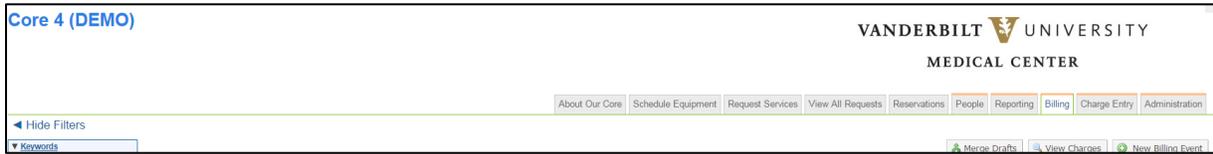


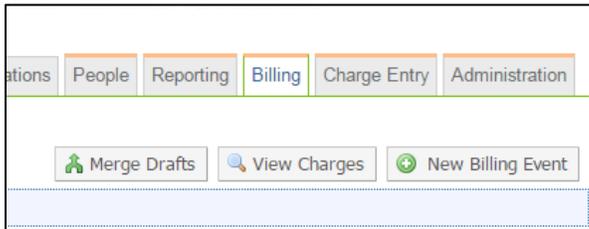
## iLab: Creating a Billing Event (Core Billing Instructions)

All cores are required to create a draft billing event at the end of each month. Navigate to your core's iLab site, click the **Billing Tab**.

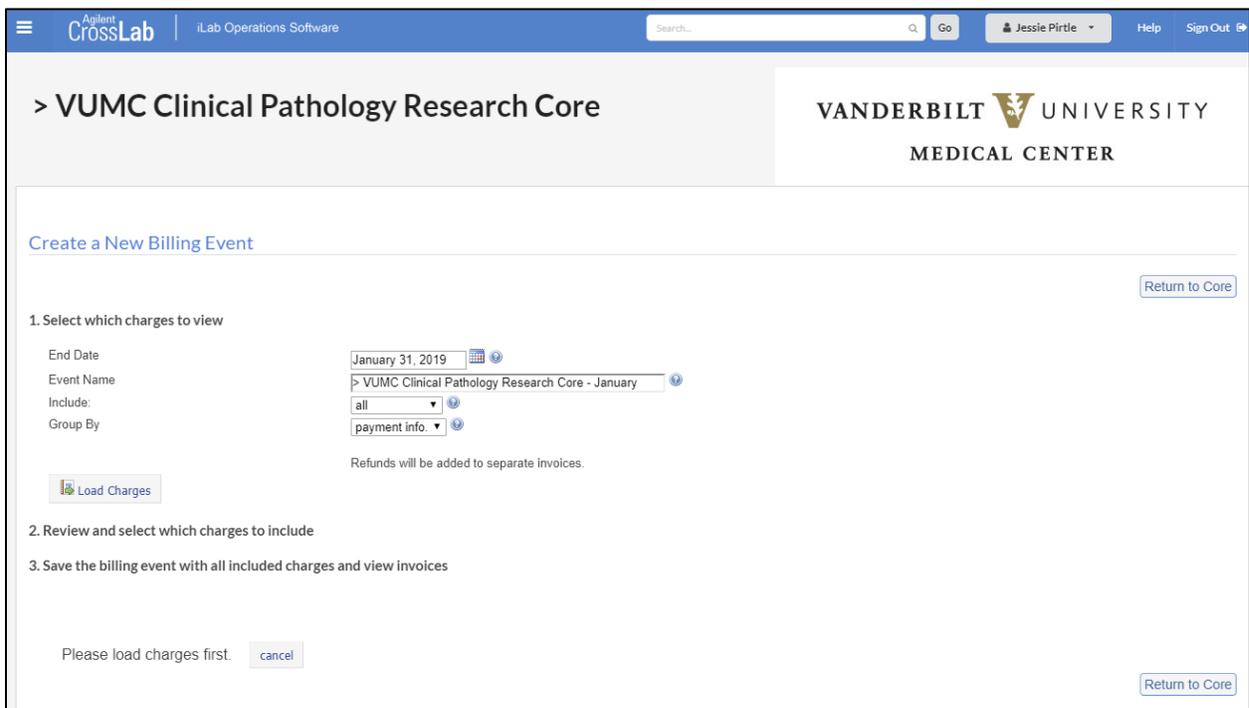


### Step 1: Initiate a New Billing Event.

1. Select **'New Billing Event'** on the top right hand side of the page.



2. The settings will all be set to the correct option by default. No changes should be made.
  - a. **"End Date"** will reference the last day of the current month.
  - b. **"Event name"** will reference core name and month of billing.
  - c. **"Include"** field will be **'all'**.
  - d. **"Group By"** field will be **'payment info'**.
3. Click **"Load Charges"** to create a list of all services that have been marked as complete and ready to bill.



## Step 2: Review and select which charges to include in the billing event.

A list of unbilled charges will be displayed. Review the charges to ensure all items should be included in the billing file for the month.

