University of Pittsburgh:
Core Centralized Billing Manual

Contents

Overview

Pitt follows a centralized billing workflow, implying that there is a central point of contact who will finalize billing then send the billing file to Oracle EBS. This manual explains how to prepare charges for billing and how to complete a billing event for review.

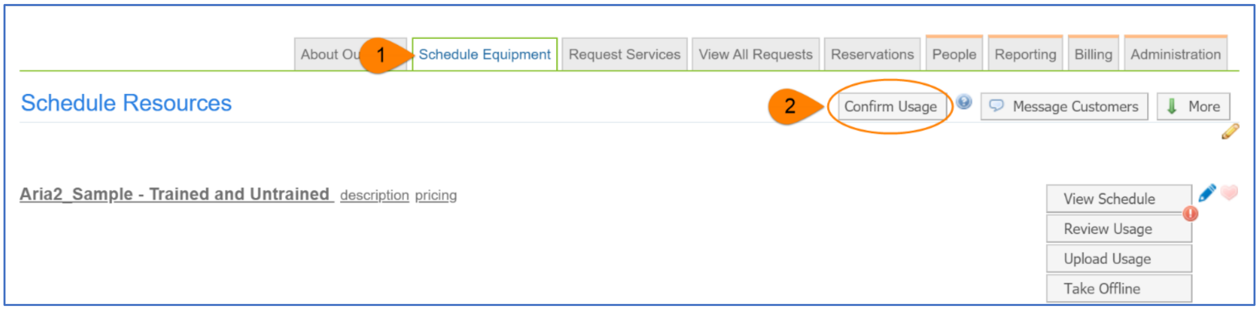
Core administration must submit all billing events weekly, bi-weekly, or monthly to be reviewed by the central biller. If submitting all charges at once for the month, we recommend submitting charges by the 20th of the month. Please reach out to your central biller for the specific date and time those charges must be in Ready to Review status.

Core Facilities cannot bill for future activity. All work must be completed before a charge is added to the billing event. Do not create charges that are backdated.

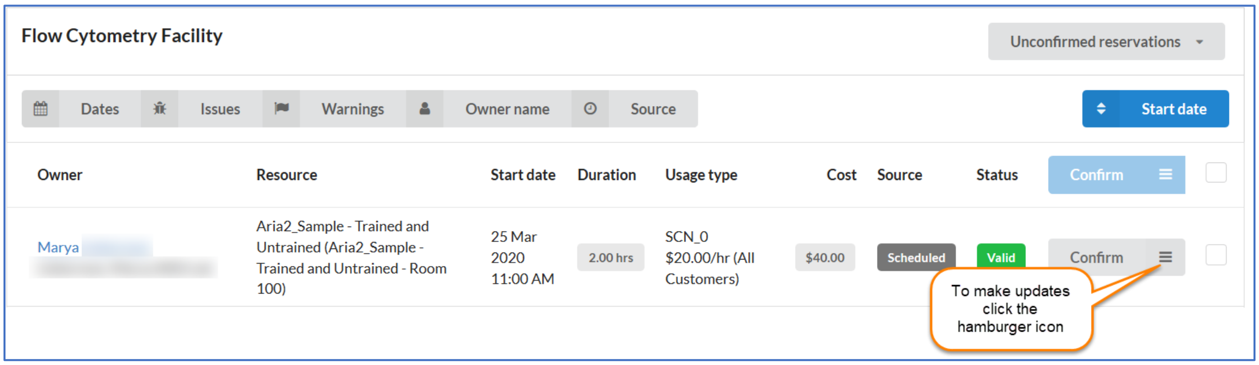
Confirm Reservations on Calendars

If your facility has calendars that users can make reservations on, you must confirm these reservations after the reservation has passed. You can only confirm and bill for reservations that have been completed. Confirming a reservation turns the charge associated with it into a billable charge.

