

GUIDELINES FOR PURCHASE AND TRACKING OF PARTICIPANT INCENTIVES

GIFT CARDS CANNOT BE CHARGED DIRECTLY TO GRANT OR CONTRACT ACCOUNTS – AIS 76xxxx BUDGET PURPOSE ACCOUNTS

To secure funds for the purchase of incentives and/or cash for use as project incentives, complete the Incentives Request form found on the [Graduate School website](#) and adhere to the following procedures.

- A. Treat gift cards like cash.
- B. Follow all purchasing rules of the University when purchasing incentives, including gift cards.
- C. If your incentive is for human subject research, you must follow the approved IRB protocol, including procedures for documentation. In all cases, incentives must be kept secure.
- D. If a p-card is used to purchase incentives, you need an exception number. For cash, an AP invoice is needed.
- E. You must keep a current master list of incentives. Include the buyer's name, the name of the incentive (e.g., Target gift card or cash), date purchased, reason for purchase, serial number, denomination, the name of the individual dispensing the incentive, and date dispensed.
- F. Any unused portion of an incentive, such as a gift card, must be returned to the person responsible for maintaining the incentive list. Any cash received as change after using a gift card must be returned to the PI/FO and deposited in the Bursar's Office to the account from which the funds for the gift card was originally purchased. Such cash received should be treated as any cash receipt. Document the activities on the master list of incentives.
- G. Upon completion of the project, retain the master list reflecting incentives dispensed to participants along with how unused incentives were handled. Keep the master list according to University record retention requirements.
- H. If the Graduate School R&D account is used, return all unused gift cards to the Graduate School Associate Dean, who will store them in a secure, locked location. If a unit's account is used, the unit's requirements for unused gift cards must be followed.
- I. Return cash to the Bursar's Office to deposit in the account from which the funds were originally disbursed.