

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 it's 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>

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 PTAE0

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.

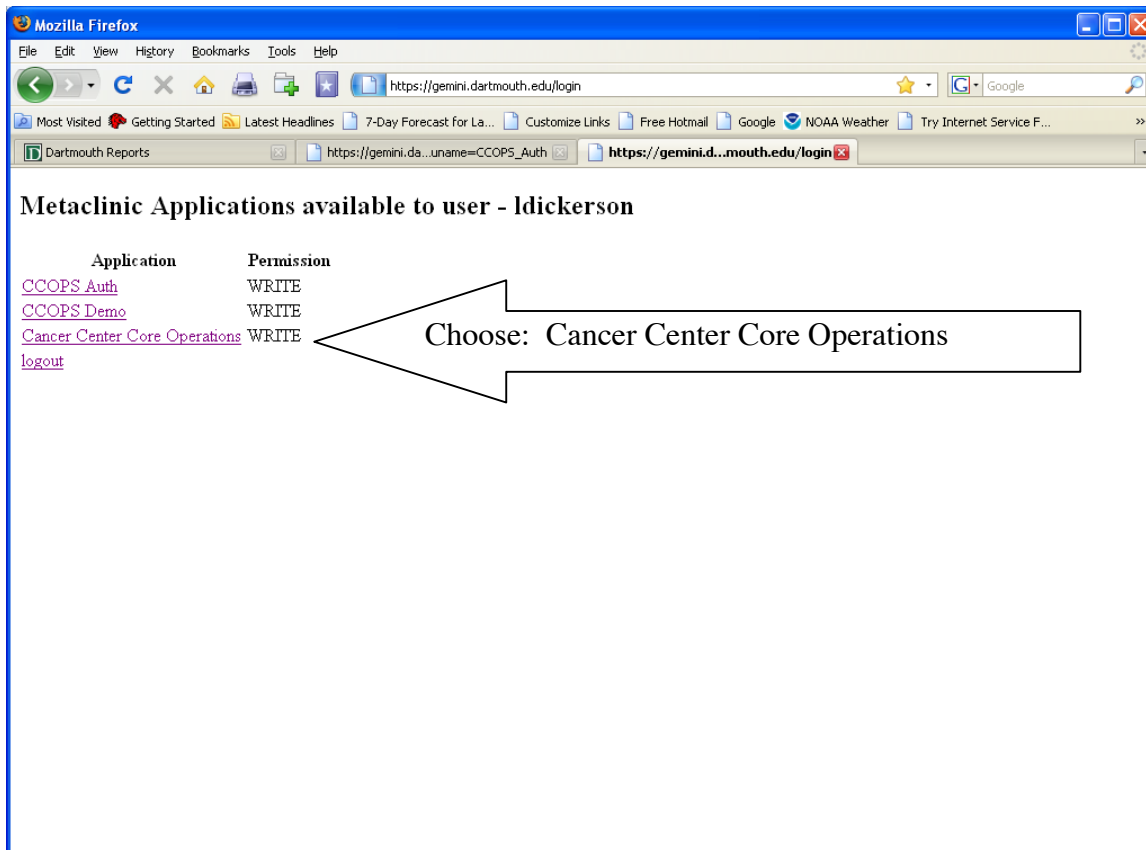
Administrative Guide

PART 1- Getting Started

Link: <https://gemini.dartmouth.edu/login>

Login: Use your first initial and last name (all lowercase and all one word)

