

iLab: Core Manager Guide

Resolving Billing Errors

Table of Contents

- Resolving VUMC Lab Group Billing Errors 2
 - VUMC Lab Group: VUMC Cost Center 2
 - VUMC Lab Group: VUMC Scholarship or Voucher 2
- Resolving VU Lab Group Billing Errors 3
 - VU Lab Group: VU PO Numbers 3
 - VU Lab Group: VUMC Scholarship or Voucher 3
- Resolving Other Lab Group Billing Errors: 5
 - VA PO Billing Errors 5
 - Other PO (from all other external user lab groups) Billing Errors 5
- How do I update the billing number on the invoice to remove the error?: 6
 - Overview 6
- Unresolved Billing Errors 6
- Complete the following steps to resolve billing errors 6

Resolving VUMC Lab Group Billing Errors

VUMC Lab Group: VUMC Cost Center

1. If a spending amount is populated, delete the amount.
 - a. No need to contact the user.

2. Do not adjust expiration date or status. If this is the cause of the billing error, contact the core. The core will contact the user to either request an extension to the current cost center or for a new cost center.
 - a. If a new cost center is provided, OOR can update the invoice and re-validate the invoice.

VUMC Lab Group: VUMC Scholarship or Voucher

1. Expiration Date: If scholarship is expired, it cannot be extended. User should provide an alternative payment number.

2. Amount: If remaining amount cannot cover balance of charge, it cannot be increased. User should provide an alternative billing number for amount remaining.
 - a. Split the cost of the charge between the two billing numbers.

3. User access to billing number: The user associated with the charge must have access to the billing number in the PI's lab group fund grid.
 - a. To resolve: Grant access for the user to the fund.

Resolving VU Lab Group Billing Errors

VU Lab Group: VU PO Numbers

1. Update expiration date if appropriate. (Confirm with VU the date can be extended).
2. Change Amount to a higher spending limit.
3. Update the status to active if appropriate (Confirm with VU number is active).
 - a. Do not re-activate a POET/COA with an invalid format.

VU Lab Group: VUMC Scholarship or Voucher

1. **Note Regarding VU users and Scholarships/Vouchers**
 - a. When a VU users provides a VU billing number (PO) as the alternative billing number to resolve a scholarship/voucher billing error, the order associated with charge line must be changed from the PI's "Scholarship and Voucher (VUMC) Lab" to the (VU) Lab.
2. Splitting cost of **project** between scholarship and VU PO:
 - a. If the charge needs to be split between a VU billing number and a scholarship/voucher, two orders must be present in the application to allow for the split charge.
 - b. On the original order, update the quantity to align with the remaining balance.
 - i. You may need to change the charge to a 'processing status' to adjust the qty.
 - ii. Add a comment to the order to record the justification for the split Qty (i.e., to split the charge between a VU billing number and scholarship/voucher).
 1. Record the other order number for reference.
 - iii. Complete the charge for billing.
 - c. Enter a new order via charge entry or for the remaining quantity.
 - i. Add a comment documenting the split charges and reference the other order number.
 - ii. Complete the charge for billing.

3. Splitting cost of a **calendar event** between scholarship and VU PO:
 - a. If the charge needs to be split between a VU billing number and a scholarship/voucher, two calendar events must be present in the application to allow for the split charge.
 - i. NOTE: If splitting the charge on a reservation event, adjust the time on the calendar instead of billing via charge entry.
 - b. Alternatively, the core can add the instrument hourly rates to the "Service List".
 - i. The original event time should be adjusted to bill the remaining balance of the scholarship.
 - ii. Enter a new order via charge entry or for the remaining quantity.
 1. Add a comment documenting the split charges and reference the original calendar event date and time.
 2. Complete the charge for billing.

Resolving Other Lab Group Billing Errors:

VA PO Billing Errors

1. The expiration date and amount are controlled by Office of Research.
2. **Do not adjust amounts or expiration dates unless approved by VA – Contact Jessie Pirtle for approval.**

Other PO (from all other external user lab groups) Billing Errors

1. Adjust expiration date as needed.
2. If the PO amount is the same amount as the total charges, it will need to be increased by at least \$1.00

How do I update the billing number on the invoice to remove the error?:

Overview

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.

Unresolved Billing Errors

Cores will have approximately 24 hours to resolve all billing errors before the Office of Research will need to finalize the month's invoices and submit all charges to VUMC Finance to meet monthly closing deadlines.

