iLab

VUMC iLab Core Managers Guide

Guide Contents

Account Registration

For full details on registering for iLab, visit ***Office of Research*** website (https://www.vumc.org/oor/vumc-ilab-application).

- All users must register for an iLab account to utilize the system.
- There are four main **roles** for accounts***: PI, Member/Manager of a lab, Department Administrator, and Core Staff/Manager.***
- Contact VUMCcores@vumc.org for registration assistance.

How Lab Groups Manage Billing Numbers

For full details on billing number management, see the ***iLab Core User Guide*** on the ***Office of Research*** website (https://www.vumc.org/oor/vumc-ilab-application).

VUMC Billing Numbers

All internal VUMC billing numbers for VUMC investigators are activated via a nightly feed from Workday.

- Sponsored Funds:
  - Types: **Grant** Worktags
  - Auto assigned to PI's VUMC Lab Group via feed.
  - Only one PI lab group per sponsored fund. This cannot be edited in iLab, it is controlled by Workday integration.

- Non-Sponsored Funds:
  - Types: **Gift** worktag, **Project** worktag, **Cost Center**
  - PI or Department must 'claim' the fund number in the PI's Lab Group Module.
  - Multiple lab groups can claim the same non-sponsored fund number.

Vouchers

VICTR vouchers are activated via an overnight feed from the StarBRITE application. If the user that has been awarded the voucher has a VUMC lab group setup in their name, the voucher will automatically appear.

- Vouchers are added into iLab via **overnight feed** from the StarBRITE application.
- The voucher is added into iLab based on the awarded investigators email.
  - Make sure the email listed in iLab **matches** what is on the voucher award in StarBRITE.
- Voucher funds are **core specific**. You can only use your voucher to purchase services from the assigned VUMC core facility.
- Any **pending** purchases will also **encumber** against the available balance in iLab.
- Since the vouchers represent funding from VICTR. A VUMC lab group will need to exist for the individual awarded the voucher.

  - **VUMC Users**: The PI will see their voucher in their "VUMC" Lab group.
    Example: Smith, Sarah (VUMC) Lab

  - **VU Users**: The PI will see their voucher in their "VUMC Scholarship & Voucher" Lab group.
    Example: Jones, Jake (VUMC Scholarship & Voucher) Lab

Scholarships

Scholarships are credit vouchers redeemable in center-supported core facilities. They are center and core specific and are awarded by centers to member investigators at the beginning of each center's grant year and expire at the end of that year. Once expired, a scholarship voucher cannot be reactivated, and the unused funds do not roll forward.

Key Points

- Scholarships will be available in a PI's VUMC or VUMC Scholarship & Voucher Labs.
- Added and managed by Office of Research and awarding department.
- Core specific funding with expiration date and spending limit.

VU Billing Numbers

VU is a separate institution from VUMC. All VU users are considered external customers to VUMC core facilities. VU Labs will use the PO payment method when requesting services or reservations.

Key Points

- POs are used to create billing numbers for VU customers within the VUMC cores in iLab.
- VU users are instructed to use their full CoA/ POET numbers as the PO number.
  - CoA Numbers should include periods.
    - Example: 110.05.11000.5411.000.000.000.0.0
  - POET numbers the POET number followed by a period and the task number.
    - Example: GC_604513.10
    - Note: Not all POET number will begin with letters.

To activate or manage VU billing numbers, users should complete **a webform** on the **Office of Research website**.

External Customers & External Billing Numbers

When working with new external customers, the following steps must be completed.

STEP 1: External User Account Creation (Core Manager or External User)

STEP 2: Purchase Order Creation (Core Manager)

STEP 3: Office of Research External Organization Activation:

Core Module Pricing Panel: Add institution & assign price type.

VUMC iLab Institution Page: Add institution and assign Workday Customer ID.

Detailed instructions are available in the *External Customer Management (Core Manager Guide)* on the *Office of Research* website (https://www.vumc.org/oor/vumc-ilab-application).

Core Billing & Instruction on Entering Charges:

There are several options for cores to enter charges into iLab.
1- Utilize Service Request functionality.
2- Utilize Equipment Calendar functionality.
3- Utilize simplified order entry via the Charge Entry module.

Managing Service Request Workflow & Billing

Some cores may opt to use the iLab Service Project Workflow functionality. With this workflow, core customers submit a request for service on the "Request Services" tab of the iLab site. The core will then use the generated project request to bill for services provided.

Managing Equipment Reservations & Calendars

Some cores may opt to use the iLab Calendar Reservation Workflow functionality. With this workflow, core customers reserve time to use core instruments on the "Schedule Equipment" tab of the iLab site. The core will then confirm usage to bill for instrument time.

Charge Entry & Upload Functionality

Simplified order entry can be completed using the **charge entry** module in iLab. This workflow is used for cores that use the iLab system for billing purposes only. All intake requests and workflow management are handled outside of iLab.

