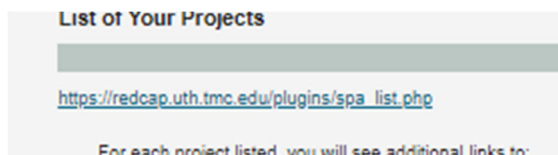


## How to Fund Reloadable Cards New Patient/First Visit

1. Note the last digits of Card ID of the card you are giving to participant (This is the ID you see through the window of the envelope the cards come in (it will look like XXXXXXX 12345) This is not the number printed on the card.
2. Go to SPA Card Web page
  - a. <https://www.uth.edu/sponsored-projects-administration/manage/clinical-trialsresearch/spa-cards-program>
  - b. Click on the link under “List of Your Projects”



3. Select “Activate/Fund Cards” for applicable Study

**Study: TEST RELOADABLE CARDS New format (ID:99-98745)**

[Activate/Fund Cards](#) | [Reorder Cards](#) | [Funding History Report](#)

- a.
4. Enter the last digits of the Card ID into the “Search” bar in the upper right hand of screen
  - a. It will look like this:

### SPA Card Activation

Show  entries Search:

ID	First Name	Last Name	DOB	Address	SSN	Upload W-9
7277641360012290	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Address Line 1"/> <input type="text" value="Address Line 2"/> <input type="text" value="City"/> <input type="text" value="State"/> <input type="text" value="Zipcode"/>	<input type="text" value="xxx-xx-xxxx"/>	<input type="button" value="Choose File"/> No file chosen

5. Enter participant’s demographics

6. Upload W-9 Form

7. Click on “Submit”

- a. You will now see the new patient added to the form and see the below notification

**New Person Successfully Added!**

The new person has successfully been added to the system and assigned to a card. You can now add funds to the card.

i.

7277641360012290	Jane	Doe	01/01/2000	123 Test Lane Houston TX 77530	xxx-xx-4569	360771	Fund Card
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8. Click on the blue “Fund Card” icon by the new person’s name (shown in above image)

- a. After you click on “Fund Card, you will see the funding screen. (Example image below)

**Fund Card**

7277641360012290

Internal ID: 4

Name: Doe, Jane

DOB: 2000-01-01

**Milestone History**

**Reimbursement History**

Milestone	Amount	Activated?	Date
Visit 1	10	No	
Visit 2	10	No	
Visit 3	10	No	

Reason	Amount	Date
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Add Funds to Card

- b. Notice that the list show none of the milestones have been activated/no payments have been made as of yet.

9. Click on “Add Funds to Card” icon

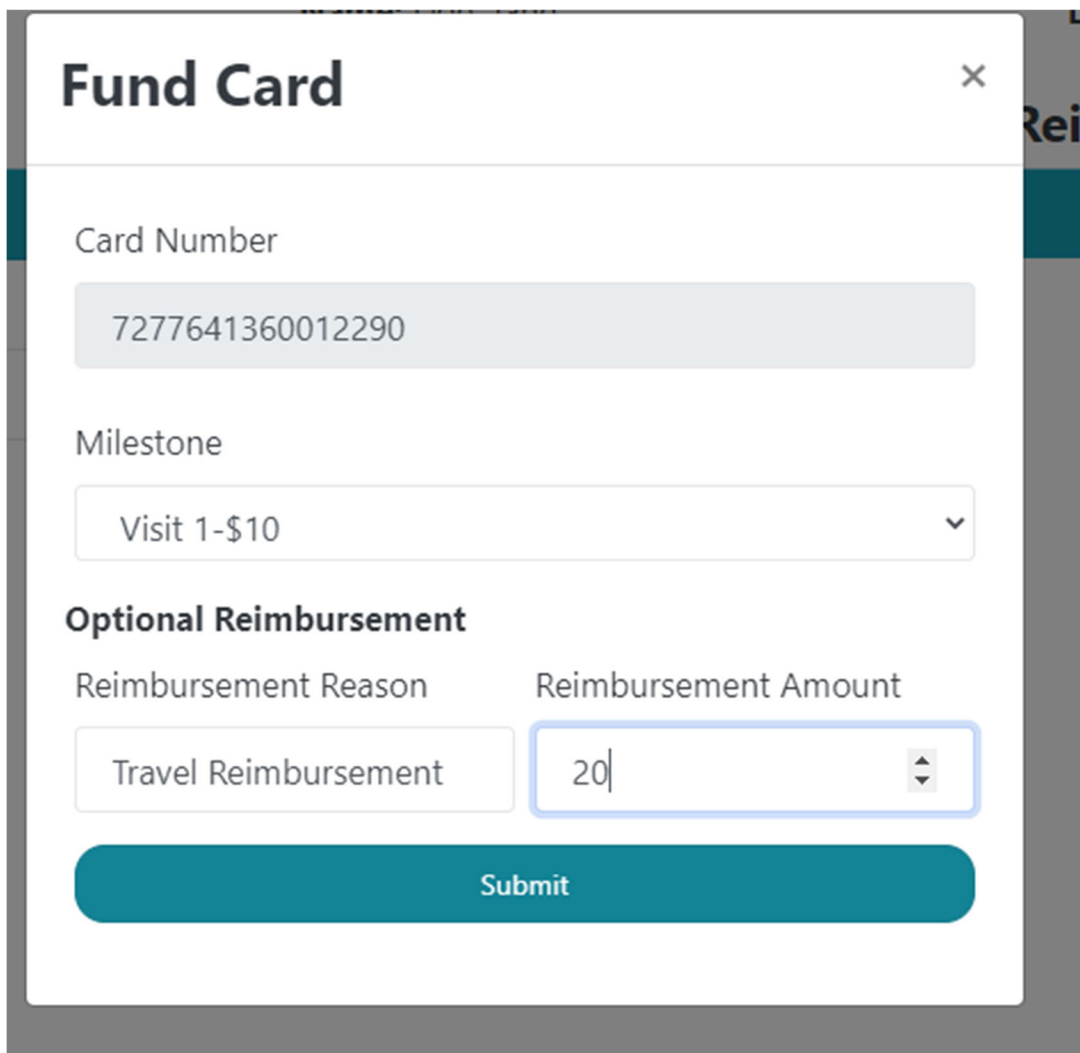
- a. Select card from dropdown Menu  
b. Select Milestone from dropdown menu

c. If applicable, you can use the “Optional Reimbursement” fields

i. If both the visit Milestone is selected AND the “Optional Reimbursement” are completed the will be added together

1. In the below example, the card holder will receive \$30 (\$10 for visit 1 completion PLUS \$20 for travel reimbursement)

d. Click “Submit”



e.

**10.If you are only paying a reimbursement SKIP the Milestone section**

11. A message will pop up asking you to confirm data entry. You must select OK for the payment to process.