


Creating a Study Fund Request

Objective: To create a Study Fund Request in myUFL so that payments can be disbursed to research participants. 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 Research Participant Payments > Study Fund Request.**
3. Click the **Add a New Value** tab.
4. Click the **Add** button. The Study Fund Request page will display.
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 of the study.
 - **Dept Contact** –Typically a fiscal person within the department who is familiar with the study protocol and funding source information. Second point of contact 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 payment tender types provided (i.e. prepaid debit cards and gift cards). First point of contact for any issues related to the SFR or study payments.
 - **Custodian Address and Phone Number** – This field must include a physical street address for audit purposes.

HSP Study Fund Request

HSP Request ID NEXT





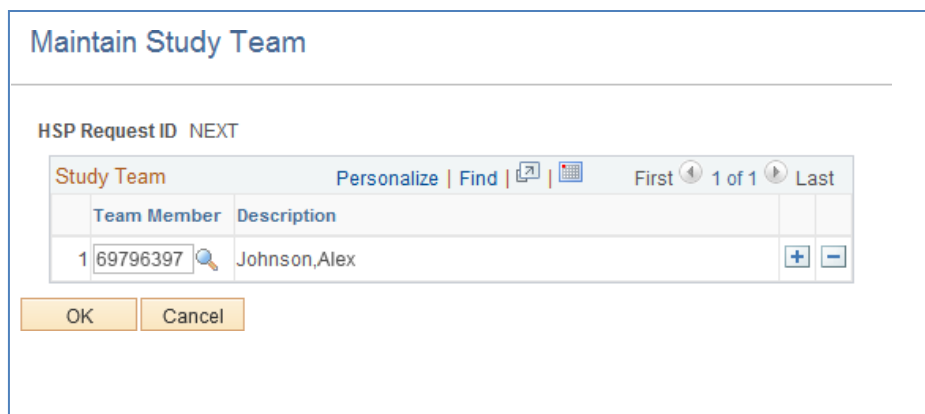
Sequence Number	0	Creation Date	04/14/2020	Status	Initial	Approval Date	
Contact Info							
Study PI	<input type="text" value="26780377"/>		Name	Mathews, Anne	Email	anne.mathews@ufl.edu	
Dept Contact	<input type="text" value="09970210"/>		Name	Vargas, Andrea Joanna	Email	ninavargas6204@phhp.ufl.edu	
Custodian ID	<input type="text" value="31745317"/>		Name	Hosford, Jennifer L	Email	jennifer.hosford@peds.ufl.edu	
Custodian Address 1	<input type="text" value="1478 Union Road"/>				<input type="button" value="Custodian Agreement"/>		
Address 2	<input type="text"/>				<input type="button" value="Update Study Team"/>		
City	<input type="text" value="Gainesville"/>	State	<input type="text" value="FL"/>	Zip	<input type="text" value="32611"/>	Phone Number	<input type="text" value="352/392-9057"/>

Figure 1: Study Fund Request page, Contact Info section

- 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.
- 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.
- 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.
- When you're finished adding team members, click **OK**.



Maintain Study Team

HSP Request ID NEXT


Study Team Personalize Find 1 of 1 Last

Team Member	Description
1 69796397	Johnson, Alex

OK Cancel

Figure 2: Maintain Study Team page

- Click the **Custodian Agreement** button, review and accept the agreement. If the currently logged-in user is not the study custodian, that person must log in to the SFR to review and accept the agreement before submitting the study for approval.
- In the Study Info section, click the **IRB/Protocol No.** field.
- Type the IRB protocol number or click the **Look Up** icon to search.
- Click the **Edit IRB Study Details** button to enter details for the study.
- Enter the **Total Study Amount for HS Payments** and **Total Participant Count**. These values should reflect the total estimated payments to be distributed and the number of participants to be enrolled over the life of the study. Click **Save**.
- Next, enter the **Max Amt Paid to Each Participant in a Calendar Year**.
- 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 Gift Card or Prepaid Debit Card.
- Select the **Vendor** and then enter the **Number of Cards/Checks** requested.

18. If you chose gift cards enter the **Amount per Payment Type**. Please note: The value entered should be consistent with the amount required for a 2-month supply of payments and dollar value of the cards being requested (i.e. 20 Walmart gift cards at \$10 each=\$200). The study can be modified to request additional cards or funds as needed.
19. Click the **Delivery Method** drop-down arrow and then click the desired delivery method.
20. To provide any information to Cost Analysis about the requested funds or delivery, click the **Special Instructions** link, enter a note, and then click **OK**.
21. 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. 
22. Repeat steps 15–21 as needed.
23. Enter the **Funding Source** information from left to right. The following fields are required:
 - Business Unit(UFLOR)
 - 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:

- a. CRIS
 - b. Source of Funds
 - c. Dept Flex
 - d. EmplID – Used when an employee is associated with the account (for example, a returned overhead account)
 - e. PC Business Unit (GRANT is required when entering a project number)
 - f. Project Number
24. To submit the Study Fund Request, scroll to the top of the page and click the **Submit for Approval** button. A message displays asking you to confirm you want to submit the request.
 25. Click **Yes**. The Study Fund Request is submitted into workflow and forwarded to your department approver for review and approval. An RPP 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. A SFR Request ID# will be assigned after saving.