

Create a New Participant

Before you add a participant, search to make sure that they are not already entered in the system. If the participant is not already in the system:

1. From Payments > Participant Check-in, click Add Participant.

2. Enter the participant information. While you can save a new participant without completing all fields, payments won't be processed until the required account information is complete.

- **First Name**
- **Last Name (accepts one or more characters)**
- **Has Guardian? (Field is required for participants under age 18)**
- **Email**
- **Address/City/State/Zip**
- **Date of Birth**
- **Participant Identifier (optional)**
- **Social Security Number (must be 9 digits and no dashes) *Required by WU, if available***
* SSN is required for tax reporting for participants receiving \$600/year or more from WU
- **Payment [Account] Type: Click Payment Card**
- **Card ICN: Enter all digits of the ICN, including the dash**

3. Click Add Participant. The participant record will open, where you can enroll the participant on a protocol. The participant information is saved, and the participant is assigned a unique identifier, the Advarra Participant ID, located at the top of the page.

*As of September 23, 2021, PO Box entries are no longer accepted as valid residential address entries by Hyperwallet for new and updated participants. Participants entered in Payments with a PO Box address prior to this date are unaffected; however, if their address is updated within Payments it must be with a valid (non-PO Box) address.

Create a participant who has a guardian

Participants under 18 years old are required to have a guardian. The participant's payments will be sent to their guardian through the guardian's Participant Payments account.

1. Create the guardian's account **first**, in the same way that you would create a regular participant account. Do not add the guardian to the protocol.

2. Then, create the participant's account. Select the Has Guardian? checkbox

3. Select the guardian's name from the Guardian field and click Add Participant. The participant record will open with their name at the top of the page.

4. Add the participant to the protocol.

5. Check in the participant's visits as you would with any other participant. All payments for this participant will be sent through the guardian's account.

Add the participant to a protocol

After you create a participant, the participant record will open. The participant's name will appear in the banner at the top of the page, and a search box beneath the name will allow you to add the participant to a protocol.

Begin typing the protocol name or number into the search field, and a list of options will appear. You will see only those protocols to which you have been granted access. If you do not see the protocol you need, contact your Participant Payments Organization Administrator.

Clicking a protocol will add the participant automatically and allow you to begin checking in visits.

A participant can be added to a protocol before the account is complete, but the participant won't be paid until it is complete.