Tango Card Introduction & Standard Operating Procedure

School of Psychology & Trinity College Institute of Neuroscience
Overview

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• Roles & Responsibilities
• Gift Card Policy
• Getting Started
  Funding Your Account
  Issuing Payments
• Monitoring & Reporting
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• Q & A
Introduction to Tango Card

Streamlining Payments in the School of Psychology & Trinity College Institute of Neuroscience

Tango Card is the chosen platform for reimbursing research participants in the School of Psychology & Trinity College Institute of Neuroscience.

Advances over existing solutions:
• Full digital solution
• Pay participants internationally
• No expiration on funds
• Flexible payment to any value (down to cents!)
• Streamlined record keeping
Tango Card Roles & Responsibilities: Key Points

• PIs have administrative access and appoint Authorised Researcher.
• Authorised Researcher will issue payments and provide financial reports.
• Support staff who process PO requests to fill wallets and submit documents for reconciliation to finance.
Getting Started!
Getting Started!

Tango Card Set-up Requests

School of Psychology
Lisa Gilroy
lmcullen@tcd.ie

TCIN
Elaine Cristina Oliveira
oliveiec@tcd.ie

Email to the appropriate contact (above)
Getting Started!

• Once the request has been reviewed, the authorised researcher and PI will receive an invite to the platform via email

• Support staff members will set up separate Tango wallets for each grant used in your studies.

• Purchase Orders (POs) will be specific to each wallet/grant.
Getting Started! Interim Summary

- Initiate the process by contacting Lisa Gilroy (Psychology) or Elaine Cristina