Wayne State Banner Integration Billing Manual

Table of Contents

When will I need to resolve charges?

With the Wayne State Banner integration, there is a check for Index Numbers when you create a billing event with internal user's charges. You can still create the billing event, but if any charges do not have Index Numbers you will get a problematic charge error that flags the charges in red to you and the user. The system will automatically send the lab contact an email asking them to resolve the charge. If a charge for an internal user is included in the billing event without an Index Number assigned to it, you will have to resolve the charge.

How can I resolve internal charges and bill?

If you can catch the charges that are missing Index Numbers before you run the billing event you can choose to push them to *excluded charges* for later once the Index Number is in the system. For more information on running a general billing event, click here.

If you create a billing event with billable charges that do not have Index Numbers, the *Billing Summary* will open with warnings that there are charges that need to be resolved (*Figure 1*). Charges will also show as red for users when they log in to review the charges, if they have not been resolved.

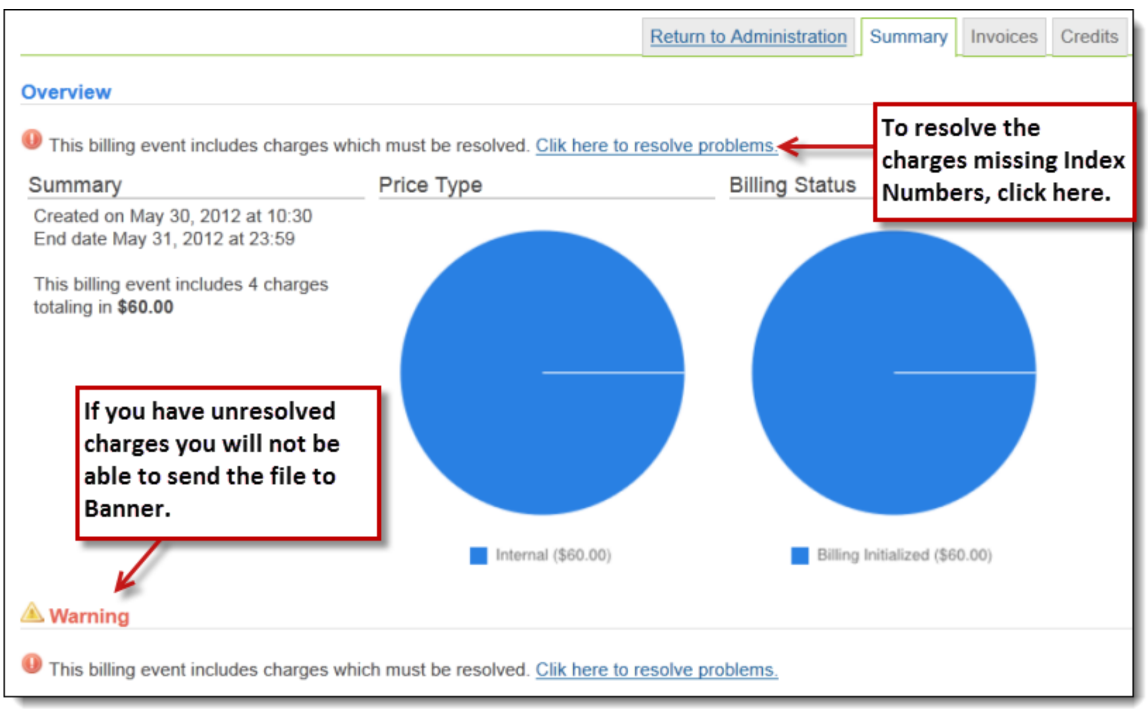

***Figure 1*. If a billing event is created with internal user charges without Index Numbers, the Billing Summary will open with a warning.**

For PIs or lab managers to resolve the charges, they must first assign Index Numbers to the user in the lab settings page and then assign the correct index number to the correct charge. For more information on how PIs or lab managers can manage Index Numbers, click here.

For the core to resolve the problematic charges, click on *Click here to resolve problems* on the *Billing Summary* page (*Figure 1*). The *Resolve problem charges* window will open with a list of charges that are missing Index Numbers (*Figure 2*).

