



Funding Your Study: Create Subscription Invoice and Credit Card Payment Instructions

Studies are eligible to receive IIDP islets and other biomaterials upon funding of the IIDP study subscription. Create an invoice and remit a payment to add subscription funds to your study. Payments in the form of Checks, Wire Transfers and Credit Card payments are accepted. Paying by credit card is the fastest way to fund your subscription and can be done directly through our website. The following subscription features of the IIDP system allows for creating invoices, making credit card payments, tracking of your payments, and viewing subscription activity and balance.

- **Create Invoice:** Create and track your subscription invoices directly from the IIDP website. Each new invoice will now be archived in your study’s history along with its payment status.
- **Pay by Credit Card:** Add funds to your subscription securely via the IIDP website. This is the fastest and easiest way to increase your subscription balance. However, checks and electronic payment transfers are also accepted.
- **View Detailed Subscription Activity (Activity, Payments & Invoices):** All payments, shipments, credits, and other adjustments to your subscription will now be viewable on the IIDP website so that you can track your study’s balance more easily and clearly. You can customize reports to include any or all subscription activities, and each report can be exported into Excel for your records.

Note: subscriptions cannot be funded with just a PO number. Funds must be received by IIDP to advance your subscription.

IIDP Investigator Website: <https://iidp.coh.org/secure/isletavail/>

Version Date: 10/1/2020

Update Date: 1/5/2022

Contents

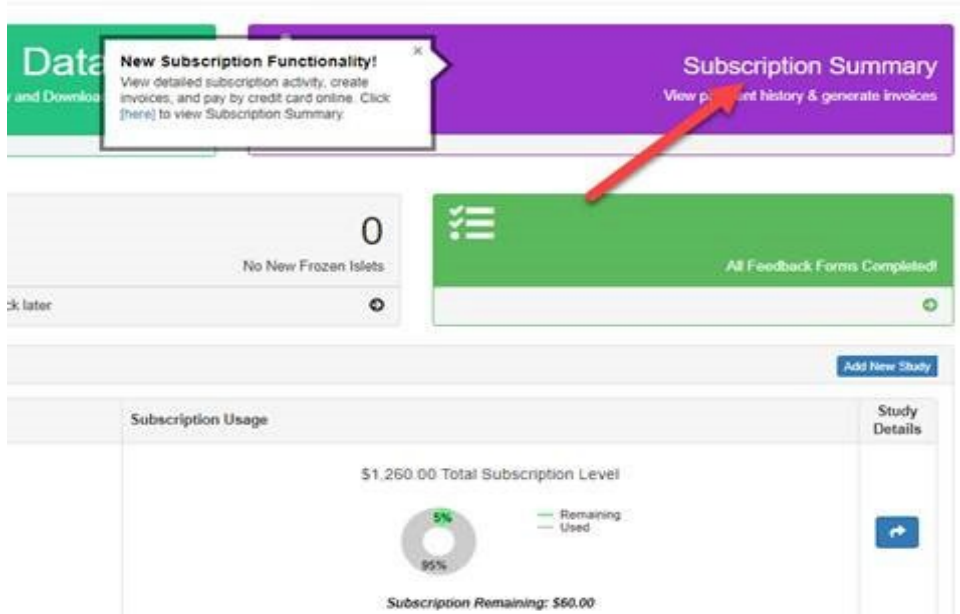
Use Case 1- Generate Invoice	2
Use Case 2- Pay by Credit Card	4
Use Case 3- View Detailed Subscription Activity.....	6
Use Case 4- View & Download Invoice Activity	7

