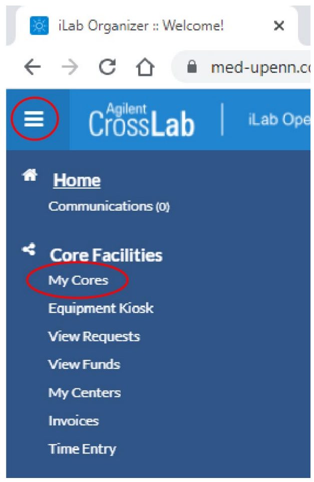
iLab Billing – Basic Overview

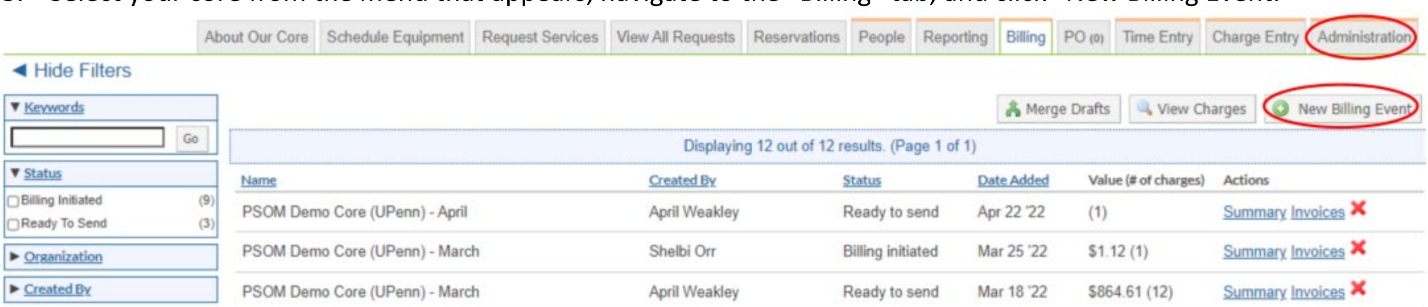
For questions or concerns please contact iLab.Support@pennmedicine.upenn.edu

1. Visit https://med-upenn.corefacilities.org/landing/264 to login to iLab with your PennKey

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

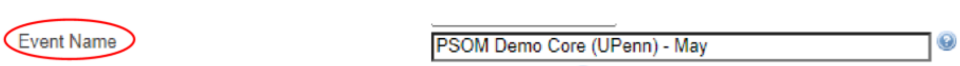


3. Select your core from the menu that appears, navigate to the "Billing" tab, and click "New Billing Event. "



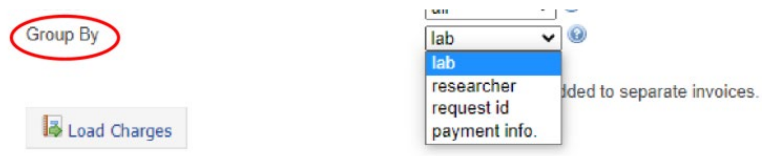
4. Confirm the billing end date. iLab defaults to the end of the current month.

5. Confirm the event name. iLab defaults to the name of your core facility / current month.



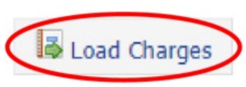
6. Confirm whether you would like the billing event to contain only internal invoices, only external invoices, or both. iLab defaults to including both (“all”).

7. Confirm how you would like the charges to be grouped. iLab defaults to grouping charges by lab.



    1. 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.
    2. Grouping charges by “researcher” produces one invoice per researcher. Invoices will contain all charges for a particular researcher.
    3. Grouping by “request id” will produce one invoice for each service request.
    4. Grouping by payment info will produce one invoice for each budget code and/or PO utilized during the selected billing period.

8. Click “Load Charges”

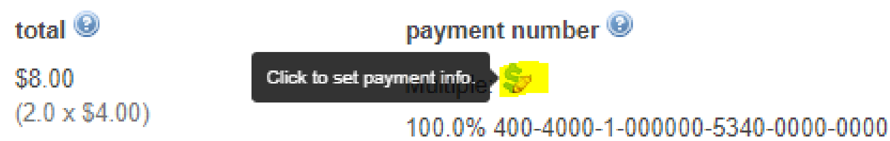


9. Review the charges.
    1. Charges with a “red flag” require action before they can be billed. Hover the mouse over the flag for further details.

    2. You may choose to correct the red flag billing errors; or you may choose to exclude them from this billing event by clicking the green arrow beneath the “Actions” column. These will be removed from the billing event and can be included at a later date.

