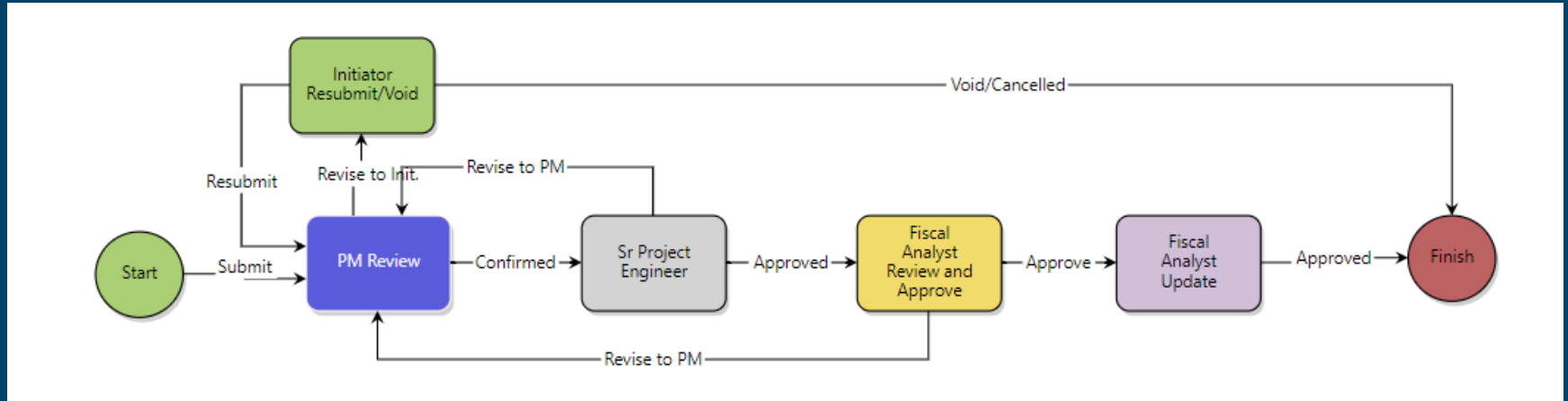




Consultant Invoicing

Consultant Invoice Routing Workflow





1. Navigate to your project, then select 'Processes' from the left side menu. Then click 'Start process' in the upper right.

The screenshot displays the Raleigh TEST application interface. On the left is a 'Project Menu' with options: Details, Planning, Forms, **Processes** (highlighted), Documents, Schedule, Cost, Contacts, Calendar, and Submittals. The main content area is titled 'Project Processes' and shows a dropdown menu with 'Z_Test_DeleteMe - 19191919'. Below this is a search bar with 'Filter by...' and an 'Open' button. In the top right corner, there are links for 'Unfinished Drafts' and 'Import Processes', and a prominent blue 'Start process' button. A 'Filters' button with a '1' indicator is also present. The main area contains a table with the following data:

Instance ↑↓	State ↑↓	Subject ↑↓
CA - 1	Open	2020-05-21 Test Contract Approval
CCMSR - 1	Open	Test April (MPS - 43)
CCMSR - 2	Open	MPS for 05/16/2022 (MPS - 46)
CCMSR - 3	Open	MPS for 06/08/2022 (MPS - 49)
CCMSR - 4	Open	tdjdfhahljh test
CCP - 5	Open	2024-01-23 test



2. Search for 'inv' and select 'Invoice - Consultant Invoice'

Select process ✕

✕

- Invoice - Construction Pay Application Invoice Paid By Other Department/Division (CNPBO)**

Costruction pay application process to record payments that are being processed by another department/division as the lead manager and your Department/Division (non-lead) providing only funding support. Invoice will be entered into PeopleSoft by others.
- Invoice - Consultant Invoice (INV)**

Process can be initiated by the External Consultant Engineer or Designer of Record to request payment. The process is routed to specific internal roles or actors to review and approve the payment request.



3. Click 'Start INV' in the lower right

Select process ✕

✕

- Invoice - Consultant Invoice (INV)**
✓ Process can be initiated by the External Consultant Engineer or Designer of Record to request payment. The process is routed to specific internal roles or actors to review and approve the payment request.
- Invoice - Consultant Invoices Paid By Other Department/Division (CIPBO)**
Consultant invoice process to record payments that are being processed by another department/division as the lead manager and your Department/Division (non-lead) providing only funding support. Invoice will be entered into PeopleSoft by others.
- Invoice - General Contractor Payment Application Initiated to Designer Of Record (GCPA)**
General Contractor submits Pay App to Designer of Record for initial approval, then follows approvals similar to COR Pay App process.
- MWBE - MWBE Information Request (MWBE)**
The main MWBE form for adding MWBE contractors and sub-contractors to a project.

Download INV **Start INV**



4. Fill out Subject and required data fields. Subjects vary by division, contact your city Project Manager for guidance.

Some example subjects are:

AECOM_SOW1_Invoice16Final_31Jul24

February 2024 Invoice INV40893 PO2400001452

Volkert Invoice Number 00207046-2024

5. Invoice/Receipts: An attachment from your company showing Professional Services rendered for the payment term, and any receipts.

6. Status Update: Requirements vary by division. This could be a short report, a couple sentences, or a schedule Gantt chart.

7. MWBE Certified Subcontractor Payment Form: This should have been included in your contract as Appendix E. Here is a link if needed: [MWBE Form](#). Include it with each payment. MWBE [site](#).



8. MBE Portion of this Invoice (\$): decimal amount of MBE portion of payment. Put 0.00 if not applicable.

9. WBE Portion of this Invoice (\$): decimal amount of WBE portion of payment. Put 0.00 if not applicable.

10. Commitment Invoice Details: Select your commitment from the 'Commitment' dropdown, and then edit the 'Invoice Amount' in the table that appears below (pencil icon). You may need to scroll to the right to see that column. Example next slide.

This is important. The money will not be marked as Paid in the contract without this step, and failing to do so will delay payment.



Commitment Invoice Details

Status:	Draft			
* Commitment:	Consultant Test Comr			
Company/Contact:	z-Test Consultant Company (Test Consultant)			
* Date Received:	08.20.2024	[08.20.2024]	Date Due:	
This is a retainage release:	<input type="checkbox"/>			

Commitment Invoice Custom Fields

Instance Process ID:	
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Invoice Items

Manage Funding

	Commitment Item #	Description	ate	Remaining to be Invoiced	Invoice Amount	Retai %
	001	Construction Cost (Vendor)	0.00	49,995.00	0.00	
Total			0.00	49,995.00	0.00	

[Cost Summary](#) | [Commitment Details](#) | [Invoices For This Company](#)



11. The invoice will now go through an internal review by the City of Raleigh. If necessary, it will be sent back to you for revision in the 'Initiator Resubmit/Void' step. At any time you may open up the invoice process and click 'Show Workflow Diagram' to see where it is. 'Show History' can also be useful.

Process Document:	INV - 13
Current Workflow Step:	Show History Current Actors PM Review Show Workflow Diagram
* Subject:	Invoice 32511-007-13 July 2024
Status:	Submitted