Use Case 1-Create Invoice

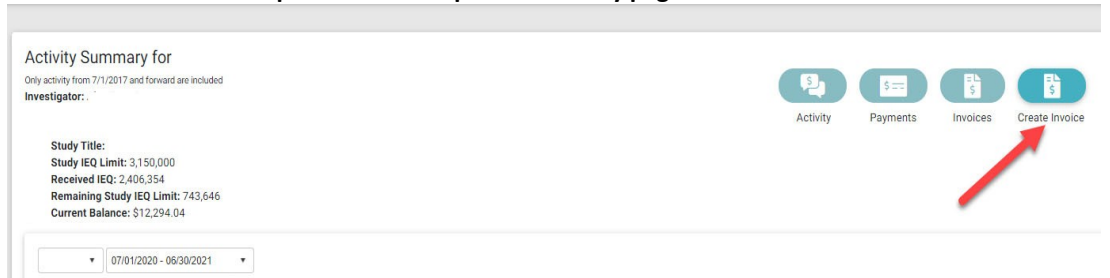
Users:	Study Investigator, Financial Staff, Study Contacts																	
Goal:	Creating an invoice for a subscription fees to be used for islets and biomaterials																	
Steps	<p>Create Invoice</p> <ol style="list-style-type: none"> 1. From Dashboard, select the Subscription Summary tile 2. From Subscription summary page, select Create Invoice button 3. From the Invoice Creation screen enter data for the following fields <ol style="list-style-type: none"> a. Study Number-select study number drop-down and choose study from drop-down or type and search for appropriate study b. Invoice Date-select /enter a date that is today or in the past but not a future date c. Bill to-Select drop-down to select a Bill to contact if Bill To needs to be added in addition to PI of study d. Selecting Complete Billing Contact button will open window to edit contact information for selected contact e. Alternatively, select Add New Contact to add a contact that is not on the Bill to drop-down f. Add New Contact opens window to add new bill to contact g. Fill out all fields for contact information and save the record. h. PO number -enter PO number if applicable i. Amount-enter amount of invoice j. Alternatively, to calculate invoice based on type of shipment use select the Calculator button k. Shipment type grid will open to add desired items to invoice l. Shipment Type- select from the drop-down to select shipment type. Once an item is selected it cannot be selected again. m. Quantity- enter the desired quantity of islets n. Close-selecting close will close the calculator window. o. Confirm Amount is being populated based on entry in calculator. p. Invoice comments- enter free text comment into this field for comments to IIDP or institutional purchasing department q. Check here to print the term Quote- select this if the invoice should be named Quote instead of Invoice for internal processing proposes 4. Create invoice-select to create invoice and generate an PDF invoice <p>Please note: See the grid below for the different available payment options</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="3" style="text-align: center;">Payment Options: Please ensure that invoice/quote number is included with Checks and Wire Transfer payments</th> </tr> <tr> <th style="width: 33%;">Checks</th> <th style="width: 33%;">Credit Card Payments</th> <th style="width: 33%;">Wiring Instructions</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> Payable to Beckman Research Institute of City of Hope Send to: City of Hope-Integrated Islet Distribution Program (IIDP) P.O. Box 515847 Los Angeles, CA 90051-3147 </td> <td style="vertical-align: top;"> Login to the Investigator website to submit a credit card payment: https://iidp.coh.org/secure/isletavail To request financial account to process credit card payments: IIDPInvoice@coh.org </td> <td style="vertical-align: top;"> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Bank: Wells Fargo, N.A.</td> <td style="width: 50%;">Swift Code: WFBUIUS6S (International)</td> </tr> <tr> <td>Address: 420 Montgomery St. San Francisco, CA 94104</td> <td>Bank Account: 4496807967</td> </tr> <tr> <td>ABA No.: 121000248 (Domestic)</td> <td>Account Name: Beckman Research Institute</td> </tr> <tr> <td></td> <td>Wiring questions email Treasury:</td> </tr> </table> <p style="text-align: center;">cashmanagement@coh.org</p> <p style="font-size: small; color: red; text-align: center;"><i>The information above is considered confidential and proprietary by City of Hope, and can only be used for the purpose that has been described to City of Hope. Please do not further circulate or distribute this information to any other party unless with the prior written consent of City of Hope.