iLab Billing – Basic Overview
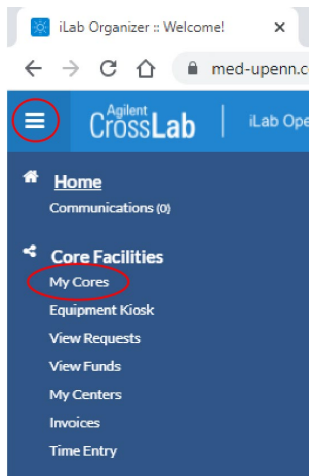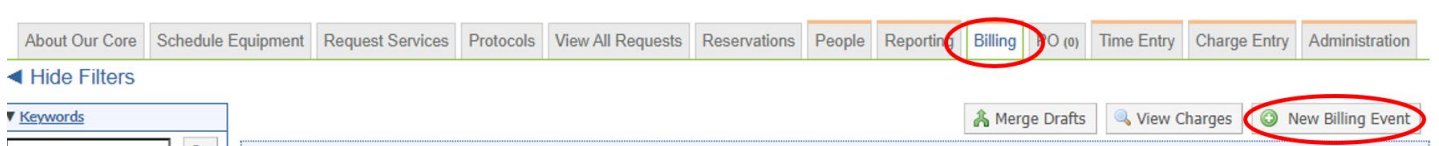
For questions or concerns please contact iLab.Support@pennmedicine.upenn.edu
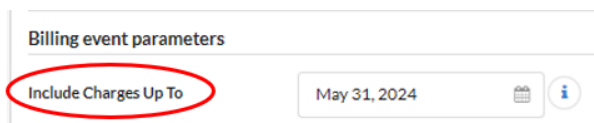
1. Visit https://med-upenn.corefacilities.org/landing/264 and login to iLab with your PennKey

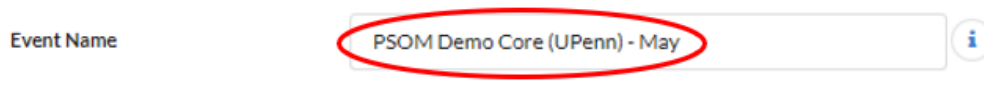2. Click the "three bar" icon on the upper right side of the page, then "My Cores."

3. Select your core from the menu that appears, click the "Billing" tab, then "New Billing Event."

4. Confirm the billing end date. iLab defaults to the end of the current month. All charges in a "Completed" or "Ready to Bill" state with a purchase date on or prior to your selected end date will load when you click the "Review Charges" button later in the process.

5. Choose a name for the billing event. iLab defaults to the name of your core facility / current month.

6. Select whether you would like the billing event to contain only internal charges, only external charges, or both. iLab defaults to including both ("all").

Select Included Charges
- all
- internal only
- external only

Group Invoices By

7. Choose how you would like to group your invoices. iLab defaults to grouping charges by lab.

Group Invoices By
- lab
- researcher
- request id
- payment info.

- Grouping charges by "lab" will produce one invoice per lab. Invoices will contain all the lab's charges for the selected end date. This is iLab's default setting and will produce one invoice per PI.
- Grouping charges by "researcher" produces one invoice per researcher. The researcher is the name of the individual who made the request in iLab. Each invoice will contain all charges for a particular researcher. If a lab has multiple individuals who requested services from your core, the PI/lab will receive more than one invoice.
- Grouping by "request id" will produce one invoice for each service request.
- Grouping by "payment info." will produce one invoice for per budget code or PO used during the selected billing period.

8. Click "Review Charges."

9. Review the charges.
- Charges with a "red flag" require action before they may be billed. Hover your mouse over the red flag to learn the type of error.

| Date	Customer	Service ID	Total ⓘ	Payment Number ⓘ	Status ⓘ	Actions
09/04	Benjamin Researcher Nelson, Sophie (TEST) Lab	PSOMDC(UP)-BR-55 SAIF-OPT IVIS Spectrum (SCTR 1-...	$0.00 (0.5 x $0.00)	Multiple: 💰 100.0% 246808642	Ready To Bill	⬇ 🗂
05/09	April Weakley 2 - Test (UPenn) Lab	PSOMDC(UP)-AW-58 SAIF-OPT Clean Up Fee (EXAMPLE)	$25.00 (1.0 x $25.00)	Multiple: 💰 No payment info set ...	Ready To Bi 🚩	⬇ 🗂

