IRB Assistant

Invoice History

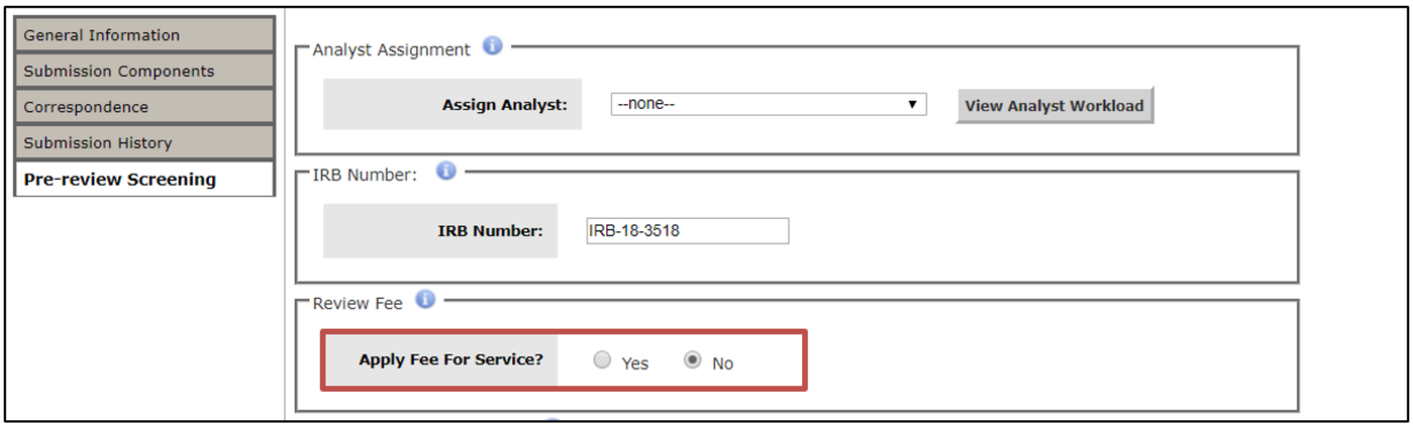
Version 11.02

Invoice History

Introduction

This manual will guide you through the process of using the **Invoice History** menu item under the **IRB Assistant** menu group on the iRIS homepage. Within this menu group you can access "fee applied" submissions, complete and incomplete invoices, and you will have the ability to generate new invoices and track invoice payments made to the IRB. Please see the IRB Assistant - Review Board Administration and Properties manuals for invoicing setup.

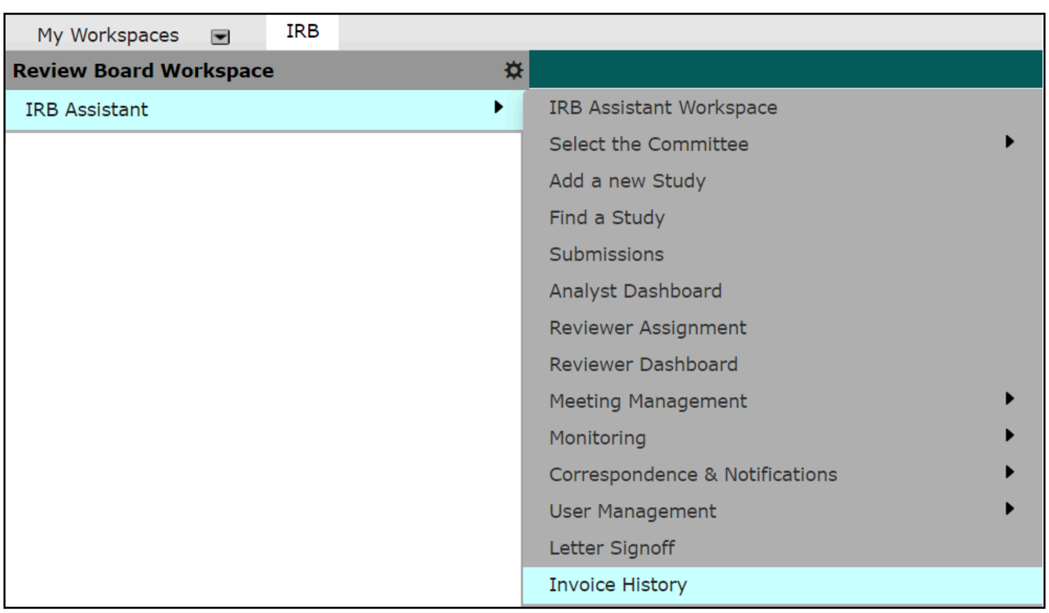
When a submission is processed by the IRB, the Coordinator will be able to indicate if the submission will receive a review service fee (see screenshot below). If the review board indicates "Yes" to apply fee for service, then you are ready to begin using the Invoice History menu item page to invoice a study.



Note: In order for the review board to apply a review fee, the Submission Form Type, Invoice Type, and Invoice Amount must be configured. For additional details please see the IRB Assistant > Review Board Administration manual.

Invoice History

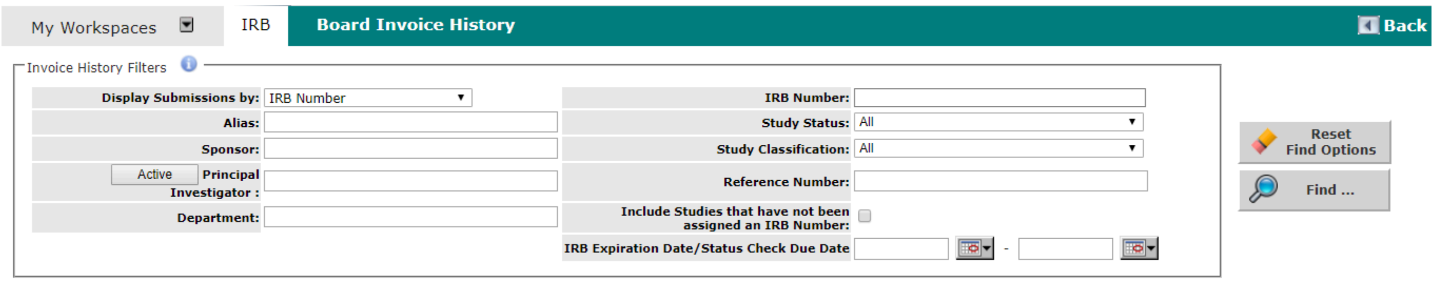
To begin, click the Invoice History link within the IRB Assistant menu item.



