**Meeting with Accounting Services**  
**Date:** 8/16/16  
**Time:** 9:00 a.m.

**Meeting Participants:** Susan Atkinson, Jose Carus, John Curtin, Liv Goff, Candace Johnson-Hurwitz, Dan Langer, Mehdi Rezai, and Susan Schneck

**Highlights:**

* Legal Affairs reported that payment for a study participant’s mobile phone plan (phone bill) is **not** a taxable event.
* Legal Affairs reported that giving a study participant a cell phone as part of his/her compensation for completing the study **is** a taxable event.
* The price of the phone will be reported as $99, which is the price of the current iPhone 6 through DoIT. The fair market value does not need to be reported.
* All study participants will complete a W-9 upon enrollment in study. Verify that the most recent version of the W-9 is completed.
* On a quarterly basis, our lab will send Jose Carus a report containing an itemized record of the payments given to participants, including any cell phones. The last 4 digits of the participants’ social security number will need to be included with the report. Lastly, Jose would like a copy of all completed W-9s quarterly. Mehdi Rezai will follow-up with us to confirm how he wants to track and report participant payments.
* Mehdi Rezai will also be sent all W-9s completed by study participants. These will be sent directly to Mr. Rezai and marked confidential so that his staff does not open them. TBD how frequently he wants these.
* It was determined that any fees associated with a participant breaking a contract will can be paid through the PIR process (DP or Expense Reimbursement).
* Meeting participants would like a copy of the notes from the 8/18/16 meeting with DoIt.

**Outstanding questions for DoIT**

* Can Verizon directly pay cancellation fees when porting non-Verizon accounts into the study account?
* Can we gain direct access to view the phone bills of our study participants through the Verizon portal?