

TANGOSM

USER MANUAL

Information and how-to tools for the University of North Carolina at Chapel Hill's Tango Card Rewards Program.



FINANCE AND OPERATIONS
Finance and Budget

Version 1.29.2024

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Tango Card Program Overview

About Tango Card

The Tango Card program is a cross departmental collaboration between Finance and Operations (F&O), the Office of Sponsored Programs (OSP), and the Office of Vice Chancellor for Research. This program has been developed to assist campus departments that conduct Sponsored and Non-sponsored research.

Tango Card, founded in 2009, offers regulated and non-regulated prepaid card products. Non-regulated cards are governed by the retail brand's terms and conditions. Regulated prepaid cards, such as Visa and Mastercard, are governed by banking laws.

Tango's primary business is electronic gift cards. Electronic reward links and electronic gift cards are 100% free to University departments and participants. The Rewards Genius software allows the University to easily order, send, and track the disbursements of electronic gift cards.

While not its primary business, Tango Card does offer a physical gift card option. Continue reading this guide for more information.

Gaining Access to the Tango Card System & Requesting Funds

Individuals who want to obtain access to the Tango Card System must complete the following:

1. **Complete Required Training** - Ensure individuals who want to access the Tango system have taken the required training and have proof of completion (training certificate).
2. **Complete & Submit the Tango Request (Setup and Access) Form** – This [form](#) includes options for requesting funding and adding user access. Email the completed form to the appropriate department based on the form's instructions.
3. **Submit Campus Voucher via ConnectCarolina** - After approval is received from the appropriate department, submit a campus voucher within 10 days of receiving an approval signature. Be sure to include the access form and other necessary documents as attachments.
4. **Complete the Reconciliation Form** – This [form](#) should be completed by the 15th of each month for the duration of time while issuing Tango rewards.
5. **Return Project Funds** – If funds remain in a Tango account and the projects ends. These funds can be returned by completing a final reconciliation using the Reconciliation form.

User Roles

User Role	Definition
UNC Sender Default	User can send rewards, view account balance, and run reports.
UNC Department Manager	User cannot send rewards, but can manage templates, see fund balance, and run reports.
Reporter	This role can only see account balances and run reports. This role is typically used by finance staff or business managers to assist with monthly reconciliations.
Custom	Roles can be customized based on departmental needs by Cash Management staff. Please email Tango@unc.edu for more information.

The Tango Portal Dashboard & Catalog of Rewards

When logging into the [Tango Portal](#) you will automatically be brought to the Send rewards page, which is also known as the Dashboard. Here you can navigate to various functions of the system and initiate the process of issuing rewards.

The screenshot shows the 'Send rewards' dashboard. On the left is a sidebar with a 'Parent Account' balance of \$1,400.00 and navigation links for 'Send rewards', 'Orders', 'Templates', 'Funding', 'Reports', and 'Team settings'. The main area has a search bar and filters for 'Country', 'Currency', 'Reward type', and 'Delivery', all set to 'All'. Below the filters is a 'Clear all' link and a 'Rewards (5)' section. The rewards are displayed as cards: 'Bulk Fee \$0 USD', 'Plastic Prepaid Visa - Bulk (not for portal orders) (Fee) \$5-\$1,000 USD (...)', 'Printed Reward Link + Plastic Redemption Options \$1-\$2,000 USD', 'Full UNC Chapel Hill Rewards \$0-\$2,000 USD', and 'Select UNC Chapel Hill Rewards \$0-\$2,000 USD'. Each card has a 'View redempt...' link. There are also buttons for 'Upload Bulk Order' and 'Cart' in the top right.

Understanding the Catalog of Rewards Dashboard

The University of North Carolina at Chapel Hill (UNCCH) has two catalogs for participants to choose from, Select UNC Chapel Hill Rewards, and Full UNC Chapel Hill Rewards. **Plastic Prepaid Visa-Bulk** is the preferred option when ordering physical gift cards.

Rewards	Available Reward Options
Bulk Fee	<p>This catalog item is for the internal use of the Tango Card administrators and should never be selected by users.</p> <p>Important: Do not send this link to participants.</p>
Plastic Prepaid Visa Gift Cards	<p>This catalog item is for the internal use purchasing a Batch/Bulk order of physical Visa cards to be mailed:</p> <ul style="list-style-type: none"> • Bulk = Physical cards mailed to an address at UNCCH. • Batch = Physical cards mailed directly to the participant and tracking is not available. <p>Important: Do not send this link to participants.</p>
Printed Reward Links + Plastic Redemption Options	<p>Participants can be issued a printed reward link. These rewards links are mailed directly to participants via United States Postal Service (USPS). The reward link will direct the participant to the Tango portal for redemption purposes.</p>
Full UNC Chapel Hill Rewards	<p>This is the full catalog of electronic rewards for all stores and non-profit organizations (if study subject wishes to donate their payment) who partner with Tango. This option also includes Mastercard Prepaid Cards.</p>
Select UNC Chapel Hill Rewards	<p>Rewards listed here can be issued as a Digital Reward Link. Participants can select to receive a physical Mastercard for an additional fee. The reward options are:</p> <ul style="list-style-type: none"> • Amazon.com • Target • Walmart • CVS Pharmacy • The Home Depot • Lowe's • Mastercard Prepaid Card

Tango Card Reward Types, Pricing & Details Table

Reward Type	Reward Delivery & Expiration	Reward Fees	Dashboard Option to Select
*Digital Reward Link	<p>Email: Reward Link is emailed to the recipient within one hour.</p> <p>Expiration: The reward link does not expire.</p>	<p>UNC Fees: None.</p> <p>Recipient Fees: No fees when selecting digital gift cards or digital prepaid. \$3.00 Fee if they opt for a physical prepaid card.</p>	<p>Select UNC Chapel Hill Rewards</p> <p>or</p> <p>Full UNC Chapel Hill Rewards</p>
Printed Digital Reward Link with Physical Gift Card Option	<p>Postal Mail: Reward link is mailed to the recipient's physical address. If the recipient selects the Physical Card option, it will arrive in 7-10 days via USPS.</p> <p>Expiration: The reward link does not expire.</p>	<p>UNC Fees: \$1.50 per card.</p> <p>Recipient Fee: No fees when selecting digital gift cards or digital prepaid. \$3.00 Fee (taken from balance) if they opt for physical prepaid card.</p>	<p>Printed Reward Links + Plastic Redemption Options</p>
*Bulk Physical Visa Cards	<p>Postal Mail: All physical cards are mailed directly to a <u>UNCCH physical address</u>. Cards are active and ready to use.</p> <p>Expiration: The card expires six months from date of issuance to UNCCH.</p>	<p>UNC Fees: \$2.00 per card and \$30.00 shipping fee.</p> <p>Recipient Fees: No fees to recipient.</p>	<p>Plastic Prepaid Visa - Bulk</p>
Batch Physical Visa Cards	<p>Postal Mail: Physical card(s) is mailed directly to the <u>recipient's physical address</u>. Cards are active and ready to use. Tracking is not available.</p> <p>Expiration: The card expires six months from date of issuance to UNCCH.</p>	<p>UNC Fees: \$2.00 per card, shipping included.</p> <p>Recipient Fees: No fees to recipient.</p>	

* This is one of two University preferred methods of issuing rewards.

Expiration Dates

None of our U.S. brand merchant gift cards expire. If your recipients redeem for a brand merchant gift card, that value will not expire. The only expiring products UNC-Chapel Hill offers are the following:

- **Mastercard Prepaid Card USD** - UNC Rewards digital reward includes the Mastercard Prepaid Card USD, which has two key timetables:
 1. If recipients redeem their UNC Rewards for the Mastercard, they will have four months to activate the value.
 2. Once they have activated their card, they will have seven months to use the value.
- **Physical Visa Rewards** - ShareFile ordering method includes the Physical Visa Reward, which expires six months from the order confirmation date.

Important: All recipient gift cards, or prepaid card selections are final. No returns or exchanges. Recipients who do not use their funds by the expiration date forfeit their money.

Requesting Tango Card Funds (Advances)

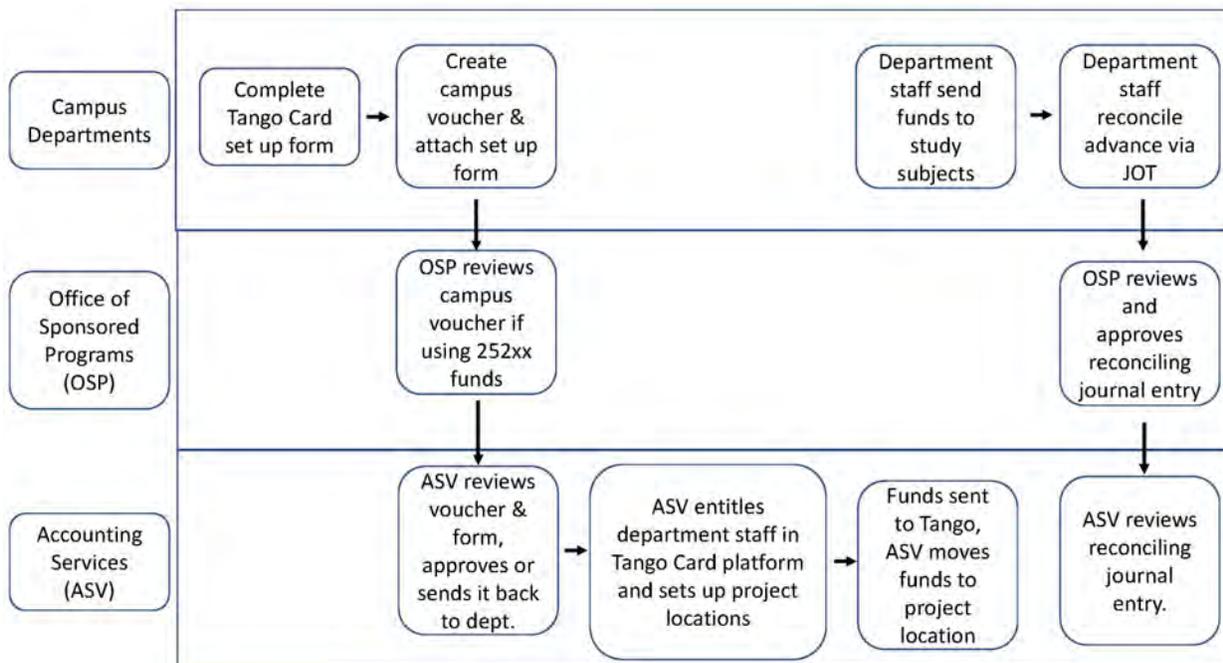
After submitting the Tango Card Set Up Form, you must request funding for a sponsored or non-sponsored project. This process can be done by a department accountant submitting a campus voucher via ConnectCarolina.