</i></p> </td> </tr> </tbody> </table>	Payment Options: Please ensure that invoice/quote number is included with Checks and Wire Transfer payments			Checks	Credit Card Payments	Wiring Instructions	Payable to Beckman Research Institute of City of Hope Send to: City of Hope-Integrated Islet Distribution Program (IIDP) P.O. Box 515847 Los Angeles, CA 90051-3147	Login to the Investigator website to submit a credit card payment: https://iidp.coh.org/secure/isletavail To request financial account to process credit card payments: IIDPInvoice@coh.org	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Bank: Wells Fargo, N.A.</td> <td style="width: 50%;">Swift Code: WFBUIUS6S (International)</td> </tr> <tr> <td>Address: 420 Montgomery St. San Francisco, CA 94104</td> <td>Bank Account: 4496807967</td> </tr> <tr> <td>ABA No.: 121000248 (Domestic)</td> <td>Account Name: Beckman Research Institute</td> </tr> <tr> <td></td> <td>Wiring questions email Treasury:</td> </tr> </table> <p style="text-align: center;">cashmanagement@coh.org</p> <p style="font-size: small; color: red; text-align: center;"><i>The information above is considered confidential and proprietary by City of Hope, and can only be used for the purpose that has been described to City of Hope. Please do not further circulate or distribute this information to any other party unless with the prior written consent of City of Hope.</i></p>	Bank: Wells Fargo, N.A.	Swift Code: WFBUIUS6S (International)	Address: 420 Montgomery St. San Francisco, CA 94104	Bank Account: 4496807967	ABA No.: 121000248 (Domestic)	Account Name: Beckman Research Institute		Wiring questions email Treasury:
Payment Options: Please ensure that invoice/quote number is included with Checks and Wire Transfer payments																		
Checks	Credit Card Payments	Wiring Instructions																
Payable to Beckman Research Institute of City of Hope Send to: City of Hope-Integrated Islet Distribution Program (IIDP) P.O. Box 515847 Los Angeles, CA 90051-3147	Login to the Investigator website to submit a credit card payment: https://iidp.coh.org/secure/isletavail To request financial account to process credit card payments: IIDPInvoice@coh.org	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Bank: Wells Fargo, N.A.</td> <td style="width: 50%;">Swift Code: WFBUIUS6S (International)</td> </tr> <tr> <td>Address: 420 Montgomery St. San Francisco, CA 94104</td> <td>Bank Account: 4496807967</td> </tr> <tr> <td>ABA No.: 121000248 (Domestic)</td> <td>Account Name: Beckman Research Institute</td> </tr> <tr> <td></td> <td>Wiring questions email Treasury:</td> </tr> </table> <p style="text-align: center;">cashmanagement@coh.org</p> <p style="font-size: small; color: red; text-align: center;"><i>The information above is considered confidential and proprietary by City of Hope, and can only be used for the purpose that has been described to City of Hope. Please do not further circulate or distribute this information to any other party unless with the prior written consent of City of Hope.</i></p>	Bank: Wells Fargo, N.A.	Swift Code: WFBUIUS6S (International)	Address: 420 Montgomery St. San Francisco, CA 94104	Bank Account: 4496807967	ABA No.: 121000248 (Domestic)	Account Name: Beckman Research Institute		Wiring questions email Treasury:								
Bank: Wells Fargo, N.A.	Swift Code: WFBUIUS6S (International)																	
Address: 420 Montgomery St. San Francisco, CA 94104	Bank Account: 4496807967																	
ABA No.: 121000248 (Domestic)	Account Name: Beckman Research Institute																	
	Wiring questions email Treasury:																	

