

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 chartfield request forms
- Initiate or approve general journal entries (access to balance sheet accounts)
- Initiate or approve cash transactions for departmental bank accounts
- Initiate grant and/or non-grant recharge center transactions
- Access additional business units
- PS Query reporting access (requires SQL knowledge for senior financial or technical users)

Yes No

Section 3: ARC Special Requests

3.1: Procurement - Senior Approval Thresholds

Roles:

- Department Requisition Approver (Requires Training)
- Department Voucher Approver (Requires Training)
- Concur Financial Approver (Requires Training)
- Senior Business Officer Approver (Requires Training)

3.2: Procurement - Interface Voucher Processing

Note: Access to this role is for users who send ARC voucher files from integrating systems (e.g., IDX, Skire, Vpay, NextSource)

Roles:

- Interface Voucher Processing (Requires 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 Processing

Note: Access to this role is for users who need to charge procurement transaction to non-expense accounts

Roles:

- 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

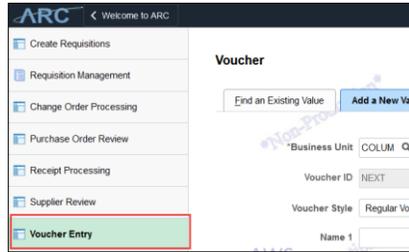
Roles:

- Clinical Trials Voucher Single Pay

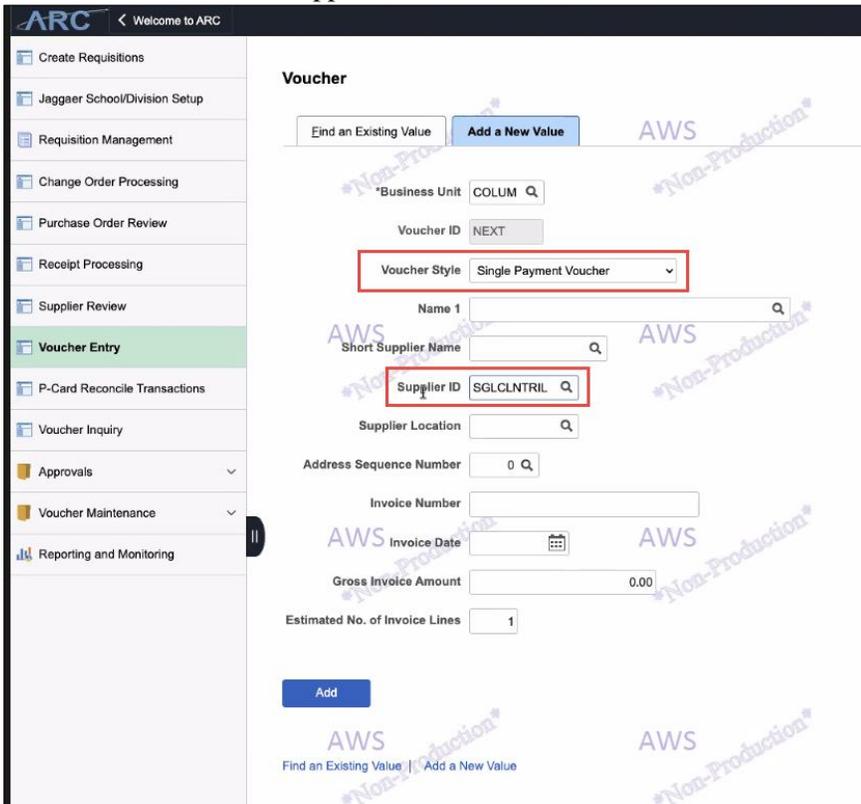
When you select the Clinical Trial Voucher Single-Pay role, the Voucher Initiator role will automatically be selected on the form and is required as part of Clinical Trial Voucher Single-Pay role.

Creating a Single-Pay Voucher for Human Subject Research Participants

1. Before creating the Single-Pay Voucher in ARC, complete the **Check Request Form**. 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.

