

You can use the Single-Pay Voucher in ARC to pay individuals for their participation in human subject studies for U.S. participants with a valid tax U.S. identification number up to \$600 without the need to set them up as vendors. You must submit a W-9 with the Single Pay Voucher.

All foreign participants must continue to be onboarded through PaymentWorks to create a vendor record in order to process a payment.

Note: This payment method is not for recurring human subject participants, to pay individuals for other purposes, or to reimburse them for expenses they incurred. If participants fall into these categories, they should be invited to submit a new vendor request form via PaymentWorks

Applying for the Clinical Trial Voucher Single-Pay Role

In order to create Single-Pay Vouchers, you must have the **Clinical Trial Voucher Single-Pay** role in ARC. You can apply for the role by submitting a **Financial Systems Security Application (FSSA) in ServiceNow**.

You can find this role in the FSSA form under the Special Requests section (click **Yes** to the **ARC/Concur Special Request** question to open Section 3).

is ARC/Concur Special Request access required? If required, please click Yes below and select access. If not, proceed to Section 4 (selecting No is not required). 😡
Special Requests are types of access needed by only a select group of users and approved by the Controller's Office. If none of these are required, please do not select access in this 🗙
section:
 Approval of requisitions and vouchers over \$500,000
 Concur approval of travel and business expense reports and travel/cash advances over \$50,000
 Concur senior business officer approval of expense reports and advances when specific audit criteria are present
Access to send voucher files from integrating systems
 Bypass the segregations of duties requirements for procurement transactions.
 Access to additional accounts for procurement transactions (revenue and balance sheet accounts)
Approval of charthold request forms
 Initiate or approve general point initias (access to balance shine accounts) Initiate or approve general point initia (access to balance shine accounts)
Initiate or approve cash natioactions for dependentiation accelerate Initiate accelerate or approve context cash accelerate Initiate accelerate or approve context cash accelerate
Access additional business units
 PS Query reporting access (requires SQL knowledge for senior financial or technical users)
Section 3: ARC Special Requests
3.1: Procurement - Senior Approval Thresholds
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Department Voucher Approver (Requires Training)
Concur Financial Approver (Requires Training)
Senior Business Officer Approver (Requires Training)
3.2 Provingment . Interface Waysher Processing G
Note: Access to this note is for users who send Aric, voucher mes from integrating systems (e.g., tux, Skille, vpay, NextSource)
Bolar
Interface voucher Processing (wild unes training)
Ability to process Single Payment Vouchers (restricted to integrating systems who send payments to one-time vendors)
3.3: Procurement - Additional Account access for Requisition and Voucher Processsing 💿
Note: Access to this role is for users who need to charge procurement transaction to non-expense accounts
Holes:
Additional Account Access for Procurement Transactions
3.4: Procurement - Single Pay Voucher 🛛
Note: Access to this role is for users who need to pay Clinical Trial participants 🗶
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When you select the Clinical Trial Voucher Single-Pay role, the Voucher Initiator role will automatically be selected on the form and is required as part of Clinical Trial Voucher Single-Pay role.

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Creating a Single-Pay Voucher for Human Subject Research Participants



Creating a Single-Pay Voucher for Human Subject Research Participants

- 1. Before creating the Single-Pay Voucher in ARC, complete the <u>Check Request Form</u>. It will create a Invoice No which you will enter as your Invoice No on the Voucher. In addition, create a PDF version of the Check Request Form to upload to Procurement EDM when completing the Voucher.
- 2. In ARC, Click the **Buying and Paying** tile and then click the **Voucher Entry** tab.



The Add Voucher screen appears.



- 3. Click the Voucher Style dropdown and select Single-Payment Voucher.
- 4. Enter **SGLCLNTRIL** in the **Supplier ID** field.
- 5. Click the Add button. The Voucher form appears on the Single-Payment Supplier tab.

ARC

Completing the Voucher Form

Completing Single-Payment Supplier Tab

ARC < Welcome to ARC	Bu	uying and Paying
Create Requisitions	Invoice Information Payments Voucher Attributes Single Payment Supplier	
Jaggaer School/Division Setup	Supplier Information	
Requisition Management	Suppler Bank Supplier Bank Address Transfer to EFT options	AWS AV
Change Order Processing	Business Unit COLUM Voucher ID NEXT Payment Method CHK Supplier Name Terry Park	*Non-r
Purchase Order Review	Additional Name	
Receipt Processing	Country USA Q United States	
Supplier Review	Address 1 123 Main Street Address 2	
Voucher Entry	A VAddress 3 A WS	AWS AN
P-Card Reconcile Transactions	Address 4:	Nonth
Voucher Inquiry	City New York	
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	Invoice Information Payments Voucher Attributes Single Payment Supplier	
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- 1. Enter the participant's name in the **Supplier Name** field.
- 2. Enter the participants Address Information. The Country field is hard coded for USA as Single-Pay Vouchers are for US citizens and legal residents only.
- 3. Enter the **SSN**. This is used for tax withholding purposes in case the participant is paid above the taxable threshold during the calendar year.
- 4. Click the **Save** button. The Invoice Information tab appears.

