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: 7277641360012290
   Name: Doe, Jane
   DOB: 2000-01-01

<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>

   ![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”

![Fund Card]

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.