OFFICE OF RESEARCH

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What are SPA Cards?

The SPA Cards Program allows clinical researchers to:
- Submit requests to add studies to the program
- Order cards (reloadable or single use debit cards)
- Enter and track participant information
- Request funds to be added to the cards based on the payment schedule approved by the Committee for the Protection of Human Subjects (CPHS).
- *Run study reports for participant payments*

HOW TO ORDER SPA CARDS /ADD A NEW STUDY

The SPA Card System utilizes REDCap, therefore you will need to set up an account in REDCap first.
➢ Go to: https://redcap.uth.tmc.edu/index.php?user_verify=UTPRHLmT9Iy2M3VPvz54

You will be prompted to enter your UTHealth credentials (username and password).

If you have never accessed UT's REDCap, the system will prompt you to sign-up. Once you complete the sign-up process, you will receive an automated email asking you to click on the link to verify. After you have verified, your account will be activated.

****Note there may be a possibility you have REDCap access with other entities.   You will need to access UT's REDCap to enter your study.

There are two types of SPA cards:
1. **One-time use**
   - Dispense new card to participant at each visit- (Non- reloadable)
   - For participants earning less than $600 for all visits combined
   - No Social Security number needed

2. **Reloadable**
   - Dispense 1 card to patient- load additional funds to card at subsequent visits

- Must be used when participants earn $600 or more for all visits combined
- Social security number must be collected/entered into SPA Card system
- Completed and signed W-9 form must be uploaded into SPA Card System at initial card activation/fund load

Before you begin placing the cards you will need the following:
1. An approved IRB
   - Provide a copy of the stamped informed consent form (ICF)
   - Or provide a copy of the outcome letter if there is a waiver of documentation
2. Peoplesoft ChartField String – *the Research Office can assist*
3. Payment schedule and amounts
4. Email address and UTHealth user name of study personnel who will be accessing the SPA Gift Card system. This is generally the PI and the study coordinator(s). – Please include the following from the Research Office under Administrator:
   - Augustus "Gerald" Bellot (Augustus.Bellot@uth.tmc.edu) - ABELLOT
   - Sandra Jung (Sandra.Jung@uth.tmc.edu) – SJUNG3
   - Lenora Trujillo (Lenora.G.Trujillo@uth.tmc.edu) – LTRUJILLO

If you have already registered you are now ready to place the SPA cards order. Click here and complete the form: https://redcap.uth.tmc.edu/surveys/?s=KYFPJNEMKN

The form will ask for Department name list **School of Dentistry** and IRB should be listed as **HSC-DB**-XX-XXXX.

We recommend taking a screenshot of the entire form, saving it as a PDF document, or printing prior to submitting.

An email will be sent to you by researchstipend@uth.tmc.edu after their review.   The email will provide instructions on how to pick up the cards. If you have questions or need assistance please send an email to SOD-IRB@uth.tmc.edu.


How To

- Request funds to be added to the cards based on the payment schedule approved by the Committee for the Protection of Human Subjects (CPHS).
- Enter and track participant information

How to dispense card to participant
It is important that you record the " Card account number" for the debit card you dispense to the research participant.

This number is NOT the number on the debit card.
The SPA Cards arrive in individual envelope packages. The card account number is visible through the window of the envelope. **Note: There is no need to open the envelope prior to providing to the Subject**
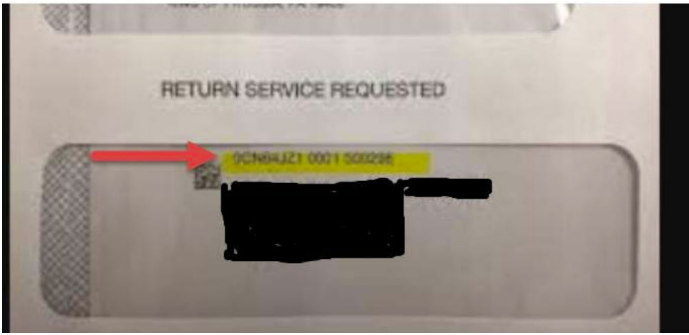
Click on "Activate/Fund Cards" link: https://redcap.uth.tmc.edu/plugins/spa_list.php

Visit Milestones automatically appear based on the data entered into the "New Study " application
- This is why it is imperative that you enter data correctly into the "New Study Activation" form.
- Simply mark visit milestone visit as complete by selecting "Activate" from drop down menu.
- You also have the option to select "Skip". The card will not be funded for the milestone visit if you select this option.

