Service Center Billing

All of the Shared Resources at Dartmouth Medical School are moving to a new billing and invoicing procedure. The initiative comes from NCCC therefore the new system is called Cancer Center Core Operations (CCOPs). Each Shared Resource will have its own way of managing users, their data and charging to accounts. Shared Resources will control this aspect of the COOP’s and only this aspect.

Departmental administrators as representatives on the Principle Investigators will be responsible for managing the users, accounts and approving the charges against their assigned accounts at the end of each month.

Please note that all invoices must be in the approved status in order them to be billed. Administrators for the Shared Resources have the ability to approve invoices for all PI accounts. If PIs/Administrators are not approving their orders the order will be billed to the account that the user chose.

Adding a user to the system is a function of the NCCC administration. Adding a user can be done by forwarding the following information to Debra Barton or Steve Bobin: (See Below) First Name, Last Name, Department, Email Phone Number Building and Room Number. Once a new person is added to the system you should be able to access the information required to allow them to spend on an account. To activate a user for a specific account see Add user ID(s) under To ADD new account strings. As students come and go you will need to adjust their account access see To REMOVE USERS from accounts. There are additional useful instructions below.

Logging into the system:

Link: [https://gemini.dartmouth.edu/login](https://gemini.dartmouth.edu/login)

Login: Use your first initial and last name (all lowercase and all one word)
Password: temp (change this password as soon as possible)

Choose: Cancer Center Core Operations

PI Admin
Choose PI name
PI Setup

To ADD new account strings:

Choose “NEW” tab (grey tab) in the blue box (not the “new” tab) on TOP of the blue box)
Enter account information:
  Account* - Enter account string
  FAS Account – Enter old FAS account number, if there is one (not mandatory)
  Account Name – Account Name
  Is Active – check box
  Account Type – Choose GL or PTAEO

Add user ID(s) and check “is active”
Make sure your name is showing in the Administrator drop down box.
Click the UPDATE button

To make accounts INACTIVE:

  Uncheck the “Is Active” box
  Click the UPDATE button

To REMOVE USERS from accounts:

  Uncheck the “Is Active” box to the right of the user’s ID
  Click the UPDATE button

To PRINT Invoices:

  Select PI Admin
  Choose PI name
  Select Order Summary Reports
  Select All orders
  Click on the OrderID link (blue)
  File, Print

To approve invoices for billing:

  An email will be generated by the CCOPs system at the end of every month reminding **PIs/Administrators** to approve invoices for billing.

  Choose PI name
  PI-Invoice Approval
  All Orders-1
  Change accounts, if needed
  Click the “approve” button
If you approve an invoice and find out that you need to make a change to it, put the status of the invoice back to “PI Pending” by placing a checkmark in the box to its left and then hitting the “suspend” button. Make your change and then hit “approve.”

**Further instruction:**
Lori Dickerson, Pathology, provided an a very nice illustrated version of the instructions. They have been appended to this document.

**Contact:**
If you have any questions, please contact Debra Barton
Debra.Barton@Dartmouth.edu 603-879-0392 or Stephen Bobin
Stephen.A.Bobin@Dartmouth.edu 603-653-6189.
Administrative Guide

PART 1- Getting Started

Link: https://gemini.dartmouth.edu/login
Login: Use your first initial and last name (all lowercase and all one word)
Password: If you haven’t used the system it is your last name in lowercase letter with a “?” There are no spaces. (Change this password as soon as possible)

Metaclinic Applications available to user - Idickerson

<table>
<thead>
<tr>
<th>Application</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>COOOPS Auth</td>
<td>WRITE</td>
</tr>
<tr>
<td>COOOPS Demo</td>
<td>WRITE</td>
</tr>
<tr>
<td>Cancer Center Core Operations</td>
<td>WRITE</td>
</tr>
</tbody>
</table>

Choose: Cancer Center Core Operations
1. Choose: PI Admin
   Then PI list will pop up
2. Choose: PI from list
   Then 2nd menu above will pop up
3. Choose: PI tab

To ADD new account Strings:
1. Choose: “NEW”
2. Enter Grant information
3. Activate
4. Account type
5. Identify Users for this account and activate.

Funding Source or Award #
Full String here
USE 7825 for EM
First initial last name (no spaces)
When a string is no longer available, simply clicking the “IsActive” switch will remove it from either the individual or everyone’s availability to use.

Scroll down to make sure that you are on the Administrator list.

NOTE: Core Administrators will also be on this list.

UPDATE – None of your input information will take effect until you do this.

“IsActive” MUST be checked for the String and/or User to see on their list. This example shows that this string will be on my account list but not Chris Ogomo’s available sting list.
Naming convention for the “Account Name” = PI last name – Grant short name – Natural Class for Core

Same Grant – different CORE Natural class.