1. All invoices with unresolved billing errors will be detached from the core's billing event and will not be finalized/ fully invoiced until the following month.
 - a. This will allow the core additional time to resolve the billing errors with the invoice.
 - b. This will also allow all other core charges to invoice within the current billing cycle.
2. The detached invoice will be automatically included in the next month's invoicing cycle.
 - a. Pending the billing error has been resolved by that time.

Complete the following steps to resolve billing errors.

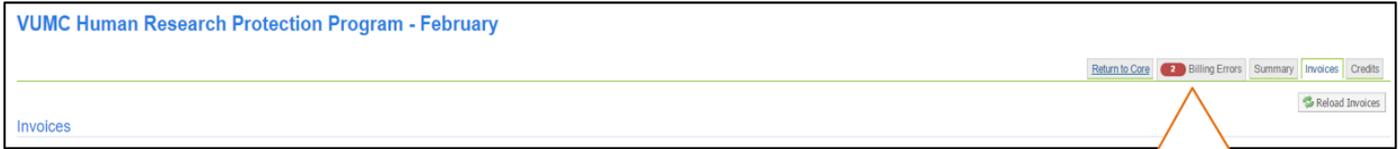
1. Open the core's **Billing** tab to view created billing events.
2. Click **Invoices** next to the billing event with a status of "**Billing Errors**".

About Our Core Request Services View All Requests People Reporting Billing PO or VU Cost Center (1) Charge Entry Administration					
Merge Drafts View Charges New Billing Event View Detached Invoices					
Displaying 2 out of 2 results. (Page 1 of 1)					
Name	Created By	Status	Date Added	Value (# of charges)	Actions
VUMC Human Research Protection Program - February	Janet Zolkover	Billing initiated	Feb 27 '17	\$74,806.69 (142)	Details Invoices ✖
VUMC Human Research Protection Program - February	Jessie Pirtle	Billing errors	Feb 17 '17	\$78,097.80 (128)	Details Invoices ✖

Status: Billing Errors

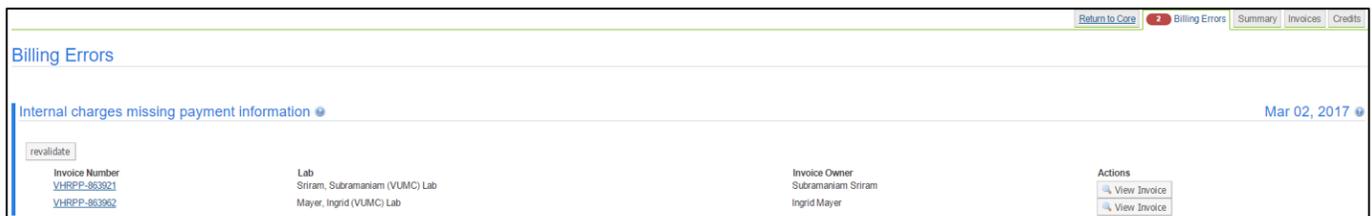
Click **Invoices** to review the billing errors.

3. The **Invoices page** will display. At the top of the invoices page, click the **Billing Errors** tab to display only the invoices with billing errors.



Click the **Billing Errors** tab to view invoices with errors.

4. A list of invoices with billing errors will display. Open the invoice by clicking **View Invoice**.



Click **View Invoice** to open the invoice.

5. **Contact the customer to confirm the billing number** that is appropriate for the invoice.
 - a. **Note:** The customer will need to work with their department administrators to either activate a billing number that is currently not in the system or extend the end date of existing center numbers in iLab.
 - b. **TIP:** See the first section of the SOP on common errors based on the lab group being billed.

VANDERBILT UNIVERSITY
MEDICAL CENTER

VUMC Human Research Protection Program
Vanderbilt University Medical Center
Phone: (615) 322-2918
Email: linda.gooch@vanderbilt.edu

VUMC core charges will post to the general ledger by internal cost transfer. No action necessary for payment.

