

External Invoice Distribution

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External Customer Invoice Distribution

All external invoices are automatically distributed to the invoice owner during the closing process. This message includes a link to login to iLab to view invoices. The email does not include a pdf copy of the invoice.

The auto-invoice notification process only distributes the email to the “Lab Primary contact (aka invoice owner).”

Additional Invoice Distribution Option

If the core wishes to also distribute the invoices to other financial contacts in the lab group, then they will need to distribute via the iLab system. This option will also attach a pdf copy to the email notification.

Distribution Workflow:

1. Open Core’s iLab Site >> Billing Tab >> Click Invoices next to the month’s billing event. A list of invoices will display.
2. Use the filter panel to filter to external invoices:
 - a. Price Types: Select options for “External-not-for-profit” & “External-for-profit”
 - b. Click Apply Filters
3. Click “Email Admins with Access to Invoices”. All invoices will display.
 - a. Click the box to Select All Invoices
 - b. Click in the contacts boxes to add additional contacts.
 - c. If the lab group has others with ‘financial manager’ access they will display.
4. Click “**Send Message & Invoice PDF**”

Email Subject: VUMC Core Name Invoice – Please remit payment.

Message (Recommended Language):

Please see the attached invoice for Vanderbilt University Medical Center research core services. If you have any questions, please contact us at (enter email address)

Remit Payment To: Vanderbilt University Medical Center Department of Finance Dept. 1236 P.O. Box 121236 Dallas, TX 75312-1236

Make checks payable to: Vanderbilt University Medical Center
Reference the invoice number & (enter cost center) on the check.

Financial Contact | Lab Primary Contact & Email Notification Settings

Who receives the invoice email notification?

Important: the automatic invoice email notification can only go to one address.

All invoices will be sent to the email address listed as the “lab primary contact” (aka “invoice owner”).

This email is the auto-generated email sent from iLab during the monthly closing process.

To change this email address: The PI or existing financial contacts will need to submit an iLab help ticket (ilab@support@agilent.com). The core can also submit the ticket but will need to copy the PI.

Message (Recommended Language):

Add the following individual as a Financial Manager to following lab group in iLab.

- PI’s Lab Group Name:

Set this user as the ‘Lab Primary Contact’. This person will need to receive the invoice notification email.

- Financial Contact Name:
- Financial Contact Email:

Who can view invoices directly in the iLab Application?

- The invoice owner. This user is the “Lab Primary Contact” assigned for the PI’s lab group.
- PIs or other Financial Managers will have access to view invoices directly in the iLab application.

Troubleshooting: User reports they did not receive the invoice notification email:

- (1) Verify user is assigned as a financial manager.
 - a. Purchase Orders tab >> Find user >> Click Requestor name hyperlink.
 - b. The user’s lab group information window will display. >> Click “Information about labs” to view lab group name and additional information.
 - c. All users with a \$ icon are financial managers.
- (2) Ask external user to check their junk mail. Emails are distributed from no-reply@ilabsolutions.com.
 - a. RECOMMENDATION: If this user is a frequent user of your core, they may need to contact their institution’s IT department to whitelist this no-reply@ilabsolutions.com email address.

External Lab Group Roles Defined

Lab Primary Contact (aka Invoice Owner):

- If the “Lab Primary Contact” is set to a specific individual, that person will be designated the ‘Invoice Owner’.
- If not officially set, the invoice owner will default to the first financial contact in the lab group list.
- The Invoice Owner name displays on the invoice.

Financial Managers Defined:

- The financial managers are all individuals (including the invoice owner) that have access to view the invoices directly in iLab.
- These users will also display as an option when using the optional workflow for additional distribution of invoices.

External User – Billing Address

How to edit the billing address on a specific project request:

This will allow the new billing mailing address to display on any invoice tied to this specific project request. However, it will not apply to all billing if the core enters more than one project.

- (1) Go to the “View All Requests” tab of the core site. | Toggle open the customer’s project request.
- (2) Scroll down to the Billing Information section. (Located under comments & service request history.)
- (3) Click edit next to the Billing Information header.
- (4) Update the billing information to reflect the correct information. This information will display on the invoice.
- (5) Click Save to finalize the changes.

