

How to Process a Billing Event

For Core Operators and Resource Managers, the following instructions detail how to generate a billing event in iLab, send invoices, and process payment.

1. To begin, log in to iLab and navigate to your core. Click on the “Billing” tab:

The screenshot shows the iLab interface for the MCW Test Core. The navigation menu at the top includes 'Billing', which is highlighted with a red box. Below the navigation menu, there are several buttons: 'Merge Drafts', 'View Charges' (highlighted with a red box), 'New Billing Event', and 'View Detached Invoices'. The main content area displays a table of billing events with the following data:

Name	Created By	Status	Date Added	Value (# of charges)	Actions
MCW Test Core - April	Amanda Casey	Billing errors	Apr 22 '19	\$96.00 (2)	Summary Invoices ✖
MCW Test Core - December	Amanda Casey	Billing errors	Dec 11 '18	\$490.00 (3)	Summary Invoices ✖
MCW Test Core - November	Ashleigh Sanchez	Billing errors	Nov 20 '18	\$156.00 (2)	Summary Invoices ✖
MCW Test Core - October	Amanda Casey	Draft	Oct 25 '18	\$140.00 (2)	Summary Edit ✖
MCW Test Core - October	Amanda Casey	Draft	Oct 25 '18	\$391.00 (4)	Summary Edit ✖
MCW Test Core - October	Ashleigh Sanchez	Billing initiated	Oct 23 '18	(7)	Summary Invoices ✖
MCW Test Core - July	Amanda Casey	Billing initiated	Jul 24 '18	\$144.00 (2)	Summary Invoices ✖

2. To preview the charges that will be included in the Billing Event, click the **View Charges** button. Every charge that was placed in a status of “Ready to Bill” since your last Billing Event will be listed here.

The screenshot shows the 'Upcoming Charges for the MCW Test Core' page. The page displays a table of charges with the following data:

date	customer	service name	quantity	unit price	total price	billing status	work status
Jan 25 06:51 PM	Ashleigh Sanchez	MCWTC-AS-17 Diet Assessment (Internal)	1.0	\$20.00	\$20.00	Ready To Bill	Completed
Jan 11 03:39 PM	Rebecca Gasper	MCWTC-RG-15 Skinfolds (Internal)	0.0	\$30.00	\$0.00	Ready To Bill	Completed
Jan 11 03:39 PM	Rebecca Gasper	MCWTC-RG-15 Diet Assessment (Internal)	1.0	\$20.00	\$20.00	Ready To Bill	Completed
Jan 10 01:01 PM	Rebecca Gasper	MCWTC-RG-14 Service 2 Category A (Internal)	1.0	\$56.00	\$56.00	Ready To Bill	Completed
Jan 10 01:01 PM	Rebecca Gasper	MCWTC-RG-14 Service 1 Category A (Internal)	1.0	\$5.00	\$5.00	Ready To Bill	Completed
Jan 10 01:01 PM	Rebecca Gasper	MCWTC-RG-14 A-TRU Service Request (Internal)	1.0	\$0.00	\$0.00	Ready To Bill	Completed
Oct 11 03:20 PM	Ashleigh Sanchez	Project ABC (charge) Project Charter (Internal)	1.0	\$888.88	\$888.88	Ready To Bill	Completed
Aug 12 11:00 PM	Michael Gill	MCWTC-MG-7 Service 9 Category B (Internal)	1.0	\$40.00	\$40.00	Ready To Bill	Completed

- If you have an open request with multiple line items in an overall status of “Processing,” you can bill for the work as you go. Just expand the request, then expand the “Forms and Request Details” section. For each line that is ready to bill, click the **Complete** button to change the status. These line items will then be included in your billing event. This works best for long-term projects as it keeps you from needing additional financial approvals.

