

Invoicing in CRIO

Approval Date: 11DEC2021

Revision Date: NA

A. Entering Payment Received (check or electronic remittance)

1. Under the Financials Tab in CRIO click on the specific study. Click on the “Reconciliation Tab” and “Add New Payment” to post a check payment or an electronic remittance.
2. Enter as much information as possible on the pop-up. For payment number be sure to enter either the check number or the ACH number that can be found in the email notification of electronic remittance.
3. Click Save.

B. If Payment is an AutoPay

1. Once payment is added (see part A above), click on the “AutoPay” tab and select each subject visit/procedure that is on the remit notice.
2. Once all visits/procedures are selected this should total the same amount as your remit notice and you have completed reconciliation of an autopay invoice.
3. If the amount that is being paid is NOT the same in CRIO pull your contract and for each line look for the item you’re reconciling. Check the amount to see if it is incorrect in CRIO or if the study Sponsor has it wrong.
4. If it’s incorrect in CRIO then discuss with CRIO Site Administrator about correcting this in the main financial configuration so we don’t keep encountering this same issue.
5. If it was the study Sponsor that was incorrect, then send via email a copy of the contracted budget and the remit notice to the study finance contact for the study Sponsor and ask for the discrepancy difference to be explained.
6. Retain all correspondence on any discrepancy.

C. If Payment is an Invoiceable

1. Once payment is added (see part A above), click on the “Invoices” tab and select the invoices being paid.
2. Once all invoices on the remit notice are selected the totals should match and you have completed reconciliation of an invoiceable payment.
3. If the amount that is being paid is NOT the same then send an email to the study finance contact for the study Sponsor and ask for the discrepancy difference to be explained.
4. Retain all correspondence on any discrepancy.

D. Creating an Invoice

1. Under the Financials Tab in CRIO click on the specific study you’re creating an invoice for. Click on “Invoices” and “Add a New Invoice.”
2. Select the date and save.
3. Review the charge sheets of what you’re creating an invoice for and click on the “+” key at the top right of the screen. This will open a column with any items available for invoicing.
4. Select the items you want to add to the invoice.
5. Be sure to add any additional information or required study info in the memo line of the invoice if needed.
6. Save your invoice and print a hard copy for your study file and print an additional PDF copy for sending to the study finance contact for the study Sponsor.
7. Send an email with the study name, PI name and site number in the subject line of the email. Be sure to attach the invoice and any supporting documentation necessary (i.e. advertising receipts).

E. End of Month Processes

1. Go to the Reports Tab in CRIO and select “Finance”

Policy Manual



2. Click on "Open Accruals"
3. Under Report Configuration, first run a report for Invoices. Scroll down to the Unpaid Invoices Section (the first section will be Uninvoiced Items and these are typically close-out fees, etc. that we can't yet invoice for- though do review occasionally to ensure we're not missing anything).
4. Check for any invoices that have been outstanding for longer than 30 days or 45 days (depending on CTA agreed payment terms). These will be highlighted by CRIO in red to show that they're overdue and will show the number of days they are overdue. If necessary, send an additional email to the study finance contact for the study Sponsor with the invoice attached reminding them that this payment is now overdue.
5. Scrolling back to the top under Report Configuration, run a report for Autopay.
6. Check for any autopay visits that are unpaid by over 45-60 days. None of our contracts have payment terms over 45 days, however, there is a cycle of when a Sponsor runs their payment report so there are times that it may stretch a payment out to 60 days after a visit. For any items long than this send an email to the study finance contact for the study Sponsor requesting a status update on this item.

Policy Manual

