University of Pittsburgh
and
UPMC

WePay
Research Study Participant Payment System
Research Study Participant Payment System

Background

- Research base at Pitt
  - 2006 - $602 Million
  - 2007 - $620 Million
  - 2008 - $642 Million

- Payments to research subjects
  - 180,000 estimated payments / year
  - $12 Million annual payments to participants
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Background (cont.)

- Decentralized payment management
  - Petty Cash (Pitt 200+)
  - A/P checks
  - Stand alone checking accounts (Pitt 100+)
  - Gift certificates

- Regulatory environment
  - IRS
  - Sarbanes-Oxley
  - HIPAA
  - Patriot Act

- Due diligence
  - Conducted with peer medical centers and universities
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University of Pittsburgh and UPMC

- Similar issues and challenges
- Internationally renown research organizations
- Substantial and experienced research infrastructure
- Strong leverage
- Experienced developer
- State-of-the-art technology
Research Study Participant Payment System

Development Process

- End user requirement definitions
- Vendor selection and implementation planning
- Resolve regulatory and legal compliance issues
- Review, refinement and approval
- Policies and procedures
- Testing, training, and deployment
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Goals of the WePay System

• Maintain CONFIDENTIALITY and security
• Reduce administrative burden
• Accommodate needs of research subject population
• Improve reporting, monitoring and controls
• Regulatory compliance and tax reporting
Role – Based System

Five active user roles in WePay

- Each user is limited to one role
- Three administrative roles
- Two roles make payments to study participants
- Segregation of duties is enforced by the system
WePay Roles

- Card Manager (CM)
- Administrator (ADM)
- Business Office Manager (BOM)

Administrative

- Study Coordinator (SC)
- Study Aide (SA)

Issue payments
Security Features

- Users can only see their Projects and Studies
- Cannot see the Projects/Studies of other Users
- Card Numbers are encrypted at database
- Masking of on-screen display of SSN and Card Numbers
- PC-to-server communication is encrypted
Alert Features

E-mail alerts are sent for 18 events and conditions

Examples:

• Project funds nearing depletion
• A Study is suspended or resumed
• IRB is nearing expiration date
• Cards not accepted by new owner after 3/5/7 days
Reports Available

A total of 19 different reports are available

Examples:

• All roles     Free Cards; Project Summary
• ADM and       Daily Financial Summary
  BOM            Project (or Study) Structural Details
                  Project (or Study) Financial Details
                  Card Payments and Debits
• SC or SA      Daily Closeout
Other Key Points

- Logs every payment
- Limits exposure to bank fraud – all funds-handling is accountable and traceable
- IRS compliance
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WePay Card
Payment Card Features

- Anonymous
- Instant issue
- Re-loadable
- MasterCard™ branded
- Stored value debit card
- Multiple redemption options
  - Point-of-sale transactions
  - Cash back from merchant
  - Automated Teller Machine
  - Select Citizen’s Bank Branch locations
Research Study Participant Payment System

Summary of the WePay System

- System functionality
- Efficient disbursement workflow
- Improves reporting and control
- Achieves regulatory compliance
- Internal adaptability
- Commercialization potential
Research Study Participant Payment System

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