saved** but not submitted or cancelled, then after 90 days the Smart Bill will be considered obsolete and **deleted**. The creator of the Smart Bill will be notified via e-mail. All email notifications come from [fin-panthersoft@fiu.edu](mailto:fin-panthersoft@fiu.edu).

If a Smart Bill is not approved by the Billing Approver, the Smart Bill will eventually be **AUTO-CANCELLED**. Smart Bills in the billing (seller) department approver’s queue that are 90 or more days old will be **cancelled**. The billing (seller) department approver will be notified via e-mail. Users can re-create the Smart Bill if required.

If the Smart Bill is not approved by the Receiving Approver, it will eventually be **AUTO-APPROVED** and **POSTED**. Smart Bills in the receiving (buyer) department approver’s queue that are 90 days old will be **auto**
approved and posted. The receiving (buyer) department approver will be notified via e-mail. Note: Only after three notifications (0/30/60 days) will the pending Smart Bill be cancelled or auto posted. See the Smart Bill Notification Guide at the end of this manual.

How to Approve Smart Bills

In order to approve a smart bill, the expense approver (billing and/or receiving) will receive an email notification. Approvers can Approve, Deny, or Hold, Smart Internal Bills. Pending Smart Internal Bills for approval are only found through the Smart Internal Billing Approval Inbox or on the Invoice itself.

1. Navigate to the Smart Internal Billing Approval Inbox through Main Menu> Smart Solutions> Smart Workflow> Transaction Approval> Approval Inbox.

2. Once in the approval inbox click on Search and any pending invoices will be displayed below. Select the invoice to be reviewed and approved.
3. Once in the Smart Bill, review information for accuracy of bill. The following actions are available at the top of the screen: Save, Collaboration, Attachments, Preview Workflow, Approve, and Deny.

4. For either the billing or receiving approver, select the **Approve** icon to approve the transaction. Approval comments can be added by either approver during approve actions. Once the bill has been approved by both parties an e-mail notification is sent to the user who created the invoice.
5. Click the **Approve** green checkbox.

The approval workflow screen will appear displaying the status and where in the approval routing the smart bill currently is.
How to Deny Smart Bills

If any approver (billing or receiving) denies a smart internal bill it will return to the smart bill creator. The creator is notified via email that it was denied and are given the Smart Bill ID. The creator can then edit the bill and re-submit if needed.

Denying an invoice should only be done when any one of the approvers does not agree with the contents of the invoice. Examples of when an invoice should be denied include incorrect receiving Activity Number, incorrect items, incorrect item price, or incorrect quantities. To deny an invoice follow the steps below.

1. Follow the same instructions as approving smart bills, except instead of approving, click the Deny icon.

2. Click the Deny green checkbox. Approval Comments are required. Enter a comment in the comments box.
The icons on the top of the Smart Internal Billing pages are called Smart Gadgets. They facilitate the navigation to a specific function. These icons change depending on the status of a smart bill.

<table>
<thead>
<tr>
<th>Smart Gadget (Icon)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save Icon]</td>
<td><strong>Save</strong>: Once clicked, this icon will save any changes to a smart bill.</td>
</tr>
<tr>
<td>![Save Smart Bill as Template Icon]</td>
<td><strong>Save Smart Bill as Template</strong>: Clicking on this icon will save a created smart bill as a template for future use.</td>
</tr>
<tr>
<td>![Collaboration (Comments Empty) Icon]</td>
<td><strong>Collaboration (Comments Empty)</strong>: This icon provides the ability to make comments related to the smart bill. It also means that there are currently no comments entered.</td>
</tr>
<tr>
<td>![Collaboration (Comments Entered) Icon]</td>
<td><strong>Collaboration (Comments Entered)</strong>: This icon displays once a comment has been added to a smart bill document. It provides access to the comment.</td>
</tr>
<tr>
<td>![Attachments Icon]</td>
<td><strong>Attachments</strong>: No attachments exist within a document. Click this icon to attach a document.</td>
</tr>
<tr>
<td>![Attachments Icon]</td>
<td><strong>Attachments</strong>: Attached documents exist within a smart bill. To view existing attachments, use this icon.</td>
</tr>
<tr>
<td>![Preview Workflow, Not Yet Pending Icon]</td>
<td><strong>Preview Workflow, Not Yet Pending</strong>: Click this icon to view the approval workflow, workflow status, and pending approvers.</td>
</tr>
<tr>
<td>![Preview Workflow, Already Pending Workflow Icon]</td>
<td><strong>Preview Workflow, Already Pending Workflow</strong>: Click this icon to view the approval workflow, workflow status, and pending approvers.</td>
</tr>
<tr>
<td>![Approve Transaction Icon]</td>
<td><strong>Approve Transaction</strong>: This icon appears for expense/project approvers when a smart bill is pending their approval. Clicking this icon will take the approver to a window. Click the <strong>Approve</strong> green checkbox to approve a smart bill.</td>
</tr>
<tr>
<td>![Deny Transaction Icon]</td>
<td><strong>Deny Transaction</strong>: This icon appears for expense/project approvers when a smart bill is pending approval. Clicking this icon will take the approver to a window. Click the <strong>Deny</strong> green checkbox to deny a smart bill.</td>
</tr>
<tr>
<td>![Load Transaction from a Template Icon]</td>
<td><strong>Load Transaction from a Template</strong>:</td>
</tr>
<tr>
<td><strong>Submit transaction for Approval</strong>:</td>
<td>Click this icon to launch smart bill along approval workflow.</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Re-submit for Approval Workflow</strong>:</td>
<td>After a transaction has been denied by either approver (billing or receiving), this icon becomes available. The requester must first save the smart bill with any changes, then this icon will appear on a pop-up window.</td>
</tr>
<tr>
<td><strong>Cancel</strong>:</td>
<td>Cancel a smart bill</td>
</tr>
</tbody>
</table>
Creating an Invoice from a Template

If a department creates similar smart bills frequently then it is recommended that the billing department create templates in order to reduce data entry. Templates can be saved publicly to be used by anyone or simply by a user’s Panther ID. To create a template, follow these steps:

1. Create a smart bill that can be used over and over as a template. This particular smart bill cannot be submitted for approval. The Billing and Receiving Activity Numbers should be ones needed frequently as they cannot be changed on a future bill.

