Pre-Kickoff Core Interview

CORENAMEHERE

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# Overview

Below are a list of questions which will help the iLab Implementation Assistant configure your facility’s site.

**When you have completed your form, please email it to the RRP team (**[**Steve.li@ucsf.edu**](Steve.li%40ucsf.edu)**) and upload it to your iLab implementation Box folder.**

## Core Primary Information

1. Who is the main contact for the core who will be responsible for overseeing the decision making and training for the implementation process? (Name and email address) (Only list the main contact. Other contacts will be listed on a different form)

Click here to enter text.

1. Who will be performing the billing functions for your core. PSU Best Practice has a department Cost or Budget Analyst performing this function for all cores in a department or Institute.

Click here to enter text.

1. What is the URL for your core’s current website?

Click here to enter text.

1. Is the website up to date? (i.e. services, equipment, pricing, etc.)

[ ]  Yes [ ]  No

## General Questions

1. What is the name of your core to be displayed on the public facing core site?

Click here to enter text.

1. Do you want your list of services to be displayed at the bottom of the core public facing page?

Click here to enter text.

1. Do you want your core to be accessible by external users? (Can external users log in and schedule time or request services without being an approved user or do they need to first request access to the core and become an approved user of the core?)

[ ]  Yes [ ]  No

1. List the name(s) of any forms required to be completed prior to granting access to the core site **within iLab**: (Please upload the form to the Box folder)

Click here to enter text.

1. List the name(s) of any forms required to be completed prior to granting access to the physical space of the **core facility**:

Click here to enter text.

1. Do you have an external recharge rate?

Click here to enter text.

1. **Describe your current system for core equipment reservations, service requests, and billing. What are your challenges?**

Click here to enter text.

1. **Do you have a flow chart describing core operations? This is a very helpful way to describe how your core operates**

[ ]  Yes [ ]  No

Click here to enter text.

## Staff

1. Does the core need to have calendars to schedule staff time? (typically no)

[ ]  Yes [ ]  No

## Equipment Scheduling

1. Does your core have equipment or other things that would require scheduling? This includes anything that needs to have a calendar. (Ex. instrument, room in the facility, computer station, etc.)

[ ]  Yes [ ]  No

**If No, You may proceed to the Services section.**

1. How do users typically contact the core to use the equipment?

[ ] Email [ ] Walk-In [ ] Schedule Online

[ ] Other Click here to enter text.

1. Do users of your core request time on equipment or is it walk-up only?

[ ]  Users Request Time [ ]  Users Walk-Up to Equipment

1. Do you have equipment that requires a user to be trained prior to using the equipment?

[ ]  Yes [ ]  No

1. Do you wish to approve user requests for time on a piece of equipment?

[ ]  Yes [ ]  No

1. Can untrained users ever schedule time on equipment? If yes, please describe any parameters for this.

[ ]  Yes [ ]  No

Click here to enter text.

1. Describe your training process?

Click here to enter text.

* 1. Do you charge for training? How much?

[ ]  Yes [ ]  No $Click here to enter text.

* 1. Is training given in one session or in multiple sessions? (Check all that apply)

[ ]  One session [ ]  Multiple sessions Click here to enter text.

* 1. Is training provided for one user or a group? (Check all that apply)

[ ] Single User [ ]  Group

1. Do users:
2. Submit a request for core staff to perform services with the equipment?

[ ]  Yes [ ]  No

1. Run the equipment themselves?

[ ]  Yes [ ]  No

1. Do you have forms that are specific to equipment scheduling?

[ ]  Yes [ ]  No

How many? Click here to enter text.

|  |  |
| --- | --- |
| Equipment | Form Name |
|  |  |
|  |  |
|  |  |

1. Reminder emails can be sent to a user prior to their equipment reservation start time. How long prior to the reservation should a user receive a reminder? (Ex. 24 hours)

Click here to enter text.