Tango Card Vouchers that have gone through departmental, Office of Sponsored Programs, Accounts Payable, and Accounting Services approval will be paid the following Friday. Funds will be available on the Tango Card platform within 1-3 business days after being paid. Finally, funds should be available on the Tango Card platform by Wednesday of the third week.

Example: If a campus voucher has been approved by Accounting Services on Thursday of the first week of the month, then the payment will be transmitted to Tango Card on the Friday of the second week.

Important: You should only request Tango Card Funds (Advances) for what you reasonably expect to disburse over the next 60 days.

Diagram of Approval Workflow



Calculating Funding

Project must consider the value of the plastic prepaid gift card and shipping/delivery fees as noted below. Calculate accordingly.

Type of Plastic Prepaid Gift Card	Where the card(s) are mailed to:	Fee per individual card:	Delivery fee (absorbed by project):
Physical Card (Bulk Delivery)	UNCCH Address	\$2.00	\$30.00
Physical Card (Batch Delivery)	Recipient(s)/Participant(s) Address	\$2.00	None

Example: A unit is calculating the purchase of four Plastic Prepaid Gift Cards for Bulk Delivery to their offices on the UNCCH campus. Below is an example of the appropriate calculation.

Description	Cost	Quantity	Amount
Value per individual card	\$25.00	x 4	= \$100.00
Fee per individual card	2.00	x 4	= 8.00
Delivery fees	\$30.00	x 1	= \$30.00

Total Funds Required = \$138.00

Important: Finance and Administration (F&A) Funds are not allowable for Tango Card Advances.

Entering Tango Card Campus Voucher Details

When entering a Campus Voucher for Tango Card Funds you must enter specific details as noted in this section. For step-by-step instruction on how to create a campus voucher, please review the [Creating Camus Voucher Student Guidebook](#).

Important: The Campus Voucher must be submitted within 10 days of the approval of the Tango Request Form for Setup & Access.

Entering Details on the Add a New Value Tab

On the Add a New Value tab enter the following information in the designated fields.

Fields on the Add a New Value Tab	Details to enter
Business Unit	Enter UNCCH Note: Only the UNCCH Business Unit is allowable to advance funds.
Voucher ID	This field is automatically populated with NEXT and should be left as is.
Voucher Style	Select Regular Voucher
Short Supplier Name	Enter Tango Card-001
Supplier ID	Enter 0000136430
Payment Method	Enter 1
Invoice Number	Enter today's date (YYYY-MM-DD) then the IRB Number. Example: 2023-06-23-12-3456 Note: You must have an IRB number to use the Tango Card Platform.
Invoice Date	Enter today's date.
Gross Invoice Amount	Enter the total amount you want made available as an advance. Be sure to include any fees for shipping or costs of physical cards, if applicable.
Freight Amount	Enter 0.00
Misc. Charge Amount	Enter 0.00
Estimated No. of Invoice Lines	The field is automatically populated with 1 and can be left as is.

Entering Details on the Invoice Information Tab

Some of the information entered on the Add a New Value tab transfers to the Invoice Information tab. User should enter the following information on the Invoice Information tab, in the designated required fields:

Fields on Invoice Information Tab	Details to enter
Distribute by	Choose Select Amount
Category	Enter UNC00004 Note: This will auto-populate the study subject payment chartfield.
Account (This is the Account Number field of the Chartfield String within the Distribution Lines section.)	Enter 559550 or 119220 Note: This must be changed from 523150 to 559550 for an OSP Request or 119220 for a Trust Request.

Adding Attachments

You must attach the following with the campus voucher request:

1. **Tango Card Form for Set Up & Access**
2. **User Entitlement Form**
3. **Training Completion Certificate(s)**

Note: All documents can be attached as a Supporting Document for the Document Type.

Important: Accounts Payable and Accounting Services will put your voucher on hold if you do not attach all fully completed forms.

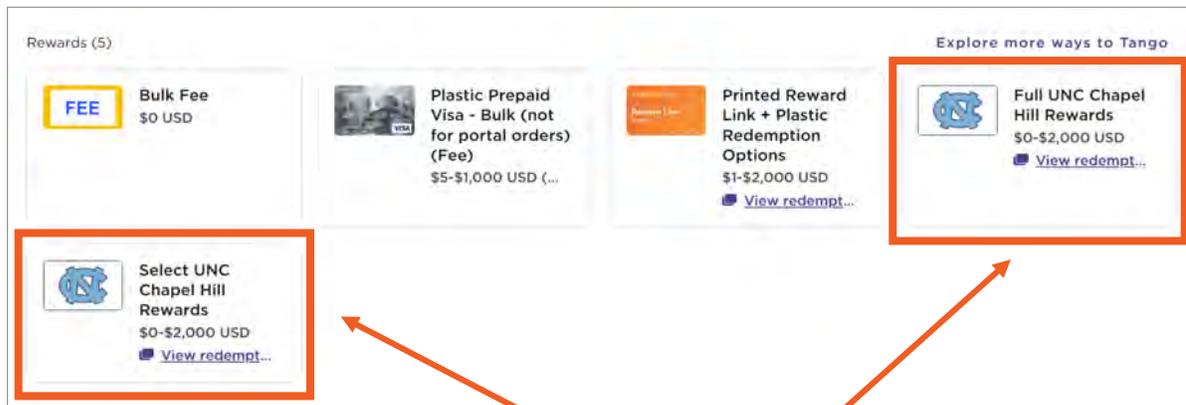
Issuing Digital Reward Links (Prepaid Digital Gift Cards)

Rewards can be issued from the Full UNC Chapel Rewards or Select UNC Chapel Rewards.

Important: Issuing Digital Reward Links, which include all digital gift card and prepaid card options, is the preferred method. To review the benefits of this option, view the [Tango Card Product Rewards, Pricing & Details Table](#).

Issuing Emailing Plastic Prepaid Card Emailing Digital Rewards

1. Log into the [Tango Portal](#).
2. Click the **Send rewards** option from the left menu if not already selected.
3. Select **Full UNC Chapel Rewards** or **Select UNC Chapel Rewards**.



Either of these Rewards options can be used to request digital reward links for prepaid digital gift cards.

4. Complete the required fields identified below.

Required Field	Details to enter...
Reward amount	Enter the amount of the reward the participant is to receive.
First name	Enter the First Name of the recipient or a generic term such as “Participant”. Note: This name will appear on reports and in the email sent to the participant.
Email address	Enter a valid email address belonging to the participant.
Participant Identifier/Code	For 1099 reporting purposes, enter the participant identifier into the required field. The identifier is determined by the project coordinators and needs to be used consistently for the duration of the project. It must link back to the study subject and their Social Security Number (SNN) so payments can be reported to Accounts Payable in accordance with Internal Revenue Service (IRS) regulations. Examples: <ul style="list-style-type: none"> • 5122583-Participant 1 (project id-participant identifier) • CARES-Participant 1 (project acronym-participant identifier) • BWK12345 (participant identifier)

5. **Optional Steps:**

- Add additional recipients by clicking the **+** button in the Recipients field.
- Click the **Edit/Change** button for the Email Template to modify/apply an existing email message or select a different template.

- Click the **Proceed to checkout** button.

- Review the cart to ensure accuracy and modify details, if necessary.
- Click the **Checkout** button.

Result: The Checkout screen will appear.

- Optional Step:** Add any additional information to the Order PO number or Order notes fields. This is optional and can be left blank.

10. Review the checkout total.

Important: Funds cannot be returned to the Tango Card or the University after checkout. This includes rewards sent inadvertently to the wrong recipient or the wrong amount. The project/study must absorb the loss.

11. Click the **Place Order** button.

Printing Digital Gift Card Certificates for Participants

Studies can print digital gift card certificates for their participants. As UNC-Chapel Hill is not the merchant of record and there is no Payment Card Industry (PCI) impact. However, the stipulation for printing the certificates are as follows:

1. The certificate must be emailed to the participant's email address. Do not email Tango Card reward links to any email other than the participant's email address.
2. The participant's Protected Health Information (PHI) cannot appear on the certificate.

What Participants/Recipients Receive

Prepaid Digital Mastercard Gift Card Reward Link Redemption

Participants will receive an email from noreply@tango.com that includes the redemption URL link and instructions on how to redeem the Prepaid Digital Mastercard Gift Card. The reward link never expires. However, once the link is redeemed, the card's expiration date will clearly be stated.

After participants click the reward link, they must acknowledge that the redemption is non-refundable. Then the participant will receive another email that includes the redemption link, a Digital Token, reminders related to expiration dates, and the option to receive a physical card for an additional fee.