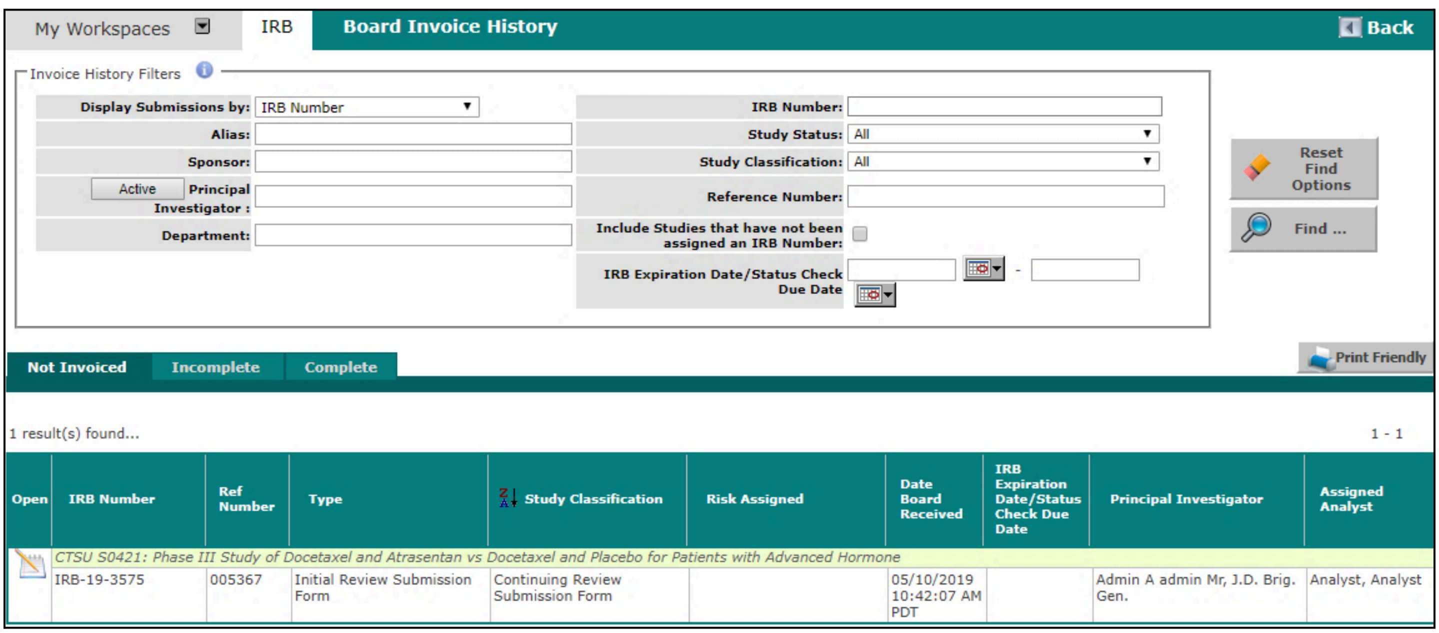
From within Invoice History, you can view all of the IRB "apply fee for service" submissions. When accessing Invoice History, you will initially be directed to the **Not Invoiced** tab. You will also have access to the **Incomplete** tab and **Completed** tab.

You are able to use the available filters to search for an invoice, or you can click the **Find** button without any filters to return all invoices back in the tab.

You can also change the display of the invoice numbering by selecting from the "Display Submission By" dropdown list. The numbers available here depend on what modules are configured in your system. The example below shows the page when IRB Number is selected from the dropdown list. The page reflects IRB information, as opposed to the default, IRB Number information.



On the Not Invoiced tab, you will find all the study submissions that have not yet been invoiced.



To view invoice details, click the  icon next to the invoice.

The invoice page contains:

***Projected* Invoice Number-**The number that will be assigned if this is the next invoice to be completed.

Waive Invoice- Gives you the option to waive the invoice fee for this submission.

Amount Due- This is the cost of the review service fee.

Amount Received- This is the total dollar amount of all payments received for this submission.

Balance Due- The remaining balance for this submission.

Invoice Type- When setting up invoice types, each has its own associated dollar amount.

