

COM's Tango E-Gift card Procedures

Tango:

Tango is a web-based platform that simplifies the administration and disbursement of incentives to study participants. Tango allows researchers to present diverse gift cards from different merchants to participants. Because of this leeway, people can choose incentives that matter to them, boosting their incentive to participate. Tango gift cards are sent digitally, so it's easy and fast. With the ability to Bulk Upload to numerous participants in a single purchase, researchers can quickly and conveniently send gift cards to participants by email, which reduces administrative work and allows for quick reward distribution.

To acquire gift cards via Tango using a Pcard, participants are required to have fulfilled all necessary requirements of the study prior to receiving the gift cards. The [Request to Use the Pcard for Participant Incentives Form](#) must be completed. This can be completed as soon as the award is setup. User accounts that fail to adhere to this stipulation will be promptly disabled. The PI/Project Manager who authorizes payment of participant incentives should, whenever possible, not also possess the Pcard or proxy.

Requesting/Submission:

1. The PI will identify the award utilized for the order, including the authorized quantity and the vendor selected.
2. A Pcard Request form will be entered by the PI/Program Manager/Departmental staff **with the option of submitting a coversheet for up to month or for a single order**, listing Tango as the vendor.
 - a. **Monthly: In this coversheet, estimate the amount of gift cards you will distribute within the month time frame. Please note in the justification field that this coversheet is going to be used for the month. Ensure that all required fields are completed prior to submission.**
Note: If the monthly order exceeds the original Pcard coversheet, a new coversheet is necessary, regardless of whether the month has ended.
 - b. Single: Create a coversheet for the exact amount of gift cards that will be distributed. Please ensure that all the fields on the coversheet are completed with a justification for the purchase. Once everything is complete, please proceed with the submission of the coversheet.
3. Via Smartsheet ([COM Participant Payment Request Form](#)), the PI/Program Manager/Departmental staff will complete the Gift Card Request Form, which requires the completion of all mandatory fields including attaching the approved IRB protocol and completed participant list with email addresses that will be password protected with the nomenclature used. The required template can be found here.
4. The amount requested cannot exceed the amount budgeted and authorized for research participants on the award.
5. The amount distributed cannot exceed the amount approved on the form.
6. If/when the additional funds that are budgeted for participants incentives are needed a new request with all documentation will be required,

Research Accounting:

1. An initial review of the request for correctness occurs upon receipt of the submission. The Grants Administrator will inform the PI/Program Manager of missing components and request the necessary information.

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- When the request is complete, the Grants Administrator will approve the Pcard coversheet and a notification through the Pcard module will be sent to the requestor and PCard holder to complete the purchase through the Tango system. Tango will automatically charge a 3.5% fee for eGift cards.

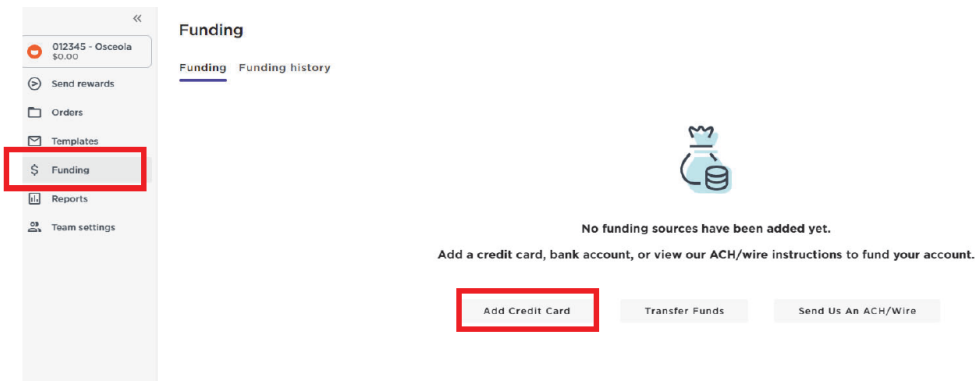
Pcard Holder

- The Pcard holder will need to log into Tango and place the order.

