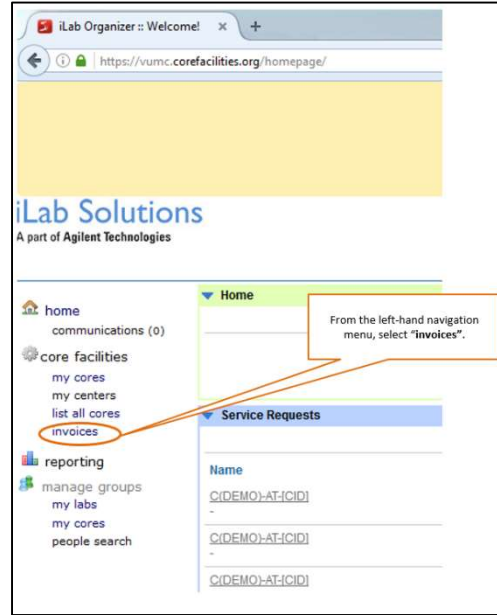


iLab Refund Process

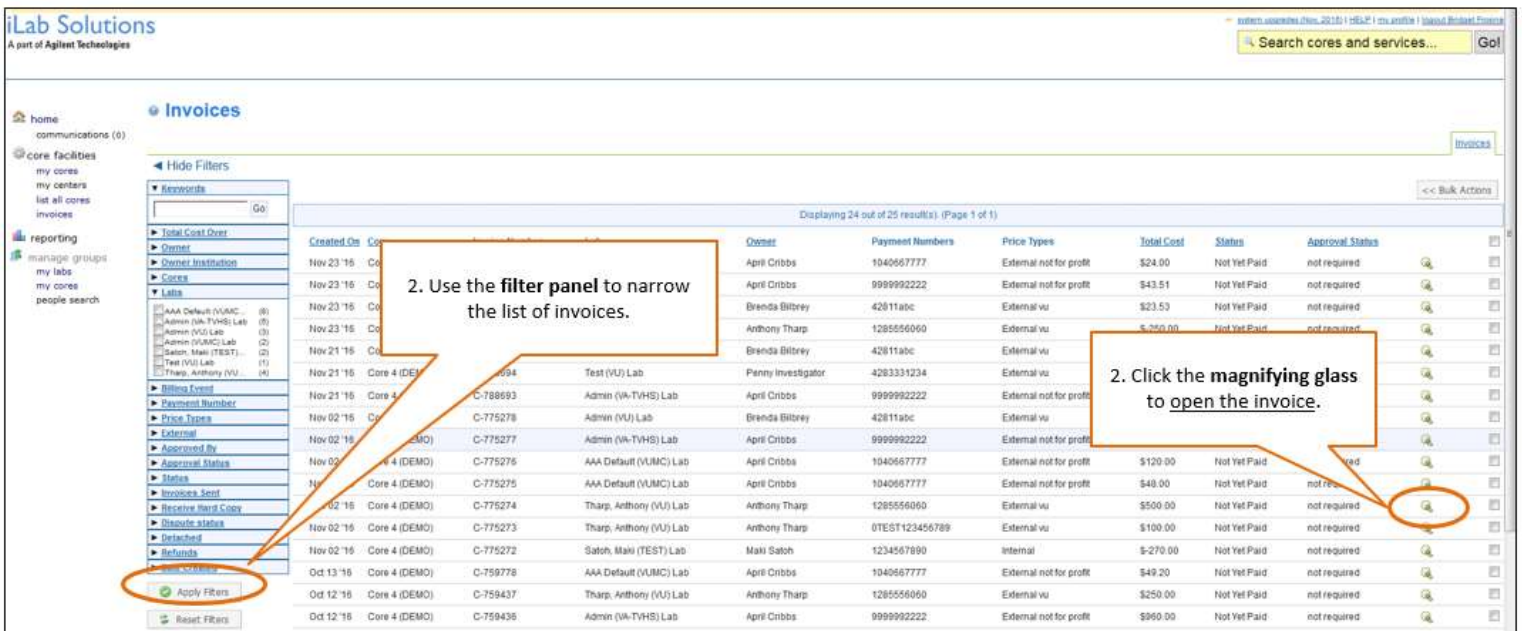
Refunds can be issued on **final invoices** only. To issue a refund, the core must navigate to the invoices list view and open the invoice.

Step 1- Navigate to the invoice.

