

Columbia University Billing Workflow

- [Confirming Reservations](#)
- [Completing Charges](#)
- [Creating a Billing Event](#)
- [Correcting Billing Errors](#)
- [Sending Internal Charges to ARC](#)
- [Verifying Charges Uploaded in ARC](#)

Confirming Reservations

From the 'Schedule Equipment' tab, click the Confirm Usage button.

The screenshot shows the 'Zuckerman Institute Virology Core' interface. At the top right is the Columbia University logo and 'College of Physicians and Surgeons'. Below is a navigation bar with tabs: 'About Our Core', 'Schedule Equipment' (highlighted in yellow), 'Request Services', 'View All Requests', 'Reservations', 'People', 'Reporting', 'Billing', 'PO (0)', and 'Administration'. Under the 'Schedule Equipment' tab, there is a 'Confirm Usage' button (highlighted in yellow) and a 'Message Customers' button. Below the navigation bar, there is a 'Schedule Resources' section with a red arrow pointing to the 'Confirm Usage' button. A text block below explains that trained users should click to view the schedule and use the calendar interface to reserve time. It also notes that new/untrained users cannot schedule until trained and should contact the core at js1719@columbia.edu. At the bottom left, there is a link for 'Cellomics CX5' with sub-links for 'description' and 'pricing'. At the bottom right, there are buttons for 'View Schedule' and 'Review Usage'.

Confirm all reservations in the 'Valid' status. Update any 'Invalid' reservations by clicking on the menu icon (the three dashes to the right of the confirm button).

The screenshot shows a table of reservations for the 'Zuckerman Institute Virology Core'. The table has columns: Owner, Resource, Start date, Duration, Usage type, Cost, Source, Status, and Confirm. There are four rows of reservations, all with a 'Valid' status. A red box highlights the 'Valid' status in the Status column of the first row, and a red arrow points to the menu icon (three dashes) to the right of the 'Valid' status. To the right of the table is a 'Select resources' sidebar with a search box, a 'Show all resources' dropdown, and a list of resources including 'Cellomics CX5'. There is an 'Apply' button at the bottom of the sidebar. At the top right of the table area, there is a dropdown menu for 'Unconfirmed reservations' and a 'Start date' button.

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm
Sally Owens	Cellomics CX5 (Instance 1)	07 May 2018 10:00 AM	3.00 hrs	Default usage type \$50.00/hr	\$150.00	Scheduled	Valid	Confirm
Gillian Smith	Cellomics CX5 (Instance 1)	07 May 2018 01:15 PM	3.00 hrs	Default usage type \$50.00/hr	\$150.00	Scheduled	Valid	Confirm
Krystal Jones	Cellomics CX5 (Instance 1)	08 May 2018 10:15 AM	5.75 hrs	Default usage type \$50.00/hr	\$287.50	Scheduled	Valid	Confirm
Sally Owens	Cellomics CX5 (Instance 1)	09 May 2018 10:15 AM	3.00 hrs	Default usage type \$50.00/hr	\$150.00	Scheduled	Valid	Confirm

Completing Charges

From the View All Requests Tab, you need to 'Complete' charges that you are ready to bill for. You can do this by either clicking on the top 'Complete' button under the status column (this will complete the entire project and all the charges within that project) or, if you are only ready to complete specific charges within the project, you can toggle open the project (by using the blue triangle to the left of the date column) and complete individual charges.

Navigation: About Our Core | Schedule Equipment | Request Services | **View All Requests** | Reservations | People | Reporting | Billing | PO (0) | Administration

Buttons: Message Customers | Reload Active Requests

Section: **active requests**

date	for	service id	status	payment number	cost
May 10 (May 10 2018)	Sally Owens Abrams, Julian (CUMC) Lab	ZIVC-SO-4	Processing		\$235.00 (\$235.00)

Left sidebar filters: Status (Draft (1), Processing (3)), Category, Labels, Assigned To, Lab, Owner, Institution, Payment Number, Payment Method, Request Date, Start Date, Due Date, Completed Date.

