Paying Research Participants Remotely

UT Austin'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 Venmo or PayPal as a means of paying participants remotely when this method is better suited to the needs of the study population or procedures.

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
    - Enter the following address from the UT master agreement with Tango:
        > 1912 Speedway
        > Stop D5800
        > Austin TX 78712
    - Enter UT Austin's Tax ID #: 74-6000203
    - Tango will send you an email to your UT Austin email address to confirm the account setup
    - You will be assigned a UT Austin account number by Tango.
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 Tango 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. Funding the Tango account can also be done via a wire transfer. ProCards may not be used to fund a Tango account.
6) 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).
   - ACH or wire transfer routing instructions can be accessed within Rewards Genius by clicking on "Funding" in the left icon menu.

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.

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 department's requirements, which may include completing a Multiple Participant Receipt Form (note that participant signature is not required for individual payments of $25 or less).
   a. You should plan to ask participants if they anticipate earning $600 or more from UT Austin during the current calendar year. If yes, participants should complete the Individual Receipt Form for tax reporting purposes.
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.

Using Venmo or PayPal to Pay Participants Remotely

Steps for Preparing to Use Venmo or PayPal

1) Request a cash advance to fund the participant payments. The PI or other designated member of the research team will be required to sign a promissory note taking responsibility for the funds.
2) Establish a bank account to deposit the funds.
3) Setup a Venmo or PayPal account and link to the established bank account for payments.

Documenting and Reconciling Payments

1) When paying participants, make every attempt to ask whether the participant is likely to earn more than $600 in the current calendar year from UT Austin, which has federal tax implications. Document the participants' answers on the Multiple Participant Payment form.
2) Record a screenshot of the payment verification screen from the Payment App to document each payment as it is issued. Maintain these in your study records.
3) Complete the Multiple Participant Receipt Form to document payment distribution (note that participant signature is not required when paying remotely and annual payments are unlikely to reach $600).
4) If participants respond Yes to potentially earning greater than $600 in the calendar year, participants should complete the Individual Receipt Form for tax reporting purposes.