There are two charge entry options:

1- Charge Entry – Manually enter each charge. See next section for detailed instructions.
2- Charge Entry Upload – Upload a file of charges.

For full details on iLab service management and billing workflows are available on the *Office of Research* website.
https://www.vumc.org/oor/vumc-ilab-application

Review the following documents:
 Managing Service Request Workflow
 Managing and Confirming Equipment Usage
 Charge Entry Billing Method

Contact VUMCcores@vumc.org or your core administrator for assistance.

Creating a Billing Event

Cores **must create a billing event each month to finalize billing** for any charges entered during the month through charge entry, service request workflows, or calendar usage.

- Cores are required to create a **draft billing event** by the last business day each month.
- If preferred, cores can create draft events more frequently throughout the month.
- During close (first and second business day), the core manager is expected **assist in resolving any billing errors**.

General guidelines for core billing schedule: The monthly core billing schedule are distributed via email each month one week before the billing deadline. The schedule is also available of the VUMC Office of Research website. The cores must complete the billing event by the last business day of each month.

Invoices will be generated once a month when the central office combines all billing events created by the core groups.

- Internal payments (VUMC users) are automatically transferred from the customer's billing number to the core's billing number during this process.
- The core books the revenue from the external customers. However, they will still need to ensure the payment (i.e., check) is received from the external customer.
  - Exception: VU customer payments are received 30 days later from VU Finance. The VU users do not submit payments directly. It is centrally managed between VU & VUMC.

Resolve Pre-Invoice Billing Errors

Billing errors are generated when invoices are created with missing payment information. The Office of Research will contact the core if billing errors were generated during the monthly closing process.

Events with unresolved billing errors cannot be processed and will be removed from the core's invoicing file prior to submission to Finance.

Cores will have approximately 24 hours to resolve all billing errors during the monthly closing process.

- All invoices with unresolved billing errors will be **removed** from the core's billing event and will not be included in that month's invoicing file to Workday.
  - This allows the core additional time to resolve the billing errors with the invoice.
  - This allows all other core charges in the event to invoice within the current billing cycle.

- The removed invoice will be automatically included in the next month's invoicing cycle. If the error has not yet been resolved, it will be removed again. The core should take action to resolve the issue.

For instruction on creating billing events and resolving billing errors, visit the Office of Research website:
https://www.vumc.org/oor/vumc-ilab-application

Contact VUMCcores@vumc.org or your core administrator for assistance.

Invoice Review

From the left-hand menu, click the **Invoices** label to access invoice and pre-invoice reports. Users can view all invoices created by any core for any billing number connected to the user's department.

1. Click on **Invoices** in the left-hand menu.
2. A **list of invoices will appear**.
3. **Use the filter panel on the left** to reduce and sort the invoices that display.
   a. **Example:** Use the '**payment number**' filter and select the invoice number. Click '**Apply Filters**'.
   b. **Example:** Use the '**keyword search**' and type in the <u>invoice number</u>. Click '**Apply Filters**'.
4. On the far right, click the **magnifying glass** to view the actual invoice.

NOTE: There is a notes section on the bottom of every invoice. Notes placed here will be visible on the invoice to the customer and core.

Refunds

Refunds can be issued on **final invoices** only. To issue a refund, the core must navigate to the invoices list view and open the invoice. Use the refund tool on the invoice to issue a refund.

For detailed instructions, review the Refunds document on the Office of Research website: https://www.vumc.org/oor/vumc-ilab-application

Reporting

The reporting functionality within iLab allows users to generate reports of core revenue across investigators and services.

Charge Reporting
1. Run iLab report for completed month by billing date.
   a. On the core's iLab site, click the **Reporting** tab
   b. Click **Build new**
   c. Set the **date range** to align with the applicable report period month
   d. Change the **date field** option to **Billing Date**
2. Click **Run report!**   The reporting data will display.
3. If needed, use **filter panel** to drill down on data results.
4. Click **Export…**
   a. Select **Source data as csv/xls**

Invoice Payment Status

Core managers and staff do not have the ability to edit the payment status of invoices. Please coordinate updates to the invoice payment status with your core administrator or VUMCcores@vumc.org. Upon request of the core, Office of Research will mark invoices as paid.

Key Points

- Internal VUMC invoices will update automatically in the system.
- VU invoices will be updated by the Office of Research monthly. VU invoices will be updated to a paid status after 30-days as VUMC receives the VU invoice payment the following month.
- VA and other External invoices will be updated upon notification from the core.

Accounts Receivable Review & Marking Invoices as Paid

Cores are responsible for managing the AR for all external invoices. The core's home department is ultimately responsible for any unrecoverable receivables.

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 Alaine 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 sepecify 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.