Request details table:

date	description	Quantity	Unit Price	Total	Billing Status	Work Status	actions
May 10 12:46 PM	pAAV.hSyn.GCamp6f.WPRE.SV40 (2.1) (100 ul) Catalog AAV Calcium Tracers	1.0	\$75.00	\$75.00	Not Ready To Bill	Processing	Complete
May 10 12:46 PM	N2C dG Rabies WTG- ChR-YFP (10 ul) Catalog Rabies WTG	1.0	\$80.00	\$80.00	Not Ready To Bill	Processing	Complete
May 10 12:46 PM	N2C dG Rabies WTG- GFP (10 ul) Catalog Rabies WTG	1.0	\$80.00	\$80.00	Not Ready To Bill	Financials Approved	Process

Creating a Billing Event

Navigate to the billing tab to create a billing event. Click on 'View Charges' to see confirmed reservations and completed charges that can be pulled into your billing event. Click on 'New Billing Event' to create a new billing event.

Organization: Zuckerman Institute Virology Core | COLUMBIA UNIVERSITY College of Physicians and Surgeons

Navigation: About Our Core | Schedule Equipment | Request Services | View All Requests | Reservations | People | Reporting | **Billing** | PO (0) | Administration

Buttons: View Charges | New Billing Event | View Detached Invoices

Name	Created By	Status	Date Added	Value (# of charges)	Actions
Zuckerman Institute Virology Core - April	iLab AdminJB	Ready to send	Apr 26 '18	\$75.00 (1)	Summary Invoices

Set the fields under section 1 and click 'Load Charges'.

Section 1: Select which charges to view

End Date: May 31, 2018

Event Name: Zuckerman Institute Virology Core - May

Include: all

Group By: lab

Buttons: Load Charges | Return to Core

Section 2: Review and select which charges to include

Section 3: Save the billing event with all included charges and view invoices

Please load charges first. cancel | Return to Core

Review all charges in the billing event, update any with red flags, then click 'Create'.

2. Review and select which charges to include

▼ Included charges

date	customer	service id	total	payment number	status	actions
04/25	Danielle Ahn Ahn, Danielle (CUMC) Lab	ZIVC-DA-3 Cellomics CX5 (Instance 1) Wed...	\$100.00 (2.0 x \$50.00)	Multiple 100.0% GG012957-01 1K08HL138289-01	Ready To Bill	
05/10	Sally Owens Abrams, Julian (CUMC) Lab	ZIVC-SO-4 N2C dG Rabies WTG- GFP (10 ul)	\$80.00 (1.0 x \$80.00)	Multiple No payment info set...	Not Ready To Bill	
05/10	Sally Owens Abrams, Julian (CUMC) Lab	ZIVC-SO-4 N2C dG Rabies WTG- CHR-YFP (10 ul)	\$80.00 (1.0 x \$80.00)	Multiple No payment info set...	Not Ready To Bill	
05/10	Sally Owens Abrams, Julian (CUMC) Lab	ZIVC-SO-4 pAAV hSyn GCamp6f WPRE.SV40 (2.1...	\$75.00 (1.0 x \$75.00)	Multiple 100.0% IN002069-01 B-600	Not Ready To Bill	
04/19	Tsehay Ashagre Ashagre, Tsehay (CUMC) Lab	ZIVC-TA-1 pAAV hSyn GCamp6f WPRE.SV40 (2.1...	\$75.00 (1.0 x \$75.00)	Multiple 100.0% GG000004-01-GOVERNMENT GRANT PROXY	Not Ready To Bill	

3. Save the billing event with all included charges and view invoices

Create Save as Draft cancel

Return to Core

Correcting Billing Errors

If you didn't address any red flags, or there are other errors, your billing event will have a 'Billing Errors' tab. Click on the 'Billing Errors' tab to view the errors.

Zuckerman Institute Virology Core - May

Return to Core **Billing Errors** Summary Invoices Credits

Billing Event Summary

Warning: This billing event has one or more charges with an error.
Please click on the 'billing errors' tab at the top to see more details and resolve any errors before you can finalize this billing event.

Email Summaries

Summary	Price Type	Billing Status
<p>Created On May 11, 2018 at 16:51</p> <p>End Date May 31, 2018 at 23:59</p> <p>Charges 6 charges totaling in \$490.00</p> <p>Grouped By lab</p>	<p>Internal - Columbia (\$490.00)</p>	<p>Billing Initialized (\$490.00)</p>

Click on the invoice number or 'View Invoice' to view the invoice and fix the error. Once all errors have been resolved click 'Revalidate'. This will remove the Billing Errors tab.