Feb 07 (Feb 07 2019) AshLeigh Sanchez Admin (MCW) Lab MCWTC-AS-23 General Request Processing \$20.00 (\$211.98)

[Complete](#)

Overview [edit](#)

Payment Information [update payment information](#)

Forms and Request Details (see bottom of list to add items to this request) [☰](#)

[View Form](#): TRU appointment request Visible Completed [🖨️](#) [📧](#) [🗑️](#)

Date	Time	Category	Quantity	Unit Price	Total	Billing Status	Work Status	Actions
Feb 07	02:14 PM	Diet Assessment (Internal)	1.0	\$18.00	\$18.00	Ready To Bill	Completed	📧 🗑️
May 14	01:48 PM	Service 2 Category A (Internal)	3.0	\$56.00	\$168.00	Not Ready To	Processing	📧 🗑️ Complete
May 14	01:48 PM	Service 5 Category A (Internal)	2.0	\$12.99	\$25.98	Not Ready To	Financials Ap	📧 🗑️ Process

[add service](#) [add charge](#) [add form](#) [add milestone](#) [change order](#)

[Build a quote, or add components to a new or running request using the 'add' links above.](#)

[Generate PDF quote](#)

- When you create a new Billing Event, you are generating invoices and sending them out in iLab. You can create as many Billing Events as you want and can bill at whatever frequency you want, however you are encouraged to bill at least monthly. To get started, click the **New Billing Event** button on the “Billing” tab:

Agilent CrossLab | iLab Operations Software

Search: Go

AshLeigh Sanchez Help Sign Out

MCW Test Core

Medical College of Wisconsin

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Name	Created By	Status	Date Added	Value (# of charges)	Actions
MCW Test Core - April	Amanda Casey	Billing errors	Apr 22 '19	\$96.00 (2)	Summary Invoices 🗑️
MCW Test Core - December	Amanda Casey	Billing errors	Dec 11 '18	\$490.00 (3)	Summary Invoices 🗑️
MCW Test Core - November	AshLeigh Sanchez	Billing errors	Nov 20 '18	\$156.00 (2)	Summary Invoices 🗑️
MCW Test Core - October	Amanda Casey	Draft	Oct 25 '18	\$140.00 (2)	Summary Edit 🗑️
MCW Test Core - October	Amanda Casey	Draft	Oct 25 '18	\$391.00 (4)	Summary Edit 🗑️
MCW Test Core - October	AshLeigh Sanchez	Billing initiated	Oct 23 '18	(7)	Summary Invoices 🗑️
MCW Test Core - July	Amanda Casey	Billing initiated	Jul 24 '18	\$144.00 (2)	Summary Invoices 🗑️

- The Billing Event settings will pre-populate by default. You can set the end date to capture charges up to a set date and can rename the Billing Event to whatever you want. You can also choose to create separate Billing Events for your Internal and External customers. We recommend you group your invoices by either “lab” or “request id.” Then, click the **Load Charges** button:

Create a New Billing Event [Return to Core](#)

1. Select which charges to view

End Date:

Event Name:

Include:

Group By:

- Your “included charges” will appear below. Charges that appear with a red flag indicate a billing error, usually that the charge doesn’t have a payment account. You can still create and send an invoice for a charge that doesn’t have a payment account, however note that the *30-day Tacit Approval* will not process and you will not be able to collect on the entire Billing Event until an account has been provided.

2. Review and select which charges to include

▼ included charges

date	customer	service id	total	payment number	status	actions
03/01	Lisa Henk Admin (MCW) Lab	MCWTC-LH-27 Service 1	\$5.00 (1.0 x \$5.00) <small>(Internal)</small>	Multiple: <small>No payment info set ...</small>	Ready To Bill	
02/07	AshLeigh Sanchez Admin (MCW) Lab	MCWTC-AS-23 Diet Assessment	\$18.00 (1.0 x \$18.00) <small>(Internal)</small>	Multiple: 100.0% 789	Ready To Bill	
01/25	AshLeigh Sanchez Admin (MCW) Lab	MCWTC-AS-17 Diet Assessment	\$20.00 (1.0 x \$20.00) <small>(Internal)</small>	Multiple: 100.0% 789	Ready To Bill	
01/11	Rebecca Gasper CTSI Test (MCW) Lab	MCWTC-RG-15 Skinfolds	\$0.00 (0.0 x \$30.00) <small>(Internal)</small>	Multiple: 100.0% 123-456	Ready To Bill	

