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](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

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:

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.

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]
   Internal ID: 4
   Name: Doe, Jane
   DOB: 2000-01-01

   **Milestone History**
<table>
<thead>
<tr>
<th>Milestone</th>
<th>Amount</th>
<th>Activated?</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit 1</td>
<td>10</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Visit 2</td>
<td>10</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Visit 3</td>
<td>10</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

   **Reimbursement History**
<table>
<thead>
<tr>
<th>Reason</th>
<th>Amount</th>
<th>Date</th>
</tr>
</thead>
</table>

   ![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. If you are only paying a reimbursement SKIP the Milestone section

   10. A message will pop up asking you to confirm data entry. You must select OK for the payment to process.
Example 1

- When you want to pay the set milestone payment only.

Example 2

- When you want to pay BOTH a set milestone payment PLUS an additional reimbursement (such as travel, lodging, or parking reimbursement. (Anything that is not included within the set milestone payment.) *See page 5 for details on tax exempt.

Example 3

- When you want to pay a reimbursement that is not listed on the Milestone drop down menu. (This could be because each payment will vary depending upon criteria met. Or the payment is not listed on milestone dropdown for any reason.) *See page 5 for details on tax exempt

**EXAMPLE 1**

**Paying for Visit Milestone Only** - In this case scenario, you select applicable Milestone from drop-down menu and SKIP the “Optional Reimbursement” section.
REMEMBER:

If you select a Milestone from the drop-down menu AND enter data into the “Optional Reimbursement section - these amounts will be added together.

If you are only paying the visit milestone - select correct milestone from drop down and SKIP the Optional Reimbursement section (leave those fields blank).

If you are only paying a reimbursement SKIP the Milestone section. Leave it as "Select Milestone" and go straight to the Optional Reimbursement section.

If the payment is tax exempt, you should check the box by "Optional Reimbursement is Tax Exempt"

Tax Exempt-
- If the payment is based upon receipt(s) provided by the research participant, the reimbursement is tax exempt. (This must also be described within the ICF approved by the IRB.)
- If the payment is based on actual mileage traveled following IRS guidelines for assessing mileage, the reimbursement is tax exempt. (This must also be described within the ICF approved by the IRB.)
- If all research participants receive the same amount per visit, the payments are not considered tax exempt reimbursements. (The payments must be based on actual mileage and/or travel receipts to be considered tax exempt.)

Question: ICF states all participants will receive $XX to cover the participant’s time and travel costs- is this tax exempt because it is covering travel?
Answer: No- If all patients are receiving the same amount per visit this is not a reimbursement based upon mileage it is a general payment for participating in the study.

Question: If the payment is covering Uber or Taxi costs is this tax exempt?
Answer: Yes- If the ICF approved by the IRB notes transportation will be paid for by the study. The study team must collect the Uber/Taxi receipts to verify dollar amounts.
EXAMPLE 2

Paying for Visit Milestone PLUS additional reimbursement

In this case scenario, you select Milestone from dropdown menu PLUS you complete the fields in the “Optional Reimbursement” section.

The Milestone Visit Payment and the Optional Reimbursement payment will be added together. In the above example the participant/recipient will receive $75  ($40 for completing visit and $35 in travel reimbursement.)
EXAMPLE 3

When you want to pay a reimbursement only and it is not available on the Milestone drop down menu. (This could be due to each payment will vary depending upon criteria met, unscheduled visit, or the payment amounts have changed and no longer match the milestone dropdown menu, or if the reason you are paying the participant is not available on the Milestone dropdown menu for any other reason.)