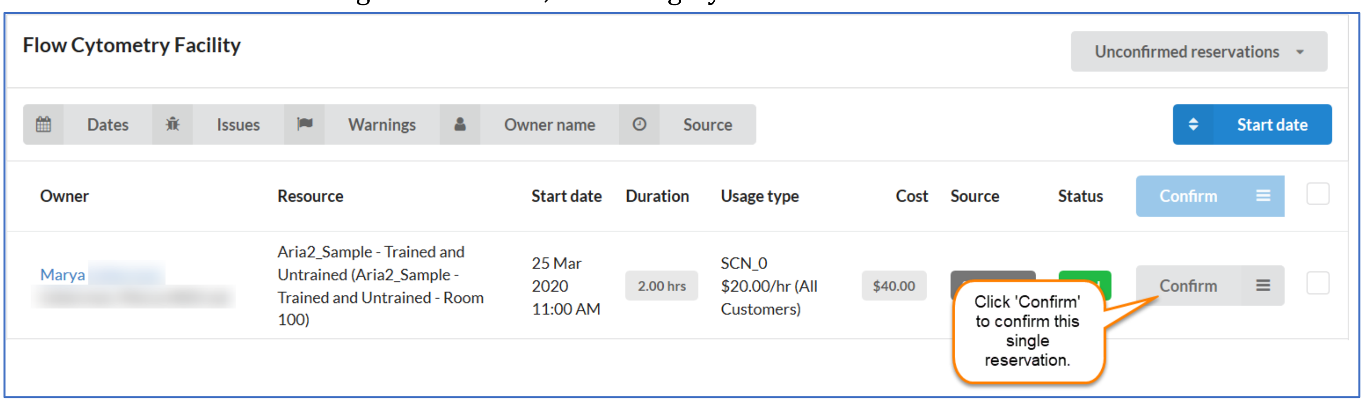
1. Navigate to the ‘Schedule Equipment’ tab.
2. Click ‘Confirm Usage’.



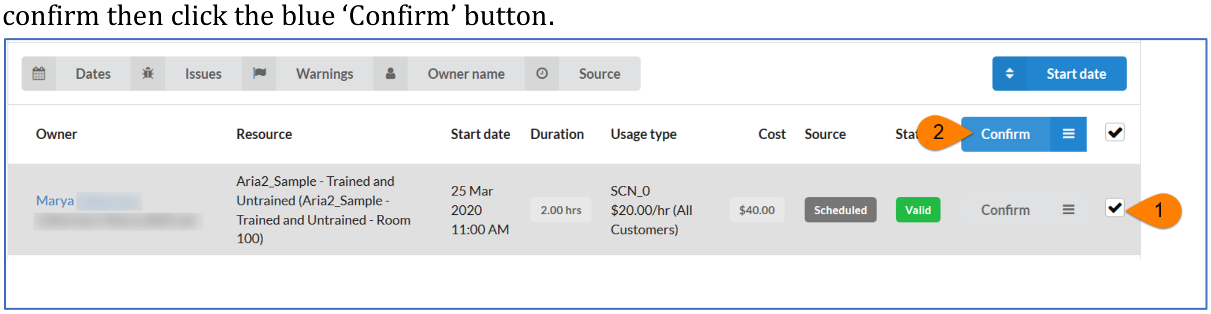
3. All past reservations that have not been confirmed will appear on this page.
4. Review the details of the reservations you need to confirm.
5. If any details need to be changed/updated, click the 3 lines in the grey confirm box.
    a. Be careful to not click 'Confirm' and click just the 3 lines.



6. To confirm a single reservation, click the grey 'Confirm' button.



7. To confirm multiple reservations, click the check box next to reservations you want to confirm then click the blue 'Confirm' button.