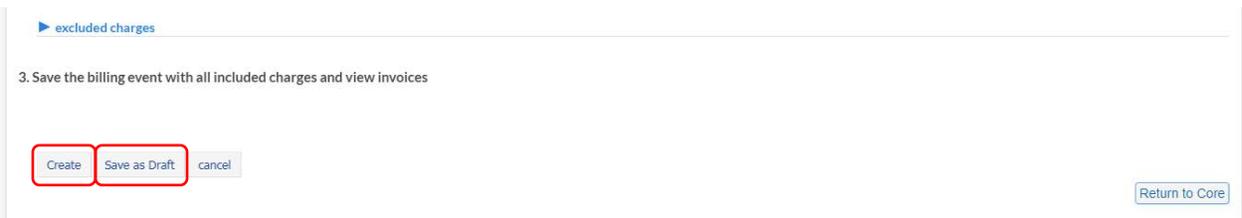
- If a charge is listed as “included” but you do not want it to be on the current Billing Event, use the green down arrow in the “actions” column to push it to the “excluded” section, below. Excluded charges in a status of “Ready to Bill” will be pulled into the next Billing Event.

01/10	Rebecca Gasper CTSI Test (MCW) Lab	MCWTC-RG-14 A-TRU Service Request	\$0.00 (1.0 x \$0.00) <small>(Internal)</small>	Multiple: 100.0% 123-456	Ready To Bill	
10/11	AshLeigh Sanchez Admin (MCW) Lab	Project ABC (charge) Project Charter	\$888.88 (1.0 x \$888.88) <small>(Internal)</small>	Multiple: <small>No payment info set ...</small>	Ready To Bill	

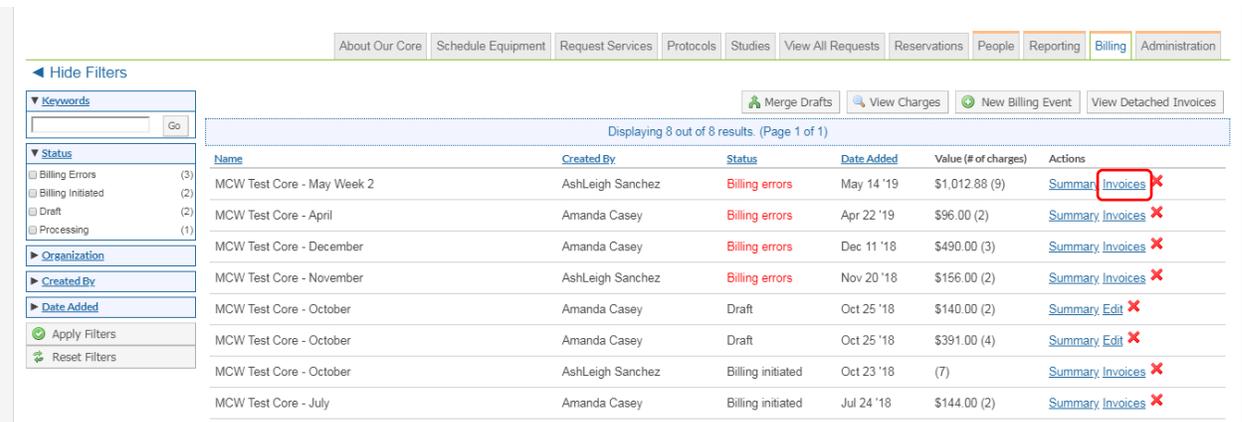
▼ excluded charges

date	customer	service id	total	payment number	status	actions
08/12	Michael Gill Admin (MCW) Lab	MCWTC-MG-7 Service 9	\$40.00 (1.0 x \$40.00) <small>(Internal)</small>	Multiple: <small>No payment info set ...</small>	Ready To Bill	
03/01	AshLeigh Sanchez Admin (MCW) Lab	MCWTC-AS-26 Service 1	\$10.00 (2.0 x \$5.00) <small>(Internal)</small>	Multiple: <small>No payment info set ...</small>	Not Ready To Bill	

