

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.

UF RPP Participant Search

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

RPP Request ID begins with ▼ 0000003620

Study PI ID begins with ▼ Q

IRB Number begins with ▼ Q

Search
Clear
Basic Search
Save Search Criteria

Search Results

View All

1-1 of 1
◀ ◻ ▶

RPP Request ID	Sequence Number	Study PI ID	IRB Number
0000003620	0	FIRPPVW	000000089

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.

Research Participant Pymt Log

Request ID 0000003620
IRB Number 000000089

[Add Research Participant](#) ←

1-1 of 1

Participant ID	Name	Participant Payment Total

[Save](#) [Return to Search](#) [Notify](#)

- 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.

RPP Participant Search

RPP Request ID 000003620
IRB Number 00000089 [Return to Payment Log](#)

Search 1: By UFID, SSN or Participant ID

UFID:

Social Security #

Participant ID

Gatorlink ID

Search 2: By Other Personal Info

First Name

Last Name

Date of Birth

Permanent Mailing Zip Code

Primary Email Address

Telephone

[Search](#) [Clear](#)

[Return to Search](#) [Notify](#)

- 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.

RPP Participant Search

RPP Request ID 0000003620
IRB Number 000000089 [Return to Payment Log](#)

Search 1: By UFID, SSN or Participant ID

UFID:
Social Security #
Participant ID
Gatorlink ID

Search 2: By Other Personal Info

First Name
Last Name
Date of Birth
Permanent Mailing Zip Code
Primary Email Address
Telephone

←

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

Middle Name

Last Name

Name Suffix

Date of Birth

Primary Email Address

UF ID

Gatorlink ID

Permanent Mailing Address Line 1

Address Line 2

Address Line 3

Country

City

State

Zip Code

Phone 1

Phone 2

- 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.

Research Participant Pymt Log

Request ID 000003620
IRB Number 000000089

Add Research Participant

1-1 of 1

Participant ID	Name	Update Participant Info	Participant Payment Total	Payment Details	Remove Participant
1382556032	A. GATOR	Update Participant Info		Payment Details	Remove Participant

Save Return to Search Notify

- 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.

Payment Log

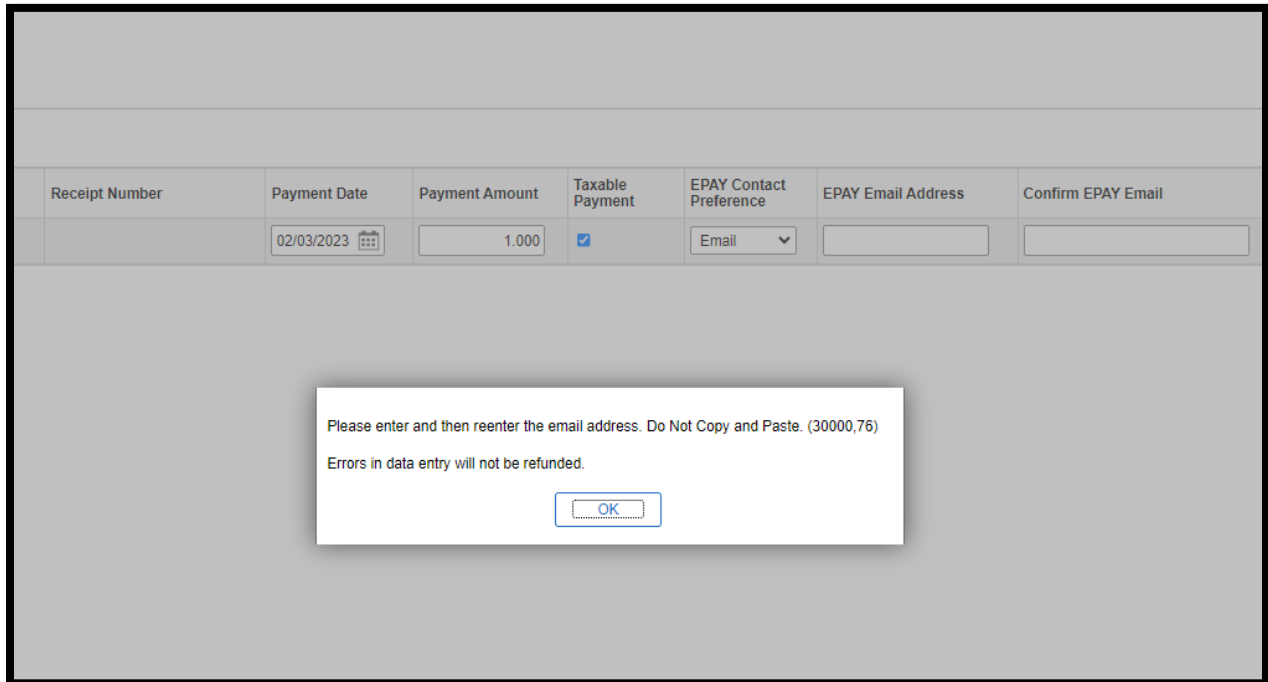
Request ID 000003620
Participant ID 1382556032
Name A. GATOR

Payment Type	Vendor	Card Number	Check Number	Receipt Number	Payment Date	Payment Amount	Taxable Payment	EPAY Contact Preference	EPAY Email Address	EPAY Phone
Prepaid Debit Card	Wells Fargo Zelle	0010010064			02/02/2023	1,000	<input checked="" type="checkbox"/>			

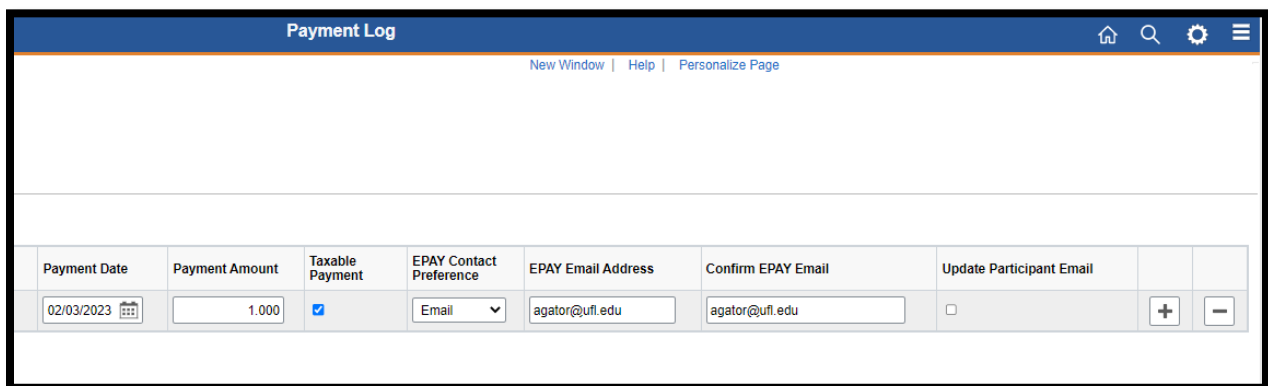
OK Cancel

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).

< Home
Payment Log

Request ID 000003620
Participant ID 1382556032
Name A. GATOR

Payment Type	Vendor	Card Number	Check Number	Receipt Number	Payment Date	Payment Amount
Prepaid Debit Card	Wells Fargo Zelle	0010010064			02/03/2023	1.000
Prepaid Debit Card	Wells Fargo Zelle	0010010065			02/07/2023	1.000

For Questions

Contact Cost Analysis at 352-392-5778 or hsp@admin.ufl.edu.