SPA Card Financial Workflow– Departmental Quick Guide

How SPA Card costs are expensed to the study account

# 1. Purpose

Provide departments with a concise reference to understand the financial workflow for ordering SPA Cards, funding participant incentives, and reconciling monthly charges.

# 2. SPA Card Basics

The SPA Card program allows study teams to issue participant incentive payments on reloadable or single‑use prepaid cards. All cards are requested in the REDCap SPA Card portal and funded directly from the study ChartField.

# 3. Fee Schedule

• $1.00 issuance fee per card (single‑use or reloadable)
• No load fee when money is added to a card

# 4. Ordering Cards

1. Log in to the REDCap SPA Card portal and complete a “Card Order” request.
2. Enter the study ChartField and quantity of single‑use or reloadable cards needed.
3. Cards arrive in 5–7 business days; secure them in a locked location until issued.

# 5. Funding Participant Incentives

When a participant is ready for payment:

✔ Open the card account record in the SPA Card portal

✔ Assign card to research participant
✔ Select preset milestone payment or enter the payment amount
✔ Funds are loaded to the card immediately (15-60 min.)

# 6. How Charges Hit Your Chart Field

First week of each month, Bursar’s office debits chart field string for all payments made to participants and/or card purchases made the previous month.

Each month the Bursar’s Office posts three journals that appear in UTHealth GL ledger:
• Journal 1 – Incentive payments (Single‑Use)
• Journal 2 – Incentive payments (Reloadable)
• Journal 3 – Card purchases/issuance fees (Single‑Use and Reloadable)

# 7. Recommended Reconciliation Steps

✔ Run monthly project expense report for the study chart Field.

✔ Run monthly Funding History Reports from SPA card (redcap report)
✔ Match expenses to Funding History
✔ Investigate variances with SPA Card administrators.

# 8. Frequently Asked Questions

Q: Who pays the replacement‑card fee?
A: Cardholder- The fee is debited from remaining balance on the card. (The participant contacts Money network to report lost card and a new card is mailed.)

* Do NOT give participant a new/replacement card from on hand stock.
	+ Single Use Cards- contact SPA prior to communicating to participant
	+ Reloadable Cards- Simply update participant to call 1-888-913-0900

Q: Where can I get help?
A: Email Researchstipend@uth.tmc.edu