

# Tango Business Process Overview

Tango is an online service that streamlines the management and distribution of research participant incentives. With Tango, researchers can offer recipients a wide range of gift cards from various retailers. This flexibility ensures that participants can select rewards that are personally meaningful to them, enhancing their motivation to participate. Tango gift cards are delivered digitally, making the process quick and hassle-free. Researchers can easily distribute gift cards to participants via email, including Bulk Upload to multiple participants in one order, reducing administrative burden and allowing for swift rewards distribution.

## Table of Contents

Tango Account Creation/Management .....	2
Creating a User Account: .....	2
Managing PI Groups and Sub-Accounts.....	2
Order Process.....	4
Overview .....	4
Request to Use P-Card Form.....	4
Adding Funds .....	4
Sending Rewards.....	7
Bulk Upload.....	8
Accounting .....	11
Reconciling P-Card Transactions.....	11
P-Card Transaction Proxy Instructions.....	12
Appendix A:.....	13
Reconciling prepaid charges .....	13

# Tango Account Creation/Management

## Creating a User Account:

To request an account, complete the Tango Research Participant Account Request form and email it to the Office of the Vice President for Research (OVPR) for processing. The form will collect information regarding the individuals and their roles that need to be associated with the account. Only FSU employees can be granted access to Tango.

### Available Roles:

**Admin:** Users with the Admin role can place orders, view the account balance, view the account order history, resend rewards, create sub-accounts, add and manage sub-account users, add funds and credit cards, and run reports.

We recommend that the Project/Lab Manager for the PI be assigned the Admin role.

**Standard:** Users with the Standard role can place orders, view the account balance, view the account order history, resend rewards, and run reports.

We recommend that staff that assist in distributing participant incentives be assigned the Standard role.

**Support:** Users with the Support role can view the account order history and run reports.

We recommend that P-Card Proxies be assigned the Support role.

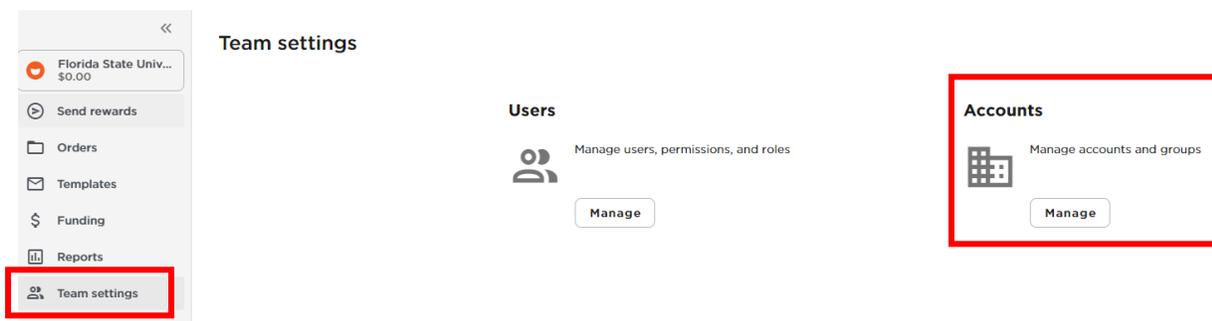
Users will receive an invitation email from Tango that will automatically link their account to their FSU account. Users who attempt to create an account on their own will receive an error message and be asked to contact the FSU Tango Account Managers in the OVPR.

## Managing PI Groups and Sub-Accounts

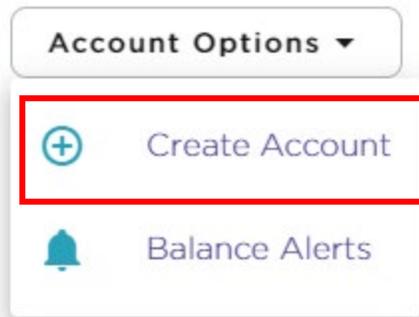
Once the account Admin receives access to Tango, your dashboard will consist of all the PIs you manage. A sub-account will need to be created for each award that is distributing research participant payments.

