Loadable Card – Process to Fund a US Bank Focus Card

To document the procedure of funding a US Bank Focus card to compensate research participants, or other individuals partaking in outreach programs such as patient support.

Information

Important items to know prior to getting started	- A new card must be disbursed and registered to the participant prior to loading funds on their card. To register a card, see QRC titled, "US Bank Focus Card Registration". - Minimum load: $0.01 - Maximum single load: $599 (see BPM E-9) - The Focus card is reloadable. - The UK Focus Card Funding Excel Spreadsheet provided by Accounts Payable Services (APS), is a template specifically formatted to meet the system requirements when loading funds onto a Focus card. The original template provided to you includes a full list of 10-digit Card IDs that have been specifically assigned to your project and are used by administration to identify each card. The unique Card ID is also displayed in the window of each card envelope. Note: The card envelope should remain sealed to safeguard the 16-digit card number. Below, is an example of what the card will look like.

Procedure

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Step 1 Building your spreadsheet	1. Create a new (blank) Excel spreadsheet and save it as an XLSX file on a department drive using the naming format: UK Focus Fund_Custodian/PI Last Name_Current Date (example: UK Focus Fund_Smith_080124) Note: This will be your working spreadsheet that you will build and email to loadablecard@uky.edu to load funds onto a card. 2. Open the UK Focus Card Funding spreadsheet provided by APS and copy/paste the **first row** into the new Excel spreadsheet created in Step 1.

A	B	C	D	E	F	G	H	I
Funding Card ID	Funding Card Passcode	Account Type	Cardholder Account	Amount	Reserved	Reserved	Reserved	Reference

3. Copy/paste the 10-digit Card ID numbers you wish to load funds to in column D.

A	B	C	D	E	F	G	H	I
Funding Card ID	Funding Card Passcode	Account Type	Cardholder Account	Amount	Reserved	Reserved	Reserved	Reference
			1234567891					

4. Enter the individual payment amount(s) in column E.

A	B	C	D	E	F	G	H	I
Funding Card ID	Funding Card Passcode	Account Type	Cardholder Account	Amount	Reserved	Reserved	Reserved	Reference
			1234567891	25.00				

5. Enter the project name/payment memo in column I.

A	B	C	D	E	F	G	H	I
Funding Card ID	Funding Card Passcode	Account Type	Cardholder Account	Amount	Reserved	Reserved	Reserved	Reference
			1234567891	25.00				Heart Health Visit 1

6. Save the spreadsheet and proceed to Step 2.

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Step 2
Email Spreadsheet
	1. Email the spreadsheet to loadablecard@uky.edu and copy the PI/Account Custodian. Use the file name as the subject line of the email.
	
	Before sending, double-check the following:
	
	⸺ The PI/Account Custodian is copied on the email.
	⸺ The file is saved in the correct naming format.
	⸺ The data in the required columns is accurate.
	
	      Column D: Participants' Card ID number
	      Column E: Payment Amount
	      Column I: Project Name/Payment Memo
	
	Note: If you are submitting more than one file to be uploaded for the same project in the same day, the file name must be unique. In such case, include a "2" on the end of the file name to indicate the second file upload.
	
	(example: UK Focus Fund_Smith_080124**_2**.xlsx)
	
	Note: A new card **must** be registered before funding. If not, the load will fail.

Step 3 Confirmation	Loadable Card will respond to your email to confirm whether the funds were successfully loaded or if there were errors.
Questions	Email: loadablecard@uky.edu