Naming convention to identify Natural Class

Note: Can have different users for the different Cores
Add new CORES on the same grant with this “NEW” tab. These will all appear under the hierarchy of the same Funding or Award.
Once the CORE Administrator adds them to the User list, their full name will appear in these peach colored boxes when the screen is refreshed as long as you have the “IsActive” box checked.

NOTE: IF a New User is added but their full name still does NOT appear in peach boxes after you have hit the “UPDATE” button.

This means they are either:
- a. Currently NOT in the database.
  OR
- b. UserID is incorrect.

Contact a CORE Administrator, who will either have to add the new user or give you the UserID that is currently in the system.

Once the CORE Administrator adds them to the User list, their full name will appear in these peach colored boxes when the screen is refreshed as long as you have the “IsActive” box checked.
Electron Microscope Facility Database
Administrative Guide

PART 2- Approving Charges

1. Choose: PI Admin
   Then PI list will pop up

2. Choose: PI from list
Choose:  Pre-Invoicing to get listing IF you need to see the details of invoice.

NOTE: Anything with an underline is an active link to the record with more information.
PI Pre-invoice Items

Mon Aug 31 10:41:38 2009

requested by ldickerson

<table>
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<tr>
<th>PINAME</th>
<th>ACCOUNT</th>
<th>CORENAME</th>
<th>USERNAME</th>
<th>STATUS</th>
<th>ORDERID</th>
<th>ORDERDATE</th>
<th>OTYPE</th>
<th>ITEM</th>
<th>ITEMDESC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dickerson, Lori</td>
<td>500006 5000 B00001 7819A 160</td>
<td>EM Facility</td>
<td>Lori Dickerson</td>
<td>Requested</td>
<td>1005286</td>
<td>08/31/2009</td>
<td>Shared Instruments</td>
<td>Edwards vacman separator</td>
<td></td>
</tr>
</tbody>
</table>

Total of 1 rows.

Download | SAS Download

This is the detail from the link on the previous page.

Note: This opens on a separate tab or window.

More Detail available on item link.
Another new tab or window when the last link opens.
1. If you don’t need to review the detail of the invoice, choose PI invoice. Then Approval choice list will pop up.

2. Approval list can be viewed by formats listed.

3. For demonstration, I’ve chosen “All Orders”
IF you do not include all charges, you MUST send an email to both Chuck Daghlain and Lori Dickerson explaining the issue so that it can be resolved in a timely manner.
After all items are approved, and no new requests are submitted, this message will appear when you try to look for the PI Approval list.
You can review your approved requests under “Order Summary” and “Orders by Year by Core”.

Total dollar amount for month. Active link for detail.

Orders by Year

Mon Aug 31 15:43:57 2009
requested by idickerson

<table>
<thead>
<tr>
<th>PINAME</th>
<th>CORENAME</th>
<th>YEAR</th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
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<tbody>
<tr>
<td>Dickerson, Lori</td>
<td>EM Facility</td>
<td>2009</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>50.88</td>
<td></td>
<td></td>
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</table>

Total of 1 rows
Download
All Orders

Mon Aug 31 15:47:42 2009

requested by Dickerson

<table>
<thead>
<tr>
<th>CORENAME</th>
<th>ORDERID</th>
<th>ORDERDATE</th>
<th>STATUS</th>
<th>ITEMID</th>
<th>USERNAME</th>
<th>PINAME</th>
<th>ACCOUNT</th>
<th>MONTH</th>
<th>YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>EM Facility</td>
<td>1005284</td>
<td>08/31/2009</td>
<td>Approved</td>
<td>JRO, JRM 1010, Ter</td>
<td>Dickerson, Lon</td>
<td>Dickerson, Lon</td>
<td>00 000 000000 00000 0000 7825</td>
<td>AUG</td>
<td>2009</td>
</tr>
<tr>
<td>EM Facility</td>
<td>1005280</td>
<td>08/31/2009</td>
<td>Approved</td>
<td>CPC 66, Commercial</td>
<td>Dickerson, Lon</td>
<td>Dickerson, Lon</td>
<td>500000 500000 000000 7819A 160</td>
<td>AUG</td>
<td>2009</td>
</tr>
<tr>
<td>EM Facility</td>
<td>1005246</td>
<td>08/31/2009</td>
<td>Approved</td>
<td>Edwards vacuum evaporator</td>
<td>Dickerson, Lon</td>
<td>Dickerson, Lon</td>
<td>500000 500000 000000 7819A 160</td>
<td>AUG</td>
<td>2009</td>
</tr>
</tbody>
</table>

Total of 3 rows.

The individual order/request(s) can be accessed by any underlined link.