Instructions for Bookkeepers

The charges from the logbooks are summarized approximately monthly, as soon after the first of the month as possible. The logbook summary information and the billing details which the client provided is passed on to our bookkeeper who issues the actual bill. That bill should come to the PI, directed to "Attn: " whoever was listed on the Registration, if included. The PI and clients SHOULD review the bill: mistakes can happen. Things that are billable are in the logbooks here and clients can do their own summary check; I also keep a logbook for time that I assisted clients if it is not in other instrument logbooks. Requests for special billing outside of these parameters will have additional charges of staff assistance for the time taken to prepare the bill.

Note 5/15/2012. Apparently our bookkeeper is directly charging SpeedTypes and itemization may not be included on the bills. This is not under our control. We provide details to the bookkeeper; please contact our bookkeeper for billing details not included in your bill.

More detail on our "system":

- All Users must be registered and approved to use the facilities. Approval requires training or skills check by the staff.
- Each PI has an "Account" entry that is essentially just PI contact info.
- One or more users are assigned to a "Project #" when they register. The "Project" is associated with an "Account" and has the "Users", the "Billing Ref", and "Notes" (as in Attn: XXXXXXXX, Rm XXX), that I was given on the Registration Form. The Billing Info can be "PI Startup Funds", "ASK", a Speedtype, "Mythbuster Grant", whatever; this is for your information and we trust this information will be sufficient for you to get us paid for our work from the proper pot of money. This system allows a PI with multiple grants to have users working on those projects and they can use the appropriate Project# for the particular work they are doing at that instant. The same person can be assigned to more than one Project#, and a PI can have as many "Projects" as needed. It is up to the client to make it clear they need a separate Project # - it is a bit of trouble and if they don't tell me different I lump it all into the PI's main "Project" group. When the bills go out, anything on a "Project" is indistinguishable. If something needs to be corrected before it is paid, I keep photocopies of the log entries the billing summary was based on, so it is possible to sort out current charges: it is much easier if people tell me they need a unique Project# at the start.

Please inform us of update information regarding Billing References, people no longer with the PI, etc.

Dale Callaham
Central Microscopy Facility

The University of Massachusetts, Amherst
The Central Microscopy Facility - User Registration Form

Date:_________________

Project Leader/Advisor:______________________________________________________________
   Phone:__________________________Email:____________________________________

Billing Information:
   Billing Reference (Speedtype, etc.):__________________________________________
   Billing Address: ____________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

P.I. Signature: ______________________________________________________

Form must be signed to authorize services as described.

User:_______________________________________________________________________________
   Phone:_____________________________ Email:____________________________________

User:_______________________________________________________________________________
   Phone:______________________________ Email:____________________________________

User:_______________________________________________________________________________
   Phone:______________________________ Email:____________________________________

Project Title:____________________________________________________________

Project Summary: (Please write (or attach) a brief written summary of work to be conducted. Please provide copies of reference material that will help us assist with your project.)

Services Requested: