Creating a Study Fund Request

To set up a UF study so that payments can be disbursed to research participants, you first need to create a Study Fund Request in myUFL. An active IRB protocol is required.

Note: To perform this process, you must have the following myUFL security role: **UF_FI_HSP_INITIATOR**

To create a Study Fund Request, perform the following steps:

1. Click the **Menu** icon.
2. Navigate to **Main Menu > Financials > UF Human Subject Payments > Study Fund Request**.
3. Click the **Add a New Value** tab.
4. Click the **Add** button. The Study Fund Request page displays.
5. Enter Contact Info for the study. To enter an individual’s contact information, type his or her UFID or click the Look up icon to search by UFID or Last Name.

   - **Study PI** – The principal investigator for the study.
   - **Dept Contact** – The individual who can be contacted for any issues related to the SFR or study payments.
   - **Custodian ID** – The individual who will be responsible for the care and safekeeping of any cash, gift cards, gift checks, or pre-paid debit cards provided.
   - **Custodian Address and Phone Number** – This information is required to enable delivery of cash, gift cards, gift checks, or pre-paid debit cards and for audit purposes.

![Figure 1: Study Fund Request page, Contact Info section](image-url)
6. To select the people who will need to enter or view study details, payments or participants, click the **Update Study Team** button. Note: The study PI, Dept. Contact and Custodian are added to the study team automatically, so you do not need to add them separately.

7. To add a team member, type the individual’s UFID in the Team Member field. You can also click the **Look up** icon to search by UFID or Last Name.

8. To add another team member, click the **Add a New Row** icon and then type the individual’s UFID or click the **Look up** icon to search by UFID or Last Name.

9. When you’re finished adding team members, click **OK**.

![Figure 2: Maintain Study Team page](image)

10. If the currently logged in user is the study custodian, click the **Custodian Agreement** button, review and accept the agreement. If the currently logged in user in not the custodian, that person will receive an email indicating the agreement must be accepted before funds can be provided.

11. In the Study Info section, click the **IRB/Protocol No.** field.

12. Type the IRB protocol number or click the **Look Up** icon to search.

13. To enter details for the study, click the **Edit IRB Study Details** button.

14. Enter the **Total Study Amount for HS Payments, Total Participant Count**, and click **Save**.

15. Next, enter the **Max Amt Paid to Each Participant in a Calendar Year**.

16. In the Payment Details section, click the **Payment Type** drop-down arrow and then select the type of payment that will be requested. The available payment types are AP check, cash, gift card, or prepaid debit card.

17. If the payment type selected is Gift Card or Prepaid Debit Card, select the **Vendor** and then enter the **Number of Cards/Checks** requested. Please note: Gift checks are no longer offered as a payment type.
18. Click the **Deliver Card Unloaded** check box. The unloaded cards will be delivered by regular mail.

19. If you chose gift cards or prepaid debit cards, enter the **Amount per Payment Type**. Please note: The amount requested should be consistent with a 2-month timeframe and dollar value of the study. Replenishment of funds can be requested when needed.

20. Click the **Delivery Method** drop-down arrow and then click the desired delivery method.

21. To provide any information to Treasury Management about the requested funds or delivery, click the **Special Instructions** link, enter a note, and then click **OK**.

22. If you need to request another payment type or denomination, scroll to the right (if needed) and then click the **Add a New Row** icon.

23. Repeat steps 15–21 as needed.

24. Enter the **Funding Source** information. The following fields are required:
   - Business Unit
   - Fund Code
   - Department
   - Program Code
   - Budget Reference
   - Requested Amount (2 Months)
   - First Expected Payment Date

   The following fields may be required depending on the Fund chosen or may be entered optionally into the **Funding Source** information:
   - CRIS
   - Source of Funds
   - Dept Flex
   - EmplID – Used when an employee is associated with the account (for example, a returned overhead account)
   - PC Business Unit
   - Project Number

25. To submit the Study Fund Request, scroll to the top of the page and then click **Submit for Approval** button. A message displays asking you to confirm you want to submit the request.

26. Click **Yes**. The Study Fund Request is submitted into workflow and forwarded to your department approver, an HSP Request ID number is assigned, and the status of the request is set to “Submitted.”

   *Note: You can save information entered and submit the request at a later time. An SFR ID# will be assigned after saving.*