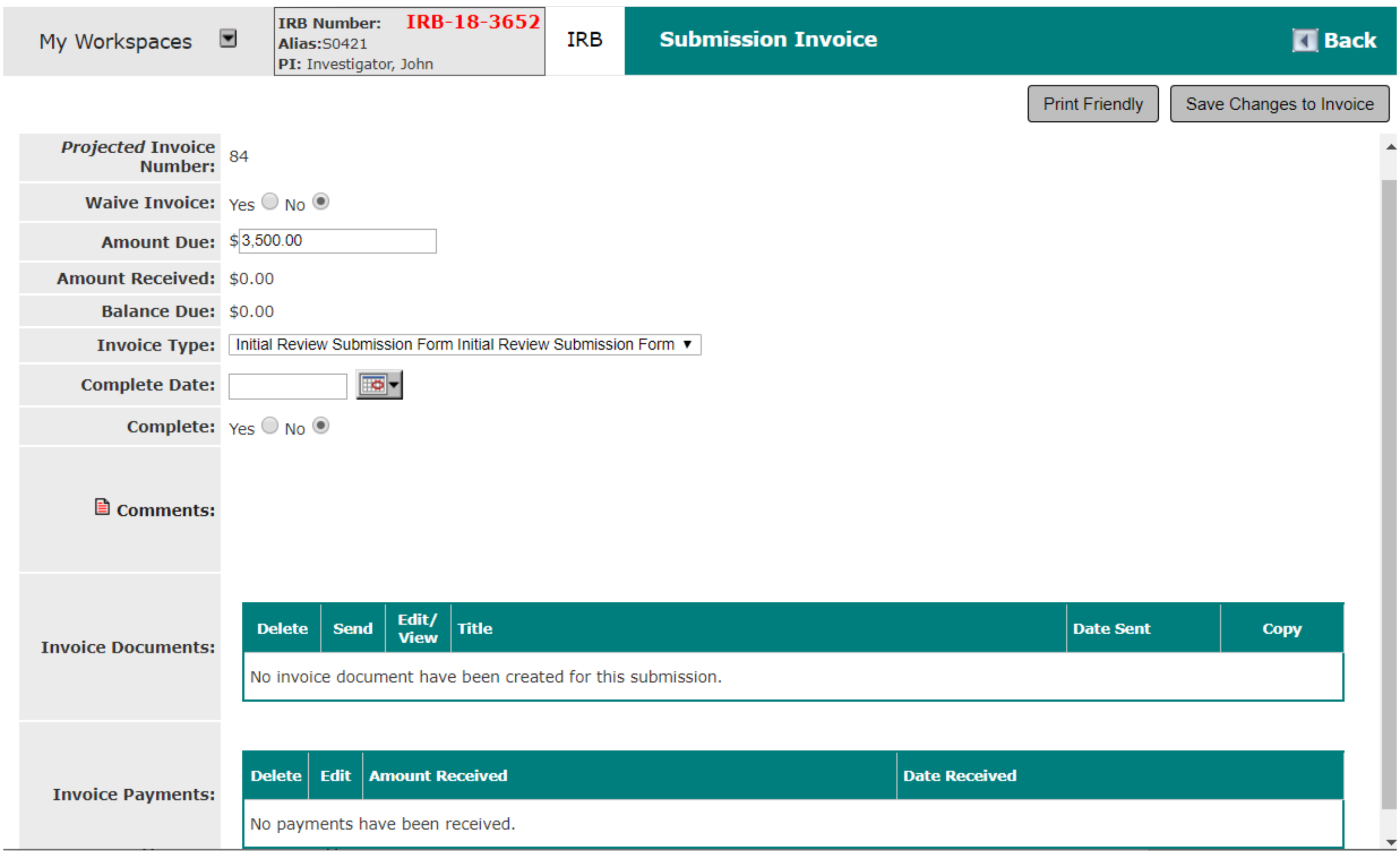
Complete Date- Here, you can enter the date that all invoice payments have been received.

Complete- This will move the invoice item to the Complete tab within the Invoice History screens.

Comments- Any comments the user may want to indicate regarding the invoice.

Invoice Documents-Where you can create and send an invoice document.

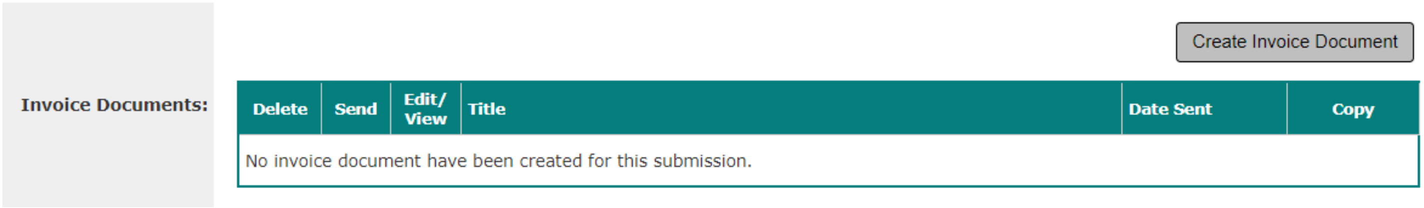
Invoice Payments- Where you can add received payments.



Click the **Save Changes to Invoice** to begin generating the invoice. Once you have saved the changes made to the fields above, the system will allow you to create Invoice Documents as well as accounts for any Invoice Payments received. The Amount Due and Invoice Type should be adjusted before creating the Invoice Document, allowing you to generate an accurate document.

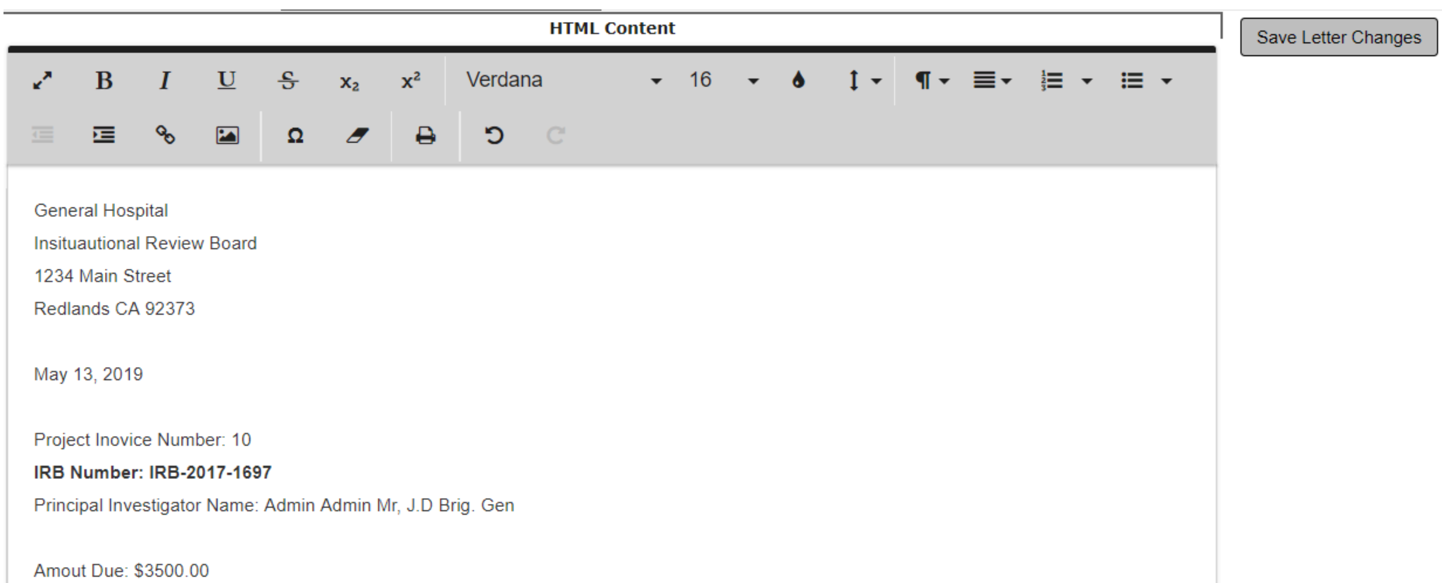
Note: The Create Invoice Document button will not display until you have saved the changes made to the invoice.

