

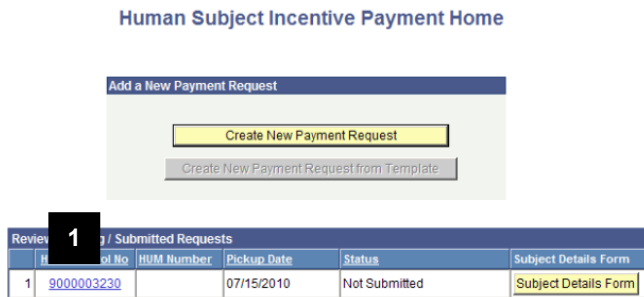
Create a Template for HSIP Requests

A requester who will be making multiple requests for a study may want to make a template to save time on future requests.

Navigation

Wolverine Access Faculty & Staff Tab > Treasury Management > **Human Subject Incentive Payment Request**

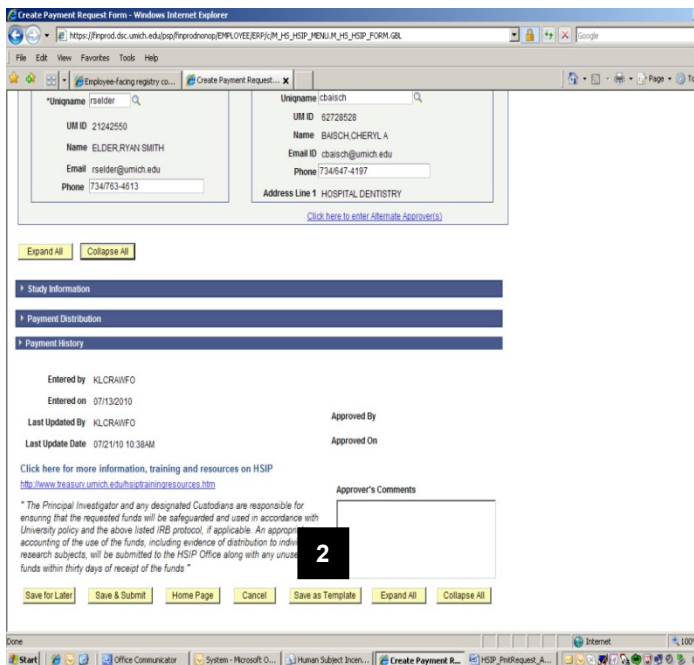
HSIP Home Page (Wolverine Access)



- Once in your HSIP Home Page, click on the HSIP Control No. for the request that you wish to make a template for. You cannot make a template until you have Saved or Saved and Submitted a request.

NOTE: Templates are at the study level. You do not need to make a template for each type of payment. This information does not save in the template.

HSIP Form Page



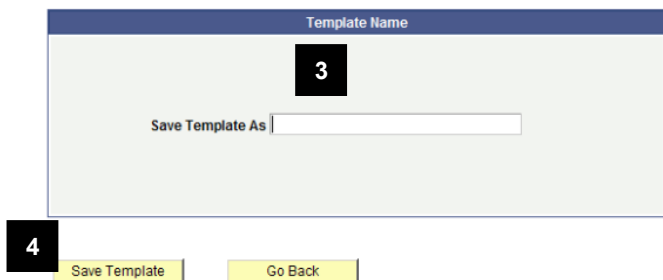
- Scroll to bottom of form and locate the Save as Template button

NOTE: The following information saves in a template.

- PI Information
- Approver Information (*Alternate Approvers do not save*)
- Study Information
- Primary Custodian (*Alternate Custodians do not save*)
- Accounting Information

No payment details or delivery information save in the template since those may change with each request.

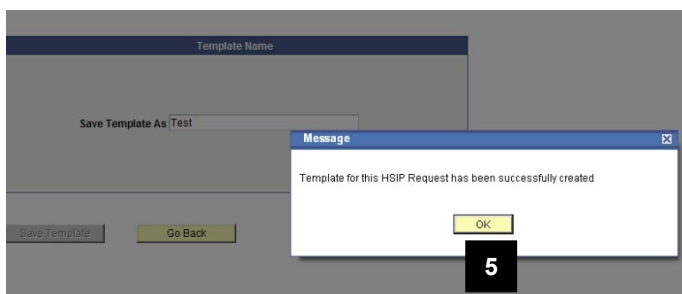
Name and Save Template



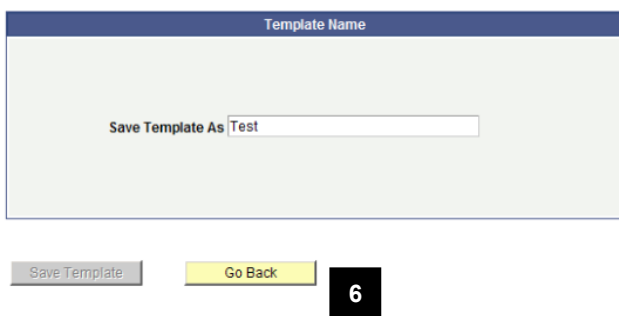
3. Type in Template Name.
4. Click on Save Template

Notes:

- Name template something that you will remember – short study name is most commonly used.



5. "Template has been successfully created" message pops up. Click OK.



6. System goes back to Template Name page. Click Go Back.

Note: At this point your template has been saved so Go Back returns you to the form that you have saved a template from.

- On form click Home Page
- Unsaved information error will pop up, click Cancel.

Create Request From Template

Human Subject Incentive Payment Home

Add a New Payment Request

Create New Payment Request

Create New Payment Request from Template **7**

Review Pending / Submitted Requests					
	HSIP Control No	HUM Number	Pickup Date	Status	Subject Details Form
1	9000003230		07/15/2010	Not Submitted	Subject Details Form

7. The Create New Payment Request from Template button is now accessible. To create a new request from a previously saved template, click this button.

HSIP Templates					
Template Name	Entered on	Last Updated	Load Template	View/Update	Delete
1 TEST	11/11/2010	11/11/2010	Load Template	View/Update	Delete
2 TEST	11/11/2010	11/11/2010	Load Template	View/Update	Delete

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[Home Page](#)

8. Click on Load Template to start a new request from your template.

NOTE: Templates do not update automatically when information changes. Any change in study information, (such as tier, approval dates etc.) require you to make a new template. Please press *Delete* to remove old template.

***View/Update* can be used to change Approver, Custodian or Accounting details. You cannot change study information in *View/Update*.**