REWARD LINK

Redemption
URL: <https://sandbox.r1.tango.com/r/1/FFrzmOvT7YW5XcYe1NN-aZe4rBYQe-zTzKYDCxiN2Q>

Expiration Date: Does Not Expire

To Redeem
[Read Terms & Conditions](#)

- Click the redemption link above to activate your Reward Link.
- Next, spend your reward balance.

If you don't want to spend your entire Reward Link value right away, save the email or URL and return via the redemption link.

If you have any problems or questions, please visit help.tango.com. To help us better assist you, we'll ask for your reference ID: RC230508-100033-72-3.

Reward Link® is a registered trademark of Tango Card.

THE FOLLOWING TERMS AND CONDITIONS APPLY TO REWARD LINK. Reward Link is managed by Tango Card, Inc. Reward Links expire on the date stated on the Reward and are valid within the USA only. Reward Links are issued to Reward Recipient without charge for loyalty, award, or promotional purposes, and are not sold to consumers. Your Reward Link balance may be redeemed for national gift cards and can be accessed at any time by clicking the Reward Link URL. Reward can only be redeemed by the Reward Recipient; Reward cannot be transferred, sold or exchanged. All redemptions are final. Reward Link balances from different programs cannot be combined. No fees apply to Reward Link. Please treat like cash. Please view our full terms of service at <http://www.rewardlink.com/reward-link-terms-of-service>. Use of this Reward constitutes acceptance of the Reward Link terms of service. Separate terms and conditions apply after Reward Link redemption based on merchant selected for redemption.



Your MasterCard® Prepaid Card USD is Here!

\$14.00



Redemption
Link: https://testurl/checkGCCreation/SWIFT/TAN01IP0088/SWFT_PCFQFdqjkl

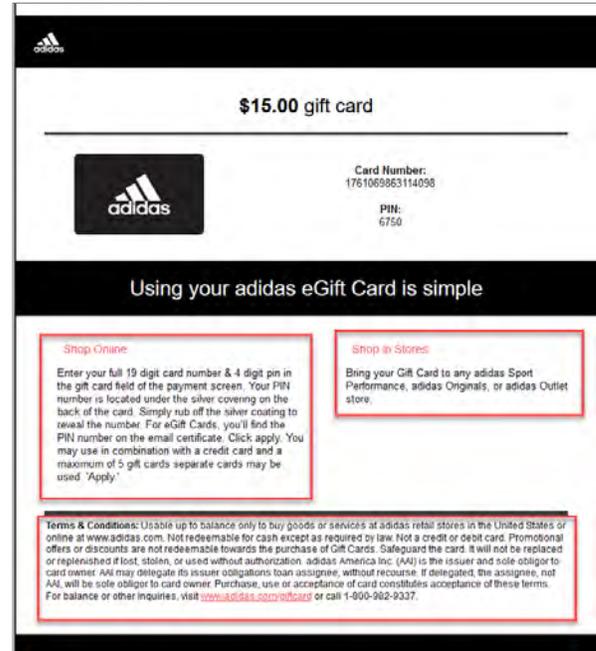
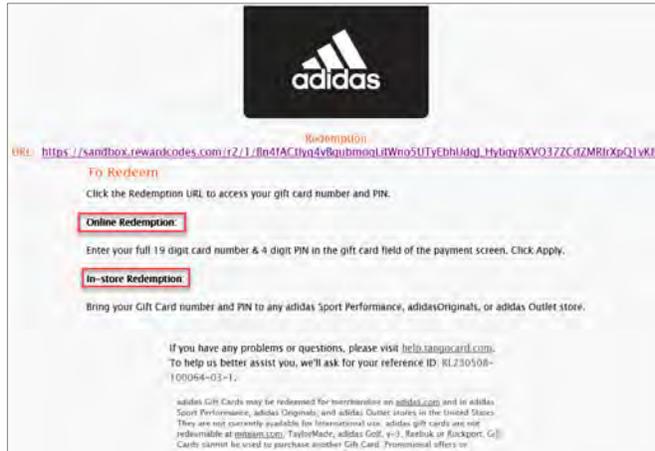
Digital Token: SWFT_PCFQFdqjkl

To Redeem

- Click the redemption link above to claim your reward.
- Select a Virtual Prepaid Mastercard, ready for immediate use online or over the phone anywhere Mastercard is accepted, or select a Physical Prepaid Mastercard to be mailed to you (shipping and handling fee of USD 3.00 applies).
- The redemption site will ask you to provide your name, address, email and mobile phone number to be associated with your Prepaid Mastercard.
- Agree to the Cardholder Agreement to complete the redemption.

Retail Digital Gift Card Reward Link Redemption

Participants will receive an email from noreply@tango.com that includes the redemption URL link and instructions on how to redeem the Retail Digital Gift Card. After participants click the reward link, the redemption will be confirmed and you will receive the digital Card Number and PIN for using the card to shop online, or in stores.

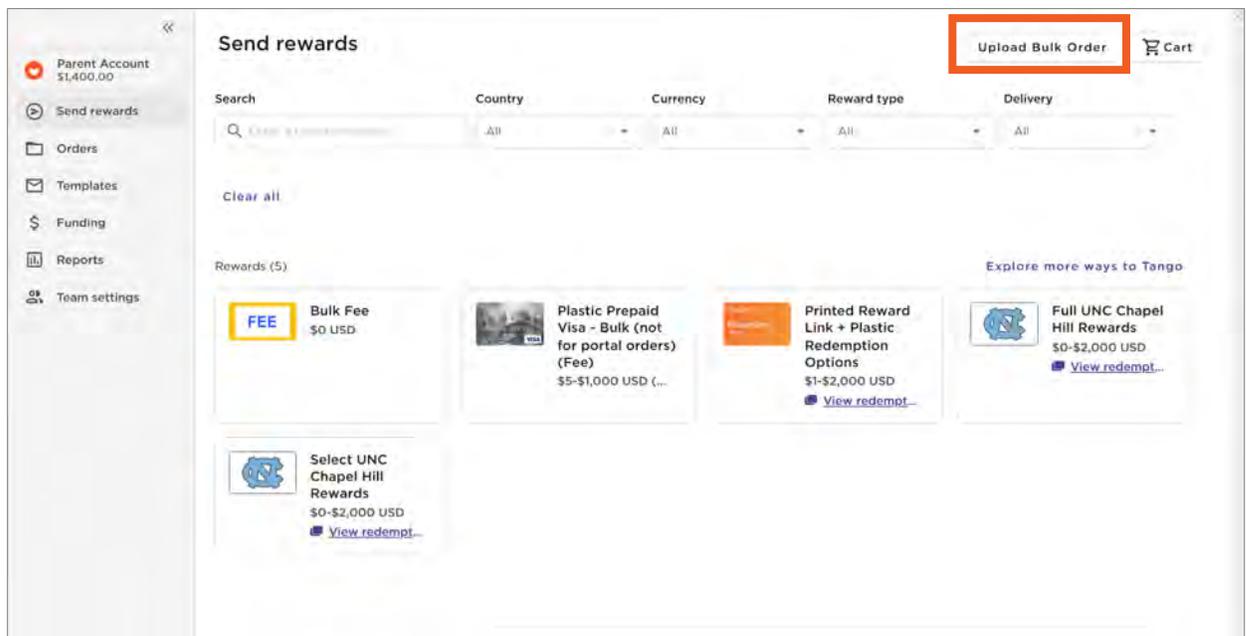


Requesting Printed Reward Links for Multiple Recipients (Sent Via Postal Mail)

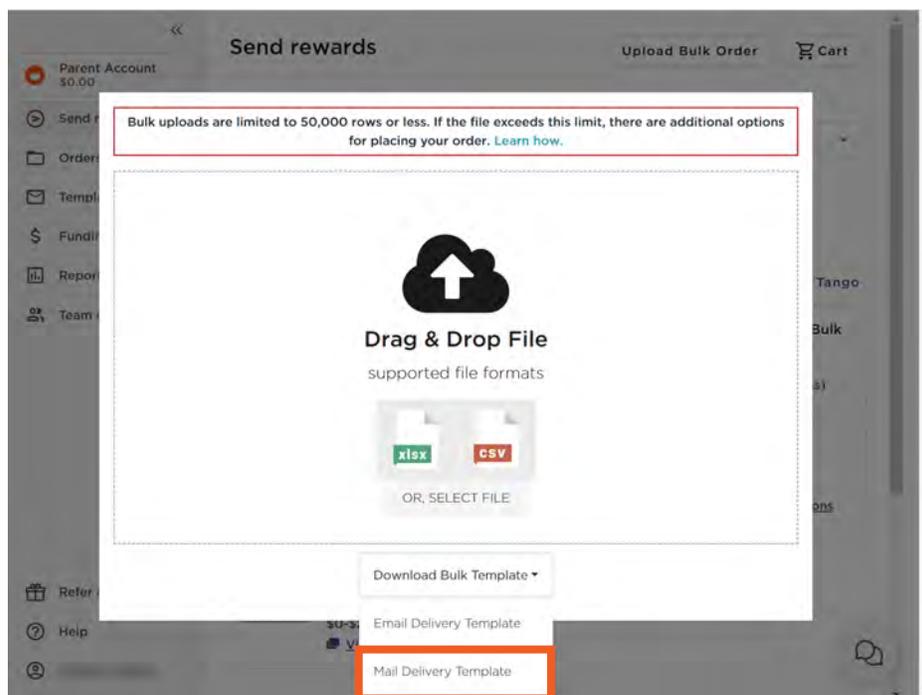
All Printed Reward Links are mailed directly to the recipient via USPS First Class Mail, with no tracking information, and cannot be printed on site.