Screenshots

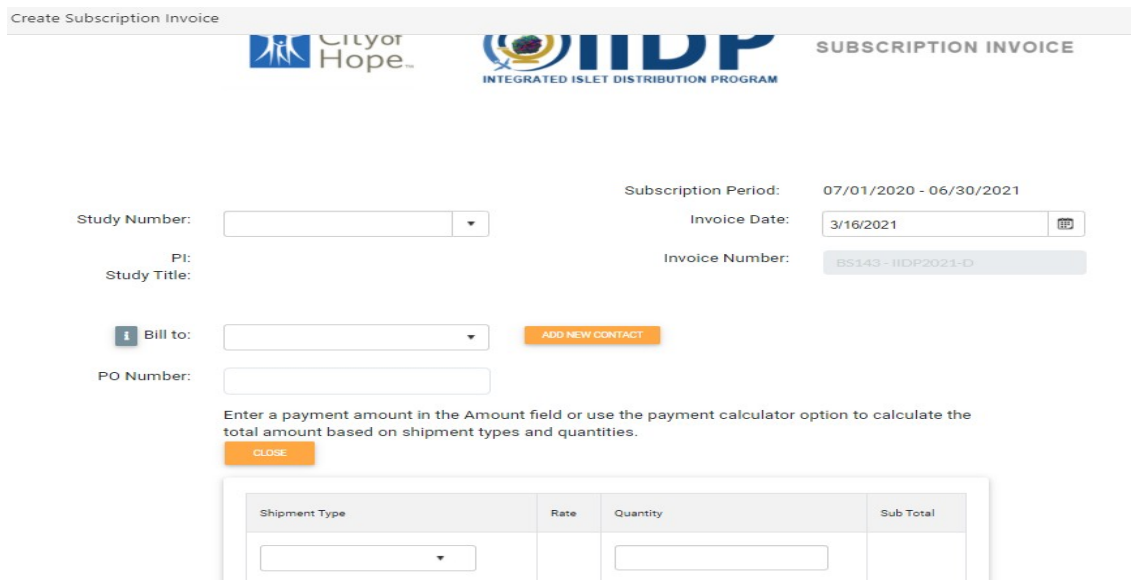
1. Click Subscription Summary Tile from Dashboard



2. Click on Create Invoice option on Subscription Summary page



3. Fill out Create Invoice Screen and generate invoice



Use Case 2-Pay by Credit Card

Users:	Study Investigator, Financial Staff, Study Contacts
Goal:	Making a credit card payment for outstanding invoice
Steps	<ol style="list-style-type: none"> 1. From Dashboard, select the Subscription Summary tile 2. From Subscription Invoice page, locate the invoice to make the payment to 3. From the invoice record, select the credit card icon to open the subscription payment page 4. From subscription payment screen, enter the data for the following fields <ol style="list-style-type: none"> a. Investigator First Name- prefilled with investigator name (cannot be edited) b. Investigator Last Name- prefilled with investigator name (cannot be edited) c. Email Address- prefilled with investigator email (can be edited, if confirmation email needs to go to someone other than PI's email) d. Phone Number- prefilled with investigator phone number (can be edited if different number) e. Institution- prefilled with investigator institution (cannot be edited) f. Payment Description- prefilled with Subscription Fees (cannot be edited) g. Payment Amount- enter the desired amount to be paid on invoice h. Invoice Number- prefilled with selected invoice number (cannot be edited) 5. After completing form, select Pay Fee to progress to credit card information screen 6. From credit card information screen, enter the following fields for the credit card holder <ol style="list-style-type: none"> a. Credit Card Number b. Exp Date c. Card Code d. First Name e. Last Name f. Billing Country g. Zip h. Street Address i. City j. State k. Phone Number 7. Select Pay button to process credit card transaction 8. Transaction confirmation page will display 9. Upon funding, your subscription will be updated, and you'll be notified via email

Screenshots

1. Subscription Invoice Screen, select Credit Card icon

Subscription Invoice Summary for

Only activity from 7/1/2017 and forward are included
Investigator:



Study Title: Overexpression of Proliferative Genes in Human Pancreatic Islets
Study IEQ Limit: 3,150,000
Received IEQ: 2,406,354
Remaining Study IEQ Limit: 743,646
Current Balance: \$12,294.04

BS1111


EXPORT TO EXCEL

Page size: 100 4 items in 1 pages

Study Number	Subscription Period	Action	Invoice Date	Invoice Number	Invoice Amount	Invoice Status	Total Paid Amount
BS1111	07/01/2019-06/30/2020		6/25/2020	- IIDP2020-C	\$2,500.00	Cancelled	
BS1111	07/01/2020-06/30/2021		7/10/2020	- IIDP2021-A	\$50,000.00	Partially Paid	\$10,000.00
BS1111	07/01/2020-06/30/2021		7/22/2020	- IIDP2021-B	\$14,440.00	Processing	
BS1111	07/01/2020-06/30/2021		1/5/2021	- IIDP2021-C	\$8,450.00	Unpaid	

2. Subscription Payment Amount Screen

Index



SUBSCRIPTION PAYMENT

Fields marked with an asterisk (*) are required.

