Paying Research Participants Remotely through Tango
Revised June 24, 2021

University of Maryland’s preferred method for paying research participants remotely is through use of Tango Card, an online gift card service. The university also allows researchers to utilize online payment options as a means of paying participants remotely when this method is better suited to the needs of the study population or procedures. Please see the Guidelines for Participant Payments prior to starting a research study with paid participants.

Using Tango Card for Research Participant Compensation
UMD allows for the use of Tango Card to compensate research participants. 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 College or Unit, if the Unit is approved by the College, establishes their own Platform on Rewards Genius using their UMD 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. The gift card catalog can be amended and/or limited as necessary per funder restrictions.
- Rewards Genius can be integrated with Qualtrics to automatically distribute the gift card email upon survey completion.
- Purchasing cards may not be used to fund a Tango account.

Steps for Setting Up Tango Card/Rewards Genius:
https://help.rewardsgenius.com/en/articles/1858450-how-to-create-an-account-and-or-group

The Platform (Tango Card account) must be created by your College business office, unless your unit has received special approval from your College to create the Platform directly.

See Appendix A for the College operated set-up. See Appendix B for a unit operated set-up.

To establish a Tango Card Platform:
Go to Rewards Genius and click on Sign Up for Free to set up a new account
- Company Name: University of Maryland at College Park
- Work email address: use your UMD email address (@umd.edu)
- Indicate if you are interested in integration with Qualtrics
- Enter the following address from the UMD master agreement with Tango:
  2113R Chesapeake Building
  4300 Terrapin Trail
  College Park, MD 20742
- Tango will send you an email to confirm the account setup
- You will be assigned a UMD account number by Tango

At the time creating these guidelines the University of Maryland Tango representative is Tamira
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 name and email address.
3. If you have set up 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.
   a. 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.
   b. If a participant does not receive the email or loses the email, those with appropriate permissions on the account can verify the reward has not been spent and re-issue the email.

Documentation and 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 College or Unit’s requirements but at a minimum of every 60 days. See more about Reports.
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.

Requesting a Refund of Unspent Funds
To request a refund, email Tango Card’s funding team (funding@tangocard.com) with the amount to be returned including your Tango account information, the current PO number and the phone number associated with the account.

The refund will be returned via ACH payment to the University. Provide Gail Belshay, gbelshay@umd.edu, in the Office of Finance with the amount, KFS account number and object code and PO associated with the refund.
Appendix A: College operated Platform

The College owns the Platform. A “Group” is composed of the Unit or the Department. Within each Group is an “Account” or PI study. To learn about permissions for users please visit Rewards Genius: User Permissions

In this example:
Platform is the College/School: School of Public Health (SPH)
Group is the Unit: Behavioral and Community Health (BCH)
Account is the Study: “Living Pink” study
Appendix B: Unit operated Platform

The Unit owns the Platform. A “Group” is composed of the PI. Within each Group is an “Account” or PI study. To learn about permissions for users please visit Rewards Genius: User Permissions.

In this example:
Platforms the Department/Unit: Department of Psychology
    Group is the PI: Dr. Redcay(PI)
    Account is the study: “A Prospective Longitudinal Association…”

This guide was modeled after the University of Texas, Austin’s Tango Guide.
Tango FAQs

What is Tango?

- Tango is an online gift card system used for human subjects compensation/incentives. It allows researchers to pay participants (virtually) a set amount and participants to choose where they want to spend. The catalog of vendors the participants can choose from is here: [https://www.rewardsgenius.com/reward-catalog/](https://www.rewardsgenius.com/reward-catalog/).

How does the funding process for my Tango Account work?

- After your Tango account has been created, the College or Unit will request an invoice from Tango for your initial funding amount as stated on your MOU.
- Once the College or Unit receives the invoice from Tango we will create a purchase order (PO) for your specific Tango account under the KFS account.
- The College or Unit will then send the invoice that was created by Tango to Accounts Payable (AP).
- Once the account has been created it will take about two weeks to one month for the account to be funded.
- Once the invoice has been processed and paid by AP you will be able to start using your Tango Account.

How do I add more funds to my Tango Account?

- Requesting additional funds is similar to a draw request. To request more funding for your Tango account please work with your College or Unit. The following information at least ONE MONTH before the funds are needed in your account:
  - Include the following in the body of the email
    - Account Number/Study Name
    - Request Number (Draw Number)
    - Funding Amount

How long will it take for funds to hit my account after I send a fund request to the College or Unit?

- Since funding is processed via PO and Invoice, the speed at which funds hit the account are dependent on Accounts Payable. Currently it takes about one month for funds to be processed into your Tango account.
  - If funding has taken longer than one month to be processed into your account please contact your College or Unit.

How is the reconciliation process for Tango different from cash payments?

- The College or Unit will be responsible for initiating the reconciliation process.
  - Tango stores logs of all incentive payments within the system
    - Fund custodians (FCs) can access the logs of all incentive payments that they have sent.
  - The logs are used to calculate the total amount of money sent by your project account each month and will charge your KFS account for the total amount of payments sent out to your participants each month.
Departments are expected to continue to keep track of participant consent forms.

Can payments to participants be canceled and if so will my account be refunded?

- Once a reward is sent to a recipient, only certain rewards can be canceled and refunded. If you ever need to cancel a payment please contact your College or Unit.
  - Payments can only be canceled if they have not been redeemed.
  - The items eligible for cancellation are reward email links that have not yet been redeemed and pre-paid/cash-equivalent options such as Visa gift cards.
  - Click to read more about Tango’s cancellation policy for participants

Once the reward email has been sent to the participant, how long until they can use the funds? Is it an immediate payment?

- Once an order has been placed within the Tango platform it is emailed to the participants shortly thereafter. Some orders may show “Pending” before getting sent out and ‘Completed’; the “Pending” status does not last longer than 24 hours.

Do users have the option of choosing several gift cards at once? For example, if the recipient was sent a link for a $10 reward would they be able to choose a $5 Bath and Body Works gift card as well as a $5 Walmart gift card?

- Yes, when participants receive the link to their reward they will be able to choose multiple gift cards to redeem.

What type of gift cards are my participants able to choose from?

- Click here to see the gift card catalog

What is the Visa gift card link in the Tango platform?

Tango allows users to send cash equivalent gift cards such as Visa gift cards to participants. However, there are fees and rules associated with sending the Visa gift card link to participants.

- Once the participant receives their reward link and they want to send a physical Visa gift card to their home this will cost the participant $3.00.
- To use their virtual Visa gift cards participants must claim their Tango credit within 4 months of receiving it. After they redeem the Visa card, participants will have 7 months to use the funds before it expires.

Please specify on the MOU if you would like your participants to have access to select a Visa gift card as a reward option.

- When sending a Visa gift card link to participants please send the following instructions to them separately.
  - Click here to access Visa instructions for participants
How do I send Visa gift card payments to participants?

- When you go to place an order (send rewards to your participants) click on the 'Reward Link Preferred + Visa'. This allows participants to choose Visa gift cards as well other gift cards. See image below for example.

Can I send Visa Gift cards links to participants outside of the United States?

- No, participants have to be in the United States to be able to use the Visa gift cards.

How do I send payments that do not include Visa gift cards?

- When you go to place an order (send rewards to your participants) click on the ‘Reward Link Preferred’ or the 'Reward Link Preferred University of Maryland' this allows participants to choose other gift cards that do not include Visa gift cards. See image below for example.

My participants are outside of the United States. Can I still send rewards to them?

- If your participants are outside of the United States please let us know (specify on the MOU). We will inquire with our Tango representative to see if the country in question has a reward link.