Issuing Printed Reward Links

1. Login to the [Tango Portal](#).
2. Click the **Upload Bulk Order** at the top right corner of the screen.



3. Select **Mail Delivery Template** from the Download Bulk Template dropdown.



Result: An Excel file will be available for download.

4. Open the Excel file.
5. Complete the required fields based on the instructions and examples within the file.
6. **Optional Step:** If this is your first time issuing Printed Reward Links, feel free to email the completed order template for review to tango@unc.edu before uploading it back to the Tango Portal.
7. Save the completed field with a unique file name.
8. Click the **Upload Bulk Order** button, on the Send Rewards page to upload the saved file.

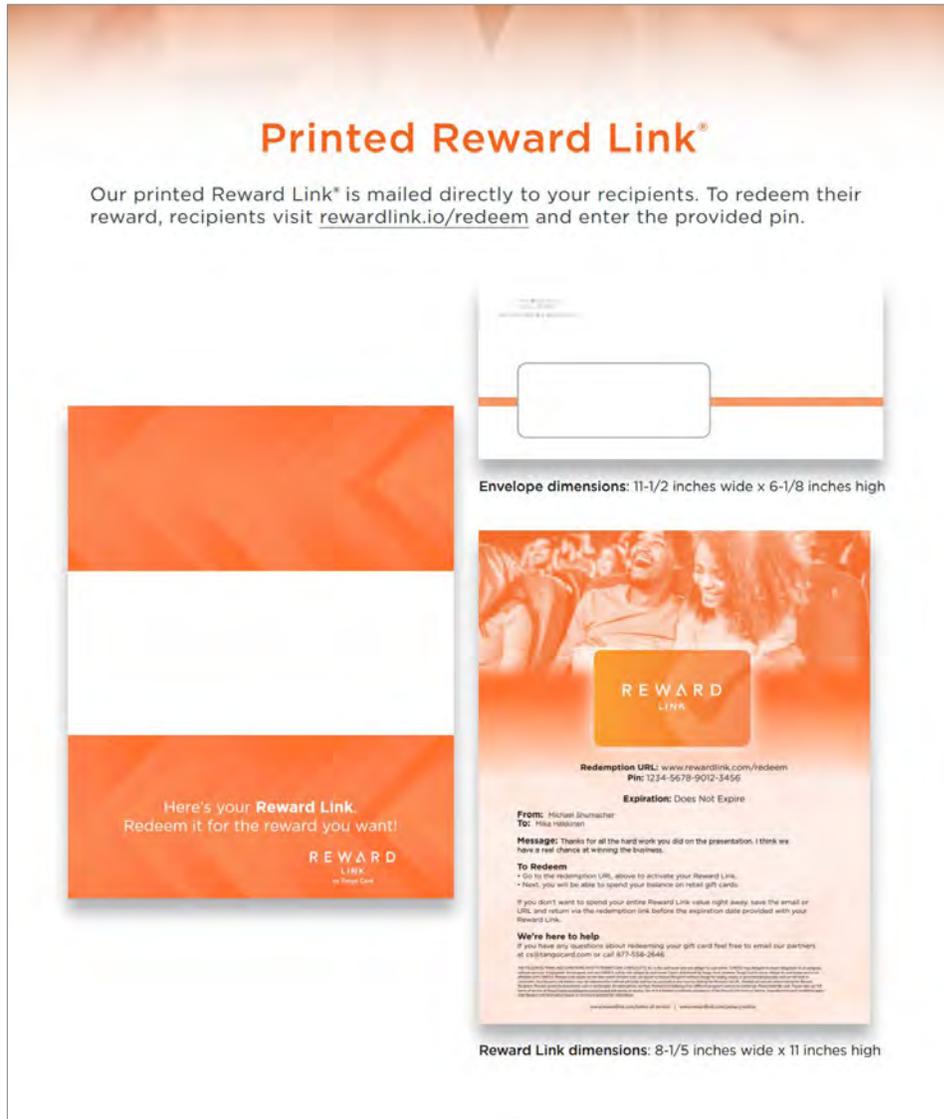
Result: You will receive an email confirmation letting you know the order was uploaded successfully and the order is added to your cart.

9. Click the **Cart** button.
10. Continue by following steps 6 to 11, from the [Issuing Digital Reward Links \(Prepaid Digital Gift Cards\)](#) chapter of this guidebook to checkout.

Result: The Tango Program Support Team will print the rewards and mail them directly to the recipients.

What Participants Receive

Printed Reward Links are mailed directly to recipients. The Printed Reward Link will arrive in a standard size envelope with an orange stripe on the bottom of the envelope within 7-10 business days, once issued. Enclosed will be the printed Redemption URL, PIN, and instructions on how to redeem the reward.



Requesting Plastic Visa Prepaid Gift Cards (Bulk & Batch)

There are two methods for ordering physical cards, Bulk or Batch. **The University recommends using the Physical Card Bulk Delivery option to have the cards delivered to a UNC-Chapel Hill address;** then mail or hand deliver the cards to participants. Each card will arrive in an individual envelope with the participant's name.

Important: The project Tango account must be fully funded before an order can be completed. Projects will absorb the costs of delivery fees. Be sure to account for any fees when calculating the funding of your account.

Information to Consider Prior to Placing a Physical Gift Card Order

Also, before placing a Bulk or Batch Order of Plastic Visa Prepaid Gift Cards here are some things to consider:

- The recipient's first and last name will appear on the card itself and on the mailing envelope.
- The reward amount is NOT automatically included on the envelope. If you use the Bulk method and do not include recipient-identifying information in the spreadsheet, we recommend including the reward value in the Recipient First Name or Recipient Last Name field.

Example: "Recipient First Name" = Program ABC and "Recipient Last Name" = \$10 Incentive, so that the envelope & card would read "**Program ABC \$10 Incentive**".

- Users can choose the best possible details to include in Recipient Name fields.

Examples:

- Recipient Name
 - Program Name + Reward Value
 - Program Name + Participant ID
- There is no fee for a second card being sent to precisely the exact same address if the card has a full balance. However, there is a \$10 fee deducted from the reward value if any of the value has been spent or if it is reissued to an address that is not precisely the exact same address.

How to Request Bulk or Batch Physical Plastic Gift Card

1. Send an email to tango@unc.edu stating that you are interested in placing a bulk or batch order to gain access to the ShareFile. The email should include the following information:
 - **Account** – Your Tango Account Number, Project ID Number, and Project Name
 - **Group** – Your Tango Group Number (Your Department ID and Department Name)
 - **Email** – The email address of staff who should have access to the ShareFile.

Result: The Tango Product Support Team will create a ShareFile folder allowing you to order physical Visa cards. This is the secure web-based portal we use to transmit files.

2. Open the ShareFile folder.

Note: When signing into the ShareFile directory, you will see “Bulk” and “Batch” templates. There is an “Orders In” folder for you to upload completed files, and a “Processed Files” folder where completed orders will be placed. There is also an “Example File” folder with an example of what your Order tab might look like in the Tango Portal, once complete.

3. Download the appropriate order template file based on the delivery method, Bulk or Batch.
4. Complete the order form being sure that every card order cell is completed. When completing the order form, please be sure every card order cell is completed:
 - Fill in Name columns for each recipient (Notify the Cash Management Office, if not using recipient names to discuss other options)
 - Enter the value for each card in the Card Amount cell(s). Do not include any fees that should be absorbed by the University.
 - UTID is the "Unique Tango ID" or the identifier for the reward you are sending. The UTID Key at the bottom of the template provides UTIDs. Note that the Bulk Delivery Method includes a space in Row 2 for the \$30 Bulk Fee, including the Bulk Fee UTID (U725205).
 - No need to write directly in Column G; it will auto-fill with the cell details that come after Column G.
 - Complete Column I with "BULK" or "BATCH" for every line depending on the order method template.
 - US Zip codes should only be five digits.
 - US Country Code is 840.
 - To copy details down a column, simply double-click a completed square in the lower right-hand corner to fill.

Important: For bulk orders, include the Participant Identifier/Code in the "Customer Notes" column.

5. Once the order sheet is complete, save the file.

Important: When saving your file use the following naming configuration for the file:

- Company Name – Date Submitted (Example: UNCCH 10 22 13)

6. Upload the file to the "Orders In" folder in the ShareFile.

Result: You will receive an email confirmation message letting you know the order has been received by the end of the following business day. No further steps are required of users. Tango will handle the process of printing and mailing out the physical cards. Once the process is complete the account balance will change accordingly, and you will receive a second email notification once the order has shipped.

What Participants Receive

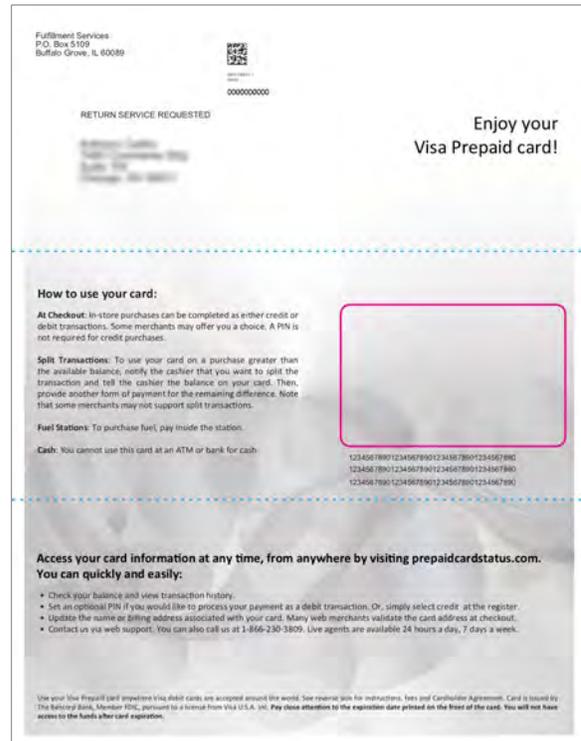
Participants will receive their physical plastic gift card depending on the type of order, with instructions on how to use their card, and additional information.

