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
  - 2009 - $654 Million
  - 2010 - $737 Million (including $44 Million in stimulus funds)

- Payments to research subjects
  - 80,000 estimated payments / year
  - $6 Million annual payments to participants
Research Study Participant Payment System

- 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
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
Research Study Participant Payment System

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)  
  Administrative
- Business Office Manager (BOM)
- Study Coordinator (SC)  
  Issue payments
- Study Aide (SA)
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
Research Study Participant Payment System

WePay Card
Research Study Participant Payment System

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
Summary of the WePay System

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