        1. Common red flag issues
            A. 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,

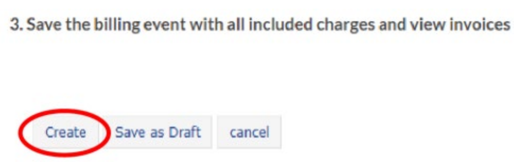
or you may click the green dollar sign to select another payment method as directed by the customer. Please note CAMS account changes are processed overnight and will be reflected in iLab the next day.



B. 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.

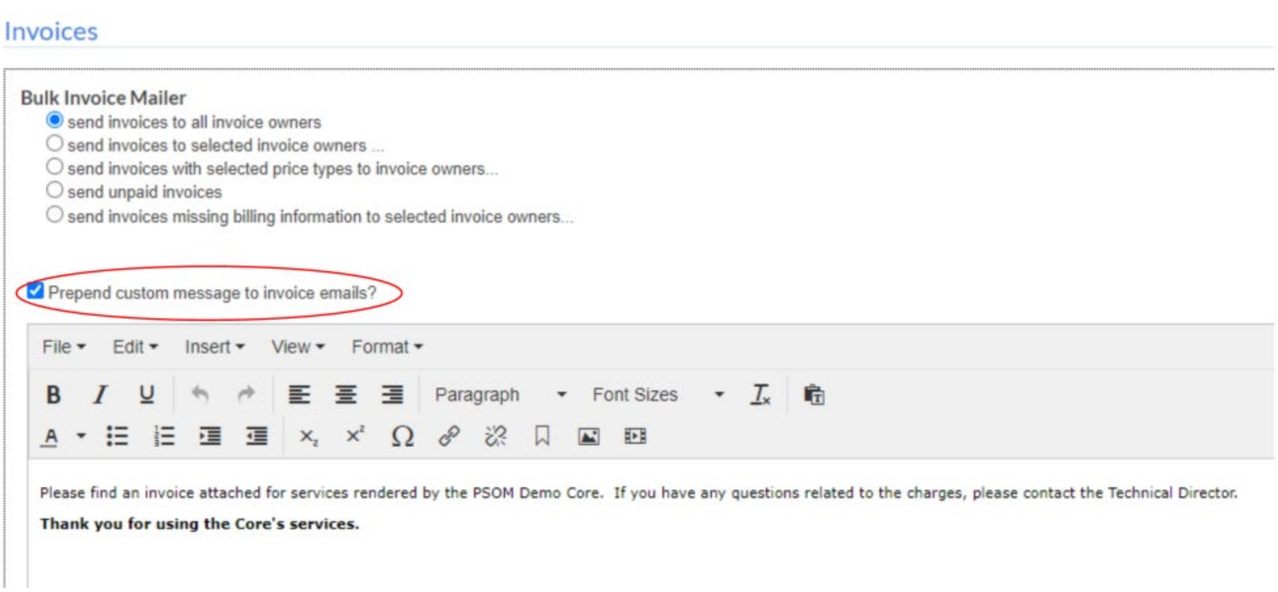
3. Charges with a yellow flag indicate non-billable services, such as pro-bono work. These charges will appear as $0 on the associated invoice.

10. Press the "Create" button at the bottom of the screen



11. Click "Invoices" in the "Actions" column of your billing event (this will appear after iLab has finished processing).

12. This will bring you to the "Bulk Invoice Mailer" screen. Here you may add a custom message to the invoice emails by checking the "Prepend customer message to invoice emails" box.



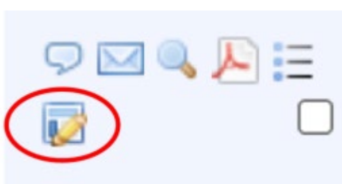
1. Please note each invoice will already contain the default header/footer your core facility established during the iLab implementation process.

13. Click “Send Invoices”

14. After reviewing the invoices, click the “Summary” tab at the top of the screen.

15. Click the “Send File to UPenn” button. This step will lock the invoices and the billing event from further changes in iLab.

1. Internal charges will be processed by CAMs overnight, and automatically marked as “paid” in iLab.
2. External charges will need to be manually marked as paid upon receipt of payment.
   A. To mark an external invoice as “paid” visit the “Billing” tab of your core facility and click “Invoices” for the appropriate billing event as detailed above.
   B. Find the invoice you wish to mark as “paid” and click the “update status” icon



3. Update the invoice status to “mark as paid.”