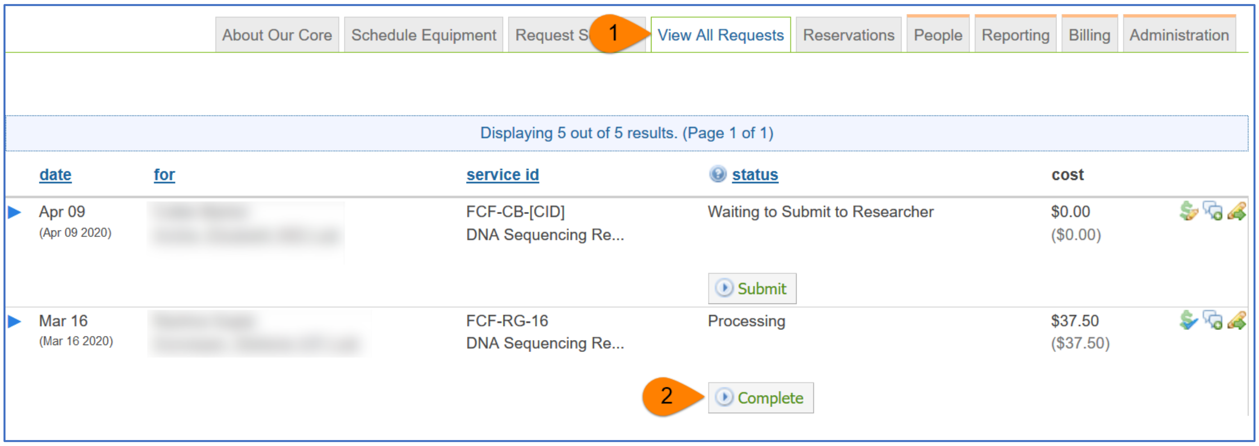


8. This will turn the charge associated with the reservation into a billable charge.

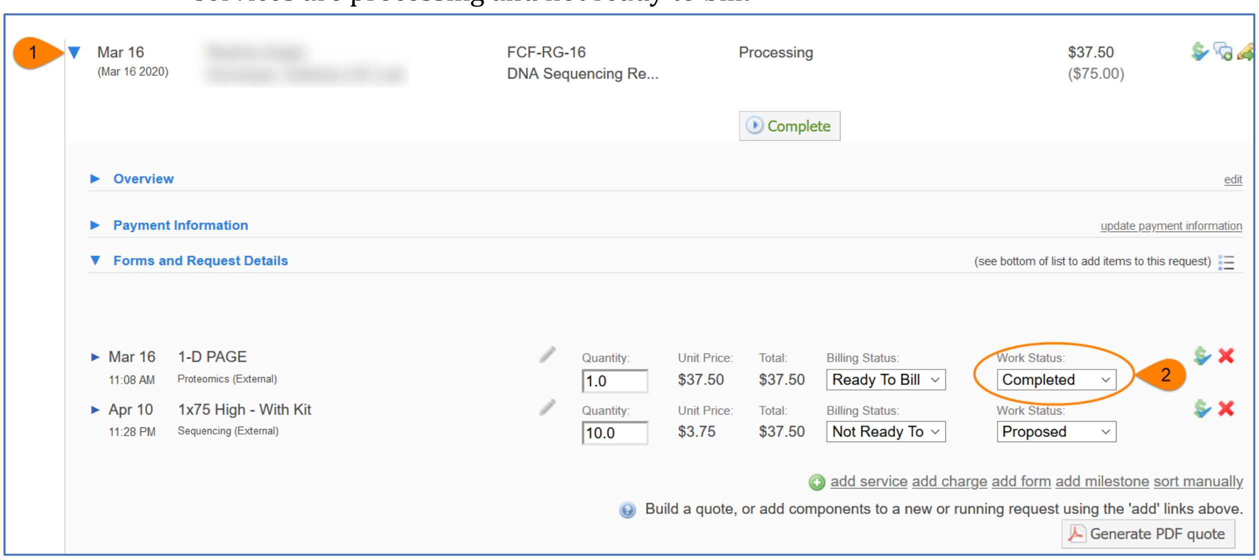
Complete Service Requests

If your facility offers services for users to request, you must complete those requests or single service items to bill for them. Once a service is marked as completed it turns into a billable charge.

1. Navigate to your 'View All Requests' tab.
   a. This will show all outstanding requests.
2. Once you have completed a service or entire request you can mark it as completed
3. To complete an entire request, in the 'status' column click the 'Complete' action button.