Tango System steps:

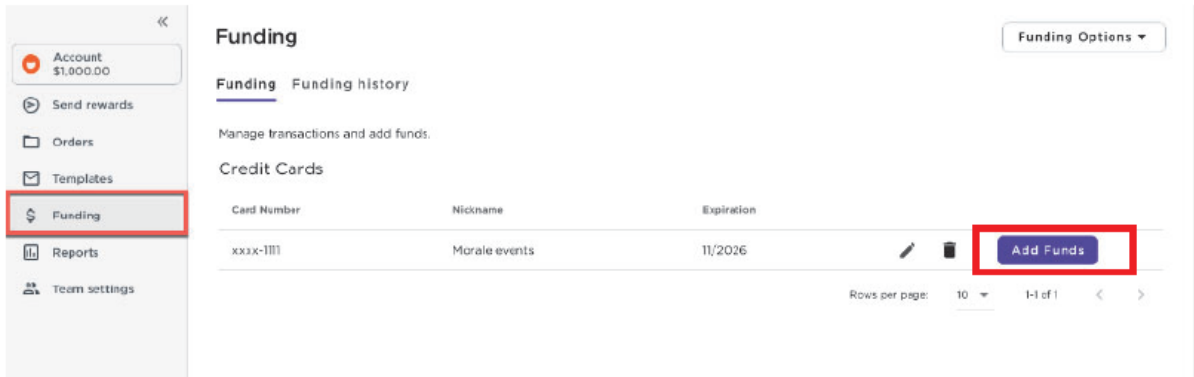
Adding Funds

- Once approval is received, the P-card holder will upload the amount of funds ready for distribution based upon completed participant milestones.
- Add the P-Card to the Tango account:
 - Select Funding
 - Select Add Credit Card
 - Once the credit card information is submitted and saved it will be available for selection for future fund uploads.

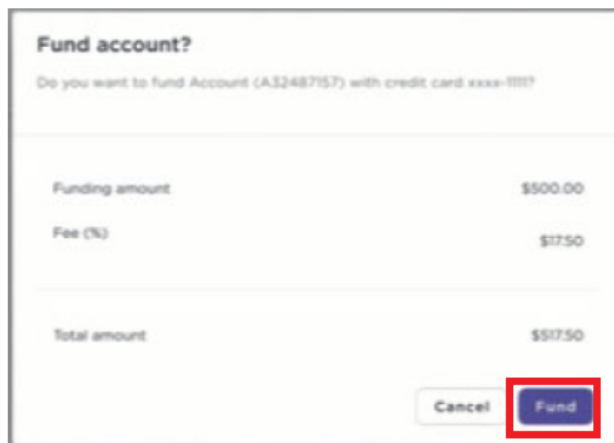


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4. Add Funds to the sub-account:
Funds added must be ready for immediate distribution.
 - a. Select Funding
 - b. Select Add Funds next to the respective P-Card



- c. Enter the amount of funds you want to add
 - i. Tango will automatically charge the 3.5% credit card processing fee on top of the upload amount.
 - d. Select Fund
 - e. Confirm the amount funded plus the 3.5% fee on the next screen
 - f. Select Fund



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- g. The Funding History report will serve as the receipt for the P-Card transaction.
 - i. Select the arrow next to the transaction you are reconciling

Funding

Funding Funding history

Date	Type	Transaction ID	Amount	Currency	Account Number	Account Name	Status
Mar 6, 2023 4:34 PM EST	Transfer	4356022	\$41.14	USD	879376	NIH 123	PROCESSED

- ii. Take a screenshot of the Details screen to upload as your P-Card receipt.

