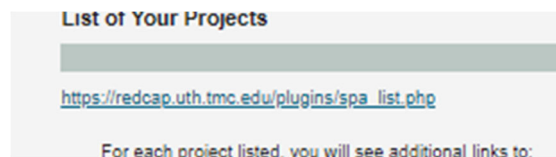
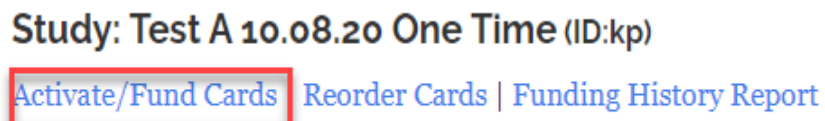


How to Fund One Time Use Cards New Patient/First Visit

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”



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



- a. [Redacted]
4. Click on “Add New Person” upper left hand of screen
 - a. Enter participant’s demographics
 - b. Select card from dropdown Menu
 - c. Choose Example 1,2, or 3 for payment entry
 - d. Click “Submit”
 - e. Click “OK” to confirm data entry

****The next pages show examples of how to complete the payment for various scenarios:**

Example 1

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

Example 2

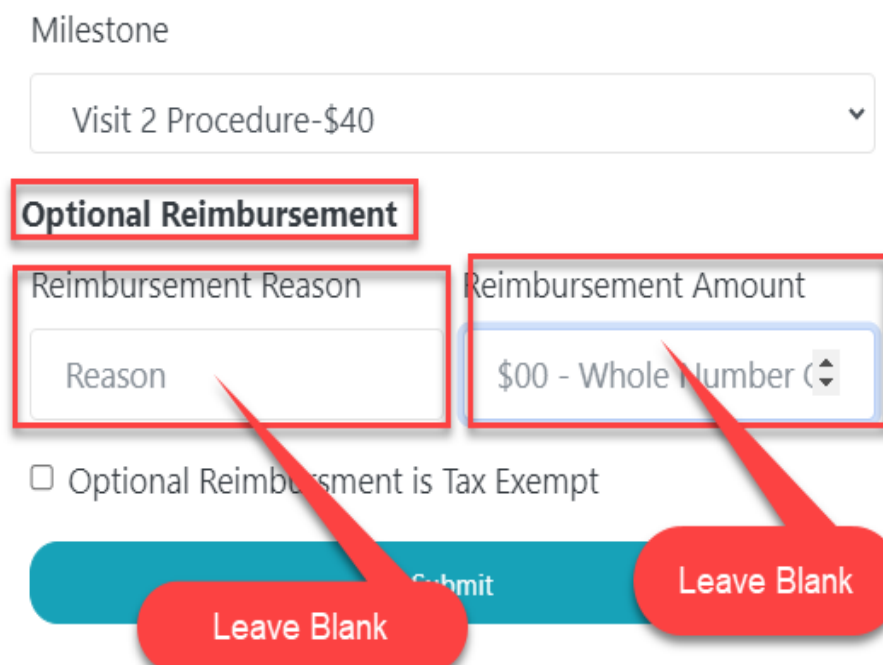
- When you want to pay BOTH a set milestone payment PLUS an additional reimbursement (such as travel, lodging, or parking reimbursement. (Anything that is not included within the set milestone payment.) *See page 5 for details on tax exempt.

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.



Milestone

Visit 2 Procedure-\$40

Optional Reimbursement

Reimbursement Reason

Reason

Reimbursement Amount

\$00 - Whole Number

Optional Reimbursement is Tax Exempt

Submit

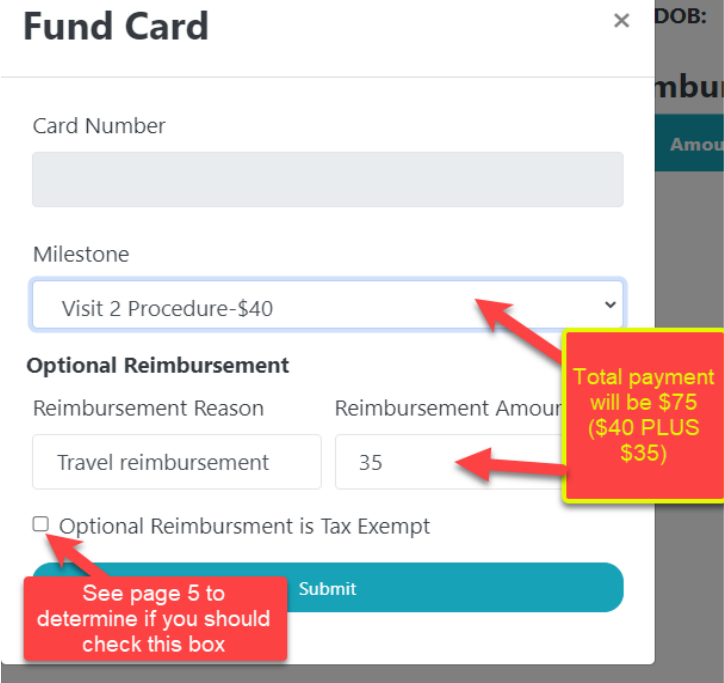
Leave Blank

Leave Blank

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 screenshot shows a "Fund Card" form with the following fields and annotations:

- Card Number:** A greyed-out input field.
- Milestone:** A dropdown menu with "Visit 2 Procedure-\$40" selected. A red arrow points to this field.
- Optional Reimbursement:**
 - Reimbursement Reason:** A text input field containing "Travel reimbursement".
 - Reimbursement Amount:** A text input field containing "35". A red arrow points to this field.
 - Optional Reimbursement is Tax Exempt:** An unchecked checkbox.
- Submit:** A teal button at the bottom right.

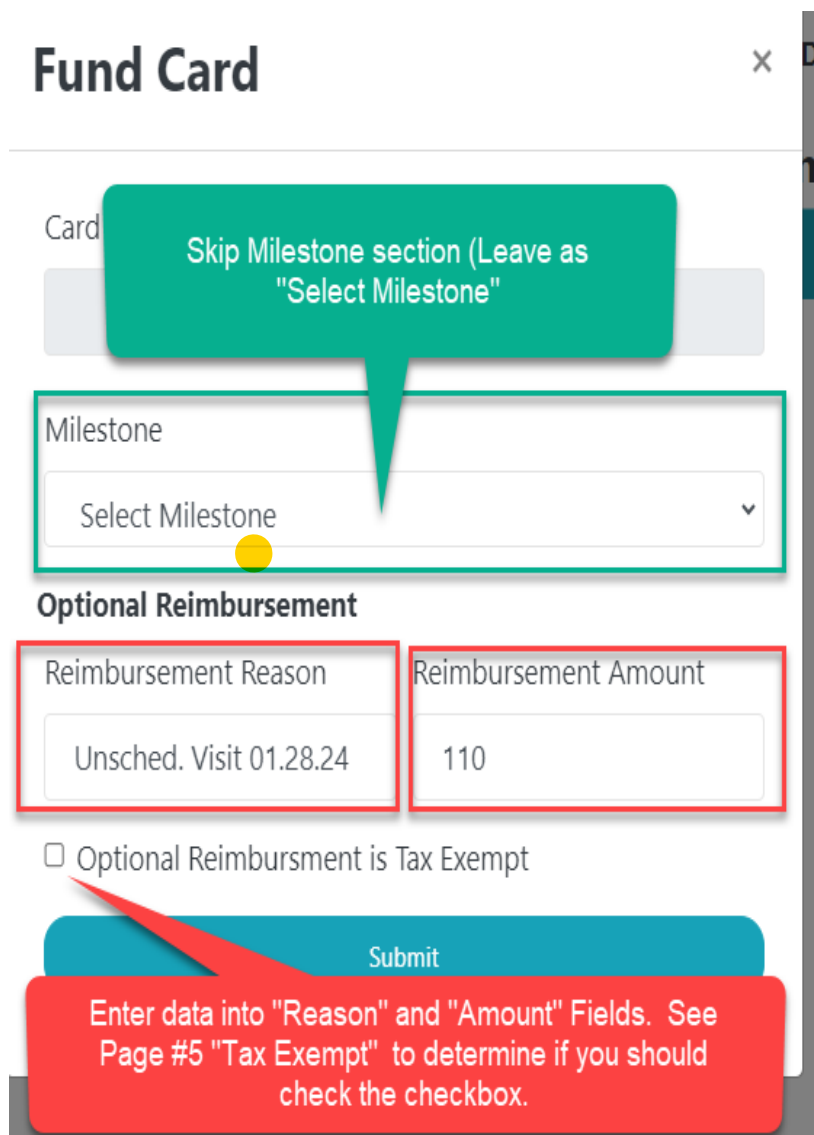
Two red callout boxes provide additional information:

- A yellow box with red text: "Total payment will be \$75 (\$40 PLUS \$35)". Red arrows point from this box to the Milestone dropdown and the Reimbursement Amount field.
- A red box with white text: "See page 5 to determine if you should check this box". A red arrow points from this box to the "Optional Reimbursement is Tax Exempt" checkbox.

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 dropdown 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.)



Fund Card [Close]

Card [Dropdown]

Skip Milestone section (Leave as "Select Milestone")

Milestone [Dropdown: Select Milestone]

Optional Reimbursement

Reimbursement Reason	Reimbursement Amount
Unsched. Visit 01.28.24	110

Optional Reimbursement is Tax Exempt

Submit

Enter data into "Reason" and "Amount" Fields. See Page #5 "Tax Exempt" to determine if you should check the checkbox.

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.