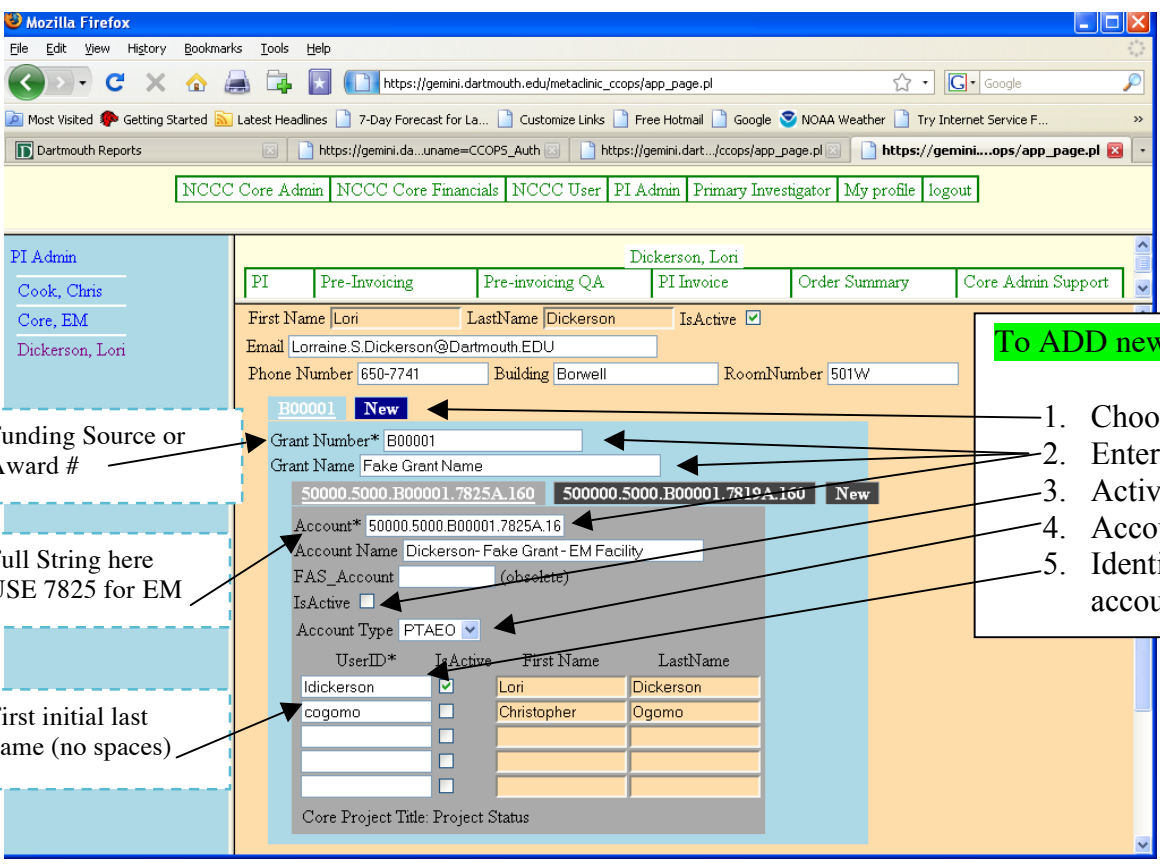
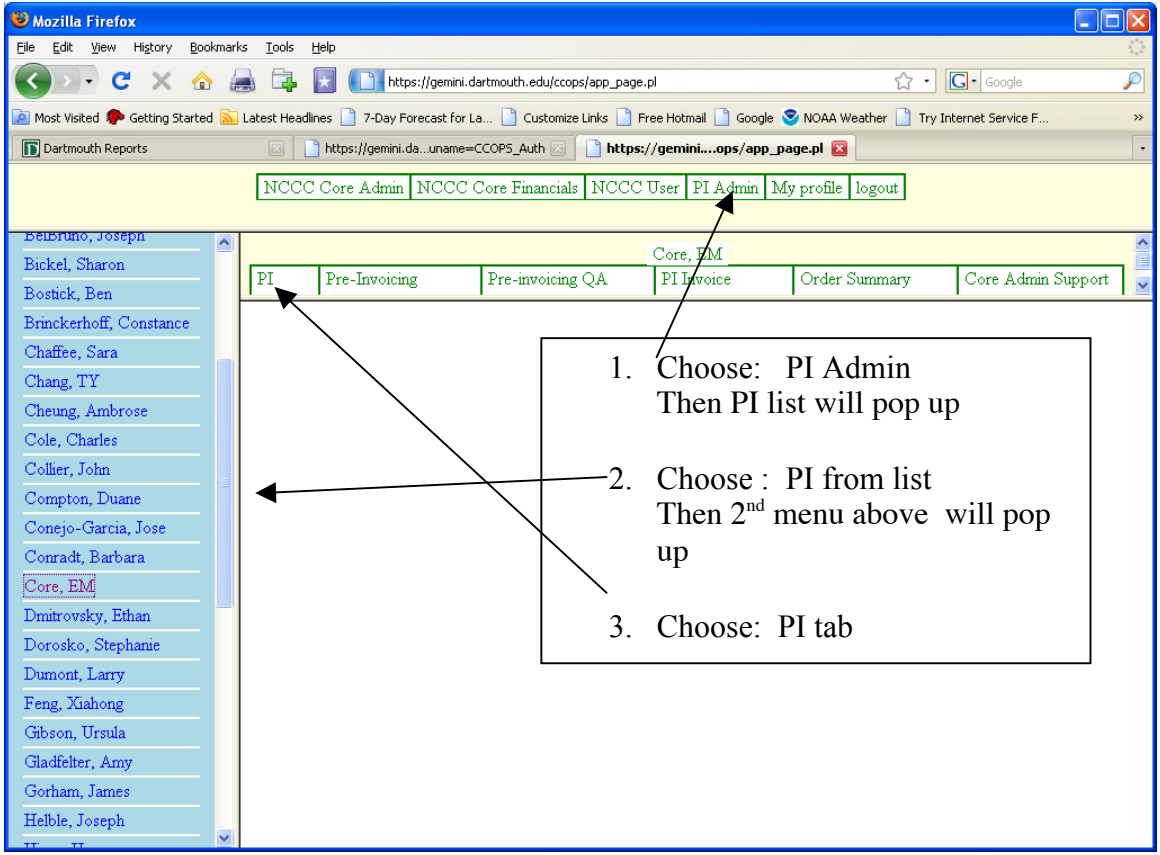
Password: If you haven't used the system it is your last name in lowercase letter with a "?" There are no spaces. (Change this password as soon as possible)