Investigator First Name *

Investigator Last Name *

Email Address *

Phone Number *

Institution

Payment Description

Amount of Payment (USD) *

Invoice Number *

3. Credit Card Details Screen

IIDP Subscription Payment

Card Number *

Exp. Date * Card Code

Billing Address

First Name Last Name

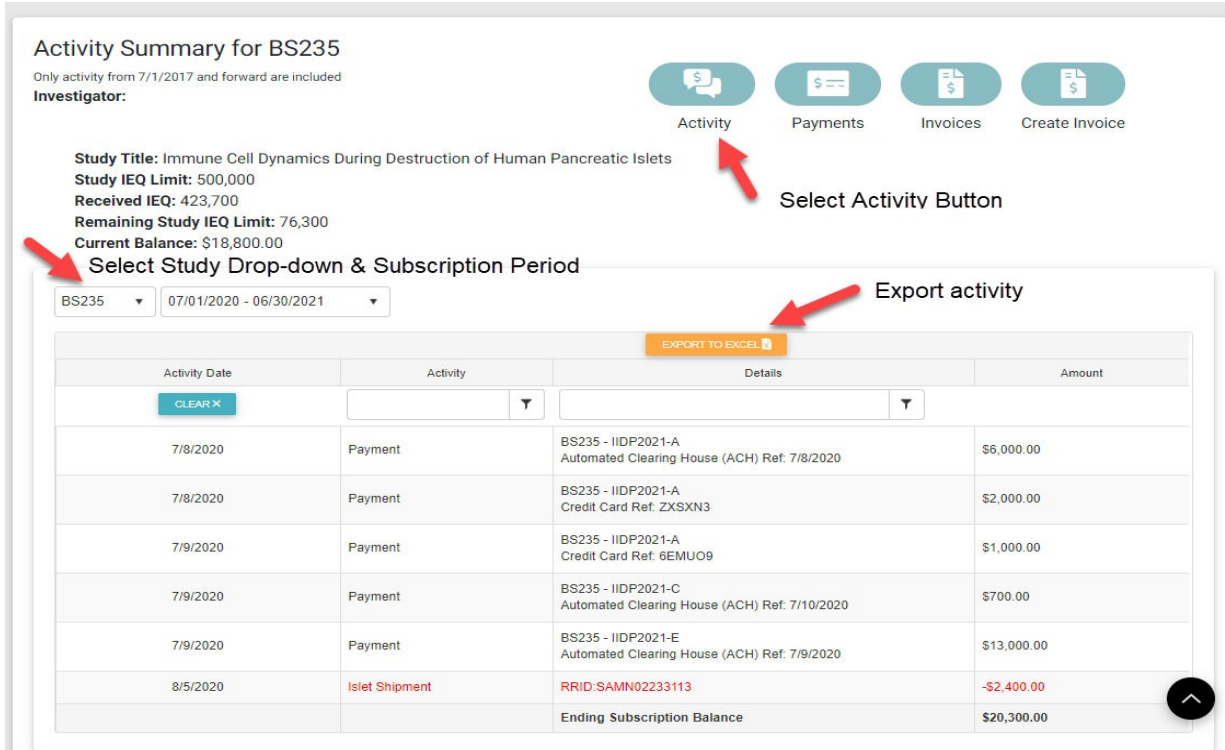
Billing Country

Street Address Zip












State City

Phone Number

Use Case 3-View Detailed Subscription Activity

Users:	Study Investigator, Financial Staff, Study Contacts																																
Goal:	View detailed activity summary for studies																																
Steps	<p>View Activity</p> <ol style="list-style-type: none"> From Dashboard, select the Subscription Summary tile From Subscription summary page, select Activity button Activity summary page will display. Summary activity will include a list of your accepted islet, acinar or frozen islet offers, payments and adjustments. <ol style="list-style-type: none"> Select Study and Subscription Period drop-downs to view available studies and periods Filter and search by Activity or Details column Export activity to Excel by selecting Export to Excel button 																																
Screenshots	 <p>Activity Summary for BS235 <small>Only activity from 7/1/2017 and forward are included</small> Investigator:</p> <p>Study Title: Immune Cell Dynamics During Destruction of Human Pancreatic Islets Study IEQ Limit: 500,000 Received IEQ: 423,700 Remaining Study IEQ Limit: 76,300 Current Balance: \$18,800.00</p> <p>Select Study Drop-down & Subscription Period</p> <p>Activity Payments Invoices Create Invoice</p> <p>Select Activity Button</p> <p>EXPORT TO EXCEL</p> <table border="1"> <thead> <tr> <th>Activity Date</th> <th>Activity</th> <th>Details</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>7/8/2020</td> <td>Payment</td> <td>BS235 - IIDP2021-A Automated Clearing House (ACH) Ref: 7/8/2020</td> <td>\$6,000.00</td> </tr> <tr> <td>7/8/2020</td> <td>Payment</td> <td>BS235 - IIDP2021-A Credit Card Ref: ZXSXN3</td> <td>\$2,000.00</td> </tr> <tr> <td>7/9/2020</td> <td>Payment</td> <td>BS235 - IIDP2021-A Credit Card Ref: 6EMUO9</td> <td>\$1,000.00</td> </tr> <tr> <td>7/9/2020</td> <td>Payment</td> <td>BS235 - IIDP2021-C Automated Clearing House (ACH) Ref: 7/10/2020</td> <td>\$700.00</td> </tr> <tr> <td>7/9/2020</td> <td>Payment</td> <td>BS235 - IIDP2021-E Automated Clearing House (ACH) Ref: 7/9/2020</td> <td>\$13,000.00</td> </tr> <tr> <td>8/5/2020</td> <td>Islet Shipment</td> <td>RRID: SAMN02233113</td> <td>-\$2,400.00</td> </tr> <tr> <td colspan="3">Ending Subscription Balance</td> <td>\$20,300.00</td> </tr> </tbody> </table>	Activity Date	Activity	Details	Amount	7/8/2020	Payment	BS235 - IIDP2021-A Automated Clearing House (ACH) Ref: 7/8/2020	\$6,000.00	7/8/2020	Payment	BS235 - IIDP2021-A Credit Card Ref: ZXSXN3	\$2,000.00	7/9/2020	Payment	BS235 - IIDP2021-A Credit Card Ref: 6EMUO9	\$1,000.00	7/9/2020	Payment	BS235 - IIDP2021-C Automated Clearing House (ACH) Ref: 7/10/2020	\$700.00	7/9/2020	Payment	BS235 - IIDP2021-E Automated Clearing House (ACH) Ref: 7/9/2020	\$13,000.00	8/5/2020	Islet Shipment	RRID: SAMN02233113	-\$2,400.00	Ending Subscription Balance			\$20,300.00
Activity Date	Activity	Details	Amount																														
7/8/2020	Payment	BS235 - IIDP2021-A Automated Clearing House (ACH) Ref: 7/8/2020	\$6,000.00																														
7/8/2020	Payment	BS235 - IIDP2021-A Credit Card Ref: ZXSXN3	\$2,000.00																														
7/9/2020	Payment	BS235 - IIDP2021-A Credit Card Ref: 6EMUO9	\$1,000.00																														
7/9/2020	Payment	BS235 - IIDP2021-C Automated Clearing House (ACH) Ref: 7/10/2020	\$700.00																														
7/9/2020	Payment	BS235 - IIDP2021-E Automated Clearing House (ACH) Ref: 7/9/2020	\$13,000.00																														
8/5/2020	Islet Shipment	RRID: SAMN02233113	-\$2,400.00																														
Ending Subscription Balance			\$20,300.00																														