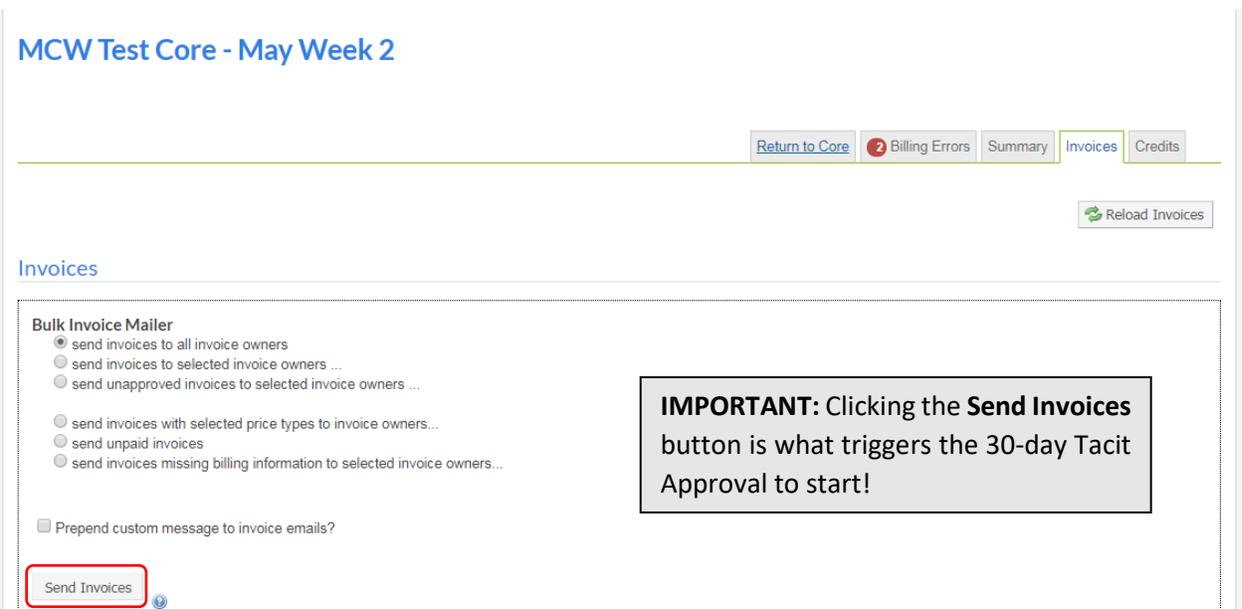
8. Once your list of “included” charges is ready, you have the option to **Save as Draft**. You also have the option to merge multiple drafts into a single Billing Event. This is a good option for large cores that have multiple contacts reviewing charges, or high-volume cores that use the drafts for organization. If you don’t want to use drafts, you can simply click the button to **Create** your Billing Event.



9. Once you’ve created the Billing Event, the system will return you to the “Billing” tab. Your latest event will briefly be in a status of “Processing,” then will automatically update to a status of “Billing Errors.” This is expected. Click the **Invoices** link to review and send out your invoices.



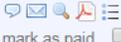
10. On the “Invoices” tab, you will see the Bulk Invoice Mailer. All invoices must be sent to all invoice owners. Keep this setting checked. You can also “Prepend custom message to invoice emails,” which allows you to enter a brief note in the email notification. Click **Send Invoices**.



11. Below the Invoice Mailer, the Invoice List includes the invoices grouped as you indicated when you created the Billing Event.

Note that before you click the **Send Invoices** button above, the Approval Status is “required,” and the envelope icon in the far right column is closed. After you click the **Send Invoices** button, the approval status is “auto-approval scheduled” and the envelope icon is open.