To create sub-accounts:

1. Navigate to Accounts via Team Settings. Select Manage.



2. Click Account Options in the top right and then select Create Account



- a. Display Name: Use the naming convention - "Project Number – Project Name" (i.e. 123456 – Osceola)
  - b. Contact Email: Your email address
  - c. Group: Locate the respective PI from the dropdown to appropriately assign this project to the PI Group
  - d. Select Create Account
3. The sub-account will now be located under the PI Group

## Create a new account

Display Name

123456 - Osceola

Contact Email

me@fsu.edu

Group

Smith

x ▼

Cancel

Create Account

\*Please note that once you create a sub-account, you cannot edit any of the information. If a mistake was made, you would need to disable the account and create a new one\*

# Order Process

## Overview

To use the P-Card to pay research incentives via Tango, 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). User accounts who do not comply with this requirement will be disabled immediately.

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.

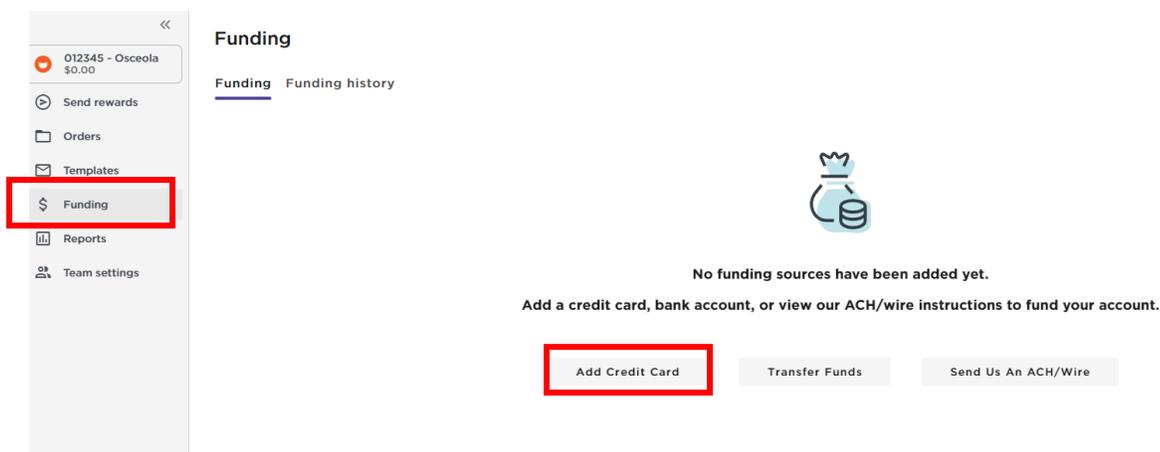
Note: In addition to FSU P-Card limits, Tango limits the amount that can be uploaded to \$5,000 per credit card 3x a day, so \$15,000 total. Tango charges a 3.5% transaction fee for using a credit card.

## 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.

## Adding Funds

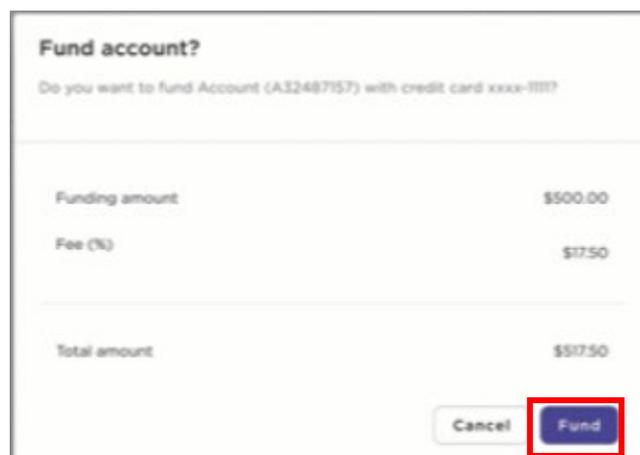
2. Once approval is received, the P-card holder will upload the amount of funds ready for distribution based upon completed participant milestones.
3. Add the P-Card to the Tango account:
  - a. Select Funding
  - b. Select Add Credit Card
    - i. Once the credit card information is submitted and saved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



