

YSM Centralized billing process for Workday:

1. The first is step to check to make sure the customer is set up in Workday. Remember it is the submitting Cost Center's responsibility to check first. If your invoice is to a customer already in the Workday system, skip to Step # 6 If not in Workday go to step # 2.
2. To add a customer or add a different address or contact name to existing customer, please refer to this form: [Yale University Customer Registration Form](#). For all domestic customers you will need to provide the customer's tax ID# (you can obtain this information by asking the customer to provide you with their W-9 form). If tax ID is not included it will be sent back, and delay set up.
3. Once you have reviewed the instructions and have all the necessary information to complete the setup, proceed to using this online form to add customer: [Yale University Customer Registration Form](#)
4. When you submit the customer form on Qualtrics, you should receive an automatic reply stating they have received your request. We have been instructed it is a 1 day turnaround for this customer to be entered into Workday. The automatic response will also assign a Case # to your request (Example of subject line in Email- Subject: Case #00528416: Customer Setup received).
5. Only when your customer has been set up in Qualtrics, the Customer Setup Team (customer.setup@yale.edu) should forward a second verification email with the Customer ID number and NS_CUSTOMER NAME. You can proceed to sending your invoice request to ysminvoicing@yale.edu.
6. All invoice requests should be sent to ysminvoicing@yale.edu with the Workday invoice request form. This needs to be fully completed with all Workday segments, including the revenue code (this form for one-off invoice requests and variable contracts). Any invoice requests that do not contain Workday COA / includes a customer that is not set up in Workday will be returned, which will delay processing your invoice. Please refer to COA guidance on the second tab of the invoice request form for any questions regarding the revenue category.
7. If the invoicing is for a new revenue agreement, please send over the executed contract along with the COA. If the contract has pre-determined billing schedules for the total contract amount such as VA IPAs/JPAs, there is no need to complete the invoice request template. The centralized billing team can add this to Workday which will generate the installments based on the contract (monthly/quarterly).

8. Please note if the customer requires invoices to be uploaded to their system (with the exception of the Department of Veterans Affairs), YSM Finance will send back the Workday invoice, as this is a department function.