

## Research Cash Advance Instructions when Using Online Survey Services

Due to the low dollar amount paid to human subject incentive recipients when PIs use Amazon Turk, Prolific, or other online survey services, Texas State University is not obligated to send out the 1099 Form to human subject incentive recipients when using these types of online survey service vendors. Those types of organizations, not Texas State University, have the 1099 reporting responsibility. If you plan to use these a third-party vendor to conduct a research survey, please follow these instructions:

### 1. Requesting Research Cash Advance

In the Funding Source section, use dropdown menu for *Sponsored Class (GL Code)*:

- Select *Human Subject Incentives* (GL code 767903) and enter the total amount needed for payments of survey respondents, click on *Add this Funding Source*
- Select *Gift Card Activation Fees and Survey Service Fees* (GL code 721000) and enter the total amount needed for the service fees, click on *Add this Funding Source*

### 2. Reconciliation

- a. Principle Investigators (PIs) are not required to submit the signed *Acknowledgement of Receipt Form* for payments to human subjects made through a third-party. However, PIs must request the following documentation from the vendor before starting a reconciliation:
  - Invoice showing the total amount paid to the vendor for the services. This total should be the sum of the following two logs.
    - Log of award distributions with survey recipients' email addresses or IDs
    - Log of Service fees
- b. On the ***Substantiation of Currently Spent Funds*** (Reconciliation Summary) page
  - i. Enter the **total award paid to survey respondents** for the *Total Human Subject Incentive Expenses*
  - ii. Enter the **total service fees** for the *Total Research Expenses*
- c. On the ***Add Non-Travel Funding Source*** page
  - i. Select *Human Subject Incentives* and enter the **total award paid to survey respondents** for the *Amount*, click on *Save*
  - ii. Select *Gift Card Activation Fees and Survey Service Fees* and enter the **total service fees** for the *Amount*, click on *Save*
- d. Fill the ***Human Subject Incentive Expenses Log Form*** (Form AP-6 HS)
  - i. Enter one row that summarizes the total award paid to survey respondents:
    - Recipient First Name: vendor's name, such as "Prolific"

- Recipient Last Name: "Survey Respondents"
  - Last 4 digits of SSN/Unique ID: "N.A"
  - Amount: total award paid to survey respondents
- ii. Upload the form under the ***Human Subject Distribution*** tab
- e. Complete the ***Research Expenses*** Section
- Enter one row that summarizes the **total** amount of the third-party service fee:
- Select *Gift Card Activation Fees and Survey Service Fees* for GL code (721000)
  - Enter the total amount of service fees in the *Amount* cell
- f. Upload the following documents provided from the vendor under the ***Upload Supporting Documents*** tab:
- Purchase Invoice
  - Log of award distributions with survey recipients' email addresses or IDs
  - Log of Service fees