Zuckerman Institute Virology Core - May

Return to Core Billing Errors Summary Invoices Credits

Billing Errors

Internal Charges Missing Customer Information

Validation last run on May 14, 2018 Revalidate

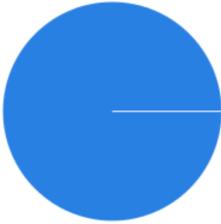
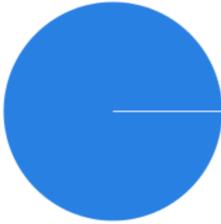
Invoice Number	Lab	Owner	View Invoice
ZIVC-5795	Abrams, Julian (CUMC) Lab	Julian Abrams	View Invoice

Sending Internal Charges to ARC

Click 'Send File to ERP Columbia' to send the internal charges to ARC. These charges will be sent that evening as there is no delay. Please note that external charges are not directly fed into ARC.

Billing Event Summary

Email Summaries

Summary	Price Type	Billing Status
<p>Created On Jun 05, 2018 at 13:48</p> <p>End Date Jun 30, 2018 at 23:59</p> <p>Charges 28 charges totaling in \$1,990.00</p> <p>Grouped By lab</p>	 <p>Internal - Columbia (\$1,990.00)</p>	 <p>Billing Initialized (\$1,990.00)</p>

Download Files

Send File to ERP Columbia

Once you have clicked send file, please click 'Email Summaries', add your Financial Manager's (ARC User) email, and click send. This will inform your Financial Manager you have created a billing event in iLab and they will need to check that charges have posted in ARC the following day.

Email Billing Event Summaries

Send Summary to Institution Managers

Send Summary to Service Center Managers

Send Summary to Additional Emails

Include Financial Manager's Email Here

Cancel
Send

Verifying Charges Uploaded in ARC

After you click 'Send Files to ERP Columbia' you will need to login to iLab the following day to verify the file was uploaded in ARC.

First check that your billing event has been sent to ARC by clicking on the 'Summary' tab of your billing event. Under the 'Download Files' section you will see a message that says, 'The billing file has been sent'. If you see the message 'The billing file has already been scheduled to be

sent', this means your file has not been sent to ARC and you will need to reach out to iLab Support for help in sending the file.

[Return to Core](#) | [Summary](#) | [Invoices](#) | [Credits](#)

Billing Event Summary

🔄 Email Summaries

Summary

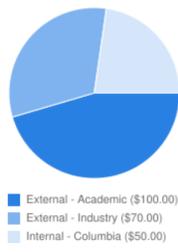
Created On
Apr 18, 2018 at 18:30

End Date
Apr 30, 2018 at 23:59

Charges
5 charges totaling in \$220.00

Grouped By
lab

Price Type



- External - Academic (\$100.00)
- External - Industry (\$70.00)
- Internal - Columbia (\$50.00)

Billing Status



- Billing Initialized (\$220.00)

Download Files

The billing file has been sent

Please contact ilab-support@agilent.com

Once you have verified your file has been sent, click on the 'Invoices' tab to verify your invoices have been marked as 'Paid'. If your invoices are still in an 'Unpaid' status, please reach out to P&S Office for Research/Jennifer Williamson to learn what changes to the billing event need to be made for the file to be uploaded in ARC.

Invoice List

◀ Hide Filters

▼ Keywords

 Go

📄 Get PDF of Invoices

📄 Download Results as CSV

✉ Email Admins with Access to Invoices

	Lab And Institution	Invoice Owner	Invoice Number	Payment Numbers	Total Cost	Status	Comment
<ul style="list-style-type: none"> ▶ Total Cost Over ▶ Owner ▶ Owner Institution ▶ Labs ▶ Payment Number ▶ Price Types ▶ External ▶ Approved By ▶ Approval Status ▶ Status ▶ Invoices Sent 	Abate-Shen, Corinne (CUMC) Lab (435044) <small>(Columbia University)</small>	Corinne Abate-Shen <small>(invoice_owner)</small>	ZIVC-6031	GG010326-01 5R01CA183929-04	\$1,140.00 10 charges	Paid	click to edit 10 mark as billed
	Abbott, Dallas Helen (CUMC) Lab (435100) <small>(Columbia University)</small>	Dallas Helen Abbott <small>(invoice_owner)</small>	ZIVC-6030	GG013227-01 OCE-1757602	\$1,165.00 8 charges	Paid	click to edit 8 mark as billed
	Abaci, Hasan (CUMC) Lab (436304) <small>(Columbia University)</small>	Hasan Abaci <small>(invoice_owner)</small>	ZIVC-6029	GG013528-01 1K01AR072131-01	\$965.00 8 charges	Paid	click to edit 8 mark as billed