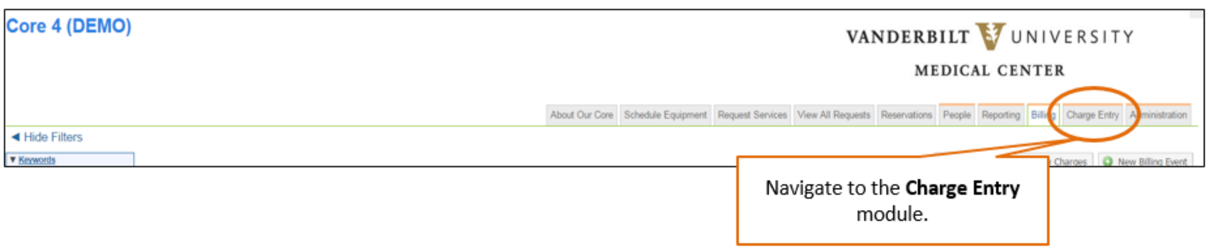
iLab Solutions – Charge Entry Billing Method

The Charge Entry module is useful for cores that will use the iLab system for billing purposes only. However, it can also be used by cores that wish to add additional charges onto existing projects requested by users.

- Cores must contact the VUMC Office of Research to activate the “Charge Entry” module for the core’s iLab site.

Navigate to the Charge Entry Tab

1. Select the ‘**Charge Entry** tab at the top of the page.
    a. The ***Quick Add*** view will be selected by default.



Step 1: Add New Charges

2. The core will need to select either the “**Create a New Request”** charge entry method or “**Add to an Existing Request”** method.
    a. <u>**Create a New Request Method:**</u>
        i. **Select the owner** by typing the customer’s name.
        ii. **NOTE:** If user is associated to multiple labs, please select the appropriate lab name.

    b. <u>**Add to an Existing Request Method:**</u>
        i. **Find the service request** by typing the customer’s name.
        ii. **NOTE:** This method requires that the customer has an active service project request on the “Services Request” tab.

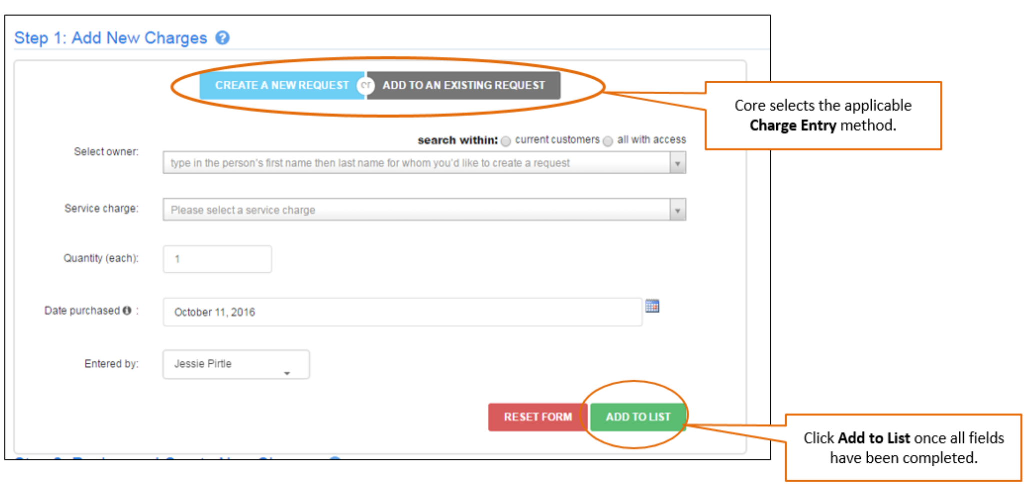
3. In the **Service Charge** field, select the service item to be billed.
    a. <u>**Core’s Service List Option:**</u>
        i. The **core’s service list** will be displayed. Select the applicable service item.

    b. <u>**Custom Charge Option:**</u>
        i. Alternatively, the core can select “**Custom Charge**” to bill for **approved pass-through charges.**
        ii. If custom charge is selected, the core must (1) select a “**Justification**”, (2) enter a “**Charge Name”**, and (3) enter the “**Charge Amount”.**
        iii. **NOTE:** A core’s use of custom pricing must be approved by the Office of Research. This option can only be used for <u>approved</u> pass-through charges that available on the core’s service list.

