HSIP System Reference Card – Requesters/PI's
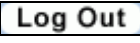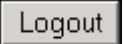
Log in and log out of M-Pathways

Login:

1. Go to the **Wolverine Access Gateway** Web site: https://wolverineaccess.umich.edu/index.jsp

2. Click **University Business** under the faculty & staff heading.

3. Click **TREASURY MANAGEMENT/HUMAN SUBJECT PAYMENT REQUEST**

4. Login using your uniqname and Kerberos password.

Logout:

1. Click [Sign out] to log off of M-Pathways.

2. Click [Log Out] to log off of Wolverine Access.

3. Click [Logout] to un-authenticate from all University login-enabled Web sites.

Submitting a HSIP Request

1. **Log In and Click on "Create New Payment Requests"**

2. **Prepare – If you compile all the information you need for a request, this will be the easiest thing you have ever done !!**

   - **HUM Number**
   - **Approver/PI – Uniqnames**
   - **If no HUM – Study Title, Approval Dates, Tier**
   - **Shortcode – Project/Grant**

3. **General Information**

   - Enter PI Uniqname - <Tab>
   - Enter UA Uniqname. -< Tab>
   - Add Alternate UA if available. Clink on **Enter Alternate Approver** link*(See approver for questions regarding who alternates approvers are for your study)*

4. **Study Information**

   - Enter HUM (ie HUM00004321) - <Tab>. Information will fill in from eResearch.
   - If Tier does not fill in, please contact HSIP Office. We will help you with your tier information.
   - If your study comes back as Tier 2 or Tier 4 you will need to pick an exception reason.
   - For Legacy or Exempt Studies – click on the appropriate box and you will need to enter study

information. *NOTE: Exempt studies come back with expiration date of 1/1/01. You must check **No HUM Needed** box to continue.*

5. **Payment Information**

   Custodian - List person responsible for incentives.

   IMPORTANT – This field automatically fills with PI. Please remove PI from custodian field if you wish to reduce email to your PI.

   Add Alternate PickUps - incentives will only be released to those listed as custodian or alternate pickup.

   Distribute To – Drop down menu shows two choices.

   Researcher – choose if you will be handing out incentives to the subjects

   Subject – choose if the HSIP office will be directly mailing the incentives to the subjects (ONLY Check and Card)

   Incentive Amount - This is the total amount you plan to spend on all subjects for the next 30 days. This is not the amount you are spending on each subject.

   Distrib Date – This is the date you would like to pick up your incentives or have them delivered to you.

   Payment Type – This is the type of incentive you wish to pay. Your choices are determined by whether you selected Researcher or Subject in the Distribute To box.

   (See back for details about *Payment Types* and what information needs to be entered)

   Max Amount Per Subject – This is the maximum amount you will pay each subject per calendar year in this study.

6. **Delivery Information**

   Enter your delivery preferences. Your choices will be limited by your payment type. (*i.e.* Checks will only go by mail, or HSIP Office pickup)

   Do not enter address in *Deliver To* area unless check is going to Researcher. Otherwise address information comes from spreadsheets or receipts.

7. **Accounting Information**

   Enter shortcode - Tab

   (Multiple shortcodes can be used by adding rows. You will need to change amounts)

8. **SAVE AND SUBMIT – You are done!!!**

   Your approver has now received an email regarding your request. Check your homepage to see status updates.

Check Requests

Requests that have submitted subject information to the HSIP Office and have been approved by 4:00pm will go out the next day.

- *Checks to Subject* – HSIP Office will mail checks or you may choose to pick them up at our office to personally hand to the subjects.

    - **Do not enter any address in *Deliver Information* area. Subject information is submitted separately.**

    - **Checks are sent to people listed on Check Information spreadsheet sent separately to HSIP Office. (*See website for spreadsheet template*)**

    - **For checks to be mailed directly to subject select *Mail*. To pick up checks for researcher to hand to subject select *HSIP Office*.**

- *Checks to Researcher* – Researcher can receive check to purchase incentives or convert to cash to hand to subjects.

    - **Checks will go to person listed as custodian.**

    - **You *must* enter the address the check will go to in the *Deliver Information* area.**

Cash Requests

Please allow 2- 3 business days for cash request processing from time request is approved.

We will try to accommodate emergency requests under $1000 but cannot guarantee. Please call HSIP Office for emergencies.

Custodian:

Cash will not be released by the Cashier's Office or Metro Delivery to anyone that is not listed in the custodian or alternate pick up area.

Coupon Requests

Coupon requests are processed within 4 hours of approval. Coupons are sent by PDF attachment to the custodian in the request.

Max Amount per Subject

This number will print out on your coupon as a control. You may change this to equal the amount that you plan to write your coupons for or the max amount you plan to write your coupons for.

Card Requests

Card requests need to be submitted and approved at least 2-3 business days before the distribution date. There is a time period to load and process the cards.

Cards will not be released by the Cashier's Office or Metro Delivery to anyone that is not listed in the custodian or alternate pick up area.

- *Cards to Subject* – HSIP Office will have Citi Bank mail cards directly to the subject.

    - **Do not enter any address in *Deliver Information* area. Subject information is submitted separately.**

    - **Cards are sent to people listed on Card Information spreadsheet sent separately to HSIP Office. (*See website for spreadsheet template*)**

- *Cards to Researcher* – Researcher can receive cards to hand out to subjects.

Documentation Requirements

The type of documentation you need to submit for incentives is based on the Tier level of the study. There are other issues that may result in documentation requirements being different for a particular study.

The main types of distribution requirements are as follows:

- Signed receipts. These receipts can be printed from the home page. Most studies use these receipts.

Click on the yellow button [Subject Details Form]

- Template spreadsheets – located on the HSIP website. Click on the link at the bottom of your request. (Most common for checks)

    Click here for more information, training and resources on HSIP
    http://www.treasury.umich.edu/hsiptrainingresources.htm

- You can submit documents to the HSIP Office via

    o Campus Mail

    o Email PDF Attachment

    o Approver attachment (your approver can attach your document into the request form.

Contact Us

Email us at subject-incentives@umich.edu.

Website is at www.treasury.umich.edu/hsipabout.