For Bulk Orders

Participants will receive physical cards directly from the department or the card is mailed to the recipient by the department.

For Bulk Orders

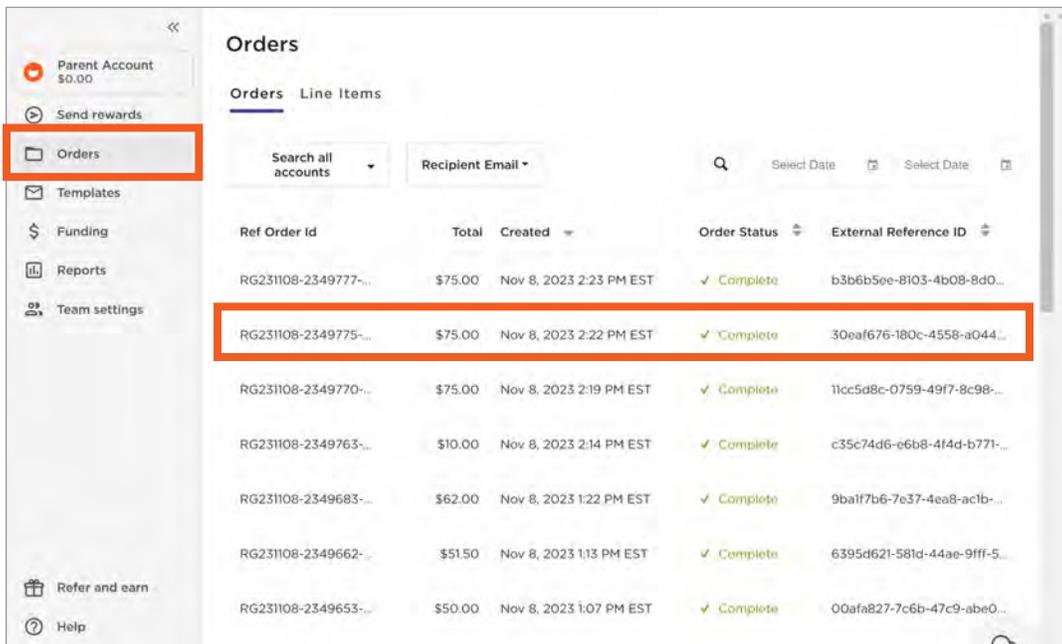
Participants will receive physical cards in the mail. They also should be informed that it will arrive in plain unmarked white envelopes within 7-10 business days once ordered for each individual card issued. This means that participants may receive more than one envelope; one for each card issued and mailed to the participant's address.



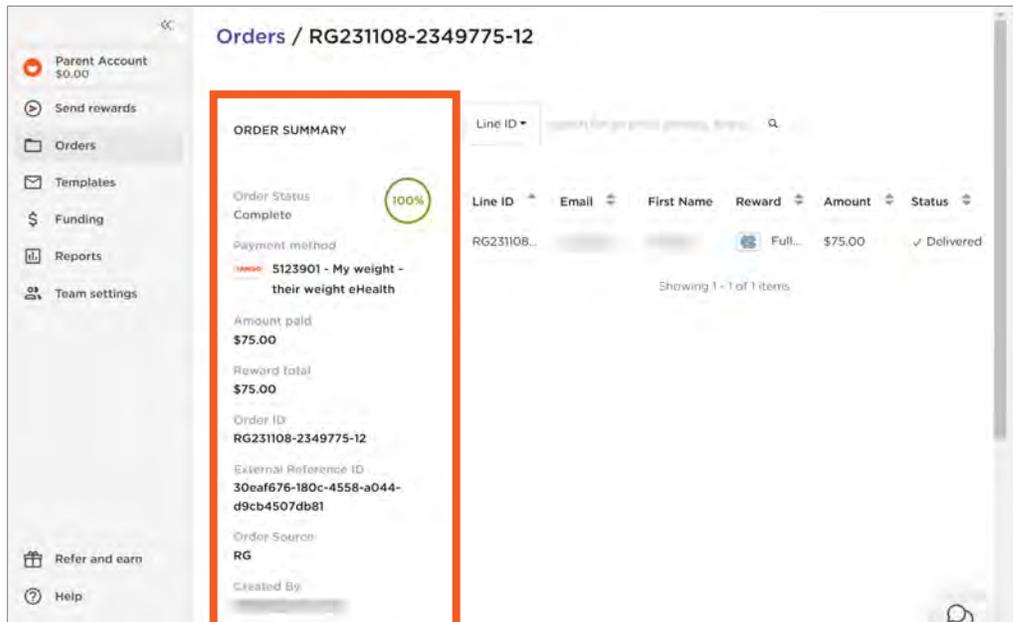
Viewing Order Summary Details & History

Viewing Order Summary & Line Item Details

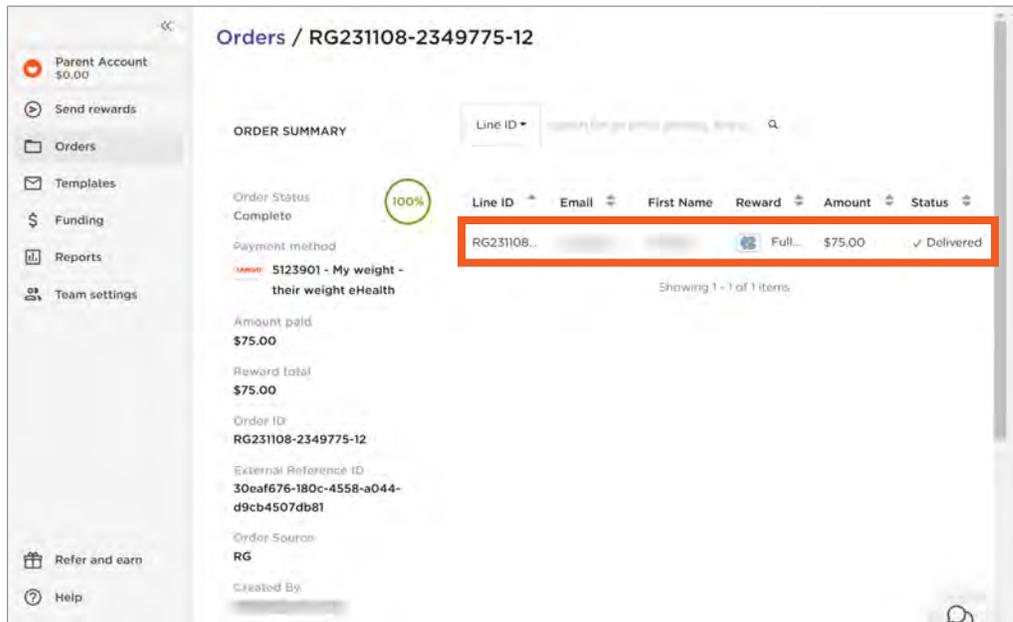
1. Log in to [Tango Portal](#).
2. Click on **Orders** from the left panel.
3. Use the dropdown to designate filters for your search.
4. In the search field, enter details for your search based on the dropdown option selected.
5. Click the search icon.
6. Scroll the results to find the order.
7. Click anywhere on the row of the order you want to view.
8. Click on the order you want to view.



Result: The Order Summary will appear.



8. Click one of the Line Items.



Result: The Line Item Details will appear.

Viewing the History of Digital & Printed Reward Links

Follow these steps to determine if the reward link has been redeemed and which reward was chosen during redemption.

1. Log in to [Tango Portal](#).
2. Click on **Orders** from the left panel.
3. Use the dropdown to designate filters for your search.
4. In the search field, enter details for your search based on the dropdown option selected.
5. Click the search icon.
6. Scroll the results to find the order and click anywhere on the row to view the Order Summary and its details.
7. Click on the line item you want to view.
8. Click the **History** tab.

Determining if a Reward has Been Sent, Delivered, Redeemed, etc.

By viewing the Reward Link redemption History, you can tell if the reward has been Sent, Processed, or Delivered to your recipient. If after a few minutes it shows Not Delivered or Bounced, try resending the digital reward. To learn more about resending rewards view the chapter, Resending Rewards.

For Plastic Prepaid Visa Cards

Prepaid Physical Visa Cards are the only cards that provide tracking information. No redemption or balance information is available for cards issued.

For Digital Reward Links (including printed)

When viewing the Rewards Detail tab, the Rewards Status will indicate one of the following and will change based on the status of the reward:

Reward Status	Description
Processed	The Reward has been received successfully.
Sent	The Reward has been sent but has not been delivered.
Delivered	The Reward has been delivered and is available for the recipient to open and redeem the Reward.
Open	The recipient has opened the Reward Link but has not clicked the redemption link.
Redeemed	The Reward has been redeemed and is ready for use by the recipient.

