m-Fin How-to: Looking Up Study Subject Payments [1]

You can look up Study Subject Payment (SSP) forms in CU-Data. They'll appear on your m-Fin Financial Detail and m-Fin Financial Detail II reports under your commonly used *Study Subject Payments* accounts.

Watch the video

- Read the Procedures

You can look up Study Subject Payments by running the m-Fin Financial Detail II report for commonly used Study Subject Payments account codes.

1. In CU-Data, click the **Team content** folder and select **Finance**. ?A list of reports will appear in alphabetical order - select *m-Fin Financial Detail II*.
2. Enter your search criteria on the first search page:
    - This report defaults to run for the entire fiscal year. Use the **Fiscal Year** and **Accounting Period** dropdowns to select a different time period.
    - If you are only looking at one SpeedType, enter it in the **Single SpeedType** box.
    - To search for a SpeedType, enter the SpeedType and click **Search**. Select the SpeedType from the Results list, and click **Insert**.
    - To run by Org, Program or Project use the fields on the right of the page.
3. Click **Next**.
4. Click the **Account custom range** tab. On this prompt page, you'll narrow the report to show only the types of payments you're looking for… the most common accounts are 495102 – the Study Subjects account code – and 702000 - the In-State Non-employee Travel account code. Enter each account both the From and To fields. Click **Insert**.
5. **If you are running the report for a single SpeedType: Click Finish.**
   If you are running the report for more than one SpeedType: Click Next. On the final prompt page, use the Page By field to determine how information will be grouped on your report. By default, the report groups all SpeedTypes onto the same report. To separate by Org or by SpeedType, select the appropriate option using the drop down menu. Then click **Finish**.
6. Your m-Fin Financial Detail II report displays, showing only the SSPs processed for the SpeedType, accounts, and time period you specified.

Wondering if you can make reconciling this account easier?

When completing the Study Subject Payment form, use the Description field to enter something meaningful. Just remember, you shouldn't enter the individual's name or any personal identifying information if the study is confidential!

For example, you can enter:

- the study subject's initials + a visit number + the date of the visit
- or, you can enter the Study Subject ID.

This information will show on the Journal Line Description field of the Financial Detail II report, allowing you to compare the report to your records and follow up on any issues.

Don't see your Study Subject Payment on the m-Fin Financial Detail II report?

Perhaps it was just entered in the Finance System and hasn't yet fed to the Reporting System.

Have a question or feedback?

Questions & Feedback [2]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Groups audience:
Controller
Right Sidebar:
OUC Looking Up SSP

Source URL:https://www.cu.edu/controller/m-fin-how-looking-up-study-subject-payments-0

Links
[1] https://www.cu.edu/controller/m-fin-how-looking-up-study-subject-payments-0
[2] https://www.cu.edu/controller/forms/questions-feedback-0