Announcement Regarding Research Subject Participant Payments

We are pleased to inform you of an important provisional change to the UW Finance Guidance on Research Subject Payments. https://finance.uw.edu/ps/how-pay/research-subjects Effective immediately, payments to participants in research studies may be paid without collection of social security number (SSN)/individual taxpayer identification number (ITIN) **if they do not exceed $600 per individual in a calendar year**. This is a provisional change to remove the original threshold of $200. We will use this provisional policy for one year to assess the business process in the new Workday system. Workday will be updated to remove the requirement to provide a SSN/ITIN when submitting a *Miscellaneous Payment Request* (*Request Category = Research Subject*) when payments are under $600. In the interim, you may enter all zeros when prompted to provide a SSN and UW Procurement will process any payment amount below $600.

Please note, we heard your concerns about data security and the lengthy data entry process when paying multiple research participants at once. We are working on a long-term solution which will move the approval process out of Workday. In future state, payment requests for research participants will route from the unit directly to Central Procurement for payment. This will limit the number of individuals who have access to identifiable research participant data to those necessary for processing payment.

Additionally, we are working to develop an Enterprise Interface Builder (EIB) template to allow group uploads for requesting multiple checks for multiple research study participants. Please also note that participant names and/or SSN/ITIN data are NEVER transferred or stored in the Enterprise Data Warehouse (EDW).

Below is a summary of payment options that are currently available to campus for paying research participants.

Methods of Subject Payment	Current Workday	Job Aid/Guide/ Notes
Tango Card	Create Requisition/Blanket Request/Request non-catalog Items/Supplier Tango Card	https://uwconnect.uw.edu/finance?id=home Search for: PRO-J-11 *How to Create Purchase Order* for further instructions

Central Check Processing	Individual submission as Misc. Payment Request, payment type = Check	https://uwconnect.uw.edu/finance?id=home Search for: AP-J-01 *How to Perform Miscellaneous Payments in Workday* for further instructions For payments to an individual that will not exceed the IRS threshold of $600 for reporting, departments should use all zeros in the SSN field.
Zelle	Individual submission as Misc. Payment Request, payment type = Zelle	https://uwconnect.uw.edu/finance?id=home Search for: AP-J-01 *How to Perform Miscellaneous Payments in Workday* for further instructions • Email or phone number are required for this payment method. The participant will need a bank account to receive funds but a bank account and routing # are not required by UW to process payment. • For payments to an individual that will not exceed the IRS threshold of $600 for reporting, departments should use all zeros in the SSN field until we reconfigure Workday.
US bank Rewards Card	To order cards, find the "Order and Load US Bank Visa Rewards Card" form in UW Connect Portal	https://uwconnect.uw.edu/finance?id=sc_cat_item&sys_id=e34377cb87c3a9506f1997dd3fbb35ac
Field Advance - Cash	Create Spend Authorization task in Workday	https://uwconnect.uw.edu/finance?id=home Search for: EXP-J-02 *How to Manage Field Advance* for further instructions

We understand that the changes in research participant payment methods resulting from UW Finance Transformation have been challenging. We appreciate your feedback, dedication to research at UW, and your cooperation during the transition.