Metaclinic Applications available to user - Idickerson

| Application | Permission |
|-----------------------------------------------|------------|
| CCOPS Auth | WRITE |
| CCOPS Demo | WRITE |
| Cancer Center Core Operations | WRITE |
| logout | |

Choose: Cancer Center Core Operations



Account* 50000.5000.B00001.7825A.16
 Account Name Dickerson- Fake Grant - EM Facility
 FAS_Account (obsolete)
 IsActive
 Account Type PTAEO

| UserID* | IsActive | First Name | Last Name |
|------------|-------------------------------------|-------------|-----------|
| ldickerson | <input checked="" type="checkbox"/> | Lori | Dickerson |
| cogomo | <input type="checkbox"/> | Christopher | Ogomo |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |

Core Project Title: Project Status

Administrator*

Barton, Debra
 Dickerson, Lori

Update

“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 string list.

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.

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.

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NCCC Core Admin NCCC Core Financials NCCC User PI Admin Primary Investigator My profile logout

PI Admin
Cook, Chris
Core, EM
Dickerson, Lori

Dickerson, Lori

PI Pre-Invoicing Pre-invoicing QA PI Invoice Order Summary Core Admin Support

First Name Lori LastName Dickerson IsActive

Email Lorraine.S.Dickerson@Dartmouth.EDU

Phone Number 650-7741 Building Borwell RoomNumber 501W

B00001 New

Grant Number* B00001

Grant Name Fake Grant Name

50000.5000.B00001.7825A.160 500000.5000.B00001.7819A.160 New

Account* 500000.5000.B00001.7819A.1

Account Name Dickerson - Fake Grant - Lab Analysis

FAS_Account (obsolete)

IsActive

Account Type PTAE0

| UserID* | IsActive | First Name | LastName |
|------------|-------------------------------------|------------|-----------|
| ldickerson | <input checked="" type="checkbox"/> | Lori | Dickerson |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |

Core Project Title: Project Status

Same Grant – different CORE Natural class.