Completing the Invoice Information Tab

Create Requisitions	Invoice Information Payments Voucher Attribute	as Geithe Fallineiri Orbhuei			
Jaggaer School/Division Setup	AWS weeks 21	AW5	AWS	AWS No Market Surgery	AWS
Requisition Management	Business Unit COLUM	Invoice No 123456Test	Invoice Total	Session Defaults Comments(0)	1-0-P100
Change Order Processing	Voucher Style Single Payment	*Pay Terms 00 Q	Line Total Currency	50.00 Attachments (0) USD Supplete List	allow
Purchase Order Review	Invoice Date 07/07/2023 Ba	sis Date Type Inv Date	Due Now Total	50.00 Provement EDM	
Receipt Processing	Invoice Received 07/07/2023		Difference 4	0.00	
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Creating a Single-Pay Voucher for Human Subject Research Participants



- 1. Enter today's date for the Invoice Date and Invoice Received Date fields.
- 2. Type the Invoice No, which is the Invoice No generated on the Check Request Form,
- 3. Select Check Req from the Voucher Type dropdown.
- 4. Enter the amount you are paying the participant for the research study in the Line Amount and Total fields. Note: *If the payee participated in multiple studies, a voucher must be created for each study and not added in to a single voucher.*
- 5. Enter ChartField data in the **Distribution** fields.
- 6. Click the **Save For Later** button. A Voucher ID number will be generated. You cannot upload documentation via Procurement EDM before clicking Save For Later.
- 7. Click the **Procurement EDM** link to upload supporting documentation regarding the study and the payee's participation, the Check Request Form, and the payee's W-9 form.

Submitting the Voucher

1. Click the Save button. Preview and Submit for Approval button appears.

Address	•					
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Save	Action	~	Run	Calculate	Print	Preview & Submit For Approval
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2. Click Preview & Submit for Approval. The Preview Approval window appears.

	Preview Approval	
Business Unit COLUM	Total 50.00	
Voucher ID 05639272		
Approval Status Pending	Submit For Approval	AWS
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3. Click Submit for Approval.

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Creating a Single-Pay Voucher for Human Subject Research Participants



Looking Up the Status of Your Single-Pay Voucher

Using the Voucher Inquiry

If you know the Voucher ID, you can use the Voucher Inquiry screen.

1. In ARC, Click the Buying and Paying tile and then click the Voucher Inquiry tab.



The Voucher Inquiry screen will appear.

	Bu	ying and Paying	
PO Business Unit		4	
From PO ID			
From Item ID			
*Currency		Q	TOR-ILA
*Voucher Style	Single Payment Voucher	~	#10-
Post Status		~	
Approval Status		~	
Voucher Balance		~	
Voucher Source		~ction	
User ID			
GL Business Unit			*Non-
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Match Status		~	
Max Rows	300 Search	Clear	1 Martin
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- 2. Enter your search criteria. The **Voucher Style** field is required. Select **Single-Payment Voucher** to narrow your search.
- 3. Click the Search button. The results appear with their associated Entry Status.

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■ Q									
Voucher De	tails A <u>m</u> o	unts More Detail	s <u>S</u> upplier Details	llÞ					
Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date ≜	Supplier ID	Entry Status	Classification	Incomplete	Match S
Perien Actions		00189592	002-1	04/11/2012	0000009619	Postable	Supplier		Matched
Match Workbe	ench	00000134	T198183	04/12/2012	000007659	Postable	Supplier		Not Appl
Payment Info Voucher Detai	rmation	00000143	T103328	04/17/2012	0000030014	Postable	Student		Not Appl
Review Docur	nent Status	00039730	T106927	04/18/2012	0000035140	Postable	Employee		Not Appl

4. Click the **Actions** dropdown by the matching Voucher and select **Payment Information** to view the payment information for the Voucher.



Using the PS Query

Buying and Paying Queries

If you do not know the Voucher ID for Single-Pay Voucher, you can use the PS Query to search based on the name of the recipient.

1. In ARC, click the Reporting and Monitoring tile.



2. Enter the **Query Name** "CU_AP_SINGLE_PAY_INFO" in the search and click the **Search** button. The Payee Name Search dialog box appears.

Advanced Search

Search

	×
CU_AP_SINGLE_PAY_INFO	
Payee Name (use % to search) %heimer%	AVV5 ADD OT
OK Cancel	*Non-Prou
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- 3. Enter the Payee Name. You can use "%" as wildcard if you are unsure of spelling.
- 4. Click **OK**. The results will appear.

Rec	ords	Query	Expressions	Prompts	Fields	s Criteria	Having \	fiew SQL Ru	in	
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Row	Unit	Voucher	Supplier	Additional	Cntry	Address 1	Address 2	Address 3	Address 4	City
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Getting Help

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now https://columbia.service-now.com

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