Using Tango Card for Research Participant Compensation

UT Austin allows for the use of Tango Card to compensate research participants, including participants who are UT Austin employees. Tango Card is an online gift card service that enables researchers to allocate research compensation remotely. A few quick facts about Tango Card:

- There is no charge to the researcher for using Tango Card.
- Tango Card operates through a portal called RewardsGenius.com.
- Each researcher establishes his/her own account on Rewards Genius using their UT Austin email as their login. Subaccounts can be created for each research project.
- Emails notifying participants that they have received compensation via Rewards Genius can be customized.
- Participants can select gift cards from numerous available vendors. Gift card redemption is done via online shopping.
- Rewards Genius can be integrated with Qualtrics to automatically distribute the gift card email upon survey completion.

Steps for Setting Up Tango Card / Rewards Genius:

1) Go to Rewards Genius and click on Sign Up for Free to setup a new account
   - Company Name: University of Texas at Austin
   - Work email address: use your UT assigned email address
   - Indicate if you are interested in integration with Qualtrics
2) A UT Austin Tango Card representative will send you an email containing the User Guide and an offer of assistance with setup and how to use the system
   - You can also get answers to your user questions in the Rewards Genius Help Center
3) Email Tango Card’s funding team (funding@tangocard.com) to request an invoice for the amount needed and provide them with the PI’s account information.
   - Tip – You may not want to order the anticipated maximum number of cards immediately in the event your study does not enroll as many participants as expected. You can always order additional gift cards at a later date, if needed.
4) Generate a Purchase Order (PO) for Pre-Payment, referencing the UT master agreement with Tango Card (UTAUS CN 2020_0835). For example, “This Purchase Order is governed by the Master Agreement signed by both parties on October 29, 2019, UTAUS CN 2020_0835.”
   - Note – Your department may have additional documentation requirements for using gift cards, such as a requirement to complete a Participant Study Cash Advance form.
5) Tango Card is setup for direct deposit (ACH), which is the preferred payment method. Once the PO is approved, work with your fiscal administrator to submit a VP1 payment for the amount of the PO referencing the invoice number and account name (PI’s
account). Funding the Tango account can also be done via a wire transfer. P-Cards may not be used to fund a Tango account.

**Paying Participants with Tango Card Electronic Gift Cards**

1) You can either use the standard Tango Card email template, or you can customize emails that are sent to participants notifying them to claim their electronic gift card.

2) To pay participants with a Tango Card electronic gift card, you must collect each participant’s email address.

3) If you have setup an integration with Qualtrics, gift card emails can be automatically sent to participants upon completion of the survey.

4) Alternatively, you will place an order through the Reward Genius interface. See instructions for placing an order.

5) Tango Card will issue an email to each participant with a link to claim their gift card.
   - Note – You may want to make sure your participants know to expect an email from Tango Card / Rewards Genius so they do not miss the email.
   - If a participant does not receive the email or loses the email, those with appropriate permissions on the account can re-issue the email.

**Tango Reports for Account Reconciliation**

1) The Order History within your account allows users to view all issued rewards, search for rewards to specific individuals, or search for rewards issued within a date range.

2) Reports can be downloaded to allow for reconciliation according to your department’s requirements.

3) When you are signed into Rewards Genius, click on “Order History” in the navigation bar on the left side of the screen. See more about Order History.