Naming convention to identify Natural Class

Note: Can have different users for the different Cores

Naming convention for the “Account Name” = PI last name – Grant short name – Natural Class for Core

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PI Admin
Cook, Chris
Core, EM
Dickerson, Lori

Dickerson, Lori

PI Pre-Invoicing Pre-invoicing QA PI Invoice Order Summary Core Admin Support

Primary Investigator Data

UserID* |dickerson

First Name |Lori| LastName |Dickerson| IsActive

Email |Lorraine.S.Dickerson@Dartmouth.EDU|

Phone Number |650-7741| Building |Borwell| RoomNumber |501W|

B00001 **New**

Grant Number* |B00001| Grant Name |Fake Grant Name|

50000.5000.B00001.7825A.160 500000.5000.B00001.7819A.160 **New**

Account* | | Account Name | | FAS_Account | | (obsolete) Is Active Account Type | |

| UserID* | IsActive | First Name | LastName |
|---------|--------------------------|------------|----------|
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |
| | <input type="checkbox"/> | | |

Grant Number and Name are the same.

Must add full string and the rest of the information for each new tab.

Add new CORES on the same grant with this "NEW" tab. These will all appear under the hierarchy of the same Funding or Award

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:

- Currently NOT in the database.
- OR
- 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

PI Admin
Cook, Chris
Core, EM
Dickerson, Lori

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

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PI Admin
Cook, Chris
Core, EM
Dickerson, Lori

Dickerson, Lori

PI Pre-Invoicing Pre-invoicing QA PI Invoice Order Summary Core Admin Support

PI Pre-invoice Report

Mon Aug 31 10:31:20 2009

requested by ldickerson

| CORENAME | ACCOUNT | STATUS | COUNT | ORDERTOTAL |
|-------------|------------------------------|-----------|----------|------------|
| EM Facility | 500000.5000.B00001.7819A.160 | Requested | <u>1</u> | \$5.00 |

Total of 1 rows.

Download SAS Download

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

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PI Pre-invoice Items

Mon Aug 31 10:41:38 2009

requested by ldickerson

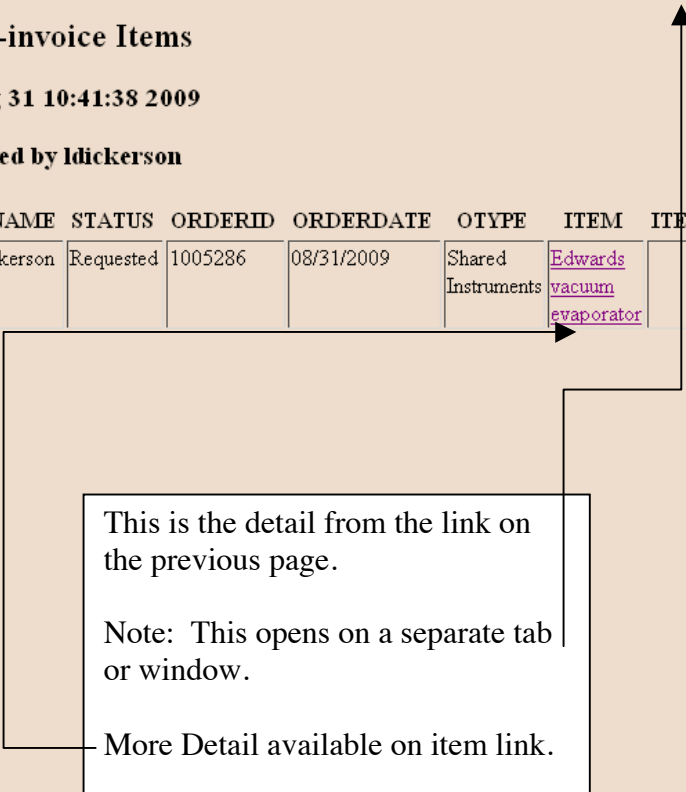
| PINAME | ACCOUNT | CORENAME | USERNAME | STATUS | ORDERID | ORDERDATE | OTYPE | ITEM | ITEMSE |
|--------------------|------------------------------|-------------|----------------|-----------|---------|------------|-----------------------|---------------------------------------------------|--------|
| Dickerson, Lori | 500000.5000.B00001.7819A.160 | EM Facility | Lori Dickerson | Requested | 1005286 | 08/31/2009 | Shared Instruments | Edwards vacuum evaporator | |

Total of 1 rows.

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.



