## 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:
  - Study Title
  - 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 and Email Address field if not present on the form and required
  - 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.
  - Leave one space between the default action tag for the items above and then add the following tag: @HIDDEN-SURVEY
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.

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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