

Loadable Card Application Instructions

This guide outlines the steps for completing the Loadable Card Application. Submitting the application in full, along with all required documentation, will help ensure timely processing.

1. **Select Card Type:** Review the comparison chart below and select the radio button for the U.S. Bank Visa card type that best meets your project needs.

Loadable Card Program - 3 Card Options	Focus Card	Rewards Card	Digital Rewards Card
Cost/fee per US Bank Visa Card	\$0	\$0	\$1
Reloadable Capability	Yes	No	No
Minimum Card Load	\$0.01	\$10	\$25
Maximum Card Load (per single transaction - see BPM E-9-1)	\$1,999	\$1,999	\$1,999
Cardholder Activation Required	Yes	Yes	Yes
Unique Participant IDs allowable with CoC or NIH funded projects	No	Yes	Yes

2. **Account Custodian Information:** Provide the required applicant information. For liability purposes, the applicant must be coded as a regular (REG) employee in the HR database. For research projects, this is typically the Principal Investigator (PI).
3. **Financial Information:**
 - **GL Account Number:** Enter the appropriate General Ledger account number. For example, with this program commonly used GL numbers include:
 - 535022 (Research Subject Payments)
 - 536121 (Patient Support)
 - **Primary Cost Object:** Specify the WBS or Cost Center to be charged when card loads occur.
 - **Secondary Cost Object:** Provide a secondary cost center to be used if the primary cost object cannot be charged (e.g., closed or over budget).
 - **Initial Card Quantity:** Estimate the number of cards needed for a 3-month period. Additional card requests may be submitted by email and are typically processed within one to two business days. This field is not required for Digital Card requests.

- **Card Load Amount(s):** Provide the anticipated dollar amount(s) to be loaded per card (e.g., \$10, \$25, \$50...) or attach a compensation schedule.
 - **Project End Date:** Enter the project end date as determined by the department or as listed on the IRB approval letter.
4. **Project Information:** Select the radio button indicating the purpose of the cards.
- If the purpose is *Research*, a current IRB approval or exemption letter must be included with the application.
 - In the text box, provide a brief description of the project and explain how the cards will be used; attach additional documentation if needed.
5. **Account Custodian User Agreement:** The Account Custodian must review and sign the User Agreement using an Adobe-certified signature and provide their LinkBlue ID. Adobe-certified signatures and LinkBlue IDs are also required from the custodian's supervisor and the applicable Dean or Business Officer.

Quick Reference Links:

[Loadable Card Program website](#) - Program details, QRCs, and FAQs

[BPM E-9-1 Compensation to Research Subjects](#) - Policy guidance not only for research subject payments but also for participants in other approved programs, such as patient support initiatives and grant-funded community outreach projects.

Questions:

For assistance, contact: loadablecard@uky.edu