Billing Unit Setup and Update Request Form

UNIVERSITY OF ALBERTA

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Purpose: This form is used by University of Alberta (U of A) departments and faculties to establish or update the billing unit information in the PeopleSoft Accounts Receivable module (bill source). An active bill source is required to issue official invoices to external customers for goods, services, or cost recoveries.

Instructions: Download the PDF document and open it using Adobe Acrobat or Reader rather than a web browser. Enter information into all sections, ensuring the form is complete; incomplete or handwritten forms will be returned for correction. The document must be digitally signed using the formal sign-off fields provided. Once finished, save the digital file directly. Do not print or scan this form, as only the original version will be accepted.

Access the Service Portal and select the Submit a Finance Form option from the Staff Services Catalog. Attach the completed form and any supporting documentation.

For assistance with this form, contact the Staff Service Centre.

Section A: Action (select one)

○ Setup Billing Unit (Bill Source) ○ Update Billing Unit (Bill Source) ◉ Inactivate Billing Unit

Section B: Information

Billing Unit Name: ____________________
(as it should appear on the invoice. Maximum 30 characters)

Unit's Associated Faculty/Admin Unit: ____________________

Billing Inquiry Contact (phone number): ____________ Billing Inquiry Email Address: ____________________

Primary Billing Specialist

CCID: ____________ Full Name: ____________________

Additional Billing Specialists:

CCID: ____________ Full Name: ____________________

CCID: ____________ Full Name: ____________________

Approvals and Authorization

Only departments/faculties that have been approved by the College/Faculty General Managers & Associate Vice President/Strategic Initiative Officer can request the setup of a Billing Unit in PeopleSoft Accounts Receivalbe module.

Name

Title | Department

Signature | Date (yyyy-mm-dd)

For Internal Use Only

Date Received: ____________ (yyyy-mm-dd) Actioned By: ____________________

Protection of Privacy: Personal information provided is collected by Section 4(c) of the Alberta Protection of Privacy Act (POPA) and will be protected under section 10. The personal information collected will be used and disclosed under sections 12 and 13 of the POPA.

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