



Purpose: A business process for Salary Billing Agreements helps to ensure that the cost of personnel effort is charged appropriately to sponsored awards and in accordance with sponsor regulations. The risk of not adhering to this process is that effort will not be recorded and certified correctly.

Standards of Service:

Department: The department is responsible for preparing the initial draft of outgoing Salary Billing Agreements *using the attached template*. In certain circumstances, if another document would be considered more appropriate, SPA should be consulted.

SRA: The SRA is responsible for reviewing the initial draft for both outgoing and incoming Salary Billing Agreements and finalizing them in consultation with the department.

AD: The AD is responsible for signing the Agreement.

Considerations:

- a) Dates: Do the dates of the proposed Salary Billing Agreement fall within the period of performance of the sponsored project?
- b) Statement of Work: Was the Statement of Work read and approved by the employee whose services are being covered? Is the work being performed at the institution being invoiced for effort?
- c) Budget: Are both salary and fringe benefit costs included?
- d) Prior Approvals: Is sponsor approval required for a significant change in effort for person whose salary is covered?
- e) Affiliates: If appropriate has, [GUIDANCE ON BILLING AGREEMENTS BETWEEN HARVARD AFFILIATED INSTITUTIONS](#) been consulted?
- f) For billing agreements with non-affiliate institution, consult with AD.

Process Steps for Outgoing Salary Billing Agreements (for personnel employed by a Harvard affiliate and working on the project at HSPH).

Step	Role	Task/Activity
1	Dept	Prepares draft Salary Billing Agreement using attached template.
2	SRA	Reviews Agreement and makes any necessary changes in conjunction with department.
3	AD	Signs Agreement.
4	SRA	Emails partially executed Agreement to department.
5	Dept	Emails copy of fully executed Agreement to affiliate institution, copying SRA.
6	Dept	Uploads fully executed in GMAS in Folder in Segment repository labeled "Salary Billing Agreement," first creating folder if needed.
7	Dept	Notifies SRA if a separate subactivity desirable.
8	Ops	Establishes new subactivity if requested by department.
9	Dept	Charges object code 7900 and includes person's name and HU ID (if available) in transaction description. Prepares a separate transaction for each person.

Process Steps for Incoming Salary Billing Agreements (for personnel employed by HSPH, but working on the project at one of the affiliates).

Step	Role	Task/Activity
1	Dept	Enters initial request in GMAS; inserts "Billing Agreement" before project title in GMAS.
2	SRA	Reviews Agreement and makes any necessary changes in conjunction with department.
3	AD	Signs Agreement.
4	SRA	Sends partially executed Agreement to affiliate institution.
5	SRA	Sends copy of fully executed Agreement to department and Ops
6	Ops	Logs "notice" and sends R&A email.
7	GM	Confirms research team
8	Ops	Sets up new fund in GMAS. Confirms that "Billing Agreement" appears first in project title. For all BAs: Source of Funding = NE and Funding Instrument = Billing Agreement

***Please note: Trainee Billing Agreements are covered under a separate process.**