Invoice No. VHRPP-863924
Pre-Invoice
Invoice Date March 02, 2017
Lab Sriram, Subramaniam (VUMC) Lab

From: VUMC Human Research Protection Program To: Sriram, Subramaniam (VUMC) Lab | Subramaniam Sriram

[show additional contacts](#)

Invoice Total		\$387.60
Invoice Details		
DATE	ITEM DESCRIPTION	PMT# QTY PPU STATUS TOTAL
Request: VUMCHRRP-SS-31 Start: February 17, 2017 Owner: Subramaniam Sriram		
January 16, 2013	Expedited - Continuing Review 1003790117CR01	4044127932 1.0 \$387.60/ea Completed \$387.60
Actual cost \$387.60		Projected cost \$387.60 Invoice cost \$387.60
Invoice Total		\$387.60

6. Once the billing number has been confirmed, click the **payment icon** to update the billing number on the invoice.

Invoice Total **\$387.60**

Invoice Details						
DATE	ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	TOTAL
▼ Request: VUMCHRPP-SS-31 Start: February 17, 2017 Owner: Subramaniam Sriram						
January 16, 2013	Expedited - Continuing Review 1903760117CR01	4044127632	1.0	\$387.60/ea	Completed	\$387.60
Actual cost: \$387.60		Projected cost: \$387.60		Invoice cost: \$387.60		
Invoice Total						\$387.60

Click the **Payment Icon** to update the billing number on the invoice.

7. The **payment icon** menu will display. **Select the appropriate billing number** from the drop-down menu.
- a. Click **Save** to confirm changes.

Invoice Total **\$387.60**

DATE	ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	TOTAL
charge	billing status	Billing Number	amount			
Expedited - Continuing Review 1903760117CR01	Billing Initialized	4044127632	\$387.60			\$387.60
selected charge(s) total: \$387.60						\$387.60
Invoice total: \$387.60						\$387.60

Update payment info for selected (*) charges

Billing Numbers ▼ 100.0 % Select Billing Number...
 100.0 % Select Billing Number...
 4044127312 - MISC CLOSED CLINICAL TRIALS-SRIRAM (Does not expire)
 4044127592 - Biogen 101MS409 (Does not expire)
 4044127632 - BAYER HEALTHCARE (Does not expire)
 4044127582 - BIOPEN IDEC (Does not expire)

make default for project?

payment notes

Send Payment Reminder?

save cancel

Select the appropriate billing number from the drop down menu.

Click **Save**.

8. After clicking save, click the **grey x** to close the payment icon menu.

charge

ITEM DESCRIPTION	PMT#	QTY	PPU	STATUS	TOTAL
Expedited - Continuing Review 1903760117CR01	Billing Initialized	4044127632	\$387.60		\$387.60
selected charge(s) total: \$					
Invoice total: \$387.60					

Update payment info for selected (*) charges

Billing Numbers ▼ 100.0 % 4044127632 - BAYER HEALTHCARE (Does not expire)
 total allocated
 100.0 %

make default for project?

payment notes

Payment information successfully updated

split charge

save cancel

Send Payment Reminder?

Click **grey x** to close the payment icon menu.

9. At the top of the invoice click **Back to Core**.

Click **Back to Core** to exit the invoice view.

VANDERBILT UNIVERSITY
MEDICAL CENTER

VUMC Human Research Protection Program
Vanderbilt University Medical Center
Phone: (615) 322-2918
Email: linda.gooch@vanderbilt.edu

VUMC core charges will post to the general ledger by internal cost transfer. No action necessary for payment.

Invoice No. VHSPP-863921
Pre-Invoice
Invoice Date March 02, 2017
Lab: Sriram, Subramaniam (VUMC) Lab

From: VUMC Human Research Protection Program To: Sriram, Subramaniam (VUMC) Lab / Subramaniam Sriram

[show additional contacts](#)

Invoice Total		\$387.60
Invoice Details		
DATE	ITEM DESCRIPTION	TOTAL
January 16, 2013	Request: VUMCHRP-SS-31 Start: February 17, 2017 Owner: Subramaniam Sriram	\$387.60
Actual cost: \$387.60	Projected cost: \$387.60	Invoice cost: \$387.60
Invoice Total		\$387.60

10. **Navigate back to the core's Billing Errors list.**
- (1) Click the core's **billing tab**.
 - (2) Click **Invoices** next the event with "**Billing Errors**".
 - (3) Click the **Billing Errors Tab**.

11. Click the **revalidate** tool to fully remove the billing error.

Return to Core Billing Errors Summary Invoices Credits

Billing Errors

Internal charges missing payment information Mar 02, 2017

revalidate

Invoice Number VHSPP-863921
Lab Sriram, Subramaniam (VUMC) Lab
Invoice Owner Subramaniam Sriram

Actions
View Invoice

Click **revalidate** to fully remove the error.

12. The system will process the revalidation request. Once processed, the invoice will no longer display on the Billing Errors tab. Once all billing errors have been resolved the "**Billing Errors**" tab will no longer display.