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



- 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**

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Account Name  
**FSU Account**

Account ID  
**872795**

Account Number  
**A09610809**

Group Name  
**FSU Customer**

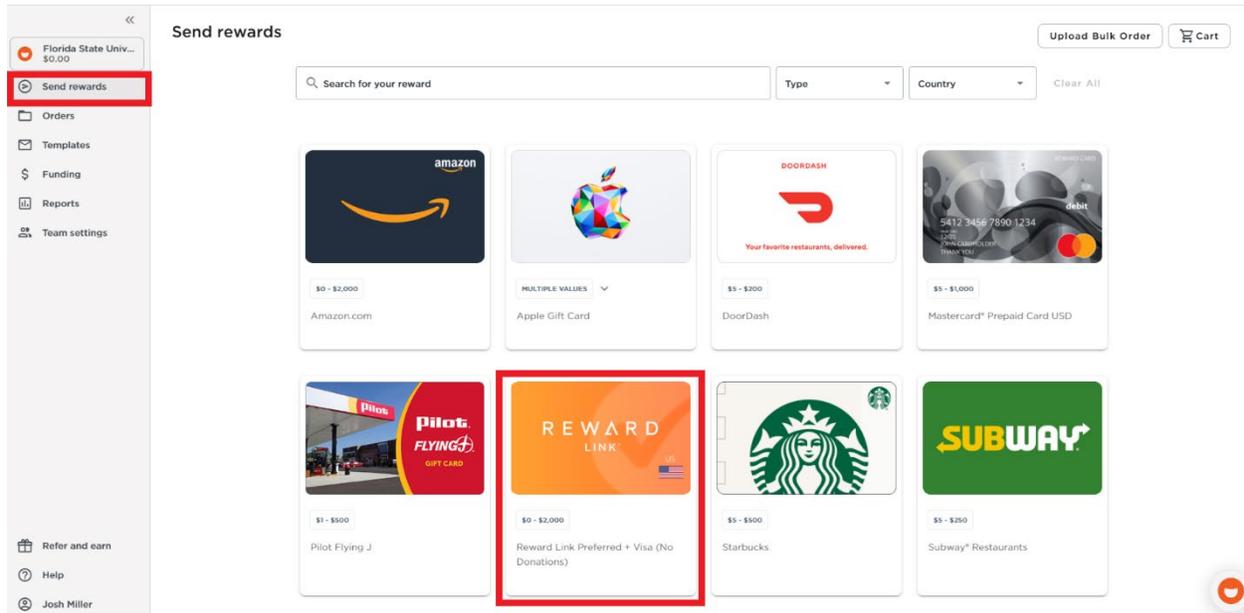
Group ID Name  
**884361**

## Sending Rewards

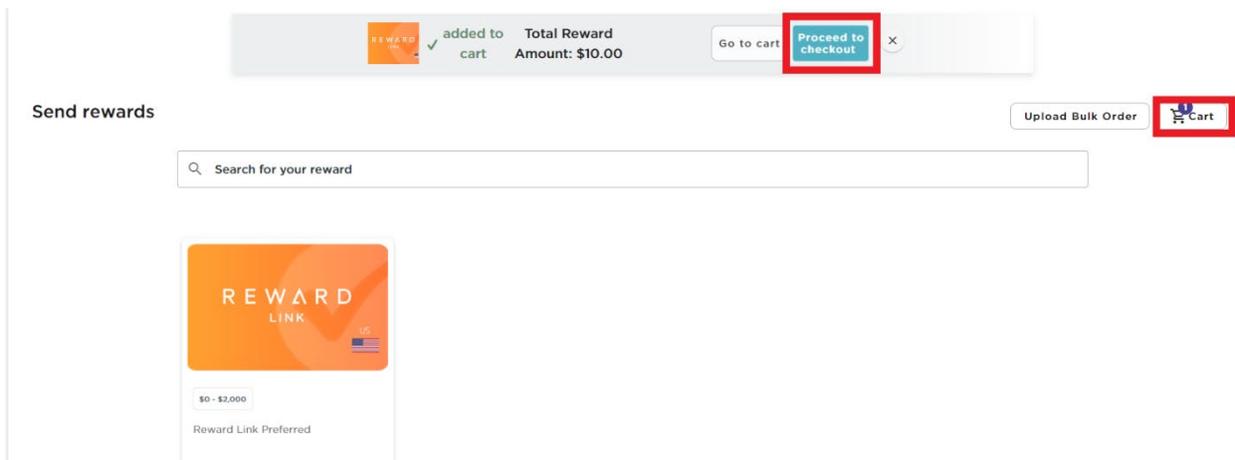
Once the sub-account has been funded, you are now ready to send rewards to participants.