One-Time-Use SPA Cards

One Time SPA Cards "Activate/Fund" forms are organized by research participant.

The form will show a list of all research participants you/your team has dispensed cards to. (You will also see the card account numbers of all cards dispensed to the patient and all of the visit milestones that have been paid.)

As with Reloadable SPA Cards, you only need to enter research participant demographics once.
Below image is what it looks like the first time you log into a One Time SPA Card Activate/Fund form.

Step 1- Click on
➢ "Add New Person" in the upper left-hand side of the screen. The demographic fields will appear.

Step 2 - Enter demographic information.
➢ All demographic fields are mandatory.
1. First name
2. Last name
3. DOB
4. Address

Step 3- <u>Select Card Account Number</u> from dropdown menu. (Note- you can enter the last 4 digits of the card account number to narrow down the selection in the dropdown menu.)

Step 4- <u>Select visit milestone</u> from drop down menu.

Step 5- <u>Click "Submit"</u>

"Activate/Fund " form for subsequent visits card dispense utilizing One Time Use SPA Cards.

For subsequent visits, you simply search for the research participant's name and:
Step 1- Select New Card ID from drop down menu
         Note you can simply enter the last four digits of the account number to narrow your results.

Step 2 - Select Visit Milestone completed from drop down menu.

Step 3 - Click on Submit

<u>Paying Reimbursements with One Time Use SPA Cards</u>
As previously discussed, reimbursements (travel, parking, medication, etc.) are variable and cannot be predefined when you complete your "New Study Application".

To manage paying reimbursements with One-Time Use SPA Cards, an "Allowance" option is automatically added to the visit milestone options on the dropdown menu for all study projects. (You do not need to manually add this within the "New Study Application" form.)

This "Allowance" option should be selected from the visit milestone dropdown menu when you intend to pay research participants reimbursements based upon receipts or mileage presented at time of visit.

(Note-With One Time Use SPA Cards, you cannot combine typical visit milestone stipend payment with reimbursements onto one card. If you have both a stipend payment and a reimbursement payment included within one visit, you will need to utilize two cards.)

Reorder New Cards
How to order additional card when your supply runs low?

When the initial "New Study Application" was approved by SPA, an email was sent to all people listed within the "Study Personnel" Section.

Locate this email and click on "Order Additional Cards" see image below.

Your MoneyCard submission for "New One time Card study" has been approved by Sponsored Projects Administration and cards have been associated with your study.

To view and activate cards for your project, visit this link: Card Activation/Funding

To order additional cards for your project, visit this link: Order Additional Cards

These links are specific to your study, "New One time Card study" - IRB#: test.

You may visit this link at anytime to see a List of Your Projects

See image of Reorder form as it will appear to you after you sign in below:

SPA Giftcard Re-order Form

How many additional cards would you like to order?

[   ] [Submit Form]

Simply add number of cards – (You can not change card type)

Reloadable SPA Cards

- First visit - Search for card account ID and add patient demographics.
- Subsequent visits- Search for patient and simply mark visit milestone as complete by selecting "Activate" from the milestone drop down menu.

Activating and Funding Reloadable SPA Cards:

Do not start the "Activation/Fund " process until you have obtained a completed and signed W-9 form from the research participant.

You will not be able to fund the debit card without uploading a copy of the W-9 form.

For the patient's first visit there are five steps:

1. Search for account number
2. Enter the participant's demographic information.
3. Upload W-9 form.
4. Mark visit milestone as complete
5. Click on "Submit"

For all subsequent visits there are only three steps:

1. Search for patient
2. Mark visit milestone as complete
3. Click on "Submit"