Click the **Create Invoice Document** button to create an invoice document.

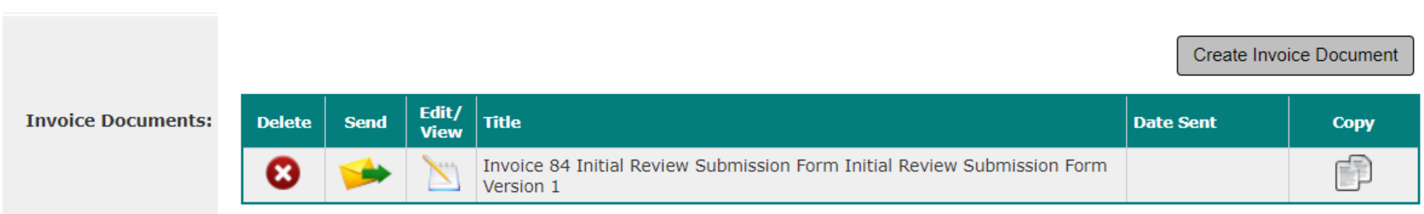


This will open your system's pre-configured invoice template. The Invoice Documents here are based on templates that are setup in Review Board Administration. These templates can include merge codes that will fill information particular to the study that the invoice is being generated for. You will be able to use the text editor to make any necessary changes to the document. Please see the IRB Assistant -RB Administration manual for Invoice Template setup.

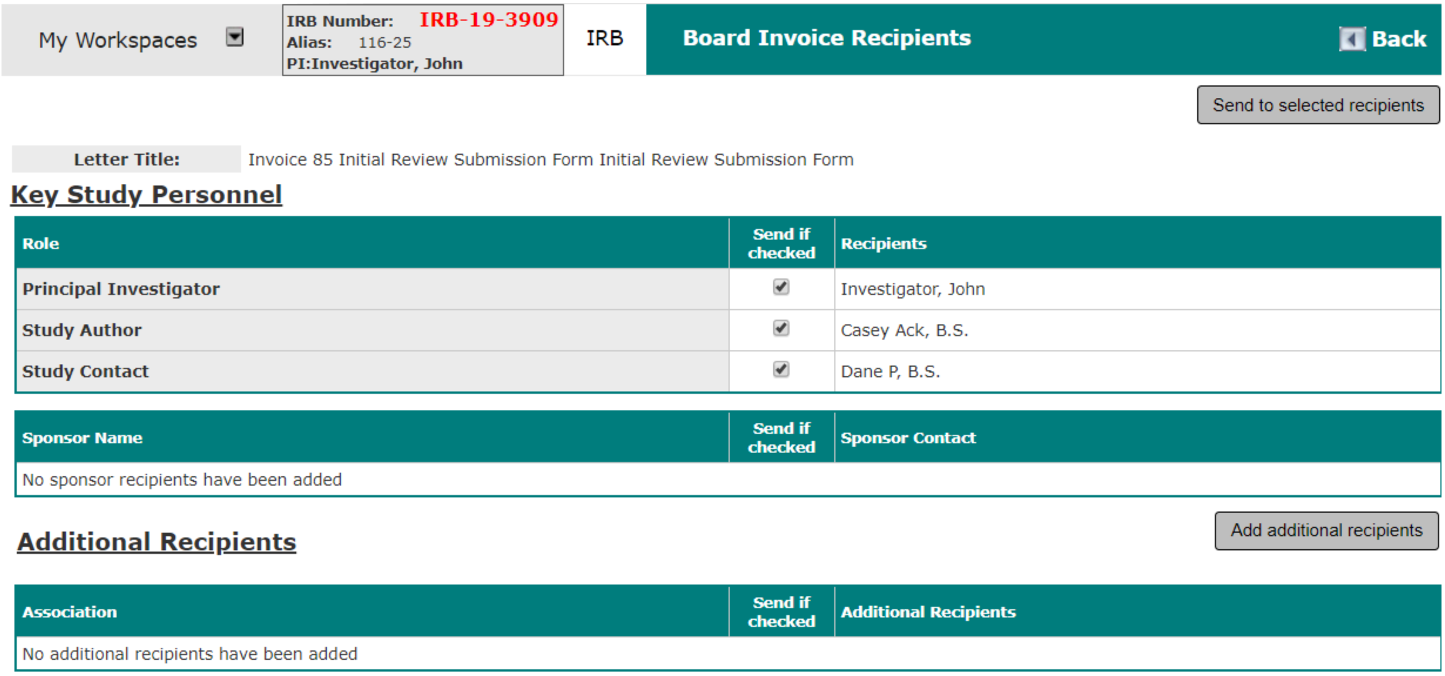
Once you are done creating/making changes to the invoice template, click the **Save Letter Changes** button.