Details ✕

Transaction ID
4330731

Amount **\$50,000.00** Currency **USD**

Status **PROCESSED** Method **Funding**

Notes
funding

Account Name
FSU Account

Account ID **872795** Account Number **A09610809**

Group Name
FSU Customer

Group ID Name
884361

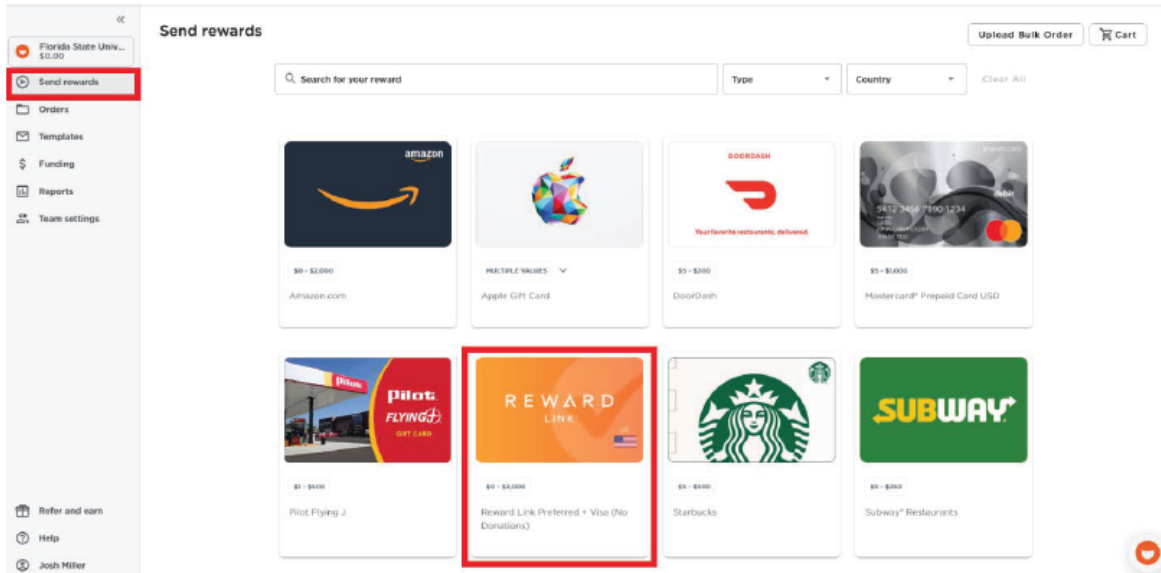
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Sending Rewards

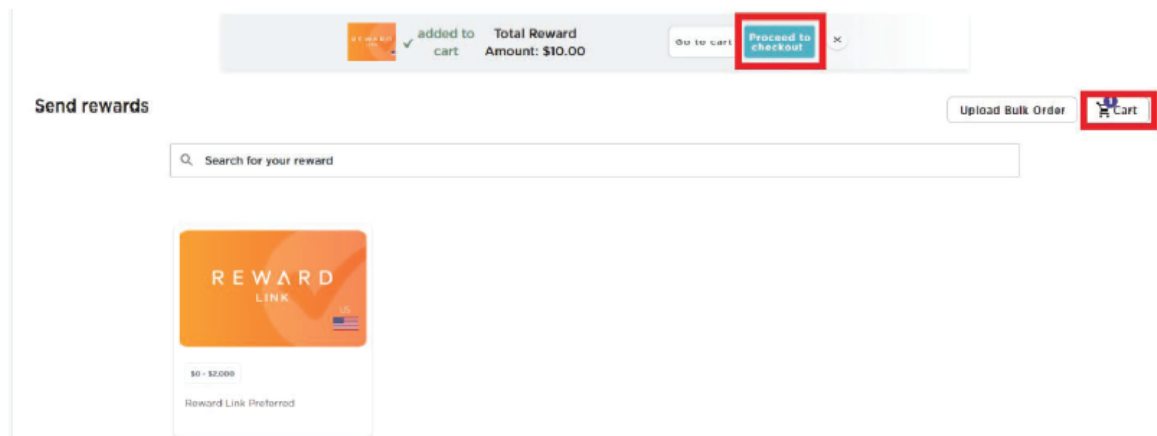
Once the sub-account has been funded, you are now ready to send rewards to participants.

To send rewards:

1. Select Send Rewards and choose Reward Link Preferred + Visa (No Donations)



2. Select the number of recipients
3. If the reward amounts are the same, uncheck the “Different amounts per request” box and enter the Reward Amount in the box next to it
 - a. This field becomes required when you uncheck the box
4. Check the “Recipient Last Name” box to display the “Last Name” field
5. Fill out the recipient information
6. Click “Add to Cart”
7. Click “Proceed to Checkout” at the top of the page
 - a. If this pop-up does not appear or disappears before you can click it, you can click the “Cart” icon and checkout from there.
 - b. Once in the Shopping Cart, you can edit or delete any of the recipients if necessary