4. Update the “**Quantity**” as needed per item.

5. Click **Add to List**.

6. Continue to add items to list for the customer selected.

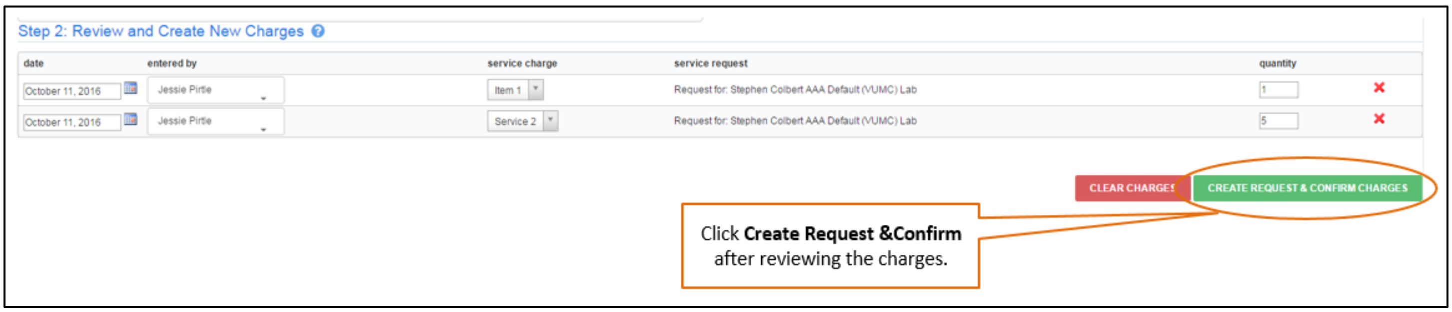


Step 2: Review and Create New Charges

7. After all items have been added, review the pending charges in the "**Step 2: Review and Create New Charges**" section.

8. Make corrections as needed.

9. Click "**Create Request & Confirm Charges**" to continue.
    a. **NOTE:** Core must **create request & confirm charges** before payment information can be entered.

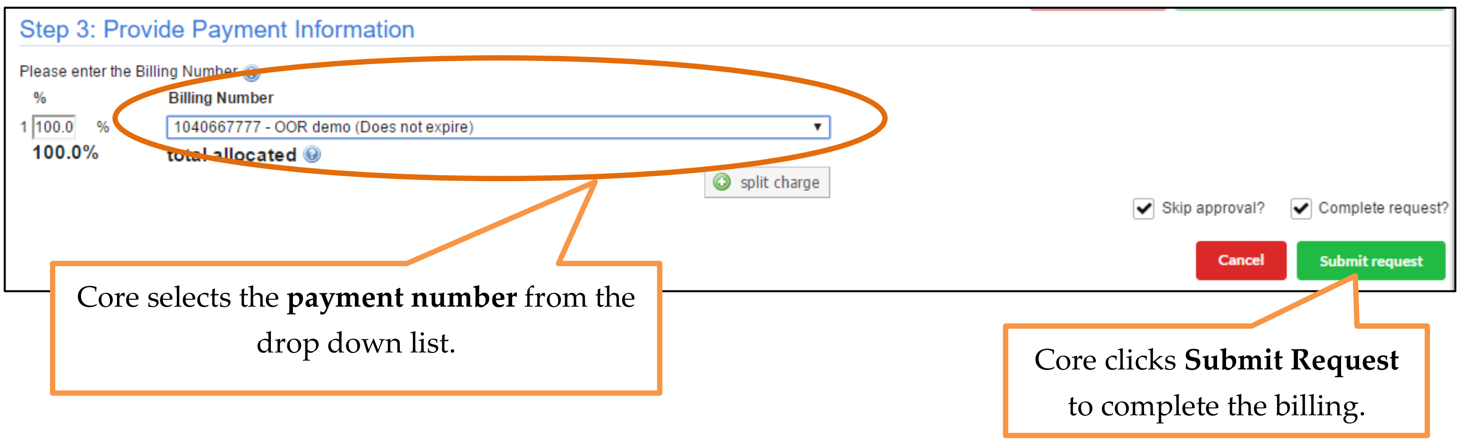


Step 3: Provide Payment Information

10. Select the appropriate **billing number** from the drop down menu in the **Payment Information** section.

11. **Confirm** the "**Complete request?**" checkbox is checked.
    a. **NOTE:** The checkbox should be checked by default.