- Common red flag issues

o Do not have access to this fund - This is a CAMS related issue. The fund may have expired, or the customer may no longer have access to the fund in CAMS. You may contact the customer or their BA to correct this. If the customer has access to an alternate fund, you may click the green dollar sign to select a different payment number as directed by the customer or their BA. <u>Please note CAMS account changes are processed overnight and will be reflected in iLab the following day.</u>

| Customer	Service ID	Total ⓘ	Payment Number ⓘ
April Weakley 2 - Test (UPenn) Lab	PSOMDC(UP)-AW-58 SAIF-OPT Clean Up Fee (EXAMPLE)	$25.00 (1.0 x $25.00)	Multiple 💲 No payment info set ...

o Missing Payment Information - You may contact the customer or their PI for the appropriate fund or PO number, which can then be entered by clicking the green dollar sign as shown above. Please note that the individual on the service request must have access to the fund in CAMS for internal requests. For external requests, you can choose to add the customer to the appropriate PO, which will then appear as a payment option after clicking the green arrow.

• Charges with a yellow flag indicate non-billable services, such as pro-bono work. These charges will appear as $0 on the associated invoice.

Not Billable 🚩

• You may choose to correct the red flag billing errors; or you may choose to exclude the flagged charges from the billing event by clicking the corresponding green arrow beneath the "Actions" column. The selected charge will be removed from the current billing event but will repopulate for subsequent billing events.

Actions ⓘ

⬇
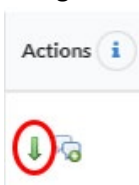
10. After reviewing all charges, you may to choose to save the event as a draft, or to press the "Create Billing Event" button to continue the billing process. If you choose the save the event as a draft, you may access and complete it at any time by returning to your core's "Billing" tab.

Cancel   Save Draft   Review Charges   **Create Billing Event**
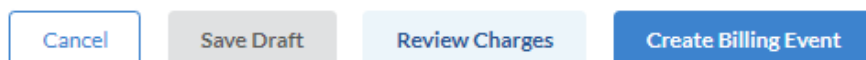
11. After clicking the "Create billing event" button, you will be taken to a screen showing an overview of your recent billing events. Click "Invoices" in the "Actions" column of the billing event you would like to complete. Please note this button will not appear until iLab has finished creating the billing event.

Name	Created By	Status	Date Added	Value (# of charges)	Actions
PSOM Demo Core (UPenn) - May	April Weakley	Billing Initiated	May 10 '24	$30.00 (5)	Summary Invoices ✖

12. This will bring you to the "Bulk Invoice Mailer" screen. Here you may choose to add a custom message to your core's default template text by checking the "Prepend customer message to invoice emails" box. If you do not check the box or edit the text, invoices will be sent with your core's default template text. The text was established during your core's iLab implementation. To change the default template text please contact iLab.Support@Pennmedicine.upenn.edu.


13. Click "Send Invoices." By default, all invoices in your core remain hidden on the invoice list view to your customer. Clicking "Send Invoices" will make all invoices on this billing event visible to your customers.
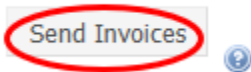

14. After sending the invoices, click the "Summary" tab at the top of the screen.
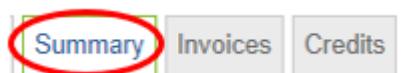

15. Click the "Send File to UPenn" button to complete the billing event. Please note this step will prohibit you from making changes to the invoices or the billing event in iLab moving forward.
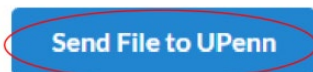
- Internal charges will be processed by CAMs overnight, and automatically marked as "paid" in iLab.
- External charges must be manually marked as paid upon receipt of payment.
   - To mark an individual external invoice as "paid" visit the "Billing" tab of your core facility and click "Invoices" for the appropriate billing event as detailed above.
   - Find the invoice you wish to mark as "paid" and click the "update status" icon
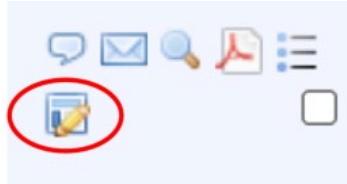
o Update the invoice status to "Mark as Paid."
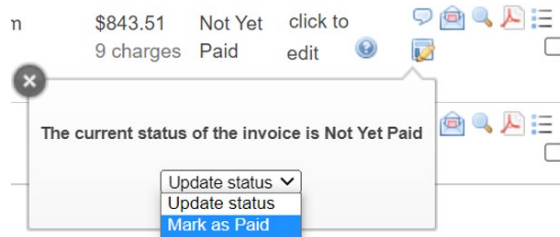
o If you have a billing event containing only external invoices, and have received payment for each, you may bulk update their invoice status to "Paid" by updating the "Mark all invoices as" dropdown.