

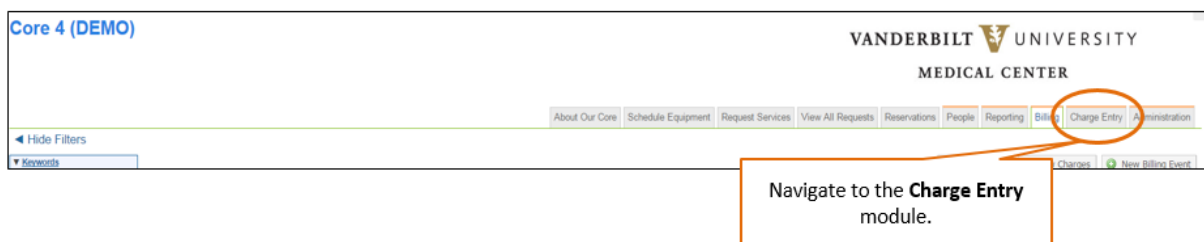
iLab Solutions – Charge Entry Billing Method

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.



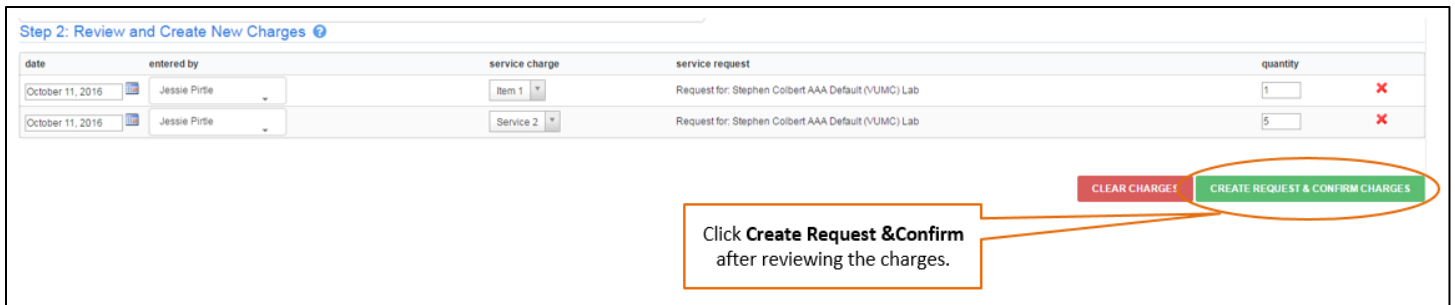
Step 1: Add New Charges

2. The core will need to select either the “**Create a New Request**” charge entry method or “**Add to an Existing Request**” method.
 - a. **Create a New Request Method:**
 - 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. **Add to an Existing Request Method:**
 - 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. **Core’s Service List Option:**
 - i. The **core’s service list** will be displayed. Select the applicable service item.
 - b. **Custom Charge Option:**
 - 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 approved 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.

The screenshot shows a web form titled "Step 1: Add New Charges". At the top, there are two buttons: "CREATE A NEW REQUEST" (highlighted with an orange oval) and "ADD TO AN EXISTING REQUEST". A callout box points to these buttons with the text: "Core selects the applicable Charge Entry method." Below the buttons, the form contains several fields: "Select owner:" with a search bar and a dropdown menu; "Service charge:" with a dropdown menu; "Quantity (each):" with a text input field containing "1"; "Date purchased" with a date picker set to "October 11, 2016"; and "Entered by:" with a dropdown menu showing "Jessie Pirle". At the bottom right, there are two buttons: "RESET FORM" and "ADD TO LIST" (highlighted with an orange oval). A callout box points to the "ADD TO LIST" button with the text: "Click Add to List once all fields have been completed."

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 2: Review and Create New Charges

date	entered by	service charge	service request	quantity
October 11, 2016	Jessie Pirte	Item 1	Request for: Stephen Colbert AAA Default (VUMC) Lab	1
October 11, 2016	Jessie Pirte	Service 2	Request for: Stephen Colbert AAA Default (VUMC) Lab	5

CLEAR CHARGE! CREATE REQUEST & CONFIRM CHARGES

Click **Create Request & Confirm** after reviewing the charges.

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.

Step 3: Provide Payment Information

Please enter the Billing Number

%
1 100.0 %
100.0%

Billing Number
1040667777 - OOR demo (Does not expire)

total allocated

split charge

Skip approval? Complete request?

Cancel Submit request

Core selects the **payment number** from the drop down list.

Core clicks **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.

View Confirmed Charges

Filter by: date created | October 11, 2016 | view only charges entered by me | display charges

date	entered by	service name	quantity	unit price	price	billing status	work status
Oct 11 12:00 AM	Jessie Pirtle	C\DEMO\SC-15 Item 1	Quantity: 1.0	Unit price: \$1.20	Total: \$1.20	Billing Status: Ready To Bill	Work Status: Completed
Oct 11 12:00 AM	Jessie Pirtle	C\DEMO\SC-15 Service 2	Quantity: 5.0	Unit price: \$24.00	Total: \$120.00	Billing Status: Ready To Bill	Work Status: Completed

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.

Billing Status: Ready To Bill Work Status: Completed

Please enter the Billing Number

1 100.0 %
100.0%

Billing Number

Select Billing Number...

Select Billing Number...

1040661234 - OOR Demo Ctr (Expires on December 30, 2017)

1040662346 - OOR Demo Ctr 2 (Does not expire)

1040667890 - OOR Demo Ctr 2 (Does not expire)

1040667777 - OOR demo (Does not expire)

1040665555 - Test Ctr - Vanderbilt IDASC Lab (Does not expire)

4008007079 - Demo Test (Expires on December 31, 2019)

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](#) to view all referenced iLab user guides and FAQs.

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