Completing the Voucher Form

Completing Single-Payment Supplier Tab

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

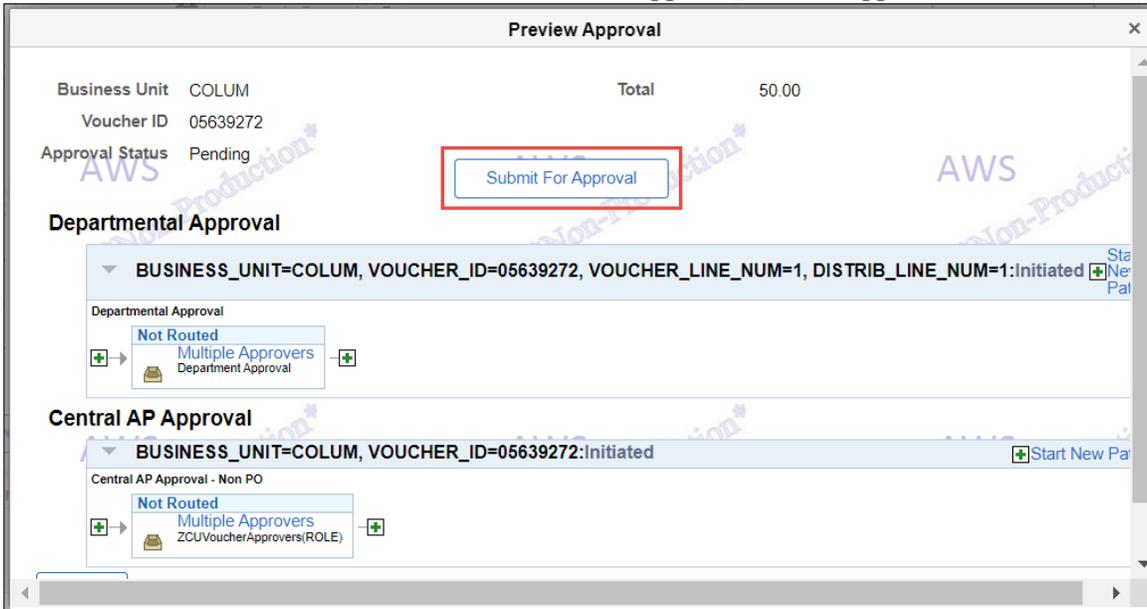
1. Enter today's date for the **Invoice Date** and **Invoice Received Date** fields.
2. Type the **Invoice No**, which is the Invoice No generated on the Check Request Form,
3. Select **Check Req** from the **Voucher Type** dropdown.
4. Enter the amount you are paying the participant for the research 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.



2. Click **Preview & Submit for Approval**. The Preview Approval window appears.



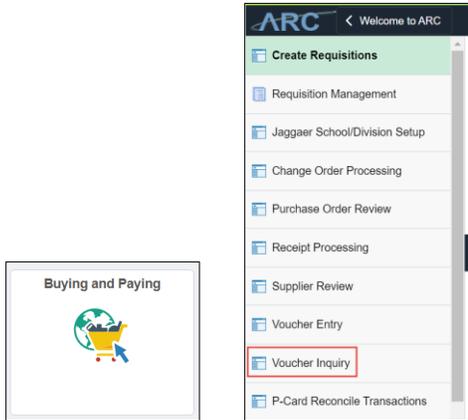
3. Click **Submit for Approval**.

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.

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.

Voucher Inquiry Results

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Classification	Incomplete	Match S
Actions Review Accounting Entries Match Workbench Payment Information Voucher Details Review Document Status	COLLIM	00189592	002-1	04/11/2012	0000009619	Postable	Supplier	<input type="checkbox"/>	Matched
		00000134	T198183	04/12/2012	0000007659	Postable	Supplier	<input type="checkbox"/>	Not Appl
		00000143	T103328	04/17/2012	0000030014	Postable	Student	<input type="checkbox"/>	Not Appl
		00039730	T106927	04/18/2012	0000035140	Postable	Employee	<input type="checkbox"/>	Not Appl

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

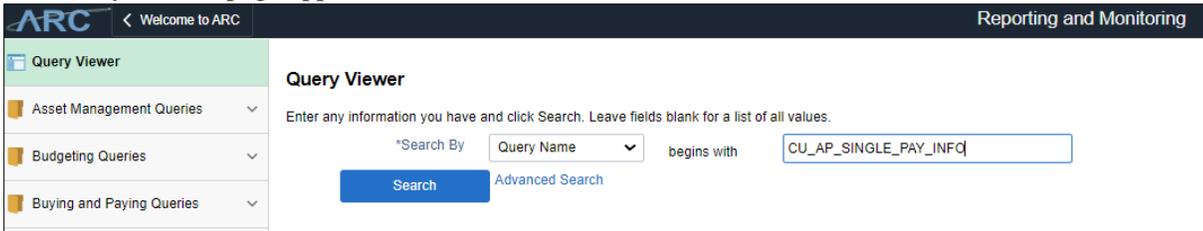
Using the PS Query

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.

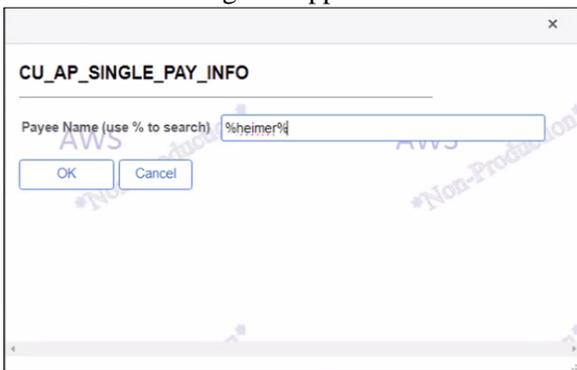
1. In ARC, click the **Reporting and Monitoring** tile.



The Query Viewer page appears,



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.



3. Enter the **Payee Name**. You can use “%” as wildcard if you are unsure of spelling.
4. Click **OK**. The results will appear.

Row	Unit	Voucher	Supplier	Additional	Cntry	Address 1	Address 2	Address 3	Address 4	City
1	COLUM	00002032	Winterheimer		USA	3000 Broadway	3000 Broadway	3000 Broadway	3000 Broadway	NEW YORK
2	COLUM	00041026	Winterheimer		USA	3000 Broadway	3000 Broadway	3000 Broadway	3000 Broadway	Pearland
3	COLUM	00042319	Veitenheimer		USA	3000 Broadway	3000 Broadway	3000 Broadway	3000 Broadway	YORKTOWN HTS

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>