

Quick Reference Guide: Completing the Payment Requests Node in Visiontracker

Purpose

The Payment Requests Node in Visiontracker is now the required method for submitting milestone payment requests. This automated workflow replaces manual email-driven processes, ensuring timely payments, transparency, and compliance.

Step-by-Step Instructions

Access the Payment Requests Node

1. Access the Payment Requests Node

- Log in to Visiontracker using your credentials.
- Navigate to your study/project dashboard.

2. Complete Project Milestones Update

- In the **Project Management** section, go to the **Milestones Node**.
- Enter milestone details for each payment request.
- Select **Provide Project Update** and click **Save**.

3. Complete the Payment Requests Node

1. Go to the **Payments Requests Node**.
2. Enter the required information:
 - Select milestone reached
 - Payment Amount – local currency. **Entry is optional**. If you choose to complete this field, use your local currency or follow the amount outlined in your contract.
 - Attach invoice (if required; for US studies, this is optional)
 - Check box - This check box is not used and can be left blank.
3. In **Actions**, select **Provide Project Update** and click **Save**.

4. Submit for Review

- Once submitted, the Primary Scientific Leader Research Manager (PSLRM) will receive an automated email notification to review your payment request.
- The PSLRM will confirm milestone completion and update the status to **Accepted** if approved.
 - If your payment request is rejected, the (PSLRM) will email the Principal Investigator (PI) with an explanation for the decision.

5. Track Payment Status

- After PSLRM approval the payment will be processed in accordance with the payment terms.
- Payment details (Paid Amount, Paid Date, Reference/Check Number) will be updated in Visiontracker for your reference.

The Payment Request Node is part of the Project Status Update Section

Directions to complete Payment Requests:

1. Select milestone reached
2. Payment Amount. Entry is optional. If you choose to complete this field, use your local currency or follow the amount outlined in your contract.
3. Attach invoice if required
4. You may leave this box unchecked; attestation is not required.
5. In the Actions Drop Down:
 - 5a. Select *Provide Project Update*
 - 5b. Then select: *Save*
6. Confirm that the Status reads: Submitted; then exit

The screenshot shows the 'Payment Requests' form in Visiontracker. The form is titled 'Expand rows (2) to see detailed information.' and contains the following fields and actions:

- Entry Date:** 23 Mar 2026
- Milestone Reached:** A dropdown menu with a callout '1' pointing to it.
- Payment Amount - local currency:** A text input field with a callout '2' pointing to it.
- Attach Invoice, If Required:** A button labeled 'Attach file' with a callout '3' pointing to it.
- Check box:** An unchecked checkbox with the text 'This check box is not used and can be left blank.' and a callout '4' pointing to it.
- Comments from Approver to Submitter:** A large text area.
- Comments:** A smaller text area.
- Status:** A dropdown menu showing 'Submitted' with a callout '6' pointing to it.
- Decision Date:** A date input field.
- Paid Amount:** A text input field.
- Paid Date:** A date input field.
- Reference:** A text input field.
- Actions:** A dropdown menu with 'Save' and 'Actions' highlighted. 'Provide Project Update' is selected, with a callout '5a' pointing to it. 'Save' is highlighted with a callout '5b' pointing to it.

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Tips & Reminders:

- **Payment attachments** are optional for US studies; provide supplemental info if desired.
- **Accuracy matters:** Ensure all milestone and payment details match your contract.
- **Status options:** Not Submitted, Submitted, Under Review, Accepted, Rejected.
- **For questions/support:** Contact your RMSD or email VISIONTRACKER_SUPPORT at vt_support@msd.com.

Reset your Visiontracker Password. If you haven't been in Visiontracker for a while, you may want to reset your password.

- Visiontracker access link: [iEnvision](#)
- Enter your email address as your User Name and the Password you selected.
- Click Log in.
- For Log in issues, contact [iEnvision Helpdesk Support](#)

To add a new user to your Visiontracker account. New applicants/users must first create an account by selecting the Register for New Account link.

The image shows a screenshot of the Visiontracker System Login page. The page has a white background with a blue header containing a lock icon and the text "System Login" with a small US flag. Below the header are two input fields: "User Name" and "Password". Below these fields are three links: "Register for New Account" (highlighted with a yellow box), "Forgot Password?", and "Forgot Login ID?". A blue "Log In" button is at the bottom. To the right of the page, there are three blue arrows pointing to the "User Name" field, the "Register for New Account" link, and a "Contact Us" section (which is also highlighted with a yellow box). The "Contact Us" section has a question mark icon and two email addresses: "For business or system questions: vt_support@msd.com" and "For login issues: helpdesk@envisionpharmasupport.com".

Returning Applicants
Enter credential in the
System Login Section

New Applicants must first
create an account by
selecting the **Register for
New Account** link

System Support can be
found in the **Contact Us**
section