NOTE: To change on all invoices for this user’s lab group, submit an iLab ticket. See the “Troubleshooting page” for recommended ticket language.

External User – Access to log into iLab

How does an external customer access VUMC iLab application?

External users may need to login to iLab to either view invoices or to request core services (depending on core’s workflow). Users may need to access a custom URL to view the VUMC core groups if their institution currently uses iLab to manage their institutional core billing or operations.

- (1) Users from an institution that do not currently use iLab: <https://vumc.corefacilities.org>
- (2) Users from institutions that are a client of iLab:
 - a. Instruct user to use their institution’s iLab website to login to iLab.
 - b. After logging the user can then navigate to invoices or the VUMC core iLab site, as needed.

Contact iLab Support to Manage External Lab Groups

iLab support tickets must be submitted to change external lab group roles or billing addresses.

iLab Support: To submit a ticket, email ilab-support@agilent.com

The PI must be copied on the support ticket.

To change the email address where the automatic invoice email is sent:

Ticket Message (Recommended Language):

Add the following individual as a Financial Manager to following lab group in iLab.

- PI's Lab Group Name:

Set this financial manager as the 'Lab Primary Contact'. This person will need to receive the invoice notification email.

- Financial Contact Name:
- Financial Contact Email:

To add Financial Managers to existing lab groups:

NOTE: If that person needs to be set as the invoice owner, in the iLab support ticket request to add the person as "Lab Primary Contact"

Ticket Message (Recommended Language):

Set this user as the "financial manager" to the following lab group:

- User Name:
- User Email:
- PI's Lab Group Name:

To update billing mailing address:

Ticket Message (Recommended Language):

Please update this lab's billing address. This is the address that should display on the invoice.

- PI Name:
- PI's Lab Group Name:
- New Billing Address

Invoice Payment Status

The Office of Research distributes an aged receivables report to all core administrators each Monday. Direct any questions regarding an unpaid invoice, to your core's administrative officer.

Payment Methods: VUMC can accept payments by check or electronic fund transfer. Unfortunately, we are unable to accept credit card payments.

VANDERBILT UNIVERSITY MEDICAL CENTER Approved Payment Methods	
Payments from external customers (non-Vanderbilt) can be made by check or electronic fund transfer.	
Payment by Check: Payment checks must be received to the appropriate "lockbox" address shown below. Checks should be made payable to Vanderbilt University Medical Center .	
Regular post: Make checks payable to Vanderbilt University Medical Center and send to:	
ATTN: Susan Meyn Vanderbilt University Medical Center Finance, Dept 1236 P.O. Box 121236 Dallas, TX 75312-1236	
Payment by Electronic Fund Transfer: Customer is responsible for all associated fees.	
Wire Transfer & ACH Instructions: Please contact Elaine Zachary (615) 875-9396 or Joseph Kemble (615) 322-1493 if you need additional information.	
Bank Name:	The Bank of New York Mellon
Address:	3319 West End Ave Suite 700, Nashville, TN 37203 (DO NOT SEND CHECKS TO THIS ADDRESS)
ABA Routing Number:	043000261
Swift Code:	MELNUS3P
IBAN:	Mellon does not have IBAN numbers.
Account Number:	9037889
Account Name:	Vanderbilt University Medical Center VUMC NON L/C
Reference:	VUMC number is required for all payments *Must be included in payment description field* (Please specify specific invoice number and VUMC Core Number to be credited) This invoice displays on the core invoice, and the VUMC core manager can provide.

Credit Card Payments: Effective Jan. 1, 2015, VUMC stopped accepting credit cards due to increased PCI Compliance requirements. Cores that opt to obtain their own PCI compliance and purchase a credit card processing machine are allowed to accept credit card payments.

Guidelines include:

- (1) Core leadership/ home department are responsible for maintaining PCI compliance and procuring credit card processing machine.
- (2) Payment should only be accepted after monthly invoice has been generated. Pre-payments are not allowed.
- (3) Core leadership/ home department are responsible for preparing & submitting journal entries to record credit card transactions.