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| **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 the **Faculty & Staff** tab.
3. In the **Treasury Management** area, select **Human Subject Payment Request.**
4. Login using your uniqname and Kerberos password.

**Logout:**

1. Click MP_Sign out to log off of M-Pathways.
2. Click WA_Log Out_button to log off of Wolverine Access.
3. Click LOGOUT_button to un-authenticate from all University login-enabled Web sites.

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| **Submitting a HSIP Request** |

1. **Log In and Click on “Create HSIP Request”**
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 Approver Uniqname. -< Tab>
   * Add Alternate Approver if available. Clink on ***Enter Alternate Approver*** link*(See approver for questions regarding who alternates approvers are for your study)*
4. **Study Information – Approved and Exempt Studies**
   * Enter HUM (ie HUM00004321) - <Tab>. Information will fill in from eResearch. **MUST ENTER HUM and 0’s.**
   * 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.
5. **Distribution Information**

**Custodian** - List person responsible for incentives.

**Anyone who will be handling incentives at any point in the process should be listed as a Custodian.**

**Add Alternate Custodian/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 directly to the subjects

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

**Total Distribution Amount** - This is the total amount you are requesting. This is not the amount you are spending on each subject.

**Distrib Date** – This is the date your incentive funds will be available for pickup. If mailing incentives (check or gift card only) this is the date the payment will be processed/mailed.

**Distribution Type** – This is the type of incentive you wish to use. The type of incentive used should match the incentive type(s) listed in your IRB application (if applicable) **(See back for details about *Distribution 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.

1. **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 subject information should be uploaded on the excel template.**

1. **Accounting Information**

Enter shortcode - Tab

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

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

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| **Check Requests** |

Requests that have submitted subject information to the HSIP Office and have been approved by 2:00pm 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 uploaded to HSIP request. (*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.**

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| **Cash Requests** |

Cash requests approved by 2:00 p.m. M-F will be available 2 business days from the approval date. Check date on “Released” email to verify date funds will be ready.

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.

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| **Coupon Requests** |

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

Please call HSIP Office for emergencies

**Max Amount per Subject**

This number will print out on your coupon as a control.

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| **Card Requests** |

Card requests approved by 2:00 p.m. M-F will be available 2 business days from the approval date. Check date on “Released” email to verify date funds will be ready. Cards will not be released by the HSIP 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 Vantiv 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 uploaded to HSIPrequest. (*See website for spreadsheet template)***
  + ***Cards to Researcher*** – Researcher can receive cards to hand out to subjects.

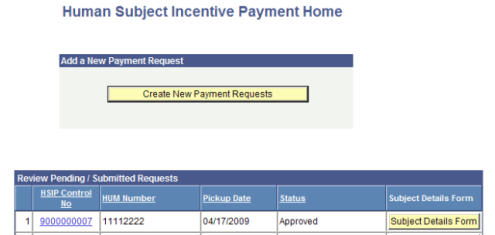
1. Please call HSIP Office for emergencies

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| **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 

* Template spreadsheets – located on the HSIP website. Click on the link at the bottom of your request or click on subject details form (Most common for checks).
* You can submit documents to the HSIP Office via
  + Upload directly to HSIP request form
  + Secure Fax ([**734-764-5375**](tel:734-764-5375)**)**
  + Drop off directly to HSIP office

**DO NOT EMAIL SUBJECT DOCUMENTATION**

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| **Contact Us** |

**Email us at** [subject-incentives@umich.edu](mailto:subject-incentives@umich.edu).

**Website:** [**http://www.finance.umich.edu/treasury/hsip**](http://www.finance.umich.edu/treasury/hsip)