

Prolific Business Process Overview

The University has approved Prolific as a supplier to use in providing incentives to research participants using the P-Card.

Overview

To use the P-Card to pay research incentives through Prolific, participants must have already completed the required components of the study to receive their incentive (i.e. you cannot use the P-Card to pre-pay for future participant incentives).

Gift Cards can only be purchased with C&G Funds (520-560) and Foundation Funds (599)

When possible, the PI/Project Manager who authorizes the payment of the participant incentives should not be the P-Card holder or Proxy.

Request to Use P-Card Form

1. Complete the Request to Use the P-card for Participant Incentives Form.
 - a. This can be completed as soon as the award is setup, so it is on-hand when you are ready for your first distribution.
 - b. The amount requested cannot exceed the amount budgeted and authorized for research participants on the award.
 - c. The amount distributed cannot exceed the amount approved on the form.
 - d. A new form must be submitted if additional funds are budgeted for participant incentives.

Reconciling P-Card Transactions

Once the funds are distributed, the P-card holder will need to download a distribution report from the supplier's portal to reconcile the P-Card transaction.

1. The report should include the following information:
 - a. Order/transaction ID (or some similar identifier)
 - b. Date distributed
 - c. Participant name*
 - d. Amount distributed

*Participants can be deidentified if the IRB protocol requires it. Departments are required to maintain a crosswalk of participants in the event of audit.
2. The amount charged to the card must match the amount distributed less any fees associated with using the supplier's service.
 - a. For example, the amount charged to the card is \$41.40 and the amount distributed is \$40 leaving \$1.40 for a 3.5% fee.
 - i. Note: This is just an example and not indicative of any actual fees charged by the suppliers.
 - b. If an unforeseen circumstance arises, like an invalid email address, and the full amount uploaded cannot be distributed, the undistributed amount must be charged to the prepaid items account (191000). Once distributed, the expense can be transferred to

the proper expense account via DOL. For more information, please reach out to the OVPR staff.

- c. Transactions will be audited for compliance by SRA/FSURF during award closeout. Any transactions not in compliance with the terms of the grant must be transferred to a non-sponsored account within the PI's department prior to closeout.

P-Card Transaction Proxy Instructions

The P-Card proxy will code the transaction to the respective funding source using account code 741954 Research Participant Excluded in MTDC or 740355 Research Participant Included MTDC, as indicated on the approved Request to Use the P-Card for Participant Incentives form.

The following supporting documentation is required for every P-Card transaction:

1. The distribution report
2. The receipt for the total amount charged to the P-Card

The respective Request to Use the P-card for Participant Incentives Forms should be uploaded with the monthly reconciliation for all projects in which participant incentives were purchased for the month.

Reconciling Prepaid Charges

1. To remain in accordance with the PCard reconciliation schedule, any funds that have been uploaded, but not disbursed, will need to be coded to account code 191000 (Prepaid Items)
 - a. This account code does not post as an expense against the project; therefore, it will not be reflected in your available balance in OMNI.
 - b. The process will not change for any funds that have already been disbursed. You will code these directly to the Participant Incentive account code as you do now.
2. The prepaid account code, 191000, must be reconciled no less than monthly to transfer the disbursed amount to an expense account code. To transfer the expense, the department should prepare a Departmental Online Journal Entry (DOL) as follows.
 - a. Run the FSU_DPT_GL_JOURNALS query in OMNI Financials
 - i. Enter the fund code, dept ID, date range and project number the gift cards were initially purchased on.
 - ii. Enter "191%" in the account code field to isolate the "Prepaid Items" journals. (Note: This account code does not appear on the BI Transaction Detail Report, so the OMNI FI query must be used).

FSU_DPT_GL_JOURNALS - Journal by Date

Fund w wildcard %	<input type="text" value="ENTER"/>
Dept ID w wildcard %	<input type="text" value="ENTER"/>
Journal ID w wildcard %	<input type="text" value="%"/>
Account w wildcard %	<input type="text" value="191%"/>
*From Jrnl Date	<input type="text" value="ENTER"/> <input type="button" value="31"/>
*To Jrnl Date	<input type="text" value="ENTER"/> <input type="button" value="31"/>
Project w wildcard %	<input type="text" value="ENTER"/>
Source w wildcard %	<input type="text" value="%"/>
<input type="button" value="View Results"/>	

- b. Sum transactions by accounting combination to determine the remaining prepaid balance on the project.
- c. Use the query results to complete the DOL as follows

	Journal ID	Date	Dept ID	Fund	Project	Account	Amount	Source	Long Descr	User	Line Descr	Line #	Bud Ref	Jrnl Line Ref	Year	Period
1	AP00329077	06/09/2020	286009	550	035980	191000	100.000	AP	Accounts Payable	FSU_BATCH	AP Accruals	8			2020	12

- i. In the description enter the following:
 1. To transfer the cost of the research participant incentives that were prepaid for project (NAME or ID#) that have now been disbursed.
- ii. In the "Transaction(s) As Currently Recorded" section:
 1. Enter the journal ID in the "Original Trnx Document #" field
 2. Enter the Dept ID, Fund, Account Code and Project number from the original journal in their respective fields
 3. Enter the Activity ID, "1"
 4. Enter the analysis type, "NCA"
 5. Enter the total amount of the gift cards being transferred in the Amount field

(NOTE: This is not necessarily the amount of the original journal if only a portion of the gift cards were disbursed)

- b. In the "Transaction(s) as Corrected" section:
 - i. Enter the same journal ID as the original transaction in the "Original Trnx Document #" field
 - ii. Enter the Dept ID, Fund and Project number for the sponsored project the gift cards were used for
 - iii. Enter the Activity ID, "1"
 - iv. Enter the Analysis Type, "GLE" for open or "CLE" for expired projects
 - v. Enter the Account code "740355" for Research Participant payments that are included in the MTDC base (Modified Total Direct Cost) OR "741954" for Research Participant Payments that are excluded in the MTDC base as approved on the Request to Use Pcard Form.
 - vi. Enter the Amount for the value of incentives that were distributed to the research participants for the particular project
- (NOTE: This may not necessarily be the total amount of the original transaction, but it cannot be more than remaining prepaid amount)

- c. The following backup will be required to be submitted with the DOL
 - i. A copy of the FSU_DPT_GL_JOURNALS query results
 - ii. The Order History report from Prolific with the participant incentives that are included on the DOL (de-identified if required by the IRB Protocol).

(NOTE: The SRA Cost Transfer Justification form is not required as a prepaid item is being expensed rather than costs being transferred. However, the transfer should occur within 90 days of the date the gift cards are distributed.)

This process will need to be completed every month in which there is a balance in the Prepaid Items (191000) account.

****Any remaining balance on the prepaid items account will need to be moved prior to project closure, so please monitor funds carefully to ensure you always have a balance to cover them.****