Projects

Section Objectives

At the end of this section, you should be able to:

- Create a project
- Maintain a project
- Grant access to a project
Create a Project

A project is the broadest scope of work available about the research awarded. The project has properties that identify its owners, funding source, General Ledger (GL) account codes, administrative staff, and payment amounts.

It is the intent of UPMC and the University that ADMs and BOMs shall only create or modify projects and studies for their respective organizations.

Project Setup and Access

In order to setup a project, a WePay™ Project Set-Up Form for Administrators must be submitted to the WePay™ Administrator (ADM). Only an ADM can create and maintain a project.

Once a project has been established, one or more studies may be created within that project.

- ADMs can assign project access to other ADMs and Business Office Managers (BOMs).
- A BOM can review project information on projects to which he has been assigned. A BOM can also assign (or remove) other BOMs to a project.
- ADMs and BOMs are directly linked to projects, and have access to all studies under those projects.

Project Status

Projects have one of three statuses associated with them.

1. **Active** – default status for a project after it is created. Projects must be Active to be used.

2. **Completed** – a project is marked as Completed by an ADM, once it is past the identified end date. Once marked as Completed, a project cannot be returned to Active status, and no payments can be made.

3. **Disabled** – a project can be manually marked as Disabled by an ADM. No studies can be assigned to it, and no payment can be made against it. A reason must be provided when disabling a project. An ADM may return a Disabled project to Active status.
Create a Project

Once a WePay™ Project Set-Up Form for Administrators has been received, the project can be setup in the WePay™ system.

<table>
<thead>
<tr>
<th>WePay™ System</th>
</tr>
</thead>
<tbody>
<tr>
<td>N → Projects → Create a Project</td>
</tr>
<tr>
<td>Create a Project</td>
</tr>
</tbody>
</table>

Create a project

1. Open the Create a Project window.

2. Enter Project Name.
   - The combination of Project Name & Project Number must be unique.

3. Enter Project Number.
   - This number should be the number assigned from the funding agency.

4. Select Organization.

5. Select Contracting Ofc/School.

6. Select Dept.

7. If applicable, select Division.

8. Select Funding Source.

9. Enter START date.
   - WePay™ system date format must always be mm/dd/yyyy (i.e. 02/21/2014).

10. Enter END date.
Create a Project

11. Enter *Total $ for Studies*.
   - This is the total funds from the grant allocated to subject compensation + expense reimbursements for all studies under this project.

12. Enter *Alert Level*.
   - When funds remaining in the project drop below this level, an email will be automatically sent to all WePay™ users associated with the project.

13. Enter *PI LAST Name*.

14. Enter *PI FIRST Name*.

15. Enter *PI Email Address*.

16. Verify all information, and confirm against IRB protocol.

17. Click the Continue button.
Create a Project

Enter GL accounts

18. The top portion of the screen displays the information previously entered. If any information is incorrect, press the Back button to return to Create a Project in order to make corrections.

19. Enter the General Ledger (GL) Codes for project costs.

- **Study Participation Payments** – GL account for compensation payments made to Subjects. All compensation payments are taxable income regardless of amount.

- **Expense Reimbursements** – GL account for reimbursement payments made to Subjects. Reimbursement refers to payments made to Subjects to repay them for expenses such as parking, transportation or meals.

- **Card Costs and Fees** – GL account for card costs and card loading charges. These bank fees are indirect expenses.
  - Card costs and fees can be charged to 04 accounts as long as there is not a restriction for the subcode.
  - Card costs and fees cannot be charged to 05 accounts.

- **Suspense Account** – GL account to be used in the event any of the others have been disabled. The WePay™ system will send an email notification if a Suspense Account is charged.
Create a Project

20. When all information has been entered, click the SAVE button.

21. The My WePay™ Projects window will appear, select the new Project.

22. Click the Project Access button.

Grant project access

23. Select user from the Grant new access to list.

24. Click the Add button.

- ADMs and BOMs may grant or remove user access to projects.
- An ADM may grant or remove access to any other ADM or BOM. At least one ADM must always remain assigned to the project.
- A BOM may grant or remove access for any other BOM.

25. Continue adding users as necessary.

26. When finished, click the Done button.

- The WePay™ system will send an email notification when users are granted project access.
Maintain a Project

Only ADMs have the ability to modify project details. If a project status is Complete, no attributes may be changed.

WePay™ System

N → Projects → Maintain a Project

Maintain a Project

Update project details

1. Select the desired project by clicking on the Project Name.

   - Only the projects to which the ADM has been granted access will appear.

   My WePay Projects

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Number</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effects of Autoimmune Disorders on Dental Health</td>
<td>002691</td>
<td>Active</td>
</tr>
</tbody>
</table>

2. This will open the Maintain a Project window.

3. The following fields cannot be edited.

   - Project Name
   - Project Number
   - Organization
   - Contracting Ofc/School
   - Dept
   - Division
   - Funding Source
Maintain a Project

7. The following fields can be edited.

- START and END Date (Note: this is the Project Start and End date, not IRB)
- Total $ for Studies
- Alert Level
- PI Last Name, First Name and Email Address
- GL Coding
- Project Access can be granted and Studies can be added

Email alerts

- Email alerts are sent to associated ADMs and BOMs if GL codes are modified, or if inactive codes are accessed to make a payment.
- Email alerts are sent when project access is granted.
- Email alerts are sent to all assigned project users when a project is disabled or re-enabled.
Projects: Summary

Projects

- Create a project
- Setup General Ledger accounts to be charged
- Grant access to a project
- Maintain a project