

**From:** Clinical Research Fiscal Support Services <[crfss@vumc.org](mailto:crfss@vumc.org)>  
**Sent:** Wednesday, August 31, 2022 3:16 PM  
**Subject:** New Requirement: eSMART Invoicing Module use for All Clinical Trial Invoices

Dear Chief Business Officers:

Executive leadership will  
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**Sent:** Wednesday, August 31, 2022 3:16 PM  
**Subject:** New Requirement: eSMART Invoicing Module use for All Clinical Trial Invoices

Dear Chief Business Officers:

Executive leadership will require **all clinical trial invoices**, *other than those the Department of Finance submits (i.e., Federal invoices)*, to be prepared and submitted through the eSMART Invoicing Module beginning **November 23, 2022**. Line-item payments will also be entered into eSMART for each invoice.

A two-hour webinar is provided through the Learning Exchange to gain access to the eSMART Invoicing Module. To help prepare for classes, please provide the names of individuals in your area responsible for clinical trial invoicing utilizing this [REDCap Survey](#). After receiving the names, Clinical Research Fiscal Support Services (CRFSS) will correspond with each person identified to provide information about training and other available resources. Feel free to share this notice/REDCap link with whomever in your area is best suited to provide this information.

There are two roles available, each requiring completion of the same course:

- **Submitter:** Drafts and submits invoices through the system (e.g., financial administrator)
- **Drafter:** Can create and enter invoiceable items on a drafted invoice but does not have submission authorization (e.g., study coordinator or assistant financial administrator)

Many departments/divisions have used this easy-to-use module voluntarily since October 26, 2021, to:

- Electronically create, track, and submit standardized, uniform invoices (including storing supporting documentation) by-study
- Automatically number invoices utilizing a Finance approved format
- Effectively communicate between department financial administrators, clinical research teams, and the Department of Finance in order to:
  - a. Ensure timely reporting of anticipated revenue when trials achieve milestones automatically paid (no invoice required) by a sponsor.
  - b. Provide an accurate receivable posting based on documented milestones/visits (i.e., CRF completion).
  - c. Ensure timely reconciliation of payments to appropriate milestones/visits.
- Apply payments received against invoices on a line-item basis.
- Track aging on outstanding amounts due and provide visibility to the Department of Finance.
- Automatically (electronically) communicate anticipated revenue to the Department of Finance for GL upload, eliminating the need to copy Finance on invoices through email and eliminating manual data entry into the GL by the Department of Finance.

For additional questions, contact **CRFSS** ([CRFSS@vumc.org](mailto:CRFSS@vumc.org)). For more information and resources related to eSMART invoicing, please visit the **Business Education** website:

<https://finance.vumc.org/ft/vu/ctinvoicing.aspx>.

Thank you for your assistance.

Sincerely,

**Gordon Bernard, M.D.**

Executive Vice President for Research

Vanderbilt University Medical Center

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