After saving the document, you will be returned to the invoice details page.



Click the **Send** button to select the recipients of the invoice document. One you have entered the page; all the Key Study Personnel will be defaulted to receive the invoice document. Click the "Send if checked" checkbox next to the recipient to include or remove them on the send-to list.



My Workspaces | IRB Number: IRB-19-3909 | Alias: 116-25 | PI:Investigator, John | IRB | Board Invoice Recipients | Back

Send to selected recipients

Letter Title: Invoice 85 Initial Review Submission Form Initial Review Submission Form

Key Study Personnel

Role	Send if checked	Recipients
Principal Investigator	☑	Investigator, John
Study Author	☑	Casey Ack, B.S.
Study Contact	☑	Dane P, B.S.

Sponsor Name	Send if checked	Sponsor Contact
No sponsor recipients have been added		

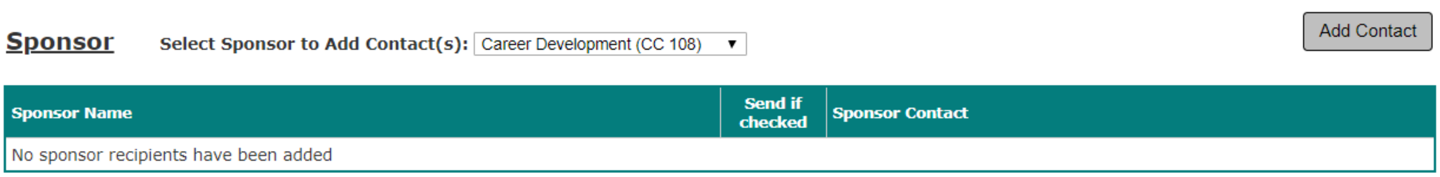
Additional Recipients

Add additional recipients

Association	Send if checked	Additional Recipients
No additional recipients have been added		

If the study is associated to a sponsor, you will be able to specify contacts associated to the sponsor. The Sponsor Contact will allow you to add as many contacts to the study for the sponsor as necessary.

Begin by clicking on the **Add Contact** button.



Sponsor Select Sponsor to Add Contact(s): Career Development (CC 108) ▼

Add Contact

Sponsor Name	Send if checked	Sponsor Contact
No sponsor recipients have been added		

A popup window will open within your browser allowing you to search the system for the existing sponsor's contacts. If the sponsor contacts associated to the study exist, then they will be listed and can be selected.

Find a Sponsor Contact x

Displayed are the sponsor contacts associated to this study for Career Development (CC 108)

* click "Add a New Sponsor Contact" to search the master list of existing contacts

Add a New Sponsor Contact

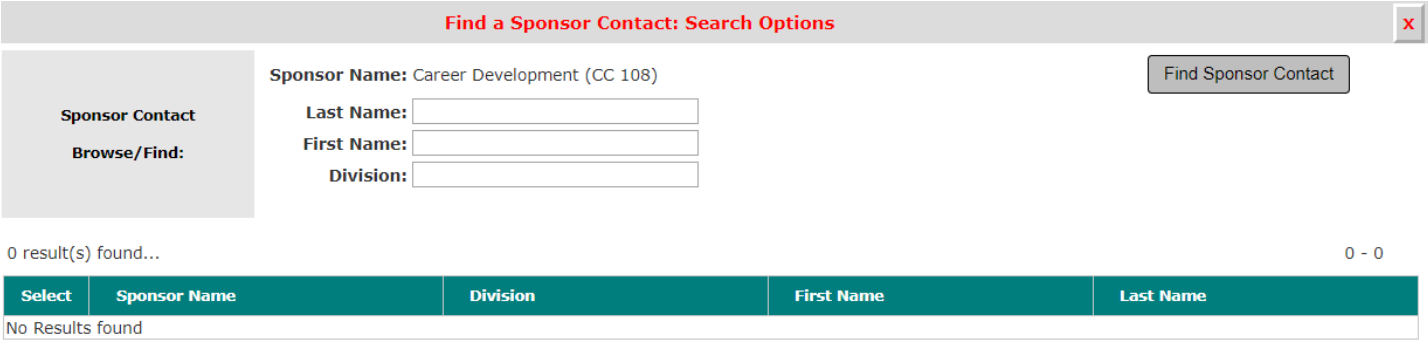
if the contact name does not exist click the "Add a new Contact to the Master List" to create a new contact

Sponsor Contacts associated with this study:

Select	Contact Name	Division	Title	Phone	Email
No Results found					

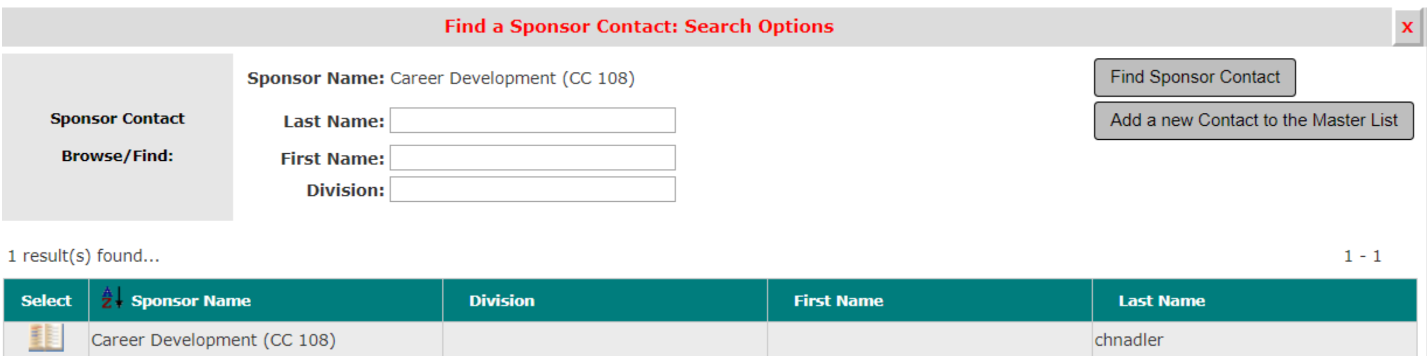
Cancel Apply

If the study does not have sponsor contacts that are associated to the study (see image above), you can click **Add a New Sponsor Contact** to search the master list of existing contacts already setup in iRIS.

