

University of Pittsburgh: Core Centralized Billing Manual

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Overview

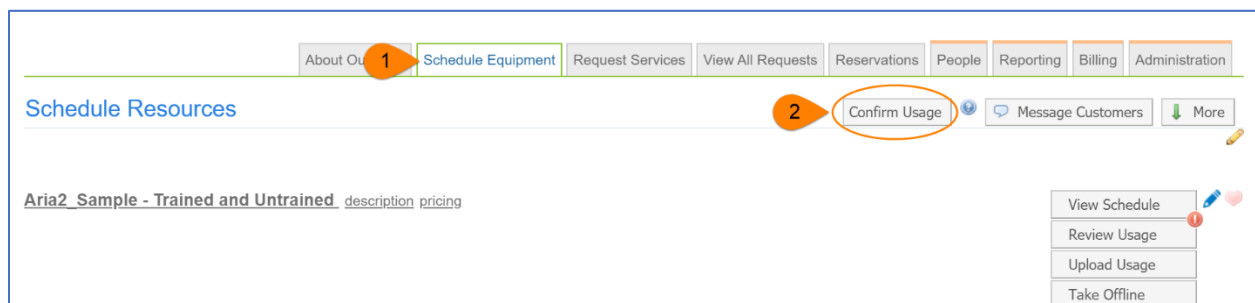
Pitt follows a centralized billing workflow which means there is a central point of contact who will finalize billing then send the billing file to Oracle EBS. This manual will take you through how to prepare charges for billing and how to complete a billing event for review.

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, please reach out to your central biller for the specific date and time those charges should be in Ready to Review status.

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.

Flow Cytometry Facility

Unconfirmed reservations

Dates Issues Warnings Owner name Source Start date

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm	
Marya	Aria2_Sample - Trained and Untrained (Aria2_Sample - Trained and Untrained - Room 100)	25 Mar 2020 11:00 AM	2.00 hrs	SCN_0 \$20.00/hr (All Customers)	\$40.00	Scheduled	Valid	Confirm	<input type="checkbox"/>

To make updates click the hamburger icon

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

Flow Cytometry Facility

Unconfirmed reservations

Dates Issues Warnings Owner name Source Start date

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm	
Marya	Aria2_Sample - Trained and Untrained (Aria2_Sample - Trained and Untrained - Room 100)	25 Mar 2020 11:00 AM	2.00 hrs	SCN_0 \$20.00/hr (All Customers)	\$40.00	Scheduled	Valid	Confirm	<input type="checkbox"/>

Click 'Confirm' to confirm this single reservation.

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

Dates Issues Warnings Owner name Source Start date

Owner	Resource	Start date	Duration	Usage type	Cost	Source	Status	Confirm	<input checked="" type="checkbox"/>
Marya	Aria2_Sample - Trained and Untrained (Aria2_Sample - Trained and Untrained - Room 100)	25 Mar 2020 11:00 AM	2.00 hrs	SCN_0 \$20.00/hr (All Customers)	\$40.00	Scheduled	Valid	Confirm	<input checked="" type="checkbox"/>

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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.

date	for	service id	status	cost
Apr 09 (Apr 09 2020)	[blurred]	FCF-CB-[CID] DNA Sequencing Re...	Waiting to Submit to Researcher	\$0.00 (\$0.00)
Mar 16 (Mar 16 2020)	[blurred]	FCF-RG-16 DNA Sequencing Re...	Processing	\$37.50 (\$37.50)

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.

date	for	service id	status	cost
Mar 16 (Mar 16 2020)	[blurred]	FCF-RG-16 DNA Sequencing Re...	Processing	\$37.50 (\$75.00)

date	time	service name	Quantity	Unit Price	Total	Billing Status	Work Status
Mar 16	11:08 AM	1-D PAGE Proteomics (External)	1.0	\$37.50	\$37.50	Ready To Bill	Completed
Apr 10	11:28 PM	1x75 High - With Kit Sequencing (External)	10.0	\$3.75	\$37.50	Not Ready To	Proposed

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

Generate Billing Event for Review

Core administration must create and submit all billing events monthly by the 25th. 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'.

The screenshot shows the 'Billing' tab selected in a navigation menu. Below the menu are buttons for 'Merge Drafts', 'View Charges', 'New Billing Event' (highlighted with a red box), and 'View Detached Invoices'. Below these buttons is a table with the following data:

Created By	Status	Date Added	Value (# of charges)	Actions
ber	File sent	Nov 09 '23	\$144.00 (2)	Summary Invoices
ber	Billing initiated	Nov 03 '23	\$121.00 (2)	Summary Invoices ✖
ber	Billing initiated	Nov 03 '23	\$43.00 (3)	Summary Invoices ✖

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".

The screenshot shows the 'Billing event parameters' form with the following fields:

- Include Charges Up To: July 31, 2024
- Event Name: Cytometry Facility - July
- Select Included Charges: all

Buttons at the bottom right: Cancel, Save Draft, Review Charges, Ready For Review.

Below the form is the 'Review and select which charges to include' section, showing a table of charges:

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 100.0% 05-13204-00000-012669	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.

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](#)