Reassigning Accounts After PI Departure

Standard Operating Procedure 052 for Pitt iLab System

iLab Role: Lab Administrator   **Revision** #: 0   **Date:** 10/2025

Contents

Purpose:

This SOP outlines the steps to proactively prevent billing errors that occur when a PI leaves the University. When a PI departs, their associated sponsored (05) accounts become inactive at the university and in iLab one day after they depart. This can result in billing errors if there are charges are still assigned to a sponsored account that have not yet been billed. To ensure uninterrupted billing and accurate financial processing, valid non-sponsored (02, 03 or 04) account numbers must be assigned to the charges.

Scope:

This SOP applies to managers and financial managers with a lab administrator role in iLab.

Changing the Account Number for a Service Request:

1. Select the 'View Request' link on the left-side navigation menu to view all requests submitted by the PI's lab group.
2. Find the request in the 'View My Requests' tab.
3. Click on the dollar icon for that request.

University of **Pittsburgh**.

Reassigning Accounts After PI Departure
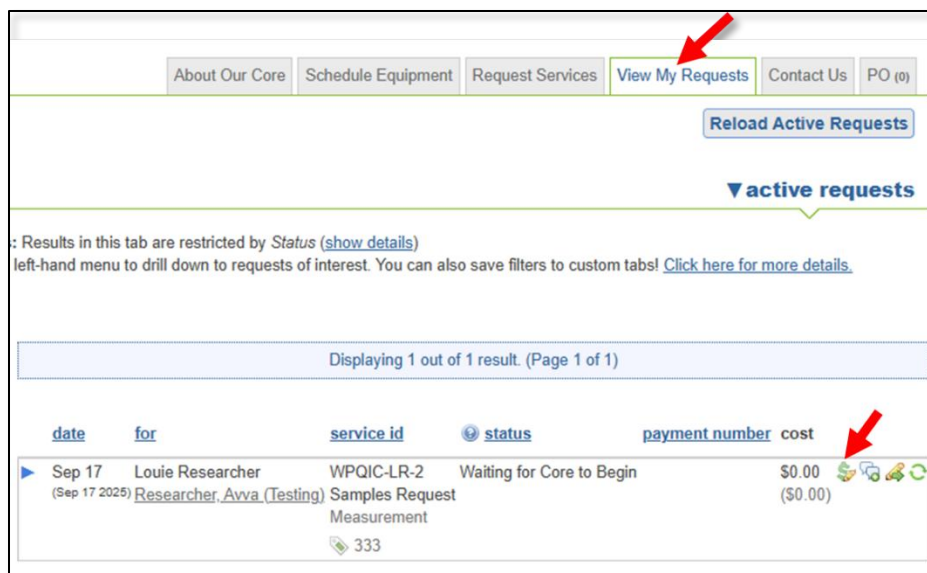
4. This will open the service request account window, which lists the charges that are part of the service request.
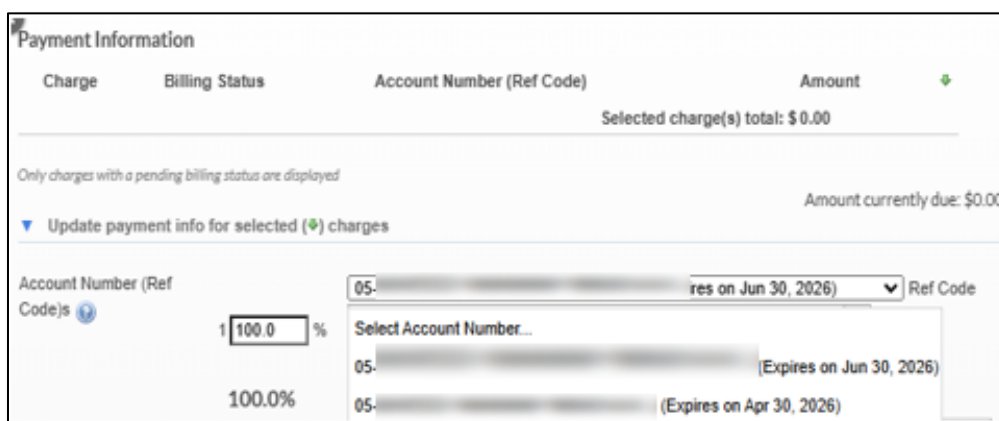
5. Select an alternative account number from the drop-down menu and hit save. If all 05 (sponsored) account numbers are inactive, a 02, 03 or 04 number will have to be selected.
   i. Repeat for all service requests.
   ii. If there are no 02, 03 or 04 account numbers to select, proceed to the next section.

Requesting and assigning a non-sponsored (02, 03 or 04) account number

1. Navigate to the PI's lab group by clicking on the 'My Groups' link in the left-hand navigation panel.
2. On the 'Membership Request & Account Numbers' tab expand the section called 'Request access to additional account numbers.'
3. Enter the account number within the text boxes (all fields are **required**). The

University of Pittsburgh®

account number will be constructed from the following elements:

- i   Entity: should be exactly 2 numeric characters
- ii   Department: should be exactly 5 numeric characters
- iii   Purpose: should be exactly 5 numeric characters
- iv   Project: should be exactly 6 numeric characters

4.   Click 'Request.'

5.   If the account number is valid, it must be approved. If the account number is not valid an error message will appear.
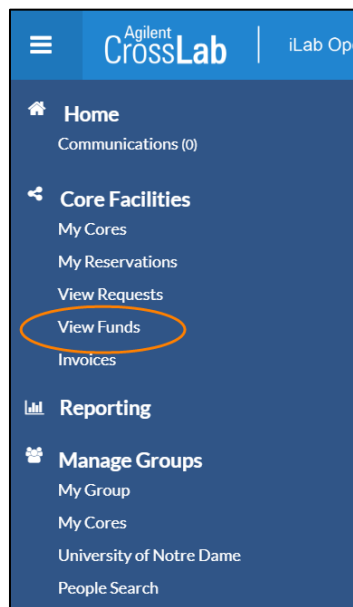
6.   Navigate to 'View Funds' in the left-hand navigation menu.'

7.   Pending access requests to non-sponsored account numbers will appear in the first section.

8. Use the action buttons on the right to 'Approve' the request.
9. Navigate to the 'Membership Requests & Account Numbers' tab of the PI lab group and click on the appropriate check box for the 02, 03 or 04 account for the member who initially made the service request.
10. When the box turns green, the account number has been assigned to the lab member. The account number can now be selected in the Changing the Account Number for a Service Request section above.

Approval Authorizations	Signature	Date
Robert Cunningham, *Vice Chancellor for Research Infrastructure, University of Pittsburgh*		4 Nov 2025
Ashley Zyhowski, *Research Project Manager, University of Pittsburgh*		10 Nov 2025