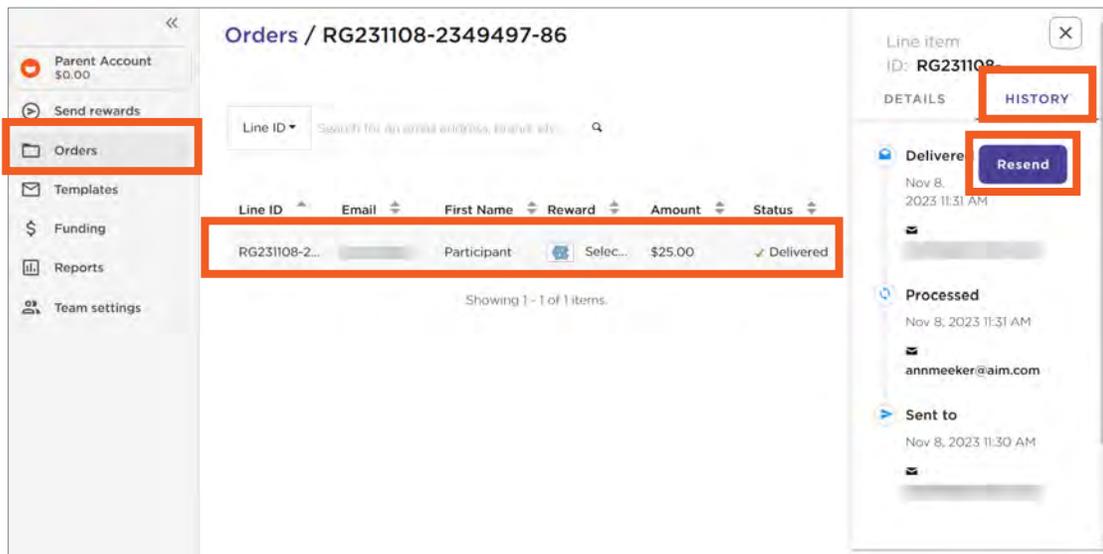
Resending & Reissuing Rewards

Resending Digital Reward Emails from the Order View

The original reward email can be resent, if the wrong email has been provided, the original email cannot be delivered, or the recipient has accidentally deleted the original email.

1. Log in to [Tango Portal](#).
2. Click on **Orders** from the left panel.
3. Use the dropdown to designate filters for your search.
4. In the search field, enter details for your search based on the dropdown option selected.
5. Click the search icon.
6. Scroll the results to find the order and click anywhere on the row to view the Order Summary and its details.
7. Click on the line item you want to resend.
8. Click the **History** tab.
9. Click the **Resend** button.

Note: The original recipient email is populated by default. Users with View-only permissions for Order history can only resend the reward to the original email address of the recipient, whereas users with Manage permissions for Order history can edit the email address before resending the reward email.



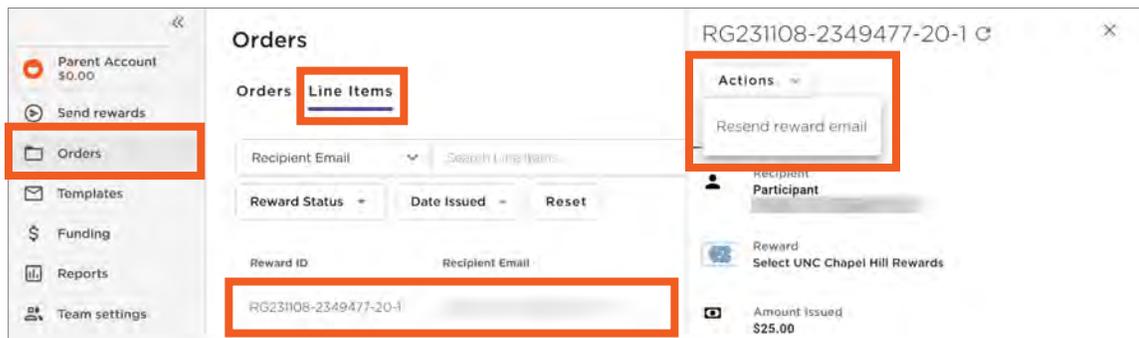
Resending Digital Reward Emails from Line Items Tab

The original reward email may be resent if the wrong email was provided, the original email couldn't be delivered, or the recipient accidentally deleted the original email.

1. Log in to [Tango Portal](#).
2. Navigate to **Orders** on the left menu.
3. Click the **Line items** tab.
4. Click on the line item you want to resend.
5. **Optional Step:** Enter an updated email for the original recipient, if needed.

Note: The original recipient email is populated by default.

6. Click **Resend reward email**.



Reissuing Lost or Stolen Physical Prepaid Cards

Lost or stolen physical prepaid cards with their full value can be reissued once, for no fee, to precisely the exact same mailing address. If the card has been used or is not being shipped to the precise and exact same address, a \$10 reissuing fee will be deducted from the reward card value. Users should email tango@unc.edu with further questions and instructions regarding lost or stolen physical prepaid cards.

Running the Tango Transaction Report

The Tango Transaction Report should accompany all reconciliations. Follow these steps to run a Tango Transaction Report:

1. Log in to the [Tango Portal](#).
2. Click **Reports** from the left menu.
3. Select **Organization, Group, or Account**.
4. Select the appropriate subcategory item, if applicable.
5. In the From and To fields, enter the appropriate date range.

Note: If this report is being run for monthly reconciling purposes. The date range should be from the 1st to the last day of the previous month. For example, October 1 -31 payments are to be reconciled on or before November 15.

6. In the Report Name field, enter a name for the report.

Important: Be sure to not to include any Protected Health Information (PHI) when naming the report.

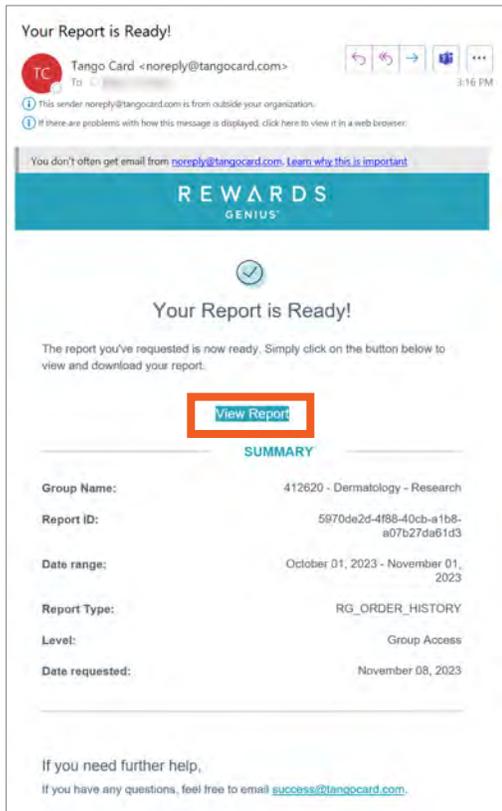
7. Click the **Generate Report** button.

The screenshot displays the 'Reports' section of the Tango Portal. The left sidebar contains a menu with 'Reports' highlighted. The main content area is titled 'Order-History Report' and includes a description: 'An order-history report provides detailed data about rewards sent.' Below this, there are three radio buttons for selection: 'Organization', 'Group' (which is selected), and 'Account'. A 'Choose a group' section features a search bar with the text '412620 - Dermatology - Research'. The 'From' and 'To' date fields are set to '2023-10-01' and '2023-10-31' respectively. The 'Report Name' field contains 'Oct-2023 Transaction Report'. A 'Generate Report' button is located at the bottom of the form.

Result: You will receive an email from noreply@tngocard.com entitled *Your Report is Ready!* when the report is ready for review.

8. From your email inbox, open the received email.

9. Click the **View Report** button.



Result: You will be redirected to the Tango Portal, Generated reports tab.

10. Click the **Download** button for the entitled report from step 6.



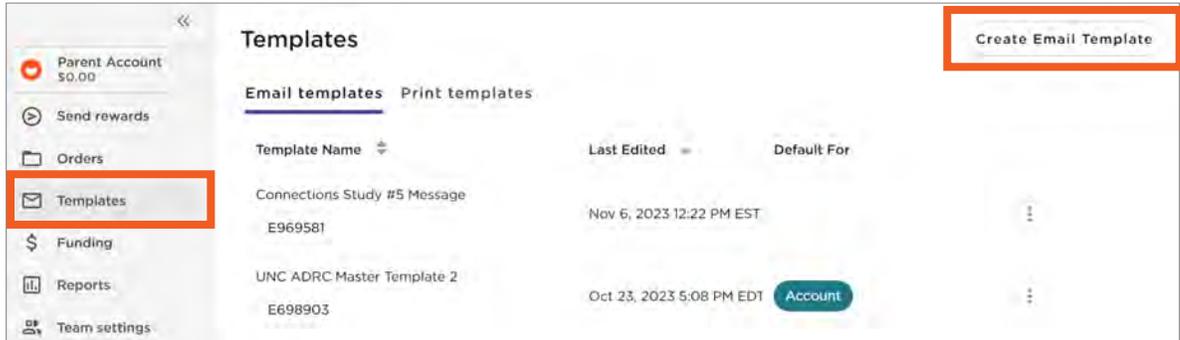
11. Open downloaded the report.

Important: If you are saving the report to be uploaded for monthly reconciliation, be sure to remove all PHI prior to saving the report.

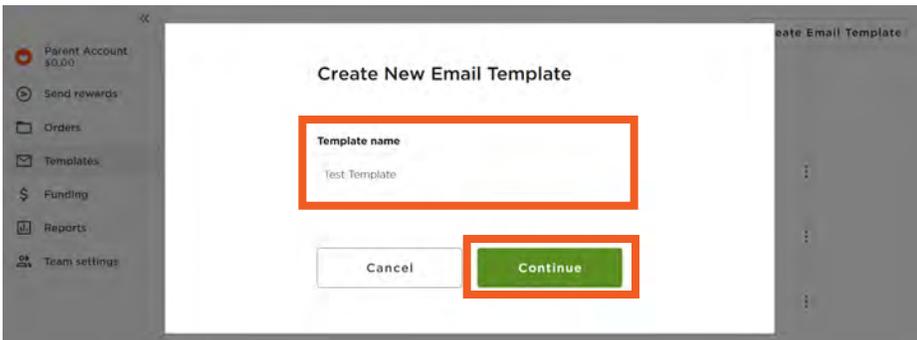
Creating Custom Email Templates

Follow these steps to create custom email templates specific to your study:

1. Log in to the [Tango Portal](#).
2. Click **Templates** from the left menu.
3. Click the **Create Email Template** button.