1. How do you bill for equipment usage? (Check all that apply)

[ ]  Actual usage time is NOT tracked. Core bills against **scheduled** time only.

[ ]  Core would like to use iLab to track actual usage, having users manually log in and out of a central kiosk when using equipment. Core bills against **actual usage** time only.

[ ]  Core would like to use iLab to track actual usage, incorporating **interlocks** that control the power to screens at each piece of equipment. Core bills against **actual usage** time only.

[ ]  Core does not bill for usage time on some or all equipment.

## Services

1. How many user service requests does your core typically perform in a week?

Click here to enter text.

1. When users request services, please describe your current quote process from start to finish.

Click here to enter text.

1. How do users contact the core to request services typically (Check all that apply)

[ ] Email [ ] Walk-In [ ] Schedule Online

[ ] Other Click here to enter text.

1. Do you require an in-person consultation prior to providing a quote for some services?

[ ]  Yes [ ]  No

If yes, which services:

Click here to enter text.

1. Do users submit a request for core staff to perform services on the equipment for the user?

[ ]  Yes [ ]  No

1. Do you have forms that are specific to service requests?

[ ]  Yes [ ]  No

How many? Click here to enter text.

Please list the service and the form name. Please upload the forms (if you have them already) into Box.

|  |  |
| --- | --- |
| Service | Form Name |
|  |  |
|  |  |
|  |  |

1. Do you sell consumable items to users?

[ ]  Yes [ ]  No

1. Are consumable items allowed to be purchased without a user making a reservation or receiving a service?

[ ]  Yes [ ]  No

1. Does the core process samples?

[ ]  Yes [ ]  No

If yes, what type of processor is used? Click here to enter text.

If samples are placed on a plate (or something similar), how are samples accepted per submission?

[ ]  One plate per PI is required

[ ]  Partial plates per PI are accepted

1. Is the core a clinical core?

[ ]  Yes [ ]  No

Does the core work with protocols?

[ ]  Yes [ ]  No

Does the core expect to load any PHI into iLab? Please describe the data to populate in iLab:

Click here to enter text.

## Pricing

In iLab, the price types are listed as Internal, Academic, and External.

1. Which pricing structures do you use in your core? (Check all that apply)

[ ]  Per Hour [ ]  Per Day [ ]  Other

[ ]  Per Sample [ ]  Per Card Click here to enter text.

1. Do you have different prices based on user criteria? ((Check all that apply)

[ ]  Trained [ ]  Untrained [ ]  Assisted Use

[ ]  Other Click here to enter text.

 Please describe.

Click here to enter text.

1. Are there add on fees when a user uses a piece of equipment? (Ex. consumables, consultation fee, staff assistance, etc.) Please describe.

Click here to enter text.

1. What is your cancellation policy?

Click here to enter text.

* 1. How long before a reservation begins can a user cancel their reservation?

Click here to enter text.

* 1. Do you charge for cancellations? A fee? Full use time?

Click here to enter text.

1. Do you charge setup fees or cleanup fees for equipment usage?

[ ]  Setup Fees Click here to enter text.

[ ]  Cleanup Fees Click here to enter text.

1. Do you provide any department funds or other funds for cost sharing with PIs? Please describe, in detail.

Click here to enter text.

## Billing

1. Does the core bill for equipment time and/or services?

[ ]  Yes [ ]  No

Click here to enter text.

1. Does the core have different revenue accounts for different pieces of equipment or services offered? Or do you use a single revenue account for all core activities.

[ ]  Singe Revenue Account

[ ]  Differing Revenue Accounts for some or all Equipment/Services

## Payments

Internal Users must use a speed type for payment.

### External Users

1. Credit card processing is an additional module in iLab that has an associated cost, is this something you might be interested in the future?
	* Yes
	* No

## Additional Information

Please upload to Box any examples of Reports, Invoices (headers and core specific text), or Email Header information you currently use or would like to add to your current process.



\*Questionnaire adapted from Penn State University