

4 E-Billing Fact Sheet

Secured Access Rule

Access to the E-Billing depends on your Project Contact Type (Role) and association with an organization. Below are sponsor roles.

	Project Contact Type (Role)			
	PROJECT SPONSORS	Logged in user is Project Contact, Alternate Project Contact, or Billing Contact on selected project	Logged in user is another type of contact on selected project	Logged in user is not a contact on selected project
Association with an Organization	Logged in user is associated with Primary Sponsor Organization	<ul style="list-style-type: none"> Can initiate billings Can delete billings Can edit billings Can submit billings Can edit Org Equipment 	<ul style="list-style-type: none"> Can only view billings Can edit Org Equipment 	<ul style="list-style-type: none"> Can only view billings Can edit Org Equipment
	Logged in user is associated with Secondary Sponsor Organization	<ul style="list-style-type: none"> Can initiate billings Can delete billings Can edit billings Can only view Org Equipment 	<ul style="list-style-type: none"> Can only view billings Can only view Org Equipment 	<ul style="list-style-type: none"> Can only view billings Can only view Org Equipment
	Logged in user is not associated with Primary or Secondary Sponsor Organization	<ul style="list-style-type: none"> Can initiate billings Can delete billings Can edit billings Can only view Org Equipment 	<ul style="list-style-type: none"> Can only view billings Can only view Org Equipment 	<ul style="list-style-type: none"> Can only view billings Can only view Org Equipment

Rules for Project Sponsors

- Sponsors can only edit their own bills.
- They can view other sponsor's bills.

Recreation and Conservation Office (RCO) staff also have unique roles. If RCO staff are logged in as 'RCO fiscal staff' for a selected project, they may initiate, delete, edit, and submit adjustment billings. Adjustment billings are those which result in 0 or a negative payment. Please note, it does not matter if the RCO fiscal staff user is the RCO fiscal contact for the selected project. They may still initiate the above tasks.

Rules for RCO Staff

- Grants managers cannot edit or submit sponsor bills. They can enter notes and select options on the routing page only when the bill is in the “In Process Grant Manager” status.
- Fiscal staff cannot edit or submit sponsor bills unless the bills are adjustment billings. They can enter notes and select options on the routing page only when a bill is in the “In Process Fiscal” status.
- Grants managers can approve, route, and return bills assigned to other grants managers. **When approval is made, the grants manager approving is noted on the routing screen.**
- Fiscal staff can approve, route, return, and release bills assigned to other fiscal staff. **When approval is made, the fiscal staff approving is noted on the routing screen.**
- Fiscal staff can enter and submit adjustment bills, which result in 0 or negative payment.