Managing Your Account in iLab

More detailed instructions on how to manage labs can be found at http://help.ilabsolutions.com/core-facilities-lab-administrators.

These instructions will also provide recommended settings that will allow for smoother scheduling and invoicing for all parties. The instructions will indicate what is only a recommendation.

Managing Access to the PI’s Study Subledgers

Log in to iLab with your UT Southwestern user ID and password.

Select my labs under manage groups

Select the appropriate lab.

Select the Membership Requests & Subledgers tab.

Under Manage Subledgers, you will see a list of all subledgers owned by the PI. These are automatically sent to iLab from SPA.

Place checkmarks in the boxes under the subledgers you would like to make accessible to the CRU for payment on studies.

NOTE: If your study team and financial personnel are members of your lab, be sure to also check the boxes next to their names so they can assign subledgers to visits on behalf of the PI.

IMPORTANT: At least one subledger must be available for selection by CRU staff. Because the CRU/IDS is a cost-recovery service center, we are not able to provide services without the expectation of timely reimbursement.

Linking Department Subledgers to Your Lab

Recommendation: If services are to be requested and provided prior to study subledger set-up, we strongly recommend you link a departmental subledger to your lab. Your department chair has co-signed the LOA indicating that departmental funds will be used, if necessary, to pay for CRU/IDS services. Because the CRU/IDS is a cost-recovery service center, we are not able to provide services without the expectation of timely reimbursement. Follow the above instructions with the below addition to add a departmental subledger.

Under Request access to additional SubLedgers, enter a departmental subledger and select Request.

Note: SPA can transfer expenses from the departmental subledger to the study subledger once the latter has been set up.
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Managing Project Costs

Under **Lab-wide approval settings**, review the settings in **Default auto-approval threshold**. The default setting is $500.00. If you wish to increase or decrease the threshold, enter the new amount and select **save approval settings**.

**Lab-wide approval settings**

- **Default auto-approval threshold**: $500.00
- **Cost overrun buffer**: $160.00

**Recommendation**: Set the default approval threshold at a high enough level to avoid having to approve financials prior to every visit as this may cause a delay in scheduling. Subledgers WILL NOT be charged at any time during the scheduling process. After invoices have been sent to study teams, an Interdepartmental Request (IDR) will be generated through PS. If necessary, subledgers may be changed by the PI’s staff at that time. **Until the IDR is approved by the PI’s department, no funds are expensed.**

Managing Member Permissions

Select the **Members** tab. Then, under **Lab members and settings**, select the pencil next to the study team member’s name to edit his/her permissions.

Select the appropriate permission from the drop-down menu. The options are Principal Investigator, Manager, or Member.

1) **PI** = Principal Investigator on the IRB Studies. Has full permissions to manage all aspects of this lab, including financial.
2) **Manager** = The study team member who will have the same non-financial permissions as the PI. This person may also be delegated as core financial contact.
3) **Member** = Member of the PI’s lab who can request services on behalf of the PI.

There are also two boxes on this screen:

1) **Can order** = Ignore, we do not utilize this setting at UTSW.
2) **Core Financial Contact** = Allows this person to receive invoices on behalf of the PI and have the same financial permissions as the PI.

**Recommendation**: iLab settings will allow the CRU to send invoices only to either the PI or the Core Financial Contact. We recommend the PI designate as **Core Financial Contact** the study team member who is responsible for either reviewing or disseminating for review all of the PI’s invoices. Otherwise, invoices will go directly to the PI for review. If the PI does not contact the CRU to advise of any errors within the review period, invoices will be pushed to PeopleSoft as is, errors included, if any. At that point, no changes to the invoice can occur in iLab, resulting in a complicated process for making financial adjustments by the CRU.

**Recommendation**: To avoid delays in processing visits, we recommend the PI delegate as **Manager** the study team member who manages the PI’s studies, such as a research manager or research coordinator.
### Adding Study Team Members to Your CRU Study in iLab

*This will allow study team members to review activities and charges related to study visits.*

<table>
<thead>
<tr>
<th><strong>Log in</strong> to iLab with your UT Southwestern user ID and password.</th>
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<tbody>
<tr>
<td><strong>Select core facilities</strong></td>
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<tr>
<td><strong>Select Clinical Research Unit (CRU)/Investigational Drug Service (IDS)</strong></td>
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<tr>
<td><strong>Select the <strong>My CRU Studies</strong> tab</strong></td>
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<tr>
<td><strong>Click on the name of the study</strong></td>
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<tr>
<td><strong>On this screen, you will see information about your study that has been entered by CRU staff</strong></td>
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<tr>
<td><strong>Scroll down to the Research Team header and select the pencil to edit this section.</strong></td>
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<th>Begin typing the name of the study team member in the search box and select the team members’ name. Note: If the person’s name does not populate, then this typically means he/she has not yet registered for an iLab account. They will need to do that before they can be added here.</th>
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<tbody>
<tr>
<td>Next to the name, select their role</td>
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<tr>
<td>Select <strong>Save</strong></td>
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