Human Subject Participation Payment

Creating REDCap Payment Form Checklist

Step 1 – Add payment form to project

- ☐ Click **"Online Designer"** within your REDCap project
- ☐ Click the **"Import"** button found next to **"A new instrument from the official REDCap Shared Library"**
- ☐ Type **"VUSN Payment"** in the search box
  - ☐ Select **"VUSN Payment Form"** if you **do not** have **VICTR funding** for participant reimbursement
  - ☐ Select **"VICTR Payment Form"** if you have/will have **VICTR funding** for participant reimbursement
- ☐ Click **"Import into my REDCap project"**
- ☐ Read the **"Shared Content Agreement"** and click **"I agree"**
- ☐ Click **"Add"**
- ☐ Click **"Return to previous page"** to return to the **"Online Designer"**

Step 2 – Customize payment form to project

- ☐ Click **"Online Designer"** within your REDCap project
- ☐ Click **"Payment Form"** and then click the **pencil icon** to add the following in the applicable fields
  - ☐ **Name of Study**
  - ☐ **PI Name**
  - ☐ **IRB Number**
  - ☐ **VICTR number (VICTR funding only)**
  - ☐ **Note:** You can create reportable, downloadable **variables** for the Study Title, IRB Number, VICTR Number, Payment Amount, Visit Type, Project Number
    - ☐ Change each variable to a **"Text Box"**
    - ☐ Delete extra text from variable label (**e.g.,** "Study Title: [insert title here]" – delete "[insert title here]")
    - ☐ Use a **default action tag** to autofill the variable with the appropriate information by inserting it into the **"Action Tags/Field Annotation"** field - **@DEFAULT= "[insert Study Title or IRB Number or Payment Amount, etc.]"**
      - ☐ **Note:** Quotation marks are necessary for the form to correctly autofill
- ☐ Delete the **SSN field** if you have an IRB waiver and will not be collecting SSN
- ☐ Add any field required that is not present on the form, for example:
  - ☐ **Field Type:** Text Box
    - ☐ **Validation:** Email
  - ☐ **Field Label:** "Email Address"
  - ☐ **Variable Name:** email (or something similar if that variable already exists in the form)
  - ☐ Choose **"Yes"** for **"Required"**
- ☐ Review the default action tags for **Account Number**, **Organization**, **Expenditure**, and **Task** and correct as needed. If information is unavailable, please reach out to the AA who will be purchasing the gift cards for your study.
  - ☐ Leave **one space** between the default action tag for the items above and then add the following tag: **@HIDDEN-SURVEY**

- ☐ Check that the **Payment Form** has <u>at least</u> the following sections:
  - ☐ Name of Study
  - ☐ Investigator
  - ☐ IRB Number
  - ☐ First Name
  - ☐ Middle Name
  - ☐ Last Name
  - ☐ Street Address
  - ☐ City
  - ☐ State
  - ☐ Zip Code
  - ☐ Email Address
  - ☐ Phone Number
  - ☐ Are you a U.S. Citizen or Permanent Resident?
  - ☐ Visit Date
  - ☐ Amount of Payment
  - ☐ Social Security Number (if not IRB waived)
  - ☐ Signature of Participant
  - ☐ Account Number
  - ☐ Organization
  - ☐ Expenditure
  - ☐ Task
  - ☐ VICTR Award Protocol Number (for VICTR Payment Form ONLY)
- ☐ Enable **Payment Form** as a **Survey** in order for participants to complete it via a survey link or directly after they submit the study survey
  - ☐ Return to **Online Designer**
  - ☐ Click **"Enable"** next to the payment form in the **"Enabled as a Survey"** column
  - ☐ Under **"Survey Customizations"**, change **"Auto Numbered"** to **"Custom Numbered"** to customize preferences.

Step 3 – Set up E-signatures for payment forms
☐ Click **"User Rights"** within your REDCap project and select your **username**
☐ Click **"Record Locking Customization"**
☐ Click **"Locking/Unlocking with E-signature authority"** if you should be able to e-sign forms
☐ **Save** changes
☐ **Repeat** for any **usernames** that should be allowed to e-sign forms
☐ Click **"Customize and Manage Locking/E-signatures"**
☐ Click the box in the **"Also display E-signature option on instrument?"** column for the payment form