Stratocore External Billing Request Process

SOP Owner: Stratocore Team
Effective Date: 11/1/2026
Version: 1.0

Purpose

This Standard Operating Procedure (SOP) outlines the process for requesting the setup of external billing entities and billing contacts within Stratocore. The process leverages a Streamline request form to standardize submissions, improve visibility, and ensure timely creation of billing profiles and user accounts.

Scope

This procedure applies to all teams that require a new external billing entity to be established in Stratocore for invoicing and billing purposes.

Procedure

Step 1: Submit an External Billing Request

1. Navigate to the External Billing Request Form:

Streamline Form: VCR Stratocore External Billing Users

2. Complete all required fields, including:
    a. Organization Name
    b. Department Name
    c. Full Organization Address
    d. Customer Information
        i. Contact information for the PI or laboratory chief who is the recognized contractor for services.
            1. First and Last Name
            2. Email address
            3. Phone number
    e. Billing Information

i. Information for the person or departmental contact responsible for paying the invoice. Depending on the institution, this may be an "Accounts Payable" office or similar.
    1. Billing contact first and last name
    2. Billing contact email address
    3. Billing phone number
3. Submit the form.

Step 2: Streamline Form Processing

1. Upon submission, the request is automatically captured in the designated Excel tracking file.
2. The Excel file serves as the system of record for external billing requests.
3. Automated notifications generated from the Excel file alert the Stratocore and finance team that a new request has been submitted.

Step 3: Stratocore and Finance Team Actions

Upon receiving the notification, the Stratocore and Finance team will:

Create a New Billing Group Profile

1. Review the submitted request for completeness and accuracy.
2. Create a new billing group profile in Stratocore for the external billing entity.
3. Configure the billing profile using the information provided in the request.

Create a New Billing Contact User

1. Establish a new user account in Stratocore for the designated billing contact.
2. Associate the billing contact with the newly created billing group profile.
3. Verify that contact information and user permissions are appropriate for billing-related activities.

Step 4: Confirmation

1. Once the billing group profile and billing contact user have been successfully created, the StratoCore team will update the request status in the tracking file.

2. The requestor may be notified that setup is complete, according to established team communication practices.