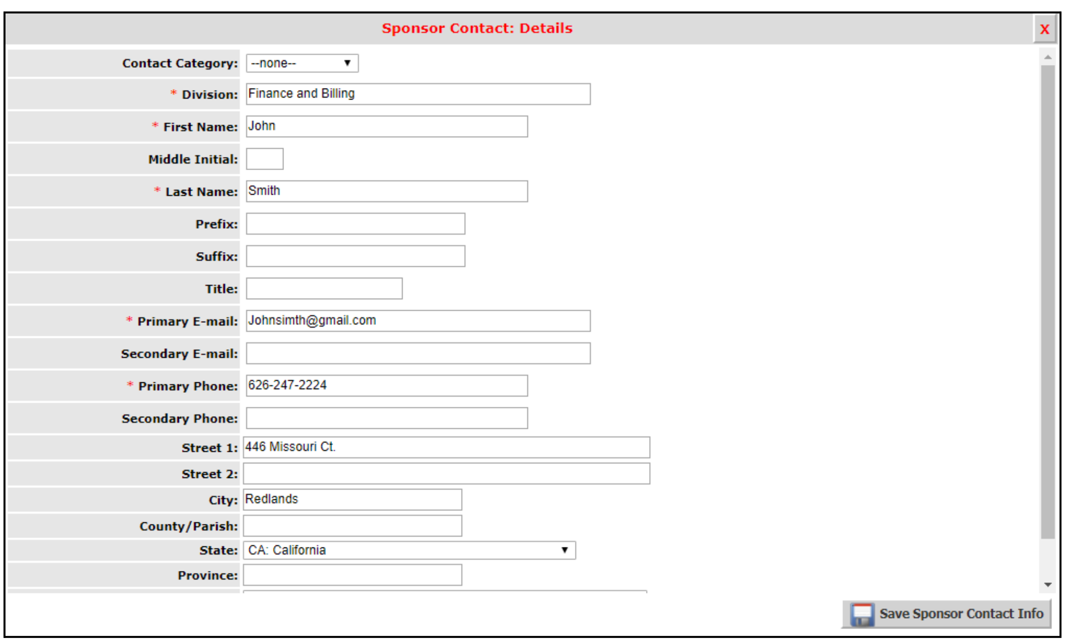


A new popup will display within the browser allowing you to search for existing sponsor contacts. Any contact already associated to the Sponsor can be searched using the Last Name, First Name and/or Division search fields. You can enter all or partial information in any of these fields or leave these fields blank and click the **Find Sponsor Contact** button to return all sponsor contacts associated to the sponsor you added to the study.

Select the Sponsor Contact from the list to add them to the send-to list.

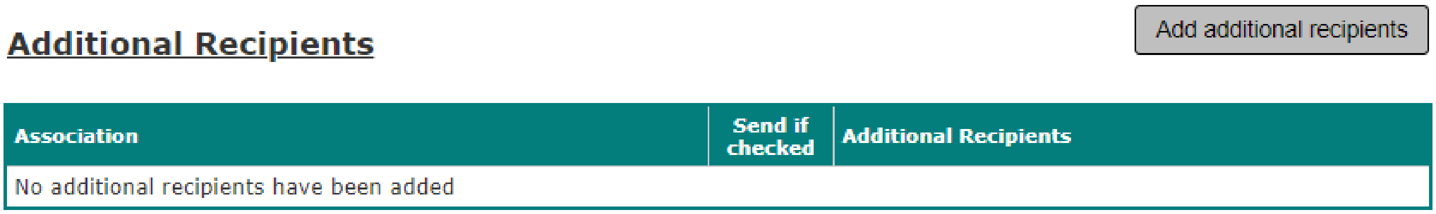


If you cannot find the sponsor contact in the list, you can add a new sponsor by clicking on the **Add a new Contact to the Master List** button.

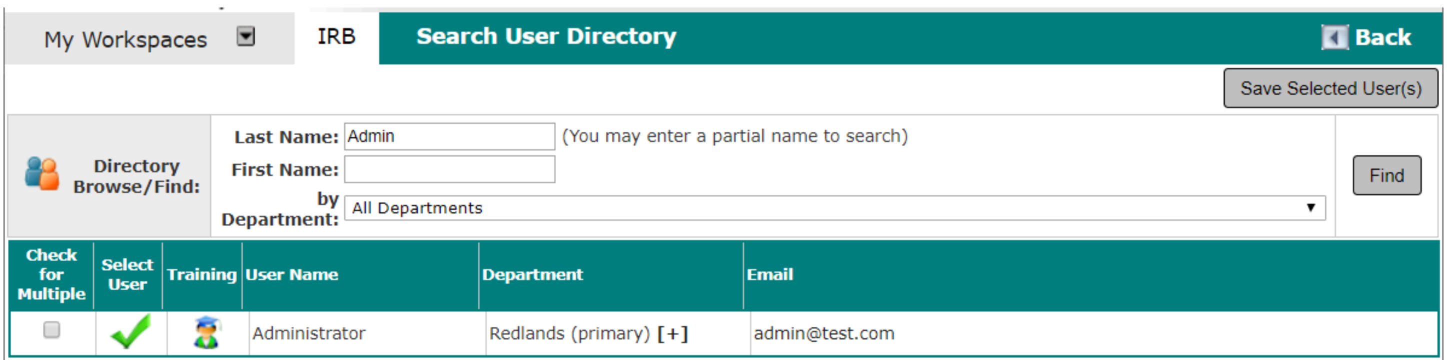


After you choose to add a new contact to the send-to list, the window will update, allowing you to specify the Contact Category, **Division** (required field), **First Name** (required field), Middle Initial, **Last Name** (required field) and information for the sponsor contact. When you are finished, click the **Save Sponsor and Contact Info** button. The system will take you back to the previous screen.