Before:

Total Cost	Status	Comment	Approved?	
\$81.00 5 charges	Partially Paid	click to edit	required	 mark as paid
\$931.88 4 charges	Not Yet Paid	click to edit	required	 mark as paid

After:

Total Cost	Status	Comment	Approved?	
\$81.00 5 charges	Partially Paid	click to edit	auto-approval scheduled	 mark as paid
\$931.88 4 charges	Not Yet Paid	click to edit	auto-approval scheduled	 mark as paid

Note that invoices sent to external institutions will remain in an Approval Status of “not required” even after the **Send Invoices** button has been clicked. It will be up to a core admin or financial contact to click **mark as paid** when a physical payment is received, such as a check or cash. External invoices will not disrupt your ability to collect internal charges on a Billing Event.

Total Cost	Status	Comment	Approved?	
\$144.00 2 charges	Not Yet Paid	click to edit	not required	 mark as paid

12. The status of the Billing Event will continue to say “Billing Errors” until 1) all invoices have been approved and 2) all invoices include a valid payment account. You can review this information on the “Billing Errors” tab within your Billing Event. Errors for invoices “Requiring Approval” will be removed as the invoices are approved, or by the end of the *30-day Tacit Approval*. Errors for invoices “Missing Customer Information” will be removed once an account has been added.

MCW Test Core - May Week 2

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Billing Errors

Invoices Requiring Approval Validation last run on May 14, 2019 [Revalidate](#)

Invoice Number	Lab	Owner	
MTC-1703283	Admin (MCW) Lab	AshLeigh Sanchez	Notify View Invoice

Internal Charges Missing Customer Information Validation last run on May 14, 2019 [Revalidate](#)

Invoice Number	Lab	Owner	
▶ MTC-1703283	Admin (MCW) Lab	AshLeigh Sanchez	View Invoice

13. Once your *30-day Tacit Approval* timer has started, you can monitor your Billing Event on the “Billing” tab. Once all errors have been resolved, the Billing Event will move from a status of “Billing Errors” to “Billing Initiated.” Click on the **Summary** link:

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Name	Created By	Status	Date Added	Value (# of charges)	Actions
MCW Test Core - May	AshLeigh Sanchez	Billing initiated	May 14 '19	\$144.00 (2)	Summary Invoices ✖
MCW Test Core - May Week 2	AshLeigh Sanchez	Billing initiated	May 14 '19	\$931.88 (4)	Summary Invoices ✖
MCW Test Core - April	Amanda Casey	Billing errors	Apr 22 '19	\$96.00 (2)	Summary Invoices ✖
MCW Test Core - December	Amanda Casey	Billing errors	Dec 11 '18	\$490.00 (3)	Summary Invoices ✖

14. You will notice that the “Billing Errors” tab disappears once all invoices have been resolved. You will also see a blue **Send File to ErpMCW** button on the “Summary” tab. Clicking this button submits your billing file to Oracle. The file will process overnight, and you will be able to review the credits in your Oracle transaction report the next business day.

MCW Test Core - May Week 2

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Billing Event Summary

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Summary	Price Type	Billing Status
<p>Created On May 14, 2019 at 15:33</p> <p>End Date May 10, 2019 at 23:59</p> <p>Charges 4 charges totaling in \$931.88</p> <p>Grouped By lab</p>	<p>Internal (\$931.88)</p>	<p>Billing Initialized (\$931.88)</p>

Download Files

[Send File to ErpMcow](#)

IMPORTANT: Clicking the **Send File to ErpMCW** button is what actually transfers fees from your customers’ accounts to your core revenue account in Oracle—don’t forget this step!

Invoice Tips:

- When reviewing the Invoice List in a Billing Event, you can send the invoice to additional contacts (envelope), download a PDF (Adobe icon), or review the live web-version of the invoice (magnifying glass). If you want to file your invoices, you can **Get a PDF of Invoices** to download.

Invoice List

◀ Hide Filters

▼ Keywords
 Go

▶ Total Cost Over
 ▶ Owner
 ▶ Owner Institution
 ▶ Labs
 ▶ Payment Number
 ▶ Price Types

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	Approved?
Admin (MCW) Lab (991703) <small>(Medical College of Wisconsin, Medical College of Wisconsin EXTERNAL)</small>	AshLeigh Sanchez <small>(invoice_owner)</small>	MTC-1703283	789	\$931.88 4 charges	Not Yet Paid	click to edit	auto-approval scheduled

Note: A red box highlights the 'Mark as Paid' icon in the 'Approved?' column of the first row.

