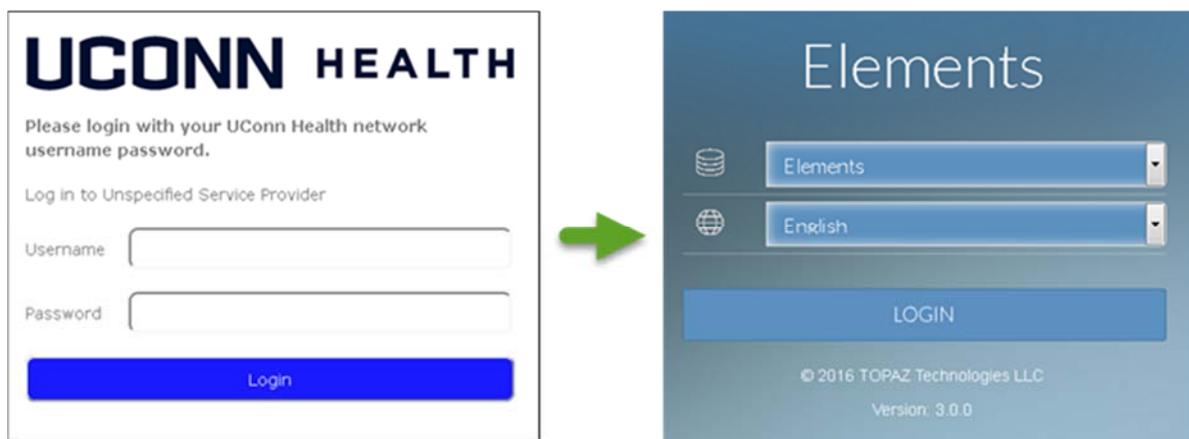


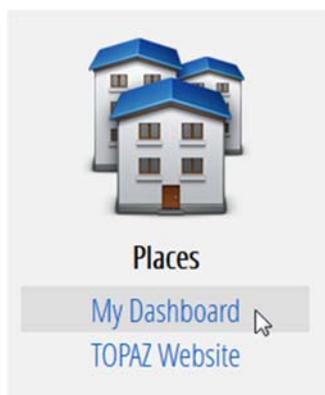
How to Review Animal Bills from the Center for Comparative Medicine (CCM)

In order to review a bill for a particular account, you must be associated with the account in Topaz Elements. This guide assumes you are the Principal Investigator (PI) and/or Department Billing Administrator associated with accounts in Topaz Elements and you wish to review bills prior to them being committed and invoiced.

1. When bills are ready for review (on or around the 4th business day of the month), you will receive an email from CCM stating that the prior month's invoices are ready for review in Topaz Elements. The email will include a deadline (typically 10 days) to return your corrections to CCM if you notice any changes that are needed before the bills are committed and invoiced.
2. Login to Topaz Elements at <https://uconnprod.topazti.net/UCElements> Enter your UConn Health domain username and password. Click Login. On the Elements sign in page, Click Login. The Topaz Elements home navigation screen appears.



3. From the Topaz | Elements home navigation screen, choose the My Dashboard link under Places. Alternatively, you can use the Product Selector (click in the top left on most screens) and select My Dashboard from the menu.



OR



4. Within the My Dashboard, click on the My Bills panel on the left hand side of the screen. A grid appears with Staff Accounts (PI Name – Account Number), status (Bill for Review or Invoiced), Invoice # (if applicable), the billing period start and end dates, and total amount of each bill.

Staff Account	Status	Invoice #	Bill Period Start	Bill Period End	Total
PI, 1 - 211201	Billed For Revie		5/28/2016	6/2/2016	\$329.16
PI, 1 - 500438	Billed For Revie		5/28/2016	6/2/2016	\$142.80
PI, 1 - 211201	Invoiced	664	5/27/2016	5/27/2016	\$54.86

Note: The My Bills dashboard panel works in similar ways to other dashboards, consult the how to guide on Using My Dashboards for further instructions and tips on customizing and manipulating the dashboard grid.

5. If desired, you can filter through results in several ways to locate bills in need of review:
 - Enter criteria in the Quick Finder to search through information on a particular page of results shown on screen (e.g. account number, particular status like Billed for Review).
 - Click near the upper right side of the screen for advanced filters. Refer to the separate how to guide on Creating and Using Filters for further details.
6. For each staff account in a Billed for Review status, review the bill and its associated charges in one or more of the following ways:

- Click to expand any Bill for Review. When a bill is expanded, you can see its transaction details. Use the scrollbar to scroll right to see additional details associated with each cost.

Transaction C	Transaction T	Description	Com	Staff Account	Account Dep	Cost	Tax Amount	Surcharge	Subtotal
6/2/2016	Cage Per Diem	Cage Per Diem		PI, 1 - 211201		\$172.20	\$0.00	\$0.00	\$172.20
6/2/2016	Cage Per Diem	Cage Per Diem		PI, 1 - 211201		\$156.96	\$0.00	\$0.00	\$156.96

- Check the box next to one or more Staff Accounts in the Billed for Review status to select them, then click the print icon to generate a report in PDF format showing the bill's detail.

7. If you have changes or questions about the charges on the bills ready for review, please email Susan Cohn at cohn@uchc.edu with requested changes by the deadline for that month.