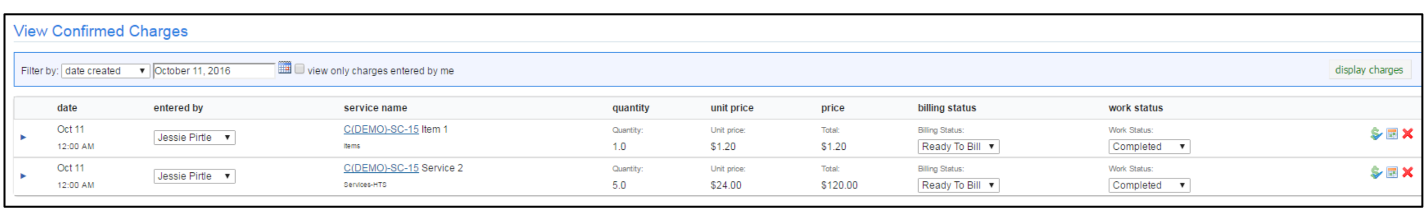
12. Click **'Submit Request"** to complete the billing.



View Confirmed Charges

After the core submits the request, a list of all confirmed charges will be displayed at the bottom of the screen.

This list will include all confirmed charges confirmed by the core since the last billing event.



Troubleshooting:

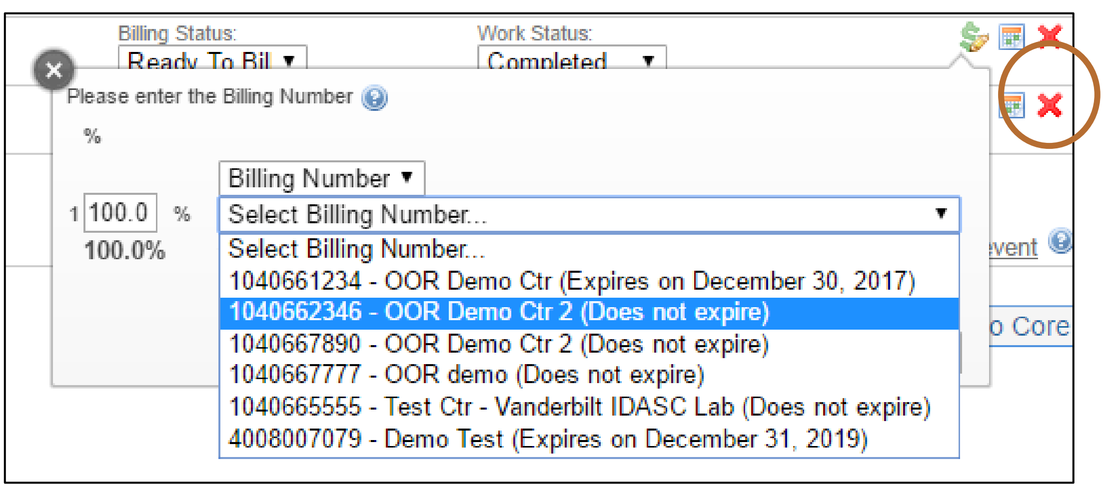
It is recommended that the core go ahead and complete the charge via charge entry even if the payment information is **not available** at the time of entering the charge.

1. The core should contact the user to have the payment information activated in iLab.
    a. VUMC department administrators can add new VUMC cost centers to iLab and assign to the PI.
    b. If the charge is being entered under the Lab Member as the user as opposed to the PI, the core will also need to contact the PI or Lab Manager to give the lab member access to the newly activated cost center.
    c. FAQs available on the Office of Research website.

2. After the payment number is activated, the core should update the payment number on the order entered earlier in the month.
    a. Recommended Method:
        i. Open the **billing** tab.
        ii. Click **view charges**.
        iii. **Navigate** to the order that is missing payment information.
            1. The yellow pencil will display on the payment icon.

Payment Icon
*Yellow Pencil = payment information missing.
*Blue Check = payment information selected and valid.

        iv. Click the **payment icon** to open.
            1. Select the **correct billing number** from the **drop down menu.**
            2. Click **Save** to save the change and close the box.



Monthly Billing

Please review the "**iLab Solutions – Creating a Billing Event in iLab**" for monthly billing requirements and details.

- Cores are required to create a billing event at the end of each month.
- If preferred, cores can create events more frequently throughout the month.

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

- Internal payments are automatically transferred from the customer's center number to the core's center number during this process.
- The core books the revenue from the external customers at this time. However, they will still need to ensure the payment (i.e., check) is received from the customer.

General guidelines for core billing schedule: The monthly core billing schedule is distributed via email each monthly one week before the billing deadline. The schedule is also available of the VUMC Office of Research website.

iLab User Guides and FAQs

Visit the [Office of Research website](https://medschool.vanderbilt.edu/oor/ilab-user-support-user-guides) to view all referenced iLab user guides and FAQS.

URL: https://medschool.vanderbilt.edu/oor/ilab-user-support-user-guides