

# Forte Payments Software

*Informational presentation, with demo of software*

Debbie Scott and John Young; Fall 2018

knowledge changing life



# Topics Covered in This Presentation

- Overview of Forte Payments
- Considerations for Department Administrators
- Financial Reviewer Role
- Participant Check-in + Pay Role
- Live Demonstration of Forte Payments Software



# Overview of Forte Payments

# Overview of Forte Payments

- What is Forte Payments?
  - Forte Payments (“Payments”) is an automated system that will help MCW pay visit fees to research participants and to reimburse participants for their allowable travel expenses.
  - Integrated with OnCore, Payments reduces the amount of time spent managing the payment process and centralizes study information to enable operational efficiencies.
  - Varying roles within Payments supports segregation of duties and a strong internal control environment.

# Overview of Forte Payments - Continued

- Who should use Forte Payments?
  - Research studies that compensate study participants
- Benefits of using Forte Payments
  - Simplifies the payment workflow for:
    - Research Study Coordinators and Other Department Personnel
    - Research Study Participants
    - Finance Office
  - Reloadable universally accepted VISA debit card can be used for multiple visits across multiple studies
  - Payments is an additional option to the Check Requisition process currently managed in Oracle

# Overview of Forte Payments - Continued

- User Roles
  - **Contact Administrator** – Manage users and assign roles (Finance Office)
  - **Protocol Administrator** – Manage protocols, create visits, and assign protocols to users (OnCore Helpdesk)
  - **Participant Check-in + Pay Stipends** – Add participants to studies, check-in participant visits, and pay participant visit fees and travel reimbursements (Research Study Coordinator)
  - **Financial Reviewer** – Approve payment requests, view participants, and run reports (Department Requisition Approver or Delegate)
  - **Payment Card Replace** – Manage the replacement of lost, stolen, or expired participant payment cards (Finance Office)

# Overview of Forte Payments - Continued

- Accounting for visit fees and travel reimbursements
  - Recorded daily at a project or cost center level
  - Details recorded include:
    - Payment Type
    - Participant Name
    - Visit / Reimbursement Description
    - Payment Date
    - Payment Amount
- Managing debit card inventory and safeguarding cards
- Replacement of lost, stolen, or expired participant issued cards



# Considerations for Department Administrators



# Department Administrators

- Identify personnel within your department who will be assigned the Financial Reviewer role
  - The person(s) assigned the Financial Reviewer role has payment approval authority in Payments and should be a person that has purchase requisition approval authority in Oracle (or a delegate)
- Financial Reviewers are responsible for:
  - Managing and safeguarding payment cards ordered and used within your department
  - Approving the first study visit payment made to each participant on a study
  - Approving *all* travel reimbursements made using the payment card



# Financial Reviewer Role

# Financial Reviewer Role

- Financial Reviewer role can perform the following tasks:
  - View participants enrolled on a study
  - Review and pay participant travel reimbursements
  - Review and pay participant payments in queue
  - Approve payments for a participant's first visit and *all* reimbursements
  - Run reports