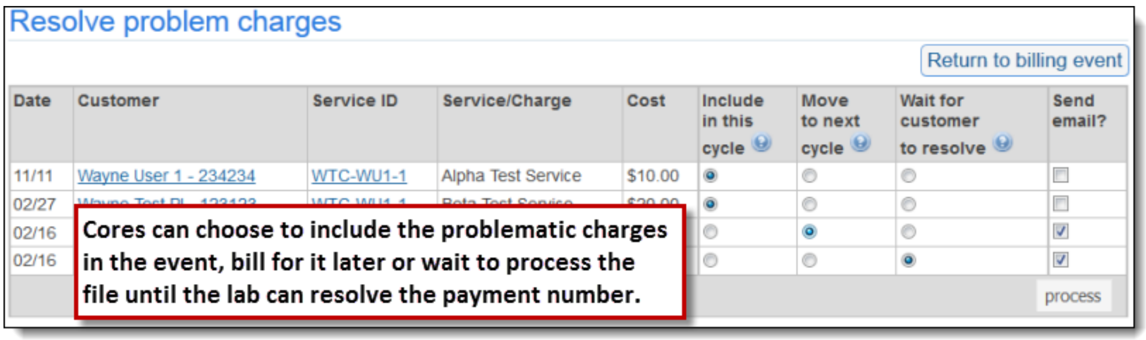

***Figure 2*. In the *Resolve problem charges* window, core administrators can choose to include the charges in the billing event, remove the charges from the event to bill for them later or wait for the lab to assign the correct Index Number.**

Any charges you choose to wait for the lab to resolve, will show up red in the invoices and in the requests when the user views their requests. For more information on how labs managers can assign index numbers and resolve payment number issues, click here.

Once the charges are resolved, you can send the billing file to Banner (*Figure 3*). Please note that if you send any charge without Index Numbers to Banner, the file import will fail and will not go into Banner.