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Send rewards / Shopping Cart

Total Reward Amount: \$40.00

Checkout

Email Delivery


1 Brand 2 Recipients

Delete All

Brand	Amount	Recipient Name	Email Address	Email Template
 Reward Link Preferred U579023	\$20.00	[REDACTED]	[REDACTED]	 Tango Card Standard T... Preview Edit/Change Edit Delete
 Reward Link Preferred U579023	\$20.00	[REDACTED]	[REDACTED]	 Tango Card Standard T... Preview Edit/Change Edit Delete

8. Review the order ensuring that the amount and Payment Account is correct. Then click "Place Order"

Order summary

Rewards  Reward Link Preferred

Delivery type Email Delivery

Recipients 2

Email template Tango Card Standard Template

Total reward amount \$40.00

Total order amount \$40.00

Place Order

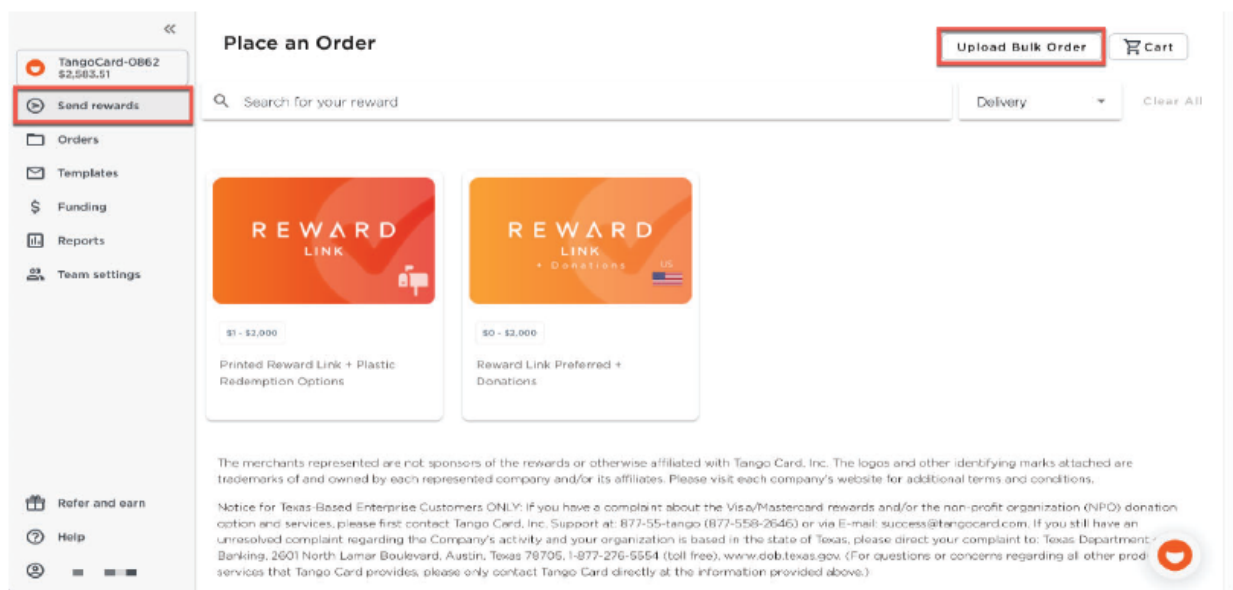
By clicking the place order button I acknowledge that I have read the brand(s) Terms & Conditions.

Bulk Upload

Tango has a unique feature known as Bulk Upload which allows you to send rewards to multiple recipients (1-50,000) in one order. Users will use the Excel Template to provide the required information and then upload the document to the Tango website for distribution.

To use the Bulk Upload feature:

1. Select Send Rewards and Upload Bulk Order



Place an Order

Upload Bulk Order

Send rewards

Search for your reward

Delivery

Clear All

REWARD LINK

REWARD LINK + DONATIONS

\$0 - \$2,000

Printed Reward Link + Plastic Redemption Options

Reward Link Preferred + Donations


The merchants represented are not sponsors of the rewards or otherwise affiliated with Tango Card, Inc. The logos and other identifying marks attached are trademarks of and owned by each represented company and/or its affiliates. Please visit each company's website for additional terms and conditions.