4. Enter a name for the new email template.
5. Click the **Continue** button.



6. Enter the following information in the appropriate fields.

Fields on Details Step	Guidance on what to enter
Sender's Name/From Name	Enter the name that should appear as the sender of the email.
Subject	Enter what should appear in the Subject Line of the email.
Add header image	You can upload an image to appear in the header portion of the email. Images should be 650px x150 px.
Image alt text	If a header image used, you must enter details that describe what the header image looks like or what relevance the image has to the content of the email.
Accent color	You have the option to change the accent color.
Message Body	Enter the details you want to include in the body of the message.
Closing	Enter any closing remarks.
Recipient Support Message	Select this option if you want Tango Support information to appear in the message.

Important: Do not include any PHI in the communication template. Also, do not include any information that may put your own or another individual's Personal Identifiable Information (PII), including digital signatures.

Notes:

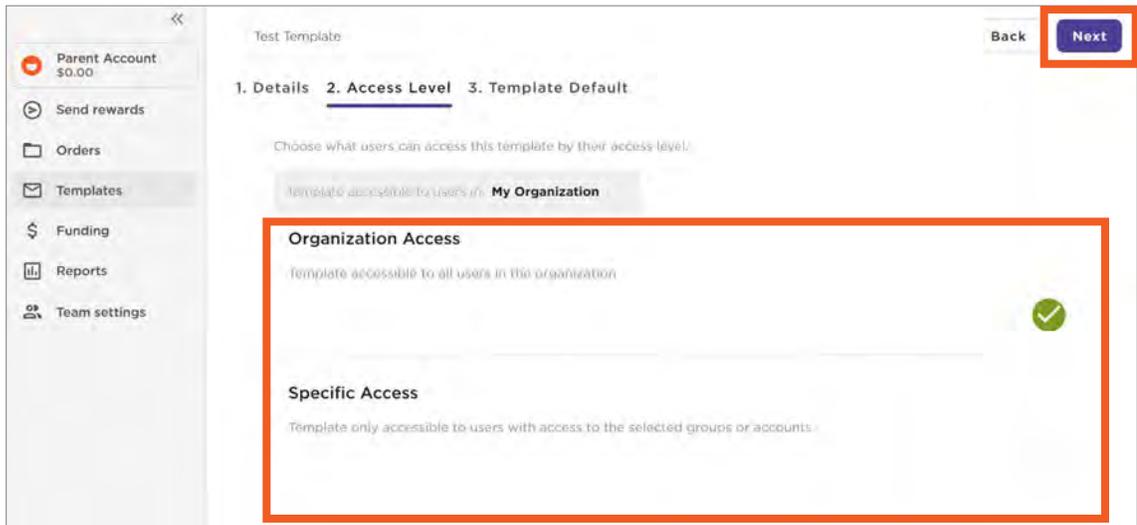
- Please review the [University Branding and Identity Guidelines](#) or the [UNC Research Branding](#) websites for logos, color palettes, and more.
- You can Insert dynamic tags in the Subject, Message body, and Closing fields to personalize the communication without needing to create multiple templates with the same message to be sent to multiple recipients.

Result: As you make changes to the template, the preview of the message will update as well.

7. Click the **Next** button.



8. Select whether the template should be accessible by the organization, specific departments or specific projects.
9. Click the **Next** button.



10. Select the **Platform, Group, or Account** that will use the email template.
11. Select any necessary subcategories, if applicable.

12. Click the **Save** button.

Parent Account \$0.00

Send rewards

Orders

Templates

Funding

Reports

Team settings

Test Template

Back Save

1. Details 2. Access Level 3. Template Default

Set this email template as the default for a platform, group, or account:
When ordering, the default template will be used unless otherwise specified.

None Platform Group Account

Choose a group & an account

Group name: 412620 - Dermatology - Research

Account name: Study of Sun on Vampire Dermis

Result: The template will be added to your template list.

Note: To access the template list, select “Templates” from the left-side panel. It is also considered best practice to use the UNC Master Template.

Important: Only create templates for your project or department. Templates are saved at the Organizational level; giving all users the ability to edit or delete templates created by others. Therefore, it is important not to edit or delete any template(s) that you did not create.

Accounting Responsibilities

Monthly Reconciliation Process

All Tango Cards must be reconciled by the 15th of the month following funding. Once funds are issued, the electronic reward of physical prepaid card must be expensed (reconciled) by the study. For example, if \$100.00 is loaded onto gift cards and/or prepaid cards and distributed to study subjects in June; an Intraunit Other Campus Journal (JOT) must be entered to reconcile \$100 to the appropriate expense account by July 15th.

The Office of Sponsored Programs or Accounting Services (if advancing from or expensing to other than contract and grant funds) will review, approve, or deny the journal entry.

Steps to Monthly Reconcile Tango Rewards

1. Obtain a Tango Card Transaction Report from the Tango platform.

Notes: For instructions on how to run a Tango Reports review the [Running the Tango Transaction Report](#) chapter of this guide.

Important: If you do not have Finance Admin WorkCenter access in ConnectCarolina to create journals entries, the report should be given to your departmental accountant or finance support staff to complete the reconciliation process.

2. Review the Tango Card Transaction Report to ensure that it does not contain any PHI.
3. Reconcile the previous month's load by the 15th of the next month. For example, July payments are to be reconciled on or before August 15.

Important: Be sure to account for all shipping and card fees that are the responsibility of the UNCCH Department.

4. Create an Intraunit - Other Campus Journal entry in the ConnectCarolina system.

Note: For instructions on how to create journal entries, review the [Campus Journals Guidebook](#).

5. Attach the following documentation to the reconciliation journal within ConnectCarolina:
 - Tango Card Transaction Report.
 - Prepaid Card Reconciliation Form (For OSP only).
 - Copy of the initial journal entry placing the prepaid card advance on the original chart field string.

Result: The reconciliation journal will credit the distributed funds from the advance account (559550 or 119220) and debit the amount to the appropriate study subject expense account. The journal lines will look like this:

Account	Fund	Source	Account	Department	Project ID	Business Unit	Activity
\$100	25200	49000	523150	123456	5123456	CHOSR	1
(\$100)	25200	49000	559550	123456	5123456	CHOSR	1

Additional Accounting Considerations

Additional Accounting Considerations	Guidance
Accounting for Longitudinal Studies and Project ID Number Changes for Existing Projects	When accounting for longitudinal studies that have changing project IDs, projects must return funds allocated to the expiring project id and request funding for the new project id.
Annual Deadlines	Tango card processing deadlines, if any, are determined on an annual basis. Review the Tango Card website for the most current information.
Escheatment and Expired Cards	Participants who do not use their funds by the expiration date forfeit their money.
Final Reconciliation (Returning Advanced Project Funds)	When the project ends and there are funds to be returned to the project, complete a Final Reconciliation using the Reconciliation Form and send it to tango@unc.edu .

Appendix

Forms

- [Tango Request Form for Setup and Access](#)
- [Reconciliation Form](#)

UNCCH Departmental Links & Email Addresses

UNCCH Tango Card Program

Cash Management and Financial Reporting are responsible for managing the Tango Card program. They ensure the timely coordination of payments between the various stakeholders. Please visit [the Tango Card program website](#) or email tango@unc.edu for more information.

Office of Sponsored Programs

The [Office of Sponsored Programs](#) reviews funding requests to ensure they align with the requirements of the study and available funding requirements. Approved requests are returned to Cash Management to prepare the journal entry request. Please visit their website for additional information or email sponsoredprograms@unc.edu for more information.

Tango Card Resources & Support

Tango Card Help Pages for UNC-Chapel Hill Employees

- [Tango Help Page](#)
- [Creating an email template](#)
- [Sending rewards bulk](#)
- [Sending rewards with standard mode \(individual rewards or just a handful\)](#)
- [Generating Order History reports](#)
- [Tango Card Website for Creating Dynamic Tags](#)

Tango Card Participant/Recipient Support

- Chatbot & Help Website: <https://help.tangocard.com/s/>
- Phone: 1-877-558-2646 from 6:00 am to 5:00 pm Pacific Time Mon-Fri.

ISO Approval Documentation & Confirmation

- [TANGO CARD APPROVAL TO PRINT CERTIFICATES v. 3.pdf](#)
- [TANGO CARD APPROVAL TO PRINT CERTIFICATES.pdf](#)

Glossary of Terms

Batch Physical Gift Cards

Physical gift cards or prepaid cards delivered directly to recipients.

Brand Merchant Gift Cards

Non-regulated gift cards from retail stores. This does not include Visa and Mastercard.

Bulk Physical Gift Cards

Physical gift cards or prepaid cards are delivered to a single address UNC-Chapel Hill address.

Catalog

Gift card and prepaid card selection portal. UNC-Chapel Hill has two catalogs of cards for participants to choose from. Refer to the matrix for pricing.

Digital Gift Card

An electronic brand name cards such as Starbucks, Amazon, Target, Walmart, etc., found in the platform's catalog.

Digital Prepaid Card

An electronic regulated Mastercard card.

Digital Reward Link

An electronic Tango-branded email link that gives the recipient the opportunity to choose from a variety of gift cards and prepaid cards from a catalog.

Participant Identifier

This is the project ID, hyphen, and an identifier/code the team has created for each participant. If the project does not have a project ID, use something else. It should maintain the participant's anonymity.

Example: 5122583-Participant 1

Example: CARES-Participant 1

Physical Reward Link

A paper reward link that is mailed to participants. See the matrix for pricing.