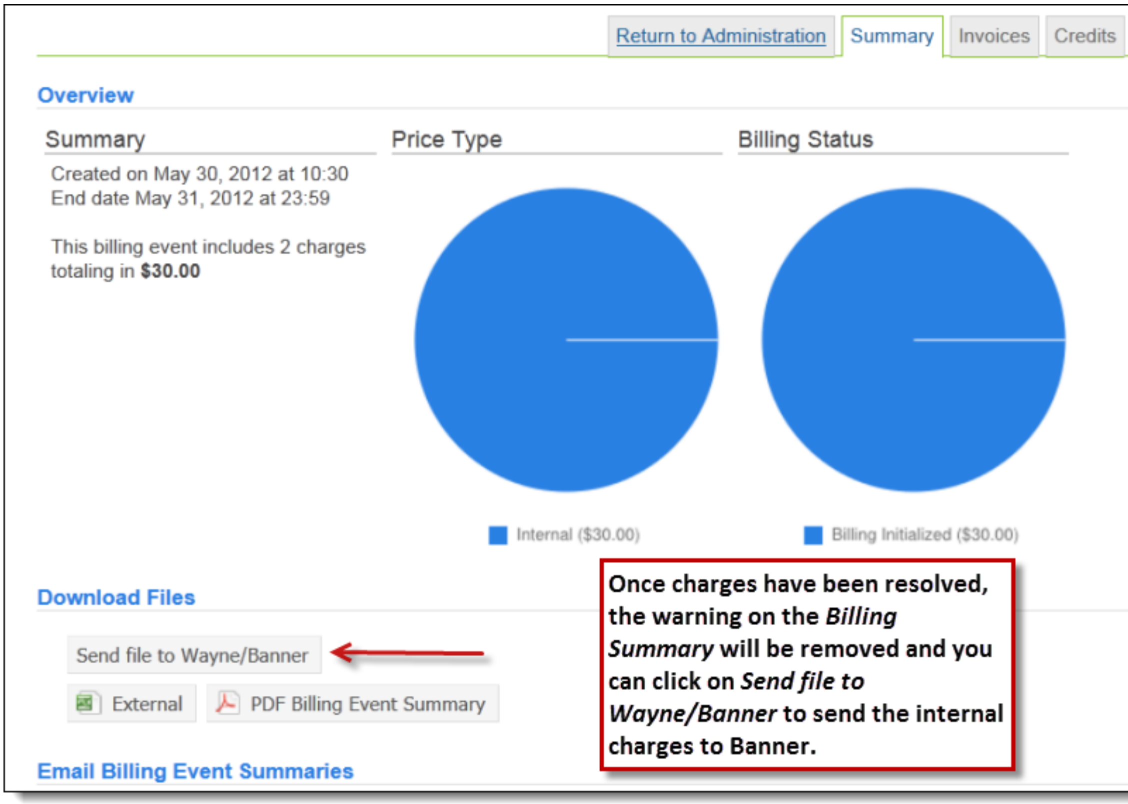

***Figure 3*. Send the file to Banner once all charges are resolved.**

How can I download a list of charges?

As a core administrator, you can download external user charges by clicking on the *External* button just below the Send file to Wayne/Banner button (*Figure 3*). This will give you a csv of all external user charges.

If you want to download all charges you can either download all invoices in the *invoices* tab, or download a csv file from reporting. To download a csv file:

1. First click on the *Reporting* tab (*Figure 4*).
2. You will want to filter by *Billing Date* and make sure the date range is for when the billing event was created.
3. Click on Refresh report and reset filters. After you refresh the report with the correct date range and by Billing Date, you will see a Billing events filter option.
4. Click on *Billing events* to see all events in the date range. Hover over the Billing event name to see the entire name. Check the Billing event(s) you want to have downloaded. You also can choose other filters for the csv file.
5. Once all of your filters are set, click on *Apply filters*.
6. The tables of the reports should update. After the reports update, click on the csv button to download the csv.

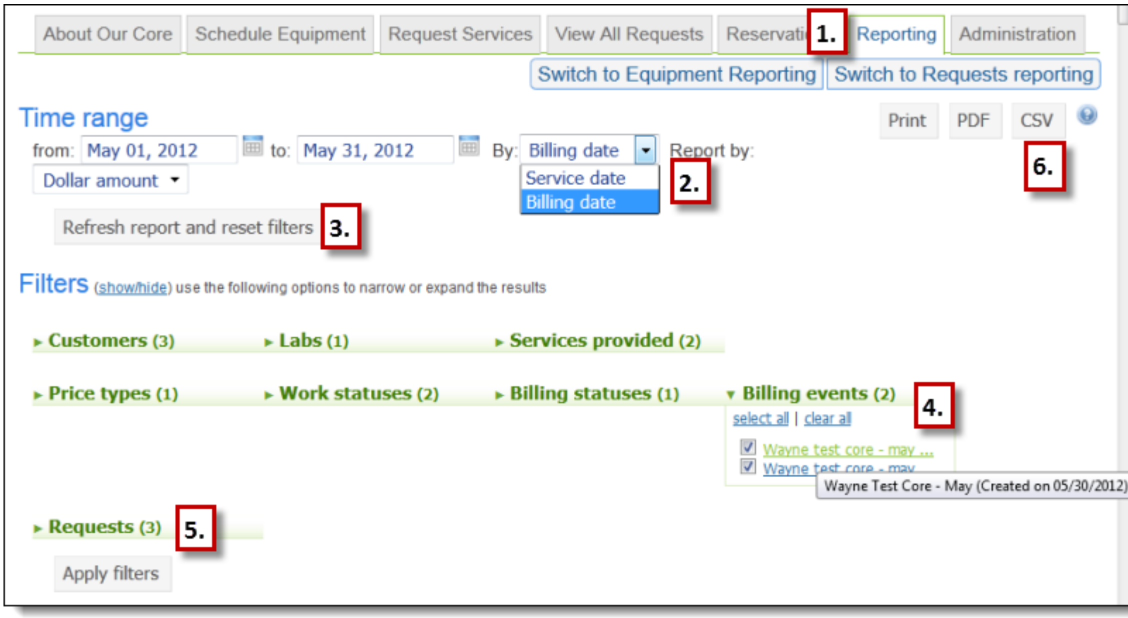

***Figure 4*. Download a csv file of charges in the *Reporting* tab.**

[Return to Table of Contents]