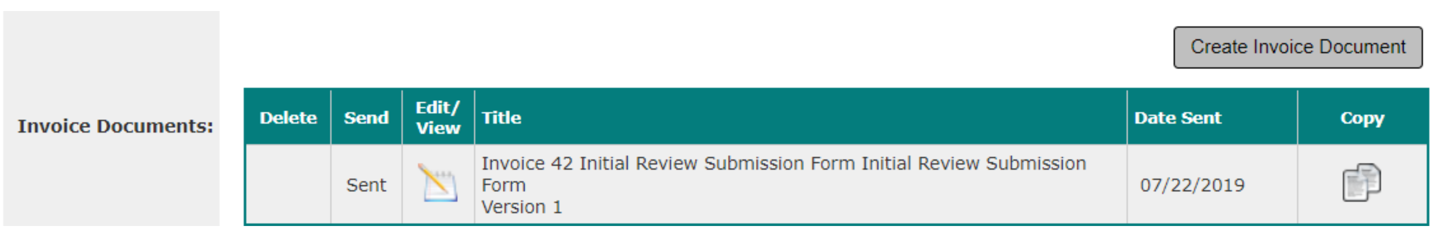
Note: If the study is not associated to a sponsor, you will not be able to add a sponsor contact.



You can click **Add additional recipients** to search the iRIS user directory for additional users to send the invoice to.



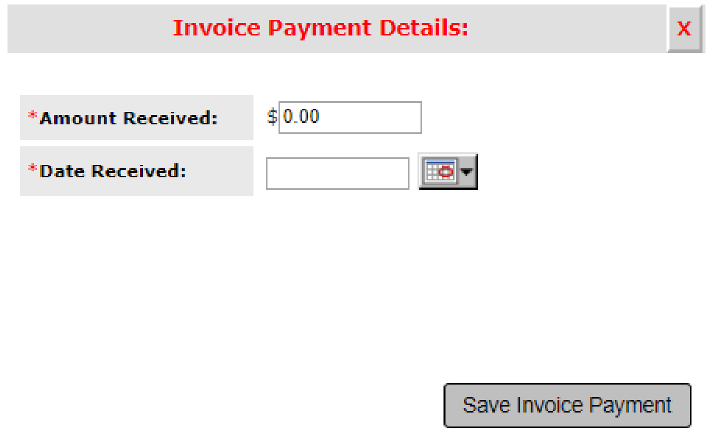
Once you have selected the appropriate recipients click the **'Save Selected User(s)'** button.



After sending the invoice document, you will be returned to the invoice details page.

Click the **Add a New Payment** button to record payment entry.

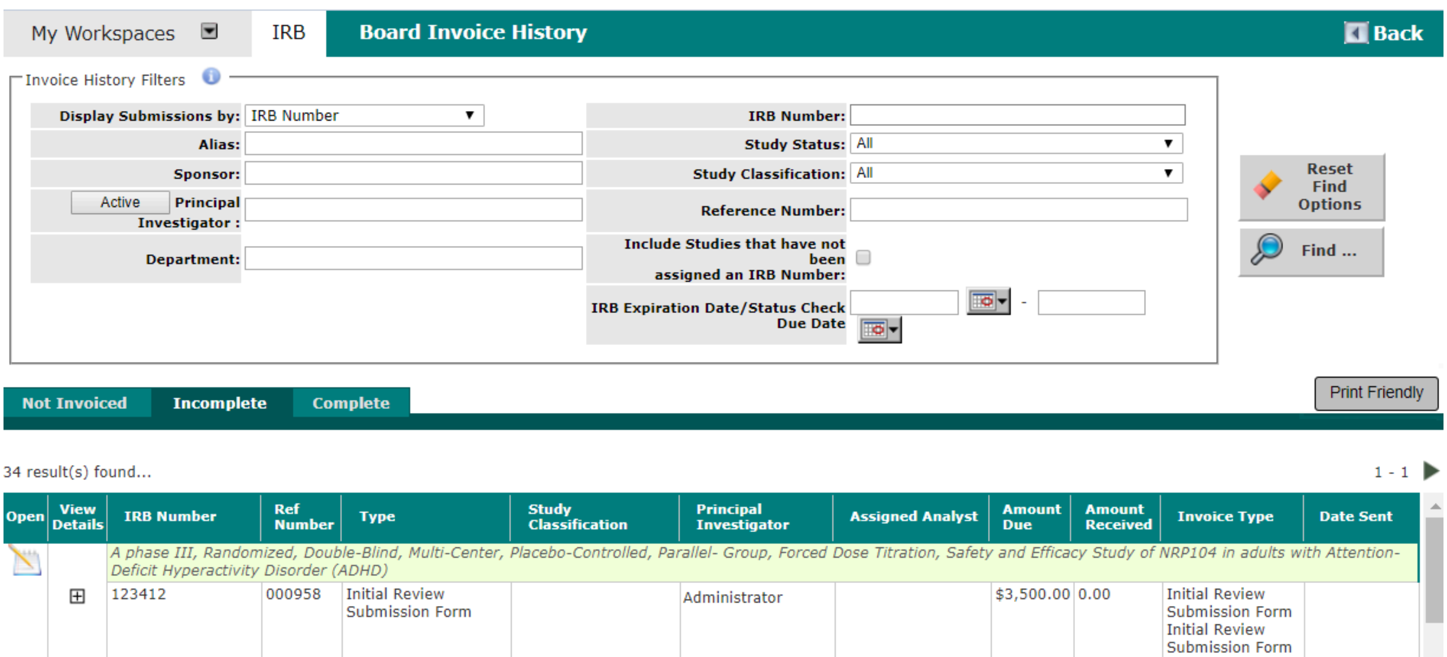
When you enter Payments for the invoice, the Amount Received will be adjusted accordingly.



