Supplier Invoice

This procedure supports Policy 3401 General Payment. It details the steps to follow to request the disbursement of University funds via an Invoice. This procedure does not cover the sourcing or purchasing of goods and services. Policy 3201 General Purchasing covers the University’s rules on those subjects (e.g., Purchase Orders, PCard use, out-of-pocket expenditures) and their supporting procedures.

An Invoice is the University’s preferred mechanism for requesting disbursement of University funds. An Invoice is required for all disbursements except those specifically enumerated in Policy 3401 General Payment, Section 3401.1. Please review the payment method page for assistance.

Invoices should be submitted for processing directly from the Supplier to Accounts Payable (“AP”). In instances when this does not occur, departments are responsible for following the process detailed in invoices received by departments.

Requestors purchasing goods and/or services for which disbursement of University funds will be requested via Invoice should instruct Suppliers to submit their Invoices directly to AP via email (for sponsored award subrecipients – yss.subcontracts@yale.edu; for all other Suppliers – ap.vendorinvoices@yale.edu). Requestors should also inform Suppliers of the following:

- An email may contain multiple Invoices, but each Invoice should be a separate attachment;
- Invoice attachments should be in PDF or TIF format;
- Invoices should contain the following related to the individual who ordered the goods and/or services: name of individual; individual’s department; and individual’s contact phone number; and
- For each email received, the Supplier will receive an email confirming receipt.

Suppliers may also submit Invoices directly to AP via mail. Requestors should inform Suppliers who elect this option of the following:

- Invoices sent via mail should be addressed as follows:
  
  Yale University
  Accounts Payable Dept.
  PO Box 208228
  New Haven, CT 06520

- Invoices sent via mail may take longer to be received and processed than those sent via email; and
- Invoices sent via mail cannot be tracked until they are received by AP and scanned into the processing system.

Under certain circumstances (e.g., high-volume Suppliers), Suppliers may submit Invoices directly to AP via an electronic invoicing system. Requestors should inform Suppliers who wish to submit Invoices electronically to contact AP (sharedservices@yale.edu) directly to request authorization.

The preferred option is to work with suppliers to have them send their invoices to A/P directly. Yale policy also dictates that in most instances, it is appropriate to have a PO in place. If you receive an invoice directly that needs to be submitted for processing, please follow these steps:

**Reviewing Invoice Prior to Submission:**

Thoroughly review and verify the information contained in the invoice prior to submitting it for payment.

If a PO invoice, ensure that the PO number is indicated on the invoice.

- Make sure the invoice number is a unique number to avoid duplication issues.
- Ensure that the supplier name and remittance address are present. Check the Supplier information on the invoice against what is listed in Workday. If the invoice is incorrect/incomplete in Workday, please work with the supplier or process a supplier change request before the invoice is submitted to YSS.
- For Goods, review the quantities and prices listed to ensure they are correct.
- For Services, review the calculations and totals to ensure they are correct.
- Yale is tax-exempt in most states so make sure there is no sales tax included. See the sale and use tax to verify the states that accept our tax exemption status.

**Charging and Approvals Required:**

The department must add the following charging and approval information prior to submission of invoice to Accounts Payable:

- Cost Center
- Supplier ID Number
- Purchase Order Number (if applicable)
- Dollar amount
- Complete charging instructions, including spend category (SC)
  
  (YDXX.XX.CCXX.XX.PGXX.XX.PJXX.XX SCXX)

- When split charging, including the specific dollar amount to be charged to each charging line;
- Date (Date of Submission)
- NetId (Preparers)

**Submitting the Invoice to Accounts Payable:**
• Email invoice and supporting document(s):
  • Check payments to: yss.invoices@yale.edu
  • Wire payments to: wires@yale.edu
• Must copy SOM BusOps when submitting invoices: sombusiness.office@yale.edu
• Email Subject Line Sample: Cost Center-Supplier Name-INV#
• File Name of attachment: Cost Center-Supplier Name-INV#
• Body of email: Must include the Business Purpose, if a PO is not associated with this invoice

Sample email from the department to YSS

Sample Invoice when supplier submits directly to AP

Sample Invoice Non-Purchase Order sent by the department

Sample Invoice with Purchase Order sent by the department

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