

CLINICAL TRIALS – HUMAN SUBJECT GIFT CARD REQUEST

Revised October 21, 2024

OVERVIEW – HUMAN SUBJECT GIFT CARDS

- **Description:** Human research subjects are often paid for their participation in research. Payment encourages participation and is considered as compensation for time and effort dedicated to the study. One of the many ways research payments can be made is gift cards.
- **Due (*minimum*):** Due date can vary depending on processing time. Payment Solutions & Compliance (PSC) recommends submitting the request *at least 4 weeks prior* to beginning research for *preferred gift cards* and *8 weeks prior* for *non-preferred gift cards*.
- **Mechanism:** Submission to Student Finance Solutions (SFS) through a two-step process
 - 1) [Research Payment Portal](#)
 - 2) [Message Center](#)
- **Processing Time:** Depends on the type of gift card
 - Preferred (Expedited Delivery) Gift Cards – Ten business days after submission of the case in the Message Center
 - Non-Preferred Gift Cards – Up to four weeks after submission of the case in the Message Center

*Peak season refers to the months of June (Fiscal Year end) and December (Winter closure) - refer to the [Gift Card Catalog](#) to see how processing time for each gift card is affected during peak season.

- **Notes:**
 - IRB approval is **required** prior to submission – Study Team submits IRB approval
 - Maximum disbursement at one time is **\$5,000**
 - Requesting a disbursement larger than \$5,000 requires additional time for review and approval
 - Additional information is required if any patient receives **more than \$600** during the calendar year
 - Must provide UCLA Accounts Payable with a list of participants (name, address, amount received) meeting this threshold as well as their W-9 form in order for a 1099 MISC form to be filed
 - Contact [Accounts Payable](#) for more information
 - Ensure compliance with University policies
 - Policy for Cash and Cash Equivalent Received – [BUS-49](#)
 - Cash Handling and Security – [UCLA Policy 361](#)
 - UCLA Safe Requirements (for storage of gift cards) – [UCLA Safe Requirements](#)

HOW TO REQUEST HUMAN SUBJECT GIFT CARDS

- Considerations *prior* to submission:
 - Type of Gift Card – [Gift Card Catalog](#)
 - Contains information on: reloadable/non-reloadable, denominations allowed, processing time, shipping/delivery fee, minimum card quantity, etc.
 - Discuss with PI to determine which type of gift card to select

- [Cashiering Services and Supplies Guide](#)
 - Review to determine armored courier (Brink's) fees for gift card delivery for on- and off-campus locations
- Designate an **Authorized Personnel (AP)** – elect a designated Study Team member as the AP to coordinate with SFS regarding gift card delivery
- Send [Gift Card Request for Patients Form](#) to the Study Team to collect required information prior to submission
- Submission – Research Administrator will submit via the following steps
 - For a detailed walkthrough on submission, refer to this [guide](#) by UCLA Business and Finance Solutions.

1) Submission via the Research Payment Portal

1. Log in to the [MyUCLA Portal](#)
2. Navigate to the “Staff” tab, then click on “Business and Finance Manager”
3. Select “Research Payment” under the “Disbursement Request” menu

[Business and Finance Manager](#)

⚠ This system is for the use of authorized users only. Individuals using this computer system without authority, or in excess of their authority, are subject to having all of their activities on this system monitored and recorded by system personnel. In the course of monitoring individuals improperly using this system, or in the course of system maintenance, the activities of authorized users may also be monitored. Anyone using this system expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such monitoring to law enforcement officials.

Note: Business and Finance Manager systems require a UCLA VPN

Disbursement Request

- Employee Recognition (VPN Required)
- Research Payment (VPN Required)**
- Non-Employee (G-42)

4. Here, on the main page, you will be able to see all requests created and their status

[Research Payment](#)

Welcome to the Research Payment Portal. Research payment requests are managed by Student Finance Solutions (SFS) and the Office of the Human Research Protection Program (OHRPP) for Institutional Review Board (IRB) approval. Research payments can be requested in the form of a BruinCard deposit, cash, e-code, or gift card.

Create a new research payment request:

Choose your payment type from the options below.
(You are limited to one payment type per request)

Need Help?

If you need additional assistance, you may choose to contact Payment Solutions and Compliance office by:

Sending Feedback (Message Center)

Quick Links

- [Business and Finance Home](#)
- [How to submit an IRB approved Research Payment Request](#)
- [How to submit a Non-IRB approved Research Payment Request](#)
- [Gift Card Catalog](#)

Research Payment Request List

Request Number	Payment Type	Grand Total	Status	Progress	Action
No records available.					

0 - 0 of 0 items

5. Create a new request by selecting ‘Gift Card’
 6. Fill out the required sections:
 - Department Information
 - Order Information
 - Additional Information
 - Finalize Request
 7. Notification will be sent to the assigned Research Administrator/Fund Manager (RA/FM) and PI for approval
 8. Once approved by the RA and PI, the status on the Research Payment Portal will change to “Approved”
- 2) Submission via the Message Center

1. Once the status reads “Approved” on the Research Payment Portal, submit a case via the [MyUCLA Message Center](#) to Payment Solutions & Compliance (PSC)
 - Toggle to the “Topic” search bar and select the “Human Subject Disbursement Request: PSC” option
 - **Subject:** Research Payment Request Number (found in the *Request Number* column of the Main Page of the Research Payment Portal)

MESSAGE CENTER: ASK A QUESTION

The screenshot shows the 'MESSAGE CENTER: ASK A QUESTION' interface. At the top, there are two buttons: 'My Messages' and 'FAQ Search'. Below them is a light blue banner with the text: 'This Message Center is monitored during normal business hours, Monday-Friday (8:00 am to 5:00 pm), excluding University holidays, and it may take several days to receive a response. Cases that present an immediate threat to self, others, or property are considered an emergency and you should call 911.' The main form area starts with a step indicator '1' and the instruction: 'The following selection will help us direct your message appropriately. Please select one of the following options:'. There are three radio button options: 'Topic' (selected), 'MyUCLA feature', and 'Academic counseling unit'. The 'Topic' option has a dropdown menu showing 'Human Subject Disbursement Request: PSC'. Below these are two text input fields: 'Type a keyword and select a MyUCLA Feature e.g. Hold' and 'Type a keyword and select an academic counseling unit'. A third option is 'I do not know who to ask my question to'. Step indicator '2' follows with the instruction: 'Enter your question below.'. There is a 'Subject' text field and a 'Message' text area with a rich text editor toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and insert table. A 'Font Sizes' dropdown is also visible above the message text area.

2. Once SFS approves the submission, the status of the request on the Research Payment Portal will change to “Completed,” and SFS will contact the AP via the Message Center to organize delivery

CONTACT/RESOURCES

- [Payment Solutions & Compliance](#) – Contact PSC with any inquiries via the MyUCLA Message Center under the “Human Subject Disbursement Request: PSC” topic
- [Research Payment Portal Status Map](#)