4. Some requests may have several services associated with it. You can complete single service items while leaving the overall request open. This will allow you to bill for certain services that are completed in one month and wait to bill other services once they are completed.
   a. Click the blue toggle icon to the left of the date column on the request to expand the details.
   b. On the single service line item select 'Completed' in the 'Work Status' drop-down menu.
   c. This will update this single service to completed and ready to bill while all other services are processing and not ready to bill.

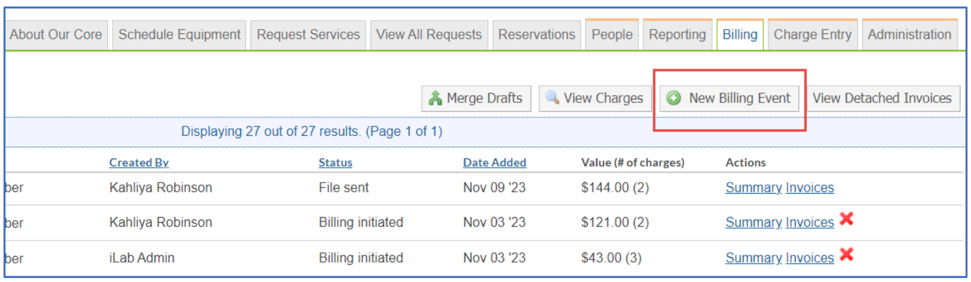


5. Once a request or single service has been marked 'Completed' it becomes a billable charge.

Generate Billing Event for Review

Pitt cores use two approaches to generating billing events. The recommended approach is to bill twice per month; however, some cores bill monthly. In either case, the core administrators must create and submit all billing events monthly prior to the 25th, although some shared research facilities prefer a few days earlier. If submitting billing at the end of the month, please reach out to your central biller for the specific date and time those charges should be in Ready to Review status. This billing event will include all charges that you marked as confirmed or completed.

1. Navigate to the Billing tab on your core.
2. Click 'New Billing Event'.



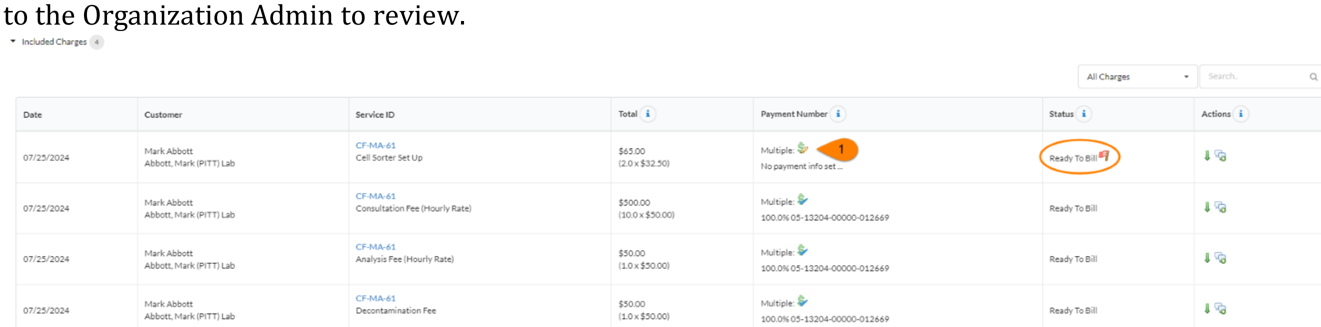
3. Select which charges to view using the filters.
   a. **End Date:** Ready to bill charges up to this date will be pulled into the billing event.
   b. **Event Name:** Modify name if needed.
   c. **Include:** Choose if you want to include just internal charges, just external charges, or all
4. Select "Review Charges"
5. Review the charges and edit payment information if necessary.
6. Select "Ready for Review". *Billing event will be posted to the month of the selected End Date. If past or future month is selected, billing event will not be processed and result in error. Make sure that the End date reflects current month. It's easy to avoid this by creating new events, reviewing the events, and making those events ready for review on the same day.*

Billing Errors

Billing errors would appear on a billing event if an Account Number were missing from a charge or if core custom billing fields are missing.

