Recording Zelle Payments

1. Navigate to The Payment Log for your study via Main Menu > Financials > Research Participant Payments > Payment Log

2. Search for your study fund request using the request ID, Study’s PI or IRB protocol

   **Tip:** You can leave all fields blank and click the search button directly, all the requests that you have access to will appear.
3. Your Payment Log will appear empty and ready for you to register your participants. Click the **Add Research Participant** button to add the participants.
4. First search for your participant to see if they already have an RPP profile from previous participation.

   **Tip:** Search for your participant using their first name, last name and zip code only for best results.
5. If your participant
   a. has never been in a study with UF before, you will select the Add New Person to Study button.

   b. has participated before, their name and information will appear next to a radio button you will select to add them to the study.
6. After the participant is added, you will be able to add more details to their information or update existing details. Click the **Save** button.

**Tip:** Remember that Zelle payments require a phone number or email address to receive the payment.

**Update Person**

- Social Security #
- First Name: A.
- Middle Name
- Last Name: GATOR
- Name Suffix
- Date of Birth
- Primary Email Address: agator@ufl.edu
- UF ID
- Gatorlink ID
- Permanent Mailing Address Line 1: S-113 CRISER HALL
- Address Line 2
- Address Line 3
- Country: USA
- City: GAINESVILLE
- State: FL
- Zip Code: 32611
- Phone 1: 352-555-555
- Phone 2

[Form Interface Image]
7. You will be directed back to the Payment Log home screen and the new participant will appear in your log. To send a Zelle payment, click the Payment Details button.

8. Follow these steps to enter a payment:
   - **Payment Type:** Prepaid Debit Card
   - **Vendor:** Wells Fargo Zelle
   - **Card Number:** Select the card number you would like to assign to the payment from the drop-down menu. Keep in mind each Card Number can only be used once.
   - **Payment Date:** Select today’s date
   - **Payment Amount:** Enter the dollar amount you want sent to the participant
   - **Taxable Payment:** This box will always be checked for payments. If you are paying a reimbursement (i.e., travel costs) you will uncheck this box.
9. You will select either their email or phone number as the payment delivery option in the EPAY Contact Preference field. 

**Tip:** You are required to enter the participant’s delivery option twice to ensure you have entered the correct phone number or email without errors. **Do not copy and paste this information.** Once the payment has been sent it **CANNOT** be reversed.

10. To make an additional payment, select the ‘+’ plus sign button at the end of the row and repeat step 8.
11. When you are finished entering payments, click the **OK** button at the bottom of your screen. The OK button will save your entry and the payment will be sent out at the next available payout time (6:00am, 10:00am, 2:00pm and 6:00pm).

![Payment Log](image)

**For Questions**
Contact Cost [Analysis](mailto:cost@hsp.admin.ufl.edu) at 352-392-5778 or [hsp@admin.ufl.edu](mailto:hsp@admin.ufl.edu).