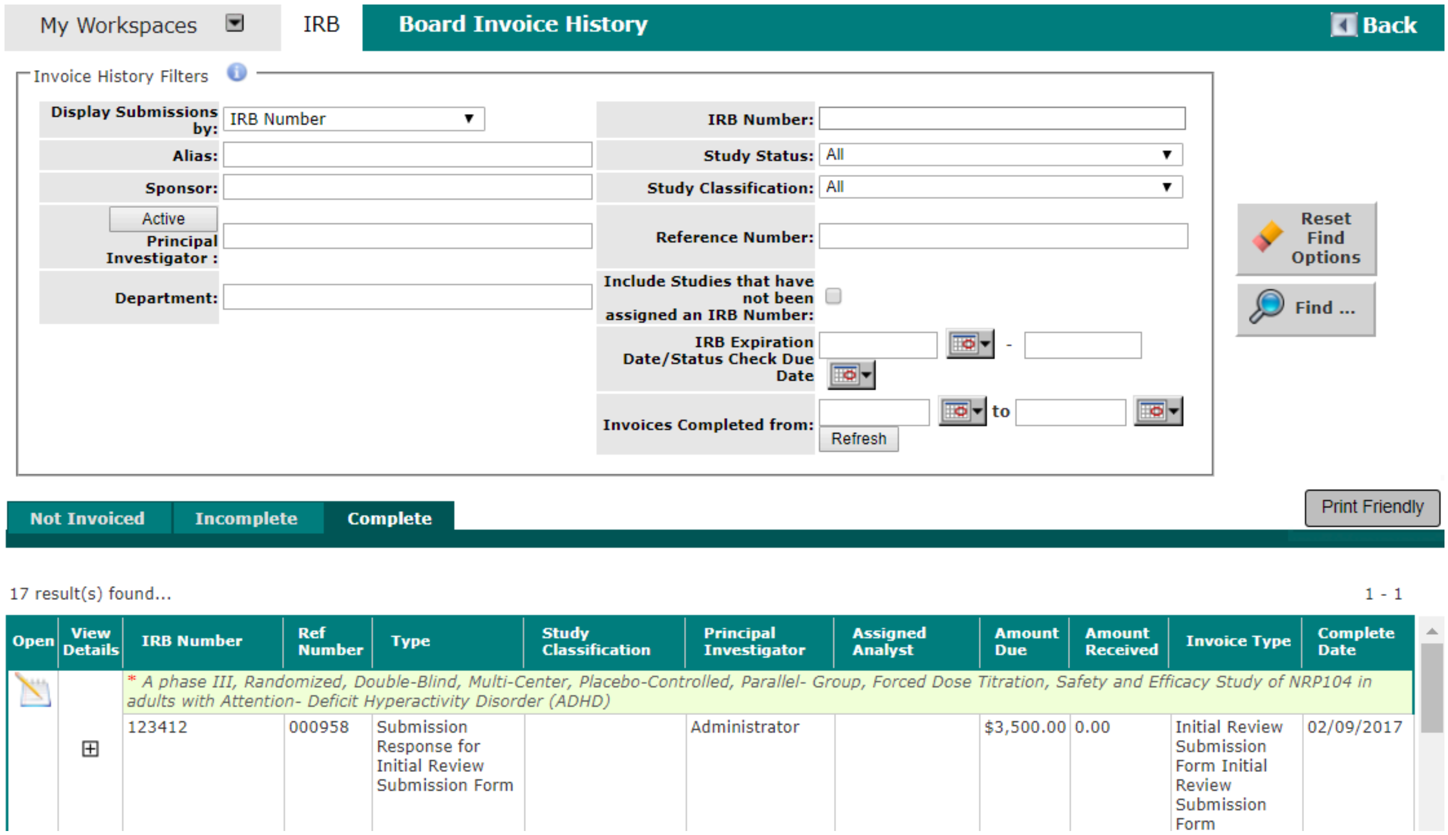
Enter the amount received and date received then click the **Save Changes to Invoice** button to save the payment entry.

Once the entire Amount Received equals the Balance Due, the Invoice is considered closed. You can now complete the invoice by selecting Yes for the Complete radio button. This will move the invoice entry to the Complete tab. Invoices that have received partial payment(s) should remain on the Incomplete tab.

The Incomplete tab will house all of the open invoices within the review board. You can continue processing incomplete invoices until all payments have been received by the IRB.



The **Completed** tab will house all completed invoice within the review board. You will have the ability to input date parameters to help narrow down results when you are searching for previously completed invoices.


My Workspaces
IRB
Board Invoice History
Back
Invoice History Filters
Display Submissions by:
IRB Number
Alias:
Sponsor:
Active
Principal Investigator :
Department:
IRB Number:
Study Status:
All
Study Classification:
All
Reference Number:
Include Studies that have not been assigned an IRB Number:
IRB Expiration Date/Status Check Due Date
Invoices Completed from:
to
Refresh
Reset Find Options
Find ...
Not Invoiced
Incomplete
Complete
Print Friendly
17 result(s) found...
1 - 1
Open
View Details
IRB Number
Ref Number
Type
Study Classification
Principal Investigator
Assigned Analyst
Amount Due
Amount Received
Invoice Type
Complete Date
* A phase III, Randomized, Double-Blind, Multi-Center, Placebo-Controlled, Parallel- Group, Forced Dose Titration, Safety and Efficacy Study of NRP104 in adults with Attention- Deficit Hyperactivity Disorder (ADHD)
123412
000958
Submission Response for Initial Review Submission Form
Administrator
$3,500.00
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Initial Review Submission Form Initial Review Submission Form
02/09/2017