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



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

TangoCard-0862  
\$2,583.51

**Send rewards**

Orders

Templates

Funding

Reports

Team settings

### Place an Order

**Upload Bulk Order** 

Search for your reward

Delivery ▼ Clear All



**REWARD LINK**

\$1 - \$2,000

Printed Reward Link + Plastic Redemption Options



**REWARD LINK + Donations**

\$0 - \$2,000

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@tangocard.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.)

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

xlsx

csv

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

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



Download Bulk Template ▾

5. Once in the Shopping Cart, you can edit or delete any of the recipients if necessary.
6. 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

7. 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.

# Accounting

## Reconciling P-Card Transactions

Once the funds are distributed, the P-card holder will download the Order-History Report to reconcile the P-Card transaction.

1. The amount charged to the card must match the amount distributed less the credit card processing fee charged by Tango.
  - a. For example, the amount charged to the card is \$41.40 and the amount distributed is \$40 leaving \$1.40 for the 3.5% processing fee.
  - 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 see Appendix A.
2. Participants can be deidentified if the IRB protocol requires it. Departments are required to maintain a crosswalk of participants in the event of audit.
3. 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.
4. 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

**Reports**

Reports Generated reports

### Order-History Report

An order-history report provides detailed data about rewards sent.

**For**

Organization  Group  Account

Choose a group & an account

Group name:

Account name:

**From**  **To**

Report Name:

**ORDER SUMMARY**

Order Amount **\$40.00**

Order Status 100%

Complete

Order ID  
**RG230302-93993-31**

External Reference ID  
**ebb7ca99-2442-4db0-9483-9ce9b41b8807**

Order Source  
**RG**

Created By  
**jaarye@fsu.edu**

Created Date  
**Mar 2, 2023 5:05 PM**

Group  
**Institute for Digital Health Initiatives**

Account  
**NIH 123**

Account Number  
**A94563923**

Total Line Items  
**4**

Line ID

Line ID	Email	First Name	Reward	Amount	Status
RG230302-93993-31-1	test@test.com	John	Reward Link Prefe...	\$10.00	<span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">Pending</span>
RG230302-93993-31-2	test@test.com	Jane	Reward Link Prefe...	\$10.00	<span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">Pending</span>
RG230302-93993-31-3	test@test.com	Bob	Reward Link Prefe...	\$10.00	<span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">Pending</span>
RG230302-93993-31-4	test@test.com	Jennifer	Reward Link Prefe...	\$10.00	<span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">Pending</span>

Showing 1 - 4 of 4 items.

### P-Card Transaction Proxy Instructions

The P-Card proxy will code the Tango 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 Funding History Details Receipt
2. The Order-History Report

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.

# Appendix A:

## 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.
  - c. The Tango Funding History Details screen will be uploaded as your P-Card receipt. The Order History supporting document is only needed for disbursed funds.
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 %   
 Dept ID w wildcard %   
 Journal ID w wildcard %   
 Account w wildcard %   
 \*From Jrnl Date    
 \*To Jrnl Date    
 Project w wildcard %   
 Source w wildcard %

- 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 Tango 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.\****