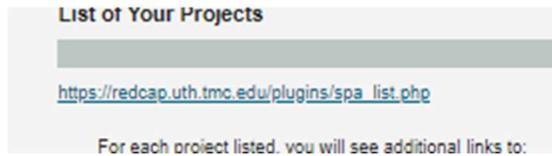
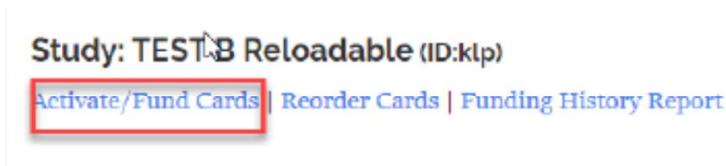


How to Fund Reloadable Cards for Subsequent Visits

1. 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”



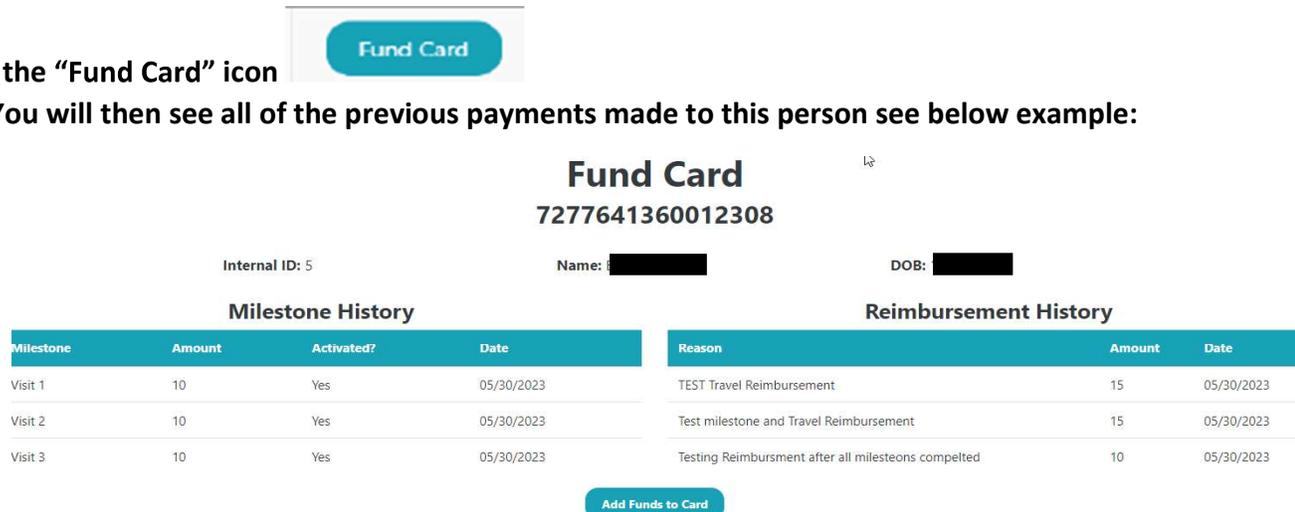
2. Select “Activate/Fund Cards” for applicable Study



3. Enter participant’s name into Search



4. Click on the “Fund Card” icon
 - a. You will then see all of the previous payments made to this person see below example:



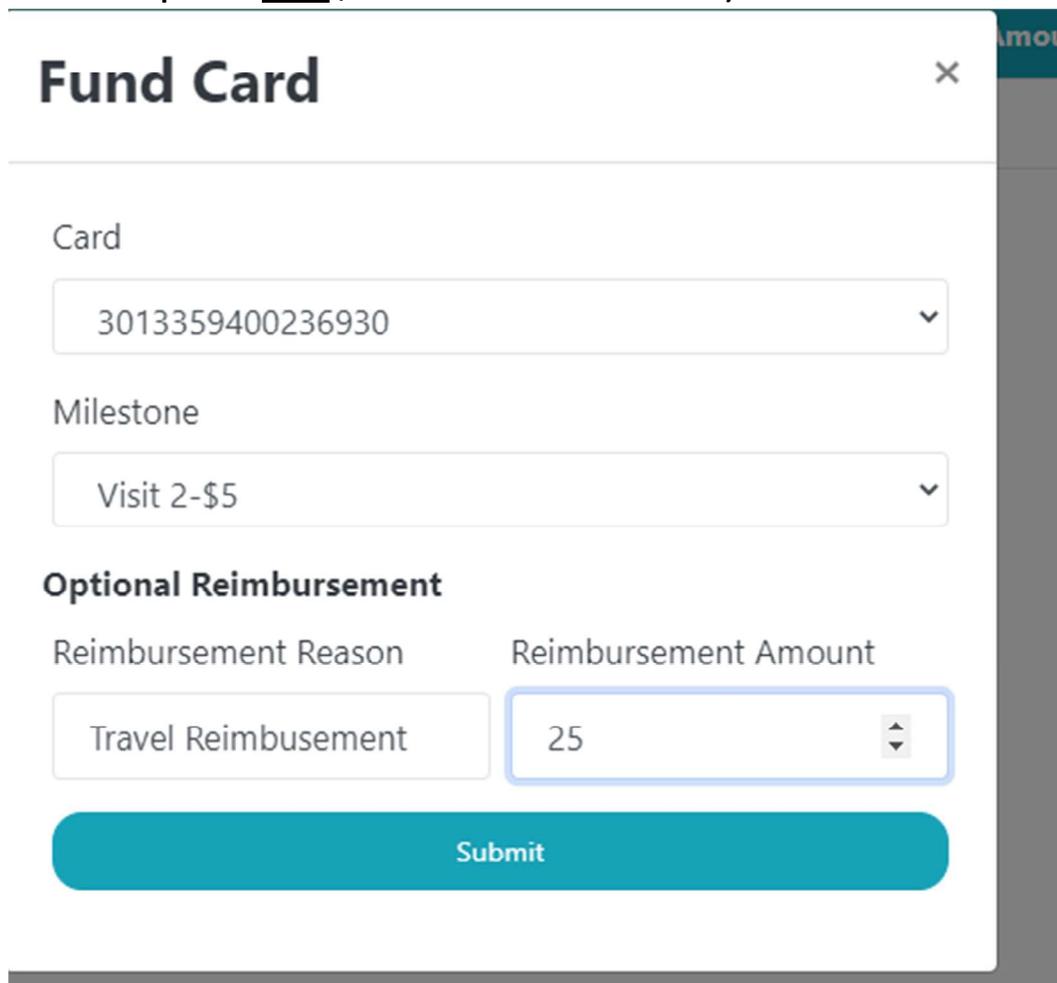
Fund Card
7277641360012308

Internal ID: 5 Name: [REDACTED] DOB: [REDACTED]

Milestone History				Reimbursement History		
Milestone	Amount	Activated?	Date	Reason	Amount	Date
Visit 1	10	Yes	05/30/2023	TEST Travel Reimbursement	15	05/30/2023
Visit 2	10	Yes	05/30/2023	Test milestone and Travel Reimbursement	15	05/30/2023
Visit 3	10	Yes	05/30/2023	Testing Reimbursement after all milestones completed	10	05/30/2023

[Add Funds to Card](#)

5. Click on the “Add Funds to Card” Icon 
6. Complete the “Fund Card” screen
 - a. Select card ID 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 total. (\$5 for visit 1 completion PLUS \$25 for travel reimbursement)



Fund Card ×

Card

3013359400236930 ▼

Milestone

Visit 2-\$5 ▼

Optional Reimbursement

Reimbursement Reason	Reimbursement Amount
Travel Reimbursement	25 ▲▼

Submit

ii.

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.)

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.