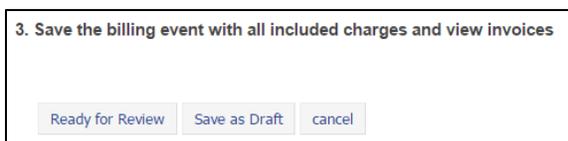
2. Review and select which charges to include						
▼ included charges						
date	customer	service id	total	payment number	status	actions
03/10	Stephen Colbert Vanderbilt Testing (TEST) Lab	CIDEMOJ-SC-18 Service 1	\$24.00 (2.0 x \$12.00)	PO Numbers:	Ready To Bill	
01/08	John Candy Vanderbilt Testing (TEST) Lab	CIDEMOJ-IC-17 Clinical Observation Room (Clini...	\$60.00 (1.0 x \$60.00)	PO Numbers:	Ready To Bill	
01/06	John Candy Vanderbilt Testing (TEST) Lab	CIDEMOJ-IC-17 Clinical Observation Room (Clini...	\$30.00 (1.0 x \$30.00)	PO Numbers:	Ready To Bill	
▼ excluded charges						
date	customer	service id	total	payment number	status	actions
03/10	John Candy Vanderbilt Testing (TEST) Lab	CIDEMOJ-IC-25 (charge) Effort Earned, per month	\$5,000.00 (1.0 x \$5,000.00)	PO Numbers:	Not Ready To Bill	
02/11	John Candy Vanderbilt Testing (TEST) Lab	CIDEMOJ-IC-25 Item 2	\$2.40 (1.0 x \$2.40)	PO Numbers:	Not Ready To Bill	
01/27	Stephen Colbert Vanderbilt Testing (TEST) Lab	CIDEMOJ-SC-18 Service 2	\$24.00 (1.0 x \$24.00)	PO Numbers:	Not Ready To Bill	
01/27	Stephen Colbert Vanderbilt Testing (TEST) Lab	CIDEMOJ-SC-18 Service 1	\$12.00 (1.0 x \$12.00)	PO Numbers:	Not Ready To Bill	

4. If needed, exclude billing line items by clicking the **green down arrow**.
  - a. This will move the line item to the **“excluded charges”** list.
  - b. The line item will be added to the **“included charges”** list the next time a billing event is created.
5. If needed, add billing line items by clicking the **green up arrow**.
  - a. This will move the line item to the **“included charges”** list. The line will be included on the billing event file.
6. Resolve all **Red Flags**. This icon indicates that payment information is missing.
  - a. Click the **Payment Info** tool to update payment information.
  - b. **IMPORTANT:**
    - i. The Office of Research cannot process billing files with missing payment information.
    - ii. Billing files received will not be submitted to Finance until all payment information is provided. **This could delay billing your core charges for at least one month.**

payment number	status
PO Numbers: No payment info set ...	Not Ready To Bill
PO Numbers: No payment info set ...	Not Ready To Bill
PO Numbers: 100.0% 405000	Not Ready To Bill

### Step 3: Save the draft billing event.

- When ready to bill, select **“Save as Draft”** to create the billing event.



- The status of created billing event will be **“Draft”**.

The screenshot shows the CrossLab iLab Operations Software interface. The user is logged in as Jessie Pirtle. The page title is '> VUMC Clinical Pathology Research Core'. The interface includes a navigation menu with tabs for 'About Our Core', 'Request Services', 'View All Requests', 'People', 'Reporting', 'Billing', 'Purchase Orders (3)', 'Charge Entry', and 'Administration'. The 'Billing' tab is active. On the left, there are filter options for 'Keywords', 'Status' (with 'Draft (2)' selected), 'Organization', 'Created By', and 'Date Added'. Below the filters, there are buttons for 'Merge Drafts', 'View Charges', 'New Billing Event', and 'View Detached Invoices'. The main content area displays a table with the following data:

Name	Created By	Status	Date Added	Value (# of charges)	Actions
> VUMC Clinical Pathology Research Core - January	Jessie Pirtle	Draft	Jan 30 '19	\$81,310.00 (2)	Summary Edit ✖
> VUMC Clinical Pathology Research Core - January	Jessie Pirtle	Draft	Jan 30 '19	\$1,520.00 (3)	Summary Edit ✖

### Notes: Draft Billing Events

- All billing events are retained within the application.
  - Previous billing events can be viewed on the **billing tab** at any time.
  - Select **“Summary”** next to the billing event to display the billing summary.
- After a core creates a billing event, the PI and/ or user can view pending charges.
  - If needed, the core can edit billing lines on the drafted billing event file as long as the status is **“Draft”**.
- The Office of Research will compile all created billing events and close the billing cycle at the end of each month.
  - The status on the events will change from **“Draft”** to **“Billing Initiated”**
    - Customers will have a brief window to review the month’s invoices and request adjustments or center changes.
  - The OOR will conduct the final close for the month. The status will change to **“File Sent”**.
    - Adjustments are no longer possible in this status.
    - Users can dispute invoices and request refunds by contacting the core directly.
    - Any refunds issued will be included in the next month’s billing event.

## Recommendations

1. Cores are **required** to generate at least one billing event at the end of the month so that their charges are included in the month's invoice file to VUMC Finance.
2. The **View Charges** tool allows cores to view pending charges without actually loading the charges for an official billing event. This is helpful for cores that simply wish to view a list of unbilled charges during the month.
3. It is recommended that each core designate **one person** in the core to create the **billing event** each month.