1. In the left-hand navigation menu, select the 'invoices' option.



2. The **invoices list view** will display all of the core's invoices.
 - a. To narrow the list, invoices can be filtered through the panel located to the left of the invoice list.
3. After navigating to the invoice, click the **magnifying glass** to open the invoice.



Step 2- Issue the refund.

1. After opening the invoice, **hover over the charge** that needs to be invoiced to **display the refund icon**.

Back to Core Billing Event Mark as paid Hide details Show details

VANDERBILT UNIVERSITY
MEDICAL CENTER

Invoice No. C-790044
Final Invoice
Invoice Date November 23, 2016
Lab Admin (VA-TVHS) Lab
Payment No. 9999992222

From: Core 4 (DEMO) To: Admin (VA-TVHS) Lab | April Cribbs

[show additional contacts](#)

Invoice Total \$43.51

Invoice Details							
DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL	
▼ Request: C(DEMO)-HM-32 Start: November 23, 2016 Owner: Henry Morgan							
November 23, 2016	Sample Requisition - 1st Aliquot	9999992222	1.0	\$43.51/ea	Completed	\$43.51	
Actual cost: \$43.51		Projected cost: \$43.51				Invoice cost: \$43.51	

Invoice Total \$43.51

Powered by iLab Solutions

Notes

- For core
- For customer

2. Once the **refund icon** is clicked, a **“Create a Refund”** menu will display.
 - a. **Select the reason** for the refund for tracking purposes from the drop down menu.
 - b. **Enter the quantity** of the charge that needs to be refunded.

3. Click **‘Initiate Refund’** to complete the process.

The screenshot displays the Vanderbilt University Medical Center iLab interface. At the top, navigation links include 'Back to Core', 'Billing Event', 'Mark as paid', 'Hide details', 'Show details', and an email icon. The header features the Vanderbilt University Medical Center logo. Invoice information is shown: Invoice No. C-790044, Final Invoice, Invoice Date November 23, 2016, Lab Admin (VA-TVHS) Lab, and Payment No. 9999992222. Contact information is listed as 'From: Core 4 (DEMO)' and 'To: Admin (VA-TVHS) Lab | April Cribbs'. A table of invoice items is visible, with one item selected: 'Sample Requisition - 1st Aliquot' with a quantity of 1.0 and a cost of \$43.51. A 'Create a refund' dialog box is open over this item, containing a 'Refund Reason' dropdown menu (set to 'Select one'), a 'Refund Quantity (1.0 available to refund)' input field (set to 1.0), and an 'Initiate Refund' button. Two callout boxes provide instructions: one points to the dropdown menu and input field, stating 'Create a refund by (1) selecting a refund reason and (2) entering the quantity to refund.' The other points to the 'Initiate Refund' button, stating 'Click Initiate Refund to complete the refund process.'

Invoice No. C-790044
Final Invoice
Invoice Date November 23, 2016
Lab Admin (VA-TVHS) Lab
Payment No. 9999992222

From: Core 4 (DEMO) To: Admin (VA-TVHS) Lab | April Cribbs

[show additional contacts](#)

Invoice Total

Invoice Details

DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOT
November 23, 2016	Sample Requisition - 1st Aliquot	9999992222	1.0	\$43.51/ea	Completed	\$43.51

Actual cost: \$43.51 Projected cost: \$43.51

Invoice Total

Powered by iLab Solutions

Notes

For core

For customer

Create a refund

Refund Reason
Select one

Refund Quantity (1.0 available to refund)
1.0

Initiate Refund

Create a refund by (1) selecting a refund reason and (2) entering the quantity to refund.

Click **Initiate Refund** to complete the refund process.

4. Click **OK** on the refund notification box.



5. Once the **Initiate Refund** process is completed, the refund icon will remain on the refunded line item as a visual indicator that a refund has been entered for the charge.
 - a. The customer and department administrator will be able to access the request and view the refund icon and summary.
6. It is recommended to include **refund comments** that display on the invoice and reporting. This will help the customer understand the refund and be used as documentation for the core.
 - a. **To record refund comments**, click the **magnifying icon** on the Request line on the invoice.
 - b. The system will then display the project.
 - c. Find the refund line, click the **pencil icon**.
 - d. **A free text field will open**. Enter any applicable comments.
 - e. Click the **green checkmark** to save the changes.

Refund Billing Notes

1. The **refund will be automatically included** in the core's next billing event.
2. Refunds will appear on a **separate invoice** from any new charges.
3. The notes fields at the bottom of the invoice do not display in reporting. To record comments that display in reporting, follow step 6 above to record refund comments.