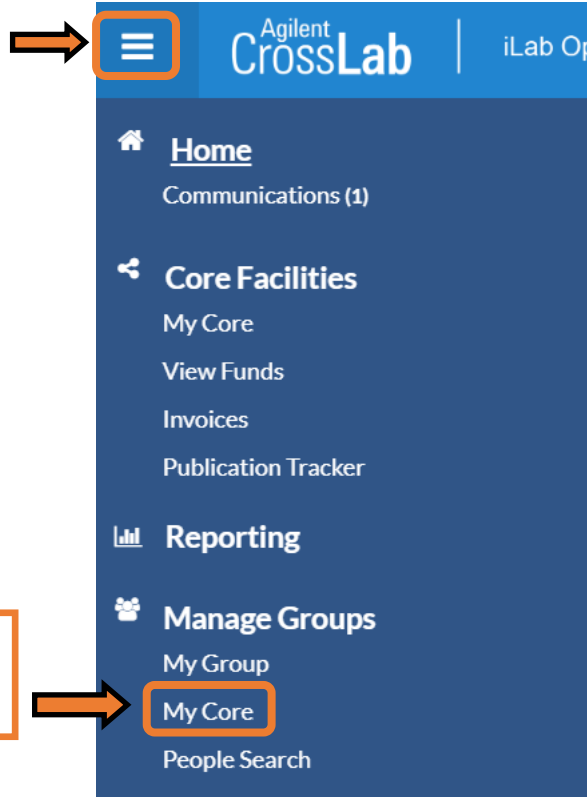




## Subject and Task: CWRUCores Billing on iLab

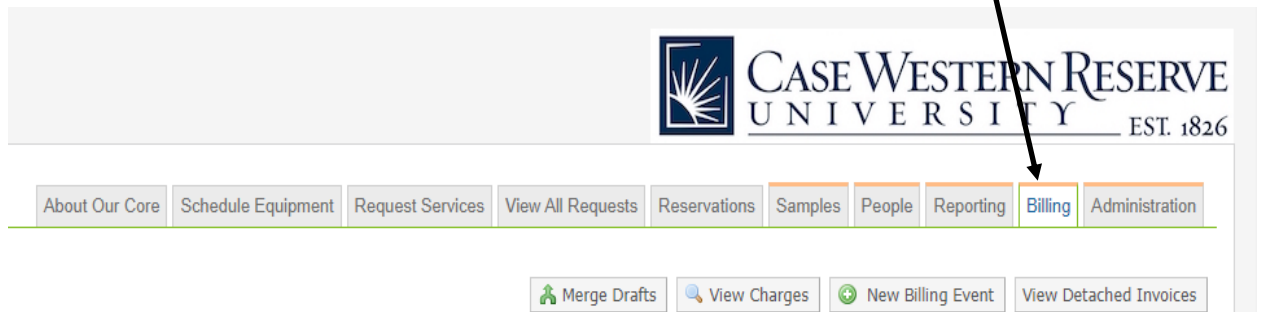
1.) After logging in, select the hamburger symbol in the top left corner.



2.) Hover over "My Core" and select your Core from the list.

**Note:** If you cannot see orange crowned tabs, contact [cwrucores@case.edu](mailto:cwrucores@case.edu) to gain access

3.) Select the orange crowned "Billing" tab.



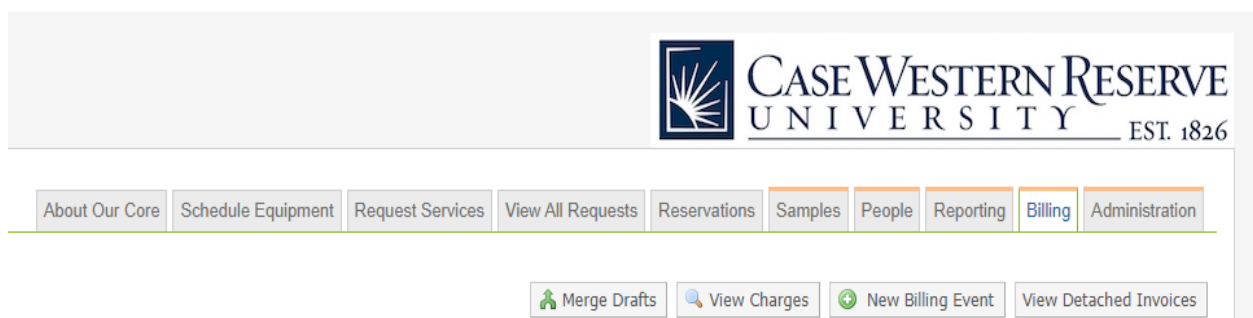
4.) Select "View Charges".

5.) Confirm the billing & work status of each charge line.

billing status	work status
Billing Status: Ready To Bill ▾ Cancelled Not Ready To Bill Ready To Bill Not Billable Pro Bono	Work Status: Completed ▾ Proposed Financials Approved Processing Completed Cancelled

If **you** initiate your Core's Billing Events continue to **Step 6**.