Physical Gift Card

A physical plastic brand name card such as Starbucks, Amazon, Target, Walmart, etc., found in the Tango Card platform catalog. See the matrix for pricing.

Physical Prepaid Card

A physical plastic regulated Mastercard or Visa card offered by Tango card. See the matrix for pricing.

Tango Card

A physical plastic regulated Mastercard or Visa card offered by Tango card.

Questions and Answers

What browser should I use to access Reward Genius?

Google Chrome is the best browser to use when navigating Reward Genius.

How often will I be locked out of the Tango Card System?

Accounting Services will deactivate inactive users every 60 days. Request reactivation by emailing tango@unc.edu.

How many days does my participant have before their reward link expires?

A reward link never expires. However, the expiration date for a redeemed card is listed in the email communication received by the participant **if such a date exists**. Typically, cards do not expire. The prepaid Mastercard and Visa card by law have expiration dates. See the product matrix for more additional information.

Can I resend a reward, change an email address, and is there a fee?

There is no fee for resending a reward link. Please confirm you have access permission to update an email address link.

Can staff print the participant's certificate using a UNC-Chapel Hill computer?

Yes, with certain stipulations. 1) The certificate must be emailed to the participant's email address. Do not email Tango Card reward links to any email other than the participant's email address. 2) The participant's PHI cannot appear on the certificate.

What happens if a participant never opens their reward link?

Reward links never expire. You can always resend the reward link to the participant.

When do e-gift cards and physical gift cards expire?

Physical gift cards expire within 6 months. E-gift card expiration dates are listed in the redemption email if an expiration date exists.

How quickly will participants have access to their e-gift cards?

Participants will have access to their e-gifts within minutes of receiving the reward link and redeeming their e-gift card.

Are there tutorials or videos available for participants?

Participants can visit <https://help.tangocard.com/s/> for tutorials and user information.

What should a research coordinator do if they hear from a participant that they did not receive their card?

Resend the reward link to the participant, check the status in the Order history, and always send physical cards with a tracking. Learn more by reading the section in this manual about physical cards.

What fees are passed from UNC-Chapel Hill to the project ID?

Card load fees and fees for physical cards, including shipping expenses, are passed on to the project.

Does the IRB consent form need include language about Tango Card?

The IRB consent form has been updated with general language to include Tango Card and other payment options. Contact the IRB for additional information.

How long from the time of a request to having funds added to Tango?

See the accounting section of this document for more information.

Can we have a joint guidance document created between the Office of Sponsored Projects, Cash Management, and the Office of Human Resources and Equal Opportunity and Compliance that helps us understand when and how we can use participant emails and other Protected Health Information (PHI) within Tango (unencrypted with consent vs encrypted) and how IRBs may need to be modified to utilize this system?

[The UNC-Chapel Hill Institutional Privacy Office](#) and UNC Chapel Hill's [IRB and the Office of Human Research Ethics](#) are the subject matter experts. Contact them with this request.

What accounting is performed to ensure real time reconciliation with grant awards?

The administering department is responsible for timely reconciliation of gift cards. Gift cards that have been funded should be reconciled to the appropriate project and expense account code by the 15th of the following month.

How does 1099 issuance work?

Tango does not track subject payments for 1099 reporting purposes. It is the responsibility of the administering department to work with UNC-Chapel Hill Accounts Payable to ensure study subject payments are reported appropriately.

Can we use Tango Card to reimburse non-taxable expenses?

Yes, Tango Card may be used to reimburse non-taxable expenses for participants. Please ensure that these expenses are reconciled to the appropriate expense account code and adequate documentation is saved to support the expense.

What audits are done to make sure expenses are appropriate?

It is the responsibility of the administering department to ensure Tango Card expenses are appropriate and allowable on the funding source to which they are charged. Tango Card advances, expenses, and reconciliations utilizing sponsored projects require the Office of Sponsored Projects review and approval. All advances and reconciliations are reviewed by UNC Accounting Services and may be audited by Internal Controls and Internal Audit staff.

Will types/options for rewards within a specific project be allowed to differ across participants? Or will we need to standardize across a project the way rewards are divided out?

They can differ across participants. Learn more by reading this manual.

How should funds be added to accounts? Can we allocate the entire reward?

Funds should be added to accounts via the voucher system.

Can Tango Cards be issued for other needs? For example: Gifts to employees.

Tango Card is only for research purposes. All requests must be associated with an Institutional Review Board (IRB). Employee gifts are taxable, and Tango Card cannot be used for them. Contact Accounts Payable about employee gifts.

How does Tango Card address the issue of compensation vs. reimbursement?

It is the responsibility of the administering department to ensure that study subject compensation and study subject reimbursement are accurately recorded upon reconciliation using the appropriate expense accounts codes.

Can departments enter social security numbers into Tango Card for 1099 reporting requirements?

No, do not enter social security numbers into Tango Card. Tango Card does have an Application Program Interface (API) that can integrate with other university systems. If we receive significant interest, we can investigate the implementation process.

Are studies required to use the Tango Card system?

No, studies are not required to use the Tango Card system. Departments can use any University-approved method to pay participants.

What guardrails are in place to ensure funds are not overdrawn from grant accounts?

The project account cannot be overdrawn in the Tango Card system. Tango card provides the account balance and can send an automated email when the account reaches a certain amount.

How are funds returned to the project if they are not entirely used by the end of the study?

Funds are returned to the project by completing the final reconciliation form.

Is there a way for participants, with the same email address, to accumulate their funds for use? If not, is this something a Tango Card can investigate?

Tango Card does not currently do not offer this option. However, they are going to share this request with their development team.

Does Tango Card use participant emails for solicitation?

No, Tango does not use participant emails for solicitation. Tango card stores email addresses for delivery purposes only.

What happens if a participant forgets to use their gift card before the expiration date?

The participant has forfeited their money.

How do I track a physical card delivery?

For bulk orders, to one specific location, the United States Postal Service (USPS) provides standard 3-day shipping with tracking. Batch orders to provide tracking. We recommend using the bulk order option,

have the cards delivered to a UNC-Chapel Hill address, and the department mail the physical cards to participants with tracking.

Can UNC-Chapel Hill cover the costs of physical cards for its participants?

- If the department uses the batch or bulk card option, the costs will be covered by the UNC-Chapel Hill study department.
- If the participant requests a physical card, they will have to cover the costs, or the department can add \$3.00 to the gift card to cover the costs.

Can Tango Card add a custom field for our participant identifier that is required?

Yes, Tango Card is adding this as a custom field to our platform.

How do I reverse an incorrect payment or update an incorrect email address?

You cannot reverse an incorrect payment. Digital cards can be resent to the same email or a different email address but must be resent to the same recipient. Once it is delivered, it becomes that recipient's property; ensure that rewards and reward amounts are correct before sending.

Is there a way to limit the amount that can be loaded onto an individual card? For example, a single load cannot exceed \$200.

Yes, by locking the reward value for a specific customized Reward Link. Standard values available are \$0-\$2,000, but you can choose a specific maximum for one (or all) of your custom UNC-Chapel Hill rewards.

Should participants contact Tango Card or research coordinators if they have questions about their cards?

Participants can contact Tango Card's first-tier customer support. Research coordinators can also add their contact information to the study's customized email template.

- Chatbot & Help Website: <https://help.tangocard.com/s/>
- Phone: 1-877-558-2646 from 6:00 am to 5:00 pm Pacific Time Mon-Fri.

Can gift cards be added to Google Pay, Apple Pay, etc.?

The digital Mastercard Prepaid Card can be added to a mobile wallet. Once a choice product, retail card, is redeemed for a brand merchant card, it is up to that brand merchant. Brand merchant gift cards have a variety of digital, mobile wallet, and physical use applications. Some can be redeemed in store and others solely online.

Do physical gift card orders appear on the transaction reports in the Tango portal?

Yes, they do. View the Order section of the Tango portal.

If we use a generic name for our participants such as "valued participant" can the participant update their name? If so, where, and how?

No, once you complete the name field it cannot be modified. When a recipient redeems for a Mastercard Prepaid Card, they are required to provide their name and address; that is not stored or collected by Tango or viewable to UNC.

Can we choose a type of reward on our participant's behalf instead of providing them with options?

No, if you issue a choice reward to a recipient, only the recipient of that reward can select their brand(s).

Will email addresses for study participants be encrypted or protected?

No, participants are responsible for keeping their email passwords confidential.

How do I know how much is left on my project's budget line?

Tango Card updates your project balance on a continuous basis. Tango Card can email you a balance reminder when your account hits a certain limit.

Who can see the "sent" list of cards?

Administrators and individuals with access to your project can see the list of cards sent.

Will the research coordinator receive a delivery confirmation email?

No, however, you can look up the status of Tango Cards in the system. Review the "Order" section of this document.

Does Tango Card have a text message option?

No, however, Tango Card is researching how to implement text message technology.

Can Tango Card integrate with a survey system that will automatically send participants an e-gift card?

Yes, Tango Card integrates with Qualtrics. See the Tango Card website for the Tango Card Qualtrics Integration documentation. In addition, Tango Card has an Application Program Interface (API) that integrates with many systems.

Is there a gift card option that will allow participants to redeem it for cash?

No, Tango Card does not offer a cash redemption product. However, participants can elect to receive a Mastercard. Departments can order physical Visa cards.

Does Tango Card offer reloadable cards?

No, Tango Card does not offer reloadable cards. They are looking into reloadable options for longitudinal studies.

What happens to a participant's funds when their card expires?

Participants who do not use their funds by the expiration date forfeit their money.

What is Tango Card's website for study recipients?

<https://help.tangocard.com/s/>

What email address are rewards sent from?

The Reward Genius email address is noreply@tangocard.com.