# Participant Check-in + Pay Role

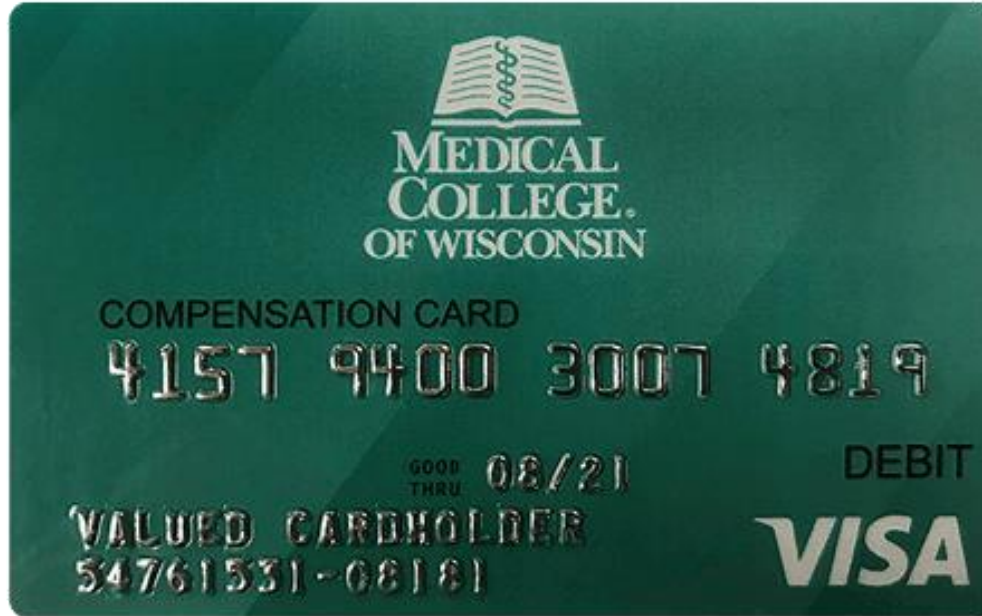
# Participant Check-in + Pay Role

- Participant Check-in + Pay role can perform the following tasks:
  - Enroll participants on a study
  - View and edit participants enrolled on a study
  - Check-in participant visits
  - Pay participant visit
    - The initial visit is sent to the Financial Reviewer for payment approval
    - Subsequent visits for payments are authorized immediately when the study coordinator clicks “Pay”
  - Request a payment for participant reimbursements
    - All travel reimbursement requests are sent to the Financial Reviewer queue for review and approval (study coordinators attach receipt when submitting request)



# Relevant Screenshots

# Sample Card



# Forte Payments Support Page for Forms

The screenshot shows the Medical College of Wisconsin website. At the top left is the logo with the text "MEDICAL COLLEGE OF WISCONSIN" and "knowledge changing life". The URL "http://www.mcw.edu/departments/research-systems" is displayed. A navigation bar includes "PATIENT CARE", "EDUCATION", "RESEARCH", "COMMUNITY", "GIVING", and a "FIND A DOCTOR" button. Below the navigation is a large image of a building with the text "Research Systems" overlaid. A secondary navigation bar contains "EBRIDGE", "ONCORE", "PAYMENTS", and "TRAINING", each with a dropdown arrow. The "PAYMENTS" dropdown menu is open, showing "REGISTER", "FEATURES", "FORMS" (highlighted with a red dashed arrow), "HELP DESK", and "SUPPORT". The breadcrumb "HOME / DEPARTMENTS / RESEARCH SYSTEMS" is visible. The main heading is "MCW Research Systems". The introductory text reads: "Within the Office of Research, MCW Research Systems coordinates the eBridge application through collaboration with: Grant Administration, IRB, IACUC Staff, Safety Committees, Sponsored Programs, and Regulatory Compliance. The Research Systems team includes eBridge Administration, OnCore Administration, and Research Systems Training. MCW Research Systems also supports the Forte Payments and OnCore systems with day-to-day help desk service, installation of system upgrades, and new functionality providing documents and training, all in collaboration with current oncology and non-oncology users, MCW Finance, the MCW Tissue Bank, Compliance, Pharmacy, EPIC and vendors."



# Example Review Queue From Payments

**Menu** Protocols Reports

**Payments**

Payment

Status

Protocol

Payment Date Range  
From *Any date* To *Any date*

Participant

Payment Type

Protocol/Visit	Visit Date ↑	Participant	Payment Type	Amount	Comments	
F-COG F-COG visit 1	01 Jun 2018	Holly So Jolly ▲	Stipend	\$25.00		<input type="button" value="Pay"/> <input type="button" value="Reject"/>
BI-TEST-FINANCIAL-CHECKIN Screening	11 Jun 2018	Javier Baez ●	Stipend	\$25.00		<input type="button" value="Pay"/> <input type="button" value="Reject"/>
BI-TEST-FINANCIAL-CHECKIN 1 Month visit	11 Jun 2018	Kris Bryant ●	Stipend	\$50.00		<input type="button" value="Pay"/> <input type="button" value="Reject"/>
Test COG First One	15 Jun 2018	Donald Duck ▲	Stipend	\$25.00		<input type="button" value="Pay"/> <input type="button" value="Reject"/>
new test name visit 1	15 Jun 2018	Mary J Scary ▲	Reimbursement	Hotel: \$150.00 Parking: \$32.00 Other: \$0.00		<input type="button" value="Pay"/> <input type="button" value="Reject"/>
Mock	19 Jun 2018	Marv J	Stipend	\$25.00		<input type="button" value="Pay"/> <input type="button" value="Reject"/>



Questions?