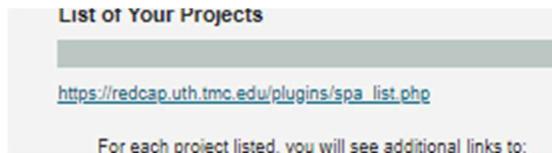# How to Fund Reloadable Cards New Patient/First Visit

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"

   List of Your Projects

   https://redcap.uth.tmc.edu/plugins/spa_list.php

   For each project listed, you will see additional links to:

3. Select "Activate/Fund Cards" for applicable Study

   ## Study: TEST RELOADBLE 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
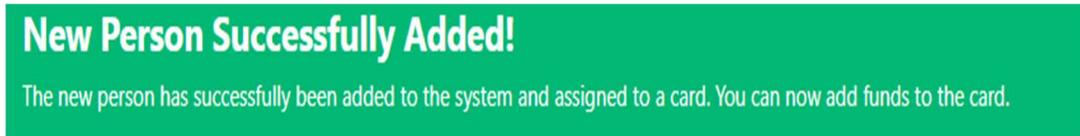   a. It will look like this:

   ## SPA Card Activation

   Show 5 ᵛ entries   Search: 2290

ID	First Name	Last Name	DOB	Address	SSN	Upload W-9		
7277641360012290	First Name 🔲	Last Name	mm/dd/yyyy 🗓	Address Line 1 / Address Line 2 / City State Zipcode	xxx-xx-xxxx	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

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		Reason	Amount	Date
Visit 1	10	No					
Visit 2	10	No					
Visit 3	10	No					

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"**
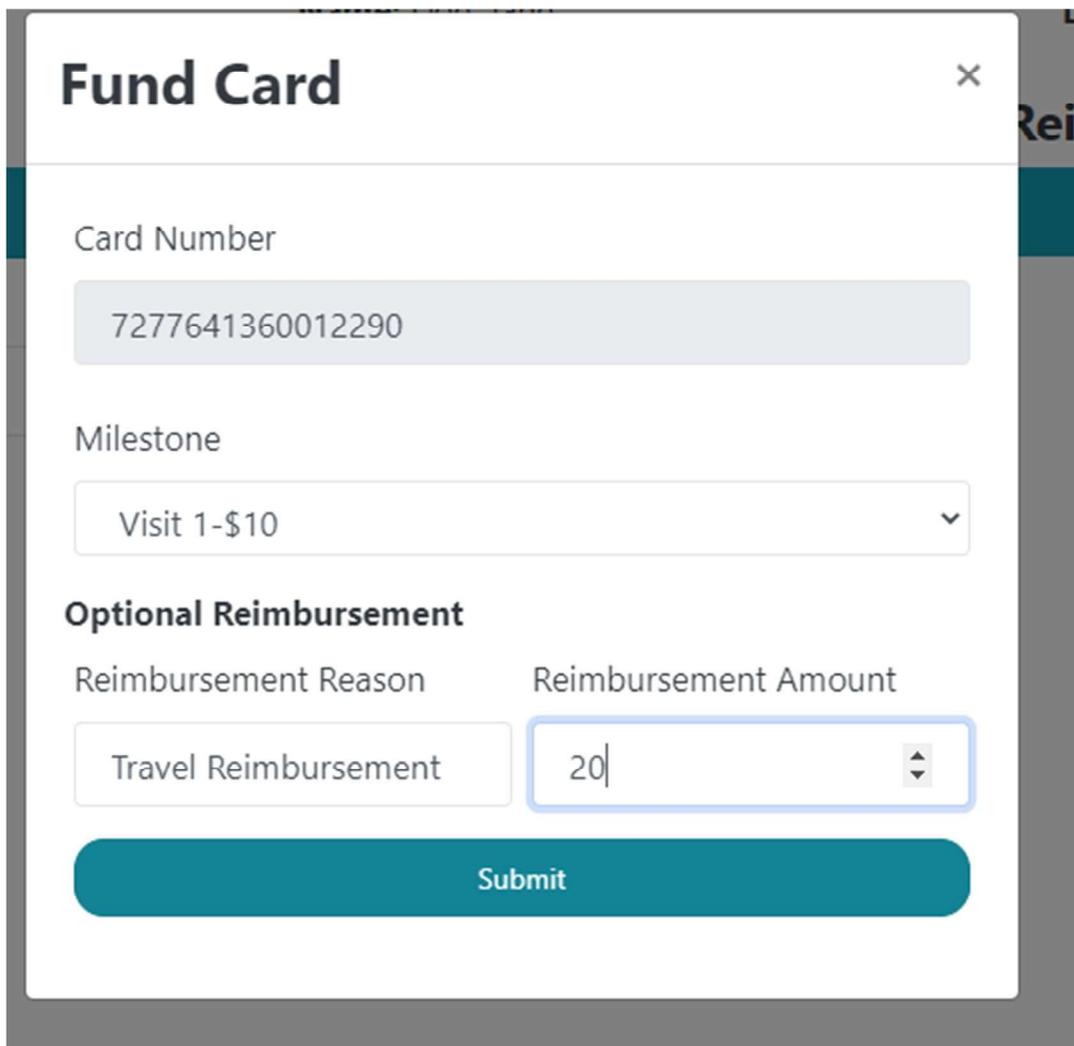
Fund Card ✕