Notice for Texas-Based Enterprise Customers ONLY: If you have a complaint about the Visa/Mastercard rewards and/or the non-profit organization (NPO) donation option and services, please first contact Tango Card, Inc. Support at: 877-55-tango (877-558-2646) or via E-mail: success@tango.com. If you still have an unresolved complaint regarding the Company's activity and your organization is based in the state of Texas, please direct your complaint to: Texas Department of Banking, 2601 North Lamar Boulevard, Austin, Texas 78705, 1-877-276-5554 (toll free), www.dob.texas.gov (For questions or concerns regarding all other products/services that Tango Card provides, please only contact Tango Card directly at the information provided above.)

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2. Select the Download Bulk Template and then Email Delivery Method

Bulk uploads are limited to 2,000 rows or less. If the file exceeds this limit, there are additional options for placing your order. [Learn how.](#)



Drag & Drop File

supported file formats



OR, SELECT FILE


Download Bulk Template ▾

Email Delivery Template

3. Using the Excel template that downloads complete all the required information on the Order tab
 - a. Tips for completing the template:
 - i. FSU's ETID is E000000
 - ii. FSU's UTID is U579023
 - iii. Don't remove or add any columns
 - iv. Avoid using special characters. For best results, use only alphanumeric characters (A-Z, 0-9), hyphens (-), and underscores (_)
 - v. Do not put spaces before or after information entered in each cell
4. Save the bulk order file as an .xlsx or .csv file type with a unique name to avoid future duplicate orders

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Bulk uploads are limited to 2,000 rows or less. If the file exceeds this limit, there are additional options for placing your order. [Learn how.](#)



Drag & Drop File

supported file formats

xlsx

csv

OR, SELECT FILE

Download Bulk Template ▾

- Once in the Shopping Cart, you can edit or delete any of the recipients if necessary.
- Select Checkout

Send rewards / Shopping Cart Total Reward Amount: \$40.00 [Checkout](#)

Email Delivery 1 Brand 2 Recipients [Delete All](#)

Brand	Amount	Recipient Name	Email Address	Email Template
Reward Link Preferred U579023	\$20.00	[REDACTED]	[REDACTED]	Tango Card Standard T... Preview Edit/Change Edit Delete
Reward Link Preferred U579023	\$20.00	[REDACTED]	[REDACTED]	Tango Card Standard T... Preview Edit/Change Edit Delete

- Select Place Order

Order summary

Rewards Reward Link Preferred

Delivery type Email Delivery

Recipients 2

Email template Tango Card Standard Template

Total reward amount **\$40.00**

Total order amount **\$40.00**

[Place Order](#)

By clicking the place order button I acknowledge that I have read the brand(s) Terms & Conditions.

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2. After submission has been processed by the requestor/PCard holder, Tango will provide the pcard holder with a funding history report that will serve as the P-Card transaction receipt.
3. The Pcard holder will snip the details of the P-Card receipt for their records and upload into the Pcard coversheet so proxying can be completed by the COM Accounting Division.
 - a. Attachment of each receipt to the coversheet is mandatory.
 - b. For month-long coversheets multiple receipts will be uploaded to the same pcard coversheet.
4. The PI/Program Manager/Departmental support staff will send confirmation that the cards have been distributed to the PI and their Grants Administrator in Research Accounting
5. The completed participant logs must be submitted to the Research Accounting office on a monthly basis.

Reconciliation

To reconcile the P-Card transaction once the funds have been distributed, obtain the Order-History Report.

1. The Department will kindly verify that the amount charged to your card exactly matches the amount that Tango has dispersed, minus their credit card processing fee.
 - a. The undistributed amount must be charged to a non-sponsored project if an unforeseen condition, such as an incorrect email address, prevents the whole amount from being distributed.
2. Upon the completion of the award, SRA/FSURF will conduct a compliance audit of all transactions. Be sure to move any transactions that don't follow the grant guidelines to a separate account in the PI's department before the closeout.
3. To generate the report:
 - a. Select Reports
 - b. Select Account
 - c. Select the respective Group Name, Account Name and Data Range for the distribution.
 - d. Select Generate Report
4. If any errors are noted on report, document and resolve the issues prior to proceeding.