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Readonly Mode

Request time for Shared Instruments

Core Name

User

Primary Investigator*

Account*

Order Date

Order Status

OrderID

Time Request

Shared Instrument*

Billing Type

Service Date*

Requested Time

Starttime (military ex 0900)

Endtime

Requested hours

Items Rate Units

Rate

Item Total

Another new tab or window when the last link opens.

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PI Admin
Cook, Chris
Core, EM
Dickerson, Lori

Dickerson, Lori

| | | | | | |
|----|---------------|------------------|-------------------|---------------|--------------------|
| PI | Pre-Invoicing | Pre-invoicing QA | PI Invoice | Order Summary | Core Admin Support |
|----|---------------|------------------|-------------------|---------------|--------------------|

PI Invoice Approval

- All Orders - 2
- By Core
- By Account
- By Order Status
- By Order Type

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"

Internal Order Approval

| Include* | CoreName | Requestor | PI | Account | OrderID | Order Status | Item |
|-------------------------------------|-------------|-----------------|-----------------|--------------------------------------------------------------------------------------------------|---------|--------------|----------------------------|
| <input checked="" type="checkbox"/> | EM Facility | Dickerson, Lori | Dickerson, Lori | 500000.5000.B00001.7819A.160 | 1005290 | Requested | OPC-60 Osmium coater |
| <input checked="" type="checkbox"/> | EM Facility | Dickerson, Lori | Dickerson, Lori | 00.000.000000.000000.0000.7825 00.000.000000.000000.0000.7825 500000.5000.B00001.7819A.160 | 1005294 | Requested | JEOL JEM-10 TEM |

Approve listed item(s)
If more than one item was listed but you didn't want to approve all, uncheck the "Include*" box.

Accounts can be changed here before invoicing.
NOTE: Only those accounts that were active for the specific PI are available.

IF you do not include all charges, you **MUST** send an email to both Chuck Daghlian and Lori Dickerson explaining the issue so that it can be resolved in a timely manner.

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PI Admin

Cook, Chris

Core, EM

Dickerson, Lori

Dickerson, Lori

| | | | | | |
|----|---------------|------------------|------------|---------------|------------|
| PI | Pre-Invoicing | Pre-invoicing QA | PI Invoice | Order Summary | Core Admin |
|----|---------------|------------------|------------|---------------|------------|

No menu items available

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.

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PI Admin

Cook, Chris

Core, EM

Dickerson, Lori

Dickerson, Lori

PI Pre-Invoicing Pre-invoicing QA PI Invoice Order Summary Core Admin

Order Summary Reports

All Orders Orders by Year by Core Orders by Core by OrderType Orders by Core by Service Orders by Core by Username Orders by Account

Orders by Year

Mon Aug 31 15:43:57 2009

requested by ldickerson

| PINAME | CORENAME | YEAR | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|-----------------|-------------|------|-----|-----|-----|-----|-----|-----|-----|-------|-----|-----|-----|-----|
| Dickerson, Lori | EM Facility | 2009 | | | | | | | | 30.83 | | | | |

Total of 1 rows.

Download

Total dollar amount for month. Active link for detail

You can review your approved requests under "Order Summary" and Orders by Year by Core"

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All Orders

Mon Aug 31 15:47:42 2009

requested by Idickerson

| CORENAME | ORDERID | ORDERDATE | STATUS | ITEMID | USERNAME | PINAME | ACCOUNT | MONTH | YEAR |
|-------------|-------------------------|------------|----------|---------------------------------------------------|-----------------|--------------------|--------------------------------|-------|------|
| EM Facility | 1005294 | 08/31/2009 | Approved | JEOL JEM-1010 TEM | Dickerson, Lori | Dickerson, Lori | 00.000.000000.000000.0000.7825 | AUG | 2009 |
| EM Facility | 1005290 | 08/31/2009 | Approved | OPC-60 Osmium coater | Dickerson, Lori | Dickerson, Lori | 500000.5000.B00001.7819A.160 | AUG | 2009 |
| EM Facility | 1005286 | 08/31/2009 | Approved | Edwards vacuum evaporator | Dickerson, Lori | Dickerson, Lori | 500000.5000.B00001.7819A.160 | AUG | 2009 |

Total of 3 rows.

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

Note: new tab/window