After adding a new value and entering the Billing and Receiving Activity/Project Numbers, either enter details within the bill and/or click the Save as Template icon. Make sure to input something into all mandatory fields: Date From, Descr, Item ID, Quantity.
2. Select a “Template Type” by selecting it from the Template Type drop-down menu. A **Private Template** indicates that it is saved specifically to the user creating it. A **Shared Template** indicates that it will be public for other users to use.

![Save as Template](image)

3. Type a **Template Name** and a **Description** in the appropriate fields. Click on the **OK** button.

![Save as Template](image)
4. Click the **Save** icon.

Click the **Checkmark** icon. A Bill ID has been created and this bill can be used as a template in the future.
Copy Smart Bill from Template

To use a previously made smart bill saved as a template, first create a new smart bill by clicking the Add a New Value tab on the Smart Internal Billing page.

1. Enter the Billing and Receiving Activity/Project Numbers. Click Add.

2. Click the Copy from Template icon.
3. Use the search fields to find the previously created template. Search by the Panther ID of the user who created the template in the **Created By** field. Search by the **Template Name** or the **Template Type** (private or shared).

4. From the search results, select the template and click **Ok** green checkbox.
5. All the mandatory fields that were completed from the template will populate into the new smart bill. Edit any fields. Continue to process the smart bill by saving and then submitting.

<table>
<thead>
<tr>
<th>Item Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item ID</td>
</tr>
<tr>
<td>00000000000444</td>
</tr>
</tbody>
</table>

Total Extended Amount: 2.00

<table>
<thead>
<tr>
<th>Item Offset Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items</td>
</tr>
</tbody>
</table>
Glossary of SIB Terminology

Bill Approver – User in billing department responsible for approving outgoing invoices.

Bill Creator – User from billing department who creates the invoices; may also be an approver

Billing Department – Department “selling” a service/good; initiates the billing process

Billing Activity – Activity number that provided the service/good, benefitting department.

Invoice – the financial document formally requesting payment

Item – the product or service offered by a department for a fee

Receiving Activity – Activity number that received the service/good; needs to pay billing department.

Receiving Approver – User in Receiving Department responsible for approving incoming invoices.

Receiving Department – Department “the customer” getting a service/good

Smart Gadgets – Graphics or icons visible during the smart internal billing process
### Smart Bill Notifications, Auto Cancellation and Approval Guide

<table>
<thead>
<tr>
<th>Billing Department (Seller)</th>
<th>Receiving Department (Customer)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Status = OPEN</td>
<td></td>
</tr>
</tbody>
</table>

#### Day 90
- If a Smart Bill is created and saved but not submitted or cancelled, then after 90 days the Smart Bill will be considered obsolete and **DELETED**. The creator of the Smart Bill will be notified via email.

#### BILLING DEPARTMENT APPROVAL
- Bill Status = INVOICED // Workflow Status = PENDING

| Day 0 | Billing Department Approver receives an email notification immediately following submission of Smart Bill by creator |
| Day 30 | Billing Department Approver receives 2nd email notification, if Invoiced Smart Bill is still in Pending workflow status. |
| Day 60 | Billing Department Approver receives **FINAL** email notification if Invoiced Smart Bill is still in Pending workflow status. |
| Day 90 | Smart Bill is **AUTO-CANCELLED**, and the Billing Department Approver is notified via email. User can re-create Smart Bill if needed. |

#### RECEIVING DEPARTMENT APPROVAL
- Bill Status = INVOICED // Workflow Status = PENDING

| Day 0 | Receiving Department Approver receives an email notification immediately following approval of Smart Bill by Billing Department Approver |
| Day 30 | Receiving Department Approver receives 2nd email notification for Smart Bill (Approved by Billing Department) in their queue and not yet approved |
| Day 60 | Receiving Department Approver receives **FINAL** email notification for Smart Bill (Approved by Billing Department) in their queue and not yet approved. |
| Day 90 | Smart Bill is **AUTO-APPROVED** and **POSTED**. The Receiving Department Approver will be notified via email. |

*All emails send from fin-panthersoft@fiu.edu

#### Smart Bills posting to sponsored projects that require Project Manager supplemental approval:
- If the Smart Bill is less than $10,000 and outstanding for 90 days, then the project manager, i.e. receiving department approver, will be notified and the Smart Bill will be auto approved and posted.
• If the Smart Bill is greater than $10,000 and outstanding for 90 days, then the project manager will be notified, and the Smart Bill will be auto approved. The Smart Bill will then be routed to the grant’s manager in ORED for final approval. The grants manager will be given 30 days to approve. If the Smart Bill is still pending grants manager approval after 30 days, then it will be auto approved and posted with e-mail confirmations to the grant’s manager and Smart Bill creator. A comment to this effect will be added to the Smart Bill as well.