Core Collaboration Model

Passing Through “On Behalf” Orders from other Cores

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Overview

Many Northwestern cores are engaged in multi-core projects where one core facility acts as a concierge to an end user, and multiple cores’ services are part of the scope of work. We need to consider how to accommodate this model in terms of billing.

One possibility is for each core to charge separately for their portion of the project. This model is cumbersome to the end user, especially if they are an external client.

Alternately, one core may order services at another core on behalf of an end user, and then pass the charges through. This requires some backend setup as described:

For internal customers, follow these steps:

1. Ensure that your core’s recharge chart string is setup as a valid Payment Source in NUcore, with the Project Manager for the work as an Owner or Purchaser on the recharge chart string Payment Source.
2. Using your own recharge, purchase services at other cores to provide your end user with the results/end products they are seeking.
3. Once billed for these services, pass through these charges to the end user. OK to setup a $0-costed Service called “Core Pass-Through Service” without any modification to the Cost Study. (Pass-through costs excluded from Cost Study calculations.)
4. At your core, use this Service to purchase pass-through charges for the end user; be sure to indicate the details for the pass-through order in the Notes field (Core Facility used, Quantity, Price per Unit).
5. Once entered and complete, update the order price to precisely match the charge on your recharge from the core providing pass-through services.
6. If you have a “Consultation” or a “Technical Time” Service Line, it may be appropriate to charge the amount of time that you spent working on this project at the other core facilities on behalf of the end user.

External customers should be charged the appropriate external rate for these pass-through orders. Add these two steps before proceeding with Step 2 in the internal customer workflow:

1. Setup an email address login in NUcore, controlled by the Project Manager for the pass-through work (setup any email address login in NUcore).
2. Setup an alternate version of the recharge chart string, specifically for any pass-through work for external users. The Fund and the Department will be the same as your usual recharge chart string, but use Program Code 1104 (Rsearch Expenditures) to distinguish this Payment Source.

When this alternate version of the recharge Payment Source is used at other core facilities, it will be charged the External Rate, since it is owned by an email address, not a Net ID. This will allow you to pass through the external charge to the end user when the other core bills your facility’s account.

You may need to work with the pass-through core to place your external email login or the alternate recharge payment source into a particular Price Group, if working with an External Academic, or a CBC member to ensure proper pricing.