- On the live web-version of the invoice, you can see specific details including auto-approval date, payment info, and request details. Once the invoice is approved, it is also date- and name-stamped with the individual who approved the invoice.

Back to Core | Billing Event | Mark as paid | Confirm Payment | Hide details | Show details | [Email] | [Refresh] | [Print]

This invoice will be auto-approved at Jun 13 '19
 Please review this invoice and [click here to approve.](#)



Invoice No. **MTC-1703283**
 Invoice Date **May 14, 2019**
 Lab **Admin (MCW) Lab**

From: MCW Test Core To: Admin (MCW) Lab | AshLeigh Sanchez

[show additional contacts](#)

Invoice Total	\$931.88
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⚠ This invoice has not been approved by a financial administrator.

Invoice Details						
DATE	ITEM DESCRIPTION	PMT.#	QTY	PPU	STATUS	TOTAL
▼ Request: Project ABC Start: October 11, 2018 Owner: AshLeigh Sanchez						
October 11, 2018	(charge) Project Charter (Internal)		1.0	\$888.88/ea	Completed	\$888.88
Actual cost: \$888.88		Projected cost: \$888.88		Invoice cost: \$888.88		
▼ Request: MCWTC-AS-17 Start: January 25, 2019 Owner: AshLeigh Sanchez						
January 25, 2019	Diet Assessment	789	1.0	\$20.00/ea	Completed	\$20.00

Note: A red arrow points to the magnifying glass icon in the 'Request: Project ABC' row.

- Clicking “show additional contacts” on the live invoice will bring up a list of all PIs, Financial Managers (lab) and Department Managers who have access to review/approve the invoice:

[show additional contacts](#)

Lab Contacts:	Name	Email	Phone	Role
	AshLeigh Sanchez	asanchez@mcw.edu		Invoice owner
	AshLeigh Sanchez	asanchez@mcw.edu		Financial managers
	Rita Sigmund	rsigmund@mcw.edu	414-955-4230	Financial managers
	Amanda Casey	amanda.casey@labsolutions.com	123-456-789	Department managers
	Lisa Henk	lhenk@mcw.edu		Department managers
	Amanda Casey	amanda.casey@labsolutions.com	123-456-789	Principal investigators
	AshLeigh Sanchez	asanchez@mcw.edu		Principal investigators
	Rita Sigmund	rsigmund@mcw.edu	414-955-4230	Principal investigators

Customers:	Name	Email	Phone
	Lisa Henk	lhenk@mcw.edu	
	AshLeigh Sanchez	asanchez@mcw.edu	

- Clicking the dollar sign icon will open a Payment Information pop-up window. The accounts that appear in the list are the accounts assigned to the request Owner (not the PI/lab). To make changes, the line item check boxes must be selected, and account must be selected, and the **save** button must be clicked:

The screenshot shows a 'Payment Information' pop-up window overlaid on an 'Invoice Details' table. The pop-up window has a table with the following data:

Charge	Billing Status	Project or General Ledger Account	Amount
(charge) Project Charter	Billing Initialized	No payment info set ...	\$888.88

Below the table, there is a section for 'Update payment info for selected (1) charges'. It includes a dropdown menu for 'Project or General Ledger Accounts' with the selected option '789 - (Does not expire)'. There is also a 'Split Charge' button and a 'Default to this payment method' checkbox.

- Invoices that need to be removed from a billing event should NOT be removed, but detached. Above the green ribbon at the top of the invoice is a series of icons. Use the purple plug icon to detach the invoice. You can View Detached Invoices from the “Billing” tab. If you have existing detached invoices, the system will ask if you want to include them when you make your next Billing Event.

The screenshot shows the top of an invoice page. A green ribbon at the top contains several icons, including a purple plug icon which is highlighted with a red box. Below the ribbon, a green banner displays the text: "This invoice will be auto-approved at Jun 13 '19. Please review this invoice and [click here to approve.](#)"