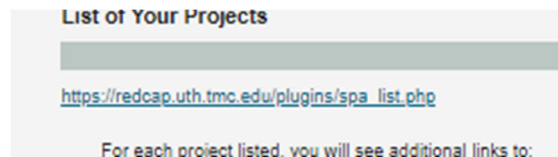
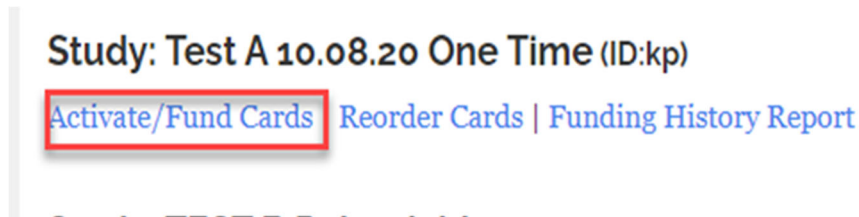


## How to Fund One Time Use Cards for Visit 2 and Beyond

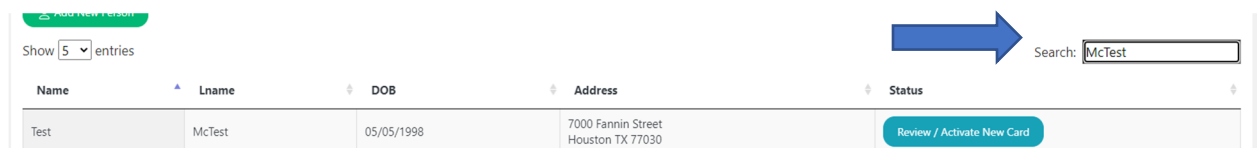
1. Note the last digits of Card ID of the new card you are giving to participant (This is the ID you see through the window of the envelope the cards come in (it will look like XXXXXXX 12345) This is not the number printed on the card.
2. Go to SPA Card Web page
  - a. <https://www.uth.edu/sponsored-projects-administration/manage/clinical-trialsresearch/spa-card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



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



4. Enter participant’s name into Search



- a. You will then see all of the previous payments made to this person see below example:

Office of Sponsored Projects  
SPA Card Program  
**Fund New Card**

Internal ID: 98646ff34118ae9

Name: McTest, Test

DOB: 1998-05-05

Card Number	Milestone	Amount	Reimbursement Reason	Reimbursement Amount	Total	Date
3013359400236898			Travel	10	10	05/25/2023
3013359400236922			Travel Reimbursement	10	10	05/30/2023

Add New Card

- b. Click on “Add New Card”
  - i. Select card ID from dropdown menu
  - ii. Select Milestone from dropdown menu
  - iii. If applicable, you can use the “Optional Reimbursement” fields
    1. If both the visit Milestone is selected AND the “Optional Reimbursement” are completed they will be added together
    2. In the below example, the card holder will receive \$30 (\$5 for visit 1 completion PLUS \$25 for travel reimbursement)

### Fund Card ✕

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Card

3013359400236930 ▼

Milestone

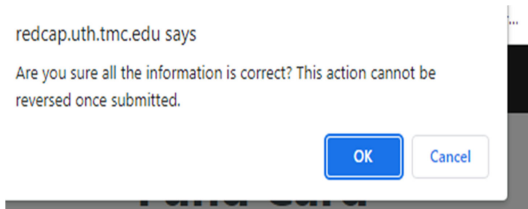
Visit 2-\$5 ▼

**Optional Reimbursement**

Reimbursement Reason	Reimbursement Amount
Travel Reimbursement	25 <span style="float: right;">⬆️⬆️</span>

Submit

5. If you are only paying a reimbursement **SKIP the Milestone section.** (Leave it as "Select Milestone") You should only check the tax exempt check-box if the payment if the payment meets tax exempt criteria (see page 3)
6. If you are only paying a milestone, leave the optional reimbursement section blank
7. Click on the "Submit" icon.
8. The system will ask you to confirm all information is correct –you must click on “OK” for the payment to process. (See below image.)



NOTE-If the payment is tax exempt- you should use Optional Reimbursement section only and check the tax exempt check box.

#### Optional Reimbursement

Reimbursement Reason	Reimbursement Amount
<input type="text" value="Reason"/>	<input type="text" value="\$00 - Whole Number €"/>
<input type="checkbox"/> Optional Reimbursement is Tax Exempt	
<input type="button" value="Submit"/>	

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.