Billing errors when creating billing event

When the core admins are creating their billing event for the Organization Financial Admin to review, they may see red flags on charges indicating there is a billing error. These errors are due to missing Account Numbers. The cores should correct these errors before submitting the billing event to the Organization Admin to review.


Included Charges 4

All Charges | Search..

Date	Customer	Service ID	Total	Payment Number	Status	Actions
07/25/2024	Mark Abbott Abbott, Mark (PITT) Lab	CF-MA-61 Cell Sorter Set Up	$65.00 (2.0 x $32.50)	Multiple: 1 No payment info set ...	Ready To Bill	
07/25/2024	Mark Abbott Abbott, Mark (PITT) Lab	CF-MA-61 Consultation Fee (Hourly Rate)	$500.00 (10.0 x $50.00)	Multiple: 100.0% 05-13204-00000-012669	Ready To Bill	
07/25/2024	Mark Abbott Abbott, Mark (PITT) Lab	CF-MA-61 Analysis Fee (Hourly Rate)	$50.00 (1.0 x $50.00)	Multiple: 100.0% 05-13204-00000-012669	Ready To Bill	
07/25/2024	Mark Abbott Abbott, Mark (PITT) Lab	CF-MA-61 Decontamination Fee	$50.00 (1.0 x $50.00)	Multiple: 100.0% 05-13204-00000-012669	Ready To Bill	

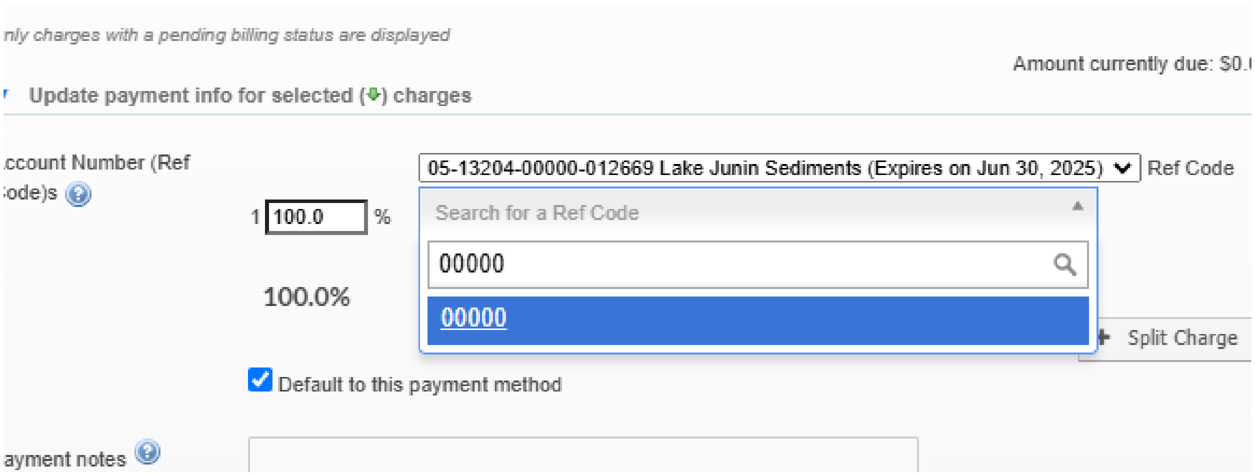
7. Then the centralized biller(s) will receive an email notification telling them that your billing event is ready to be reviewed.

Ensuring the Reference Number Appears on Invoices

Pitt uses a reference number to help us track payment details; however, iLab only includes reference number if it is explicitly set when creating the invoice. To force a reference code of "00000" to appear:

1. Navigate to your 'View All Requests' tab.
    a. This will show all outstanding requests.
    [Image from Complete above]
2. Select 'Complete' action button.
    [second image from complete above]
3. Select "update payment information"
    a. This will cause the payment information to appear.

b. Under the account number, pull down and select the default – 00000, or write in any other reference number. These numbers will now appear on invoices sent.



Advanced Invoice/Billing Features

Below are links to our help-site articles of different advanced invoice and billing features.

- [Layout of invoices tab]
- [Invoice actions]
- [Bulk Actions]
- [How to send invoices]