Use Case 4-View & Download Invoice Activity

Users:	Study Investigator, Financial Staff, Study Contacts																																																								
Goal:	View and download invoices and edit invoice statuses																																																								
Steps	<p>View Activity</p> <ol style="list-style-type: none"> From Dashboard, select the Subscription Summary tile From Subscription summary page, select Invoices button Invoice activity summary page will display. Invoice will include a list of all invoices created for your subscription. <ol style="list-style-type: none"> Select Study drop-down to view available studies Selecting PDF icon for the invoice record will download a PDF copy of the invoice Selecting the credit card icon, will open the credit card payment module (see Use Case #2) Selecting the  button will close any invoice that you have made any partial payments to. If no payment has been made to an invoice, selecting  will cancel the invoice. Filter and search by Invoice Date, Invoice Number or Invoice Status columns Export activity to Excel by selecting Export to Excel button 																																																								
Screenshots	<p>Subscription Invoice Summary for </p> <p>Only activity from 7/1/2017 and forward are included</p> <p>Investigator:</p> <p>Study Title: Study IEQ Limit: 500,000 Received IEQ: 423,700 Remaining Study IEQ Limit: 76,300 Current Balance: \$18,800.00</p> <p>Activity Payments Invoices Create Invoice</p> <p>Select Invoices Button</p> <p>Export invoice activity</p> <p>EXPORT TO EXCEL</p> <table border="1"> <thead> <tr> <th>Study Number</th> <th>Subscription Period</th> <th>Action</th> <th>Invoice Date</th> <th>Invoice Number</th> <th>Invoice Amount</th> <th>Invoice Status</th> <th>Total Paid Amount</th> </tr> </thead> <tbody> <tr> <td colspan="2">CLEAR X</td> <td>From</td> <td>to</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>07/01/2020-06/30/2021</td> <td></td> <td></td> <td>7/8/2020</td> <td>BS235 - IIDP2021-A</td> <td>\$20,000.00</td> <td>Partially Paid</td> <td>\$9,000.00</td> </tr> <tr> <td>07/01/2020-06/30/2021</td> <td></td> <td></td> <td>7/8/2020</td> <td>BS235 - IIDP2021-B</td> <td>\$12,000.00</td> <td>Cancelled</td> <td></td> </tr> <tr> <td>07/01/2020-06/30/2021</td> <td></td> <td></td> <td>7/8/2020</td> <td>BS235 - IIDP2021-C</td> <td>\$10,000.00</td> <td>Partially Paid</td> <td>\$700.00</td> </tr> <tr> <td>07/01/2020-06/30/2021</td> <td></td> <td></td> <td>7/8/2020</td> <td>BS235 - IIDP2021-D</td> <td>\$1,400.00</td> <td>Processing</td> <td></td> </tr> <tr> <td>07/01/2020-06/30/2021</td> <td></td> <td></td> <td>7/8/2020</td> <td>BS235 - IIDP2021-E</td> <td>\$13,000.00</td> <td>Fully Paid</td> <td>\$13,000.00</td> </tr> </tbody> </table> <p>Download Invoice</p> <p>Make credit card payment</p>	Study Number	Subscription Period	Action	Invoice Date	Invoice Number	Invoice Amount	Invoice Status	Total Paid Amount	CLEAR X		From	to					07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-A	\$20,000.00	Partially Paid	\$9,000.00	07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-B	\$12,000.00	Cancelled		07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-C	\$10,000.00	Partially Paid	\$700.00	07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-D	\$1,400.00	Processing		07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-E	\$13,000.00	Fully Paid	\$13,000.00
Study Number	Subscription Period	Action	Invoice Date	Invoice Number	Invoice Amount	Invoice Status	Total Paid Amount																																																		
CLEAR X		From	to																																																						
07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-A	\$20,000.00	Partially Paid	\$9,000.00																																																		
07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-B	\$12,000.00	Cancelled																																																			
07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-C	\$10,000.00	Partially Paid	\$700.00																																																		
07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-D	\$1,400.00	Processing																																																			
07/01/2020-06/30/2021			7/8/2020	BS235 - IIDP2021-E	\$13,000.00	Fully Paid	\$13,000.00																																																		