If **Research Administration** initiates your Core's Billing Events continue to **Step 13**.






6.) Select "New Billing Event".


7.) Initiate an *internal* billing event.

## Create a New Billing Event

### Billing event parameters

Include Charges Up To   

Event Name  







Select Included Charges  

8.) Select "Review Charges".











9.) Review Invalid Charges and correct **errors**.

### Invalid Charges 4



Date	Customer	Service ID	Total 	Payment Number 	Status 	Actions 
11/18/2024	Jessica... ... (LRI) Lab	...3431 Clinical Blood/Bone Marrow - Cry...	\$660.00 (11.0 x \$60.00)	Multiple:  100.0% PO or invoice	Missing external customer ID	








### Included Charges 750

Date	Customer	Service ID	Discount	Total 	Payment Number 	Status 	Actions 
02/16	Wayne Researcher Testing (TEST) Lab	CWRUDEMOC-WR-3 Recurring Charge		\$12.00 (1.0 x \$12.00)	Multiple:  100.0% Popo	Ready To Bill	 
02/17	Wayne Researcher Testing (TEST) Lab	CWRUDEMOC-WR-3 Recurring Charge		\$12.00 (1.0 x \$12.00)	Multiple:  100.0% Popo	Ready To Bill	 

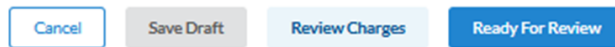
10.) Designate which charges will be included and which will excluded (if any). By default, all eligible charges are included. To exclude a charge, click on the green down arrow beside the charge. It will move to the excluded charges section. To include a charge that was previously excluded, click on the green up arrow. Similarly, the charge will display in the included charges section.

### Excluded Charges 1



Date	Customer	Service ID	Discount	Total 	Payment Number 	Status 	Actions 
02/16	Wayne Researcher Testing (TEST) Lab	CWRUDEMOC-WR-3 Recurring Charge		\$12.00 (1.0 x \$12.00)	Multiple:  100.0% Popo	Ready To Bill	 

**11.)** Select “Ready For Review” to send file to Research Administration for processing.






**Note:** “Save Draft” will *not* be processed by Research Administration.



**12.)** Initiate an *external* billing event by repeating **Steps 6-10**.

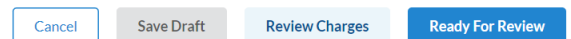
### Create a New Billing Event

#### Billing event parameters

Include Charges Up To   

Event Name  

Select Included Charges   



**13.) Complete.** Your Core’s monthly billing is now with Research Administration. There are no further steps for the Core Administrators to take.

# Notes from CWRU Research Administration

## Billing Status




**Draft:** The billing event is still with the Core Administrators. This will *not* be processed by Research Administration.

**Pending Review:** The billing event is pending processing with Research Administration. Please refer to the billing calendar for CWRUCore billing dates.

**Billing Errors:** *If Billing Errors* are found and cannot be corrected by month's end, then the invoice will be detached from the current month's Billing Event. The invoice will move into the queue to be included in next month's billing. CWRU Research Administration will work to correct the error.

**Ready to Send:** The billing event was sent from Research Administration to CWRU Accounting and will process overnight.

**File Sent:** The billing file was received by CWRU Accounting. Billing is Complete.

 Merge Drafts  View Charges  New Bill

Displaying 30 out of 164 results. (Page 1 of 6)

← Pre

Name	Created By	Status	Date Added	Value (# of charges)
CORE - April 2024 External	[REDACTED]	Pending review	Apr 25 '24	\$7,657.00 (8)
CORE - April 2024 Internal 2	[REDACTED]	Ready to send	Apr 25 '24	\$11,271.00 (15)
CORE - April 2024 Internal	[REDACTED]	Billing errors	Apr 25 '24	\$3,144.65 (104)
CORE - March 2024 External	[REDACTED]	File sent	Mar 26 '24	\$600.00 (2)

## Collections Workflow

**Note:** Research Administration is always trying to update the Lab contacts. The standard is to have a minimum of 2 contacts (1 FM in addition to the PI), but more is always better.

## Send Email

To: Invoice Owner Financial Managers Department Managers Principal Investigator Researchers  
 Harleigh Tennant  Nichole Thomas  William Schieman  Michael Piccirillo  Jane Doe

Day 1: Research Administration emails all **external** invoices to IO, FM, & PI.

Day 90: *If the invoice is 90 Days Past Due*, Research Administration sends follow up email to IO, FM, & PI, and verifies lab contact information.

Day 120: *If the customer does not reply to the 90 Day Follow Up*, Research Administration will cc DM.

Day 150: *If the customer still does not reply*, Research Administration will cc CWRUCore Administrators for additional assistance.