Card Number

7277641360012290

Milestone

Visit 1-$10 ⌄

Optional Reimbursement

Reimbursement Reason

Travel Reimbursement

Reimbursement Amount

20

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.**

Example 1

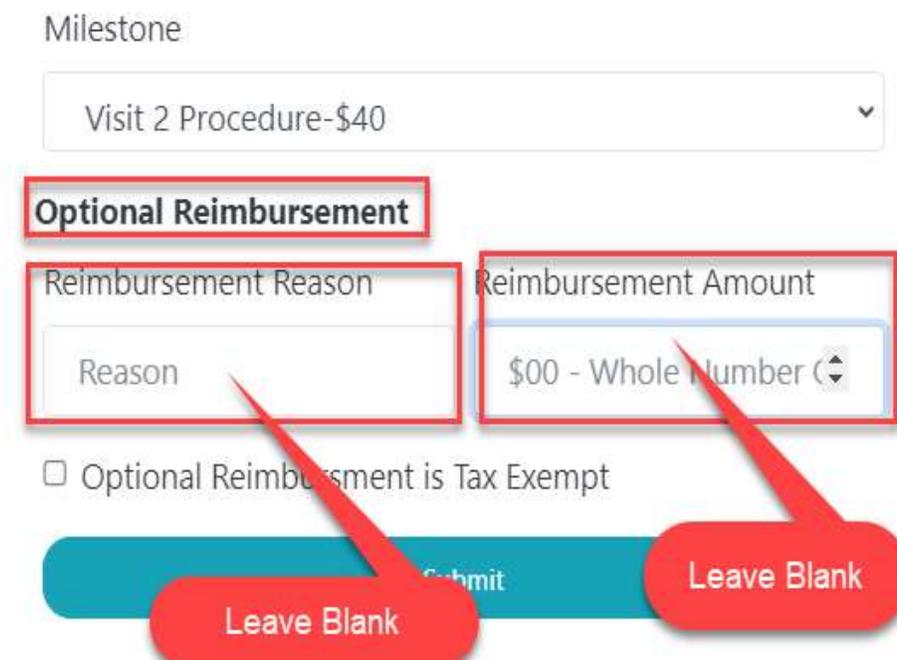- **When you want to pay the set milestone payment only.**

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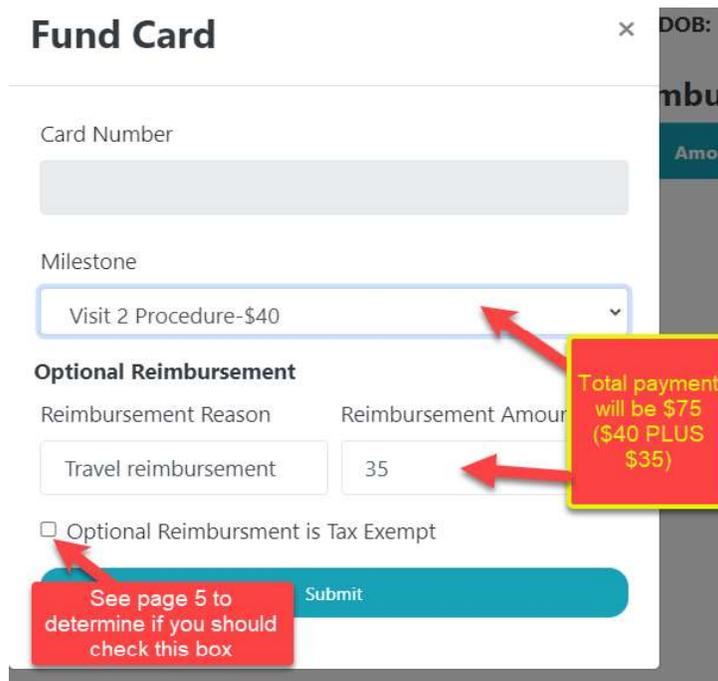
Question: If the payment is covering Uber or Taxi costs is this tax exempt?
Answer: Yes- If the ICF approved by the IRB notes transportation will be paid for by the study. The study team must collect the Uber/Taxi receipts to verify dollar amounts.

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.)