

Billing & Collections Best Practices



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Introduction

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Invoicing Best Practices

- Have a written procedure for invoicing.
- Send invoices in a timely manner
- Be sure the invoice is clear, complete, and accurate
- Include the essentials
 - Call it an INVOICE
 - Date
 - Invoice number
 - Make sure the math works!
 - Proper remittance information and payment options
 - Include required documentation
 - Contact information for questions about the invoice
 - Make sure the invoice is being sent to the proper recipient

Collections Best Practices

- Track Receivables – you need to know what is owed to you.
- Follow up in a timely manner.
- Be sure you're invoicing the right person.
- Document, document, document!



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Collections Best Practices

60 Days Past Due:

- Send invoice again with subject line “60 Days Past Due Invoice – Response Requested.”
- Follow up with phone call to accounting office or customer directly.

90+ Days Past Due:

- Send invoice and statement.
- Notify service provider and ask them to contact their customer.
- Seek advice from Billing & Receivables Services on next steps.



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Don't Forget...

The vast majority of our customers are universities, government agencies,
Or public service agencies.

They want to pay their bills, but they have strict rules about invoice
submission that are non-negotiable.

If you submit an invoice missing required information, it will be returned
unpaid.

The customer who places the order is almost never the person who pays the
invoice. Payments can be sped up by asking the customer for their accounts
payable contact/email address



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Don't Forget...

Document, document, DOCUMENT. Be sure there is a complete and comprehensive record of all collection actions taken, including date/time of communication, names, and any actions agreed to by customer or by you.

For more information, see Oregon State University's Non-Student Accounts Receivable Policy, found at this link: <https://fa.oregonstate.edu/fiscal-policy-program/03-110-202-non-student-accounts-receivable>



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The image features a dense field of 3D question marks. Most are dark grey and recede into the background, creating a sense of depth. In the center, one question mark is highlighted in a bright orange color. Overlaid on this orange question mark is the word "Questions?" in a clean, white, sans-serif font. The lighting is dramatic, casting shadows and highlighting the three-dimensional nature of the symbols.

Questions?