



Procedure Name: Paying Invoices Through Concur	Number: SOP 28 v1.0
Subject: Clinical Research	Effective Date: July 02, 2025
Linked Policy: Clinical Research Operations & Compliance Policy	Revised Date:

PURPOSE:

The purpose of this SOP is to establish a clear, standardized process for receiving, processing, and managing invoices, ensuring consistency and accuracy in the invoicing process.

SCOPE:

This SOP defines which areas of the business and which types of invoices are covered by the procedure. For the purposes of this SOP, the scope is limited to invoices received by our commercial IRB partners, WCG and Advarra

RESPONSIBILITY:

The responsibility for the processes covered in this SOP includes operations involving research team members who receive invoices directly, the Office of Clinical Research Operations Team, and post-award team members with GW School of Medicine and Health Sciences who support processing of these invoices.

PROCEDURES:

Advarra

1. Invoice will be sent from Advarra within the first two weeks of the month to the Executive Director and Research Program Associate.
2. Advarra invoices are routed to and paid through [Concur](#).
3. In Concur, click the three horizontal dots to the right of the page and select "Invoices".
4. At the top, click "Create New Invoice".
5. In the "Purchase Order Search" field, put the purchase order number: 1000243133. It will automatically populate a dropdown with Advarra's information. Click on the dropdown to open a new invoice.
6. Complete all fields marked with red.
 - a. Invoice Name should be the following format: [Advarra] [Month] [Year] [Invoice Purpose].
Ex: Advarra January 2024 CA Build
 - b. Invoice Number: Listed at the top of the invoice from Advarra



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- c. PO Number: Should be automatically imported from the PO search
 - d. Invoice Date: Listed on the invoice, usually the last day of the prior month.
 - e. Total Invoice Amount: The total at the bottom of the invoice.
 - f. Are All Services Performed Outside the US: Select NA
 - g. Is 100% of Payment for Services: Yes
 - h. Service Period: The month the invoice covers. If the invoice date is 12/31/2024, the service period is December 2024.
 - i. Invoice Form Type: Service PO Invoice
 - j. Invoice Type: Standard
 - k. Grant/Non Grant: (GL) Non-Grant
 - l. Oracle Alias: (GL-814021) Health Sciences Programs Administration
 - m. FD Group: VP Research (8)
 - n. Invoice Group ID: GW
7. Click Save
 8. A pop-up window will appear. Click "Cancel".
 9. On the main page, click the tab that says "Matching Summary".
 10. Click "Copy Items from PO".
 11. A pop-up window will appear. Select the newest version of the Advarra PO and click "Copy".
 12. Go back to the "Invoice" tab.
 13. Select the checkbox and click "Edit".
 14. It will open a new page called "Edit Line Item".
 - a. The boxes marked red will autofill. Change "Quantity" to the invoice total.
 - b. Under "Type of Activity", select "Program – Research
 - c. For "Expenditure Item Date", enter the invoice date.
 - d. Under "Distributions" at the bottom, click the checkbox.
 - e. Click "Save".
 15. You will be brought back to the main page.
 16. Under "Actions", select "Upload Image"
 17. In the pop-up window, click "Browse", then select the invoice pdf and click "Upload".
 - a. It will reload and say "Uploaded" beside the pdf title. You can then click "Close".
 18. At the top of the main page, click "Submit Invoice".
 19. For the "Invoice Approver", start typing the last name of the designated approver. In this case, it will be the Executive Director. Select the name from the dropdown when it appears.



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20. Click "Submit Invoice". It will load and bring you back to the "My Invoices" page.
21. You will receive an email confirmation of the invoice submission and additional updates as it moves through the approval process. Keep these for your records.
22. On the tracking spreadsheet, add the new invoice under "Invoices". The totals at the bottom will automatically update themselves.

WCG

1. Invoices will be sent from WCG as needed to the Executive Director and clinicalresearch@mfa.gwu.edu
2. If the invoice is under \$3,000, it will be paid with a company pcard
 - a. If it is an MFA cost center, it will be paid from the Research Grant Associate's MFA pcard
 - b. If it is under a GW PTA, it will be paid from the Research Grant Associate's GW pcard
3. If the invoice exceeds \$3,000, a PO will be requested and the payment will be processed through Concur.

Review and Revision

The SOP Review Committee shall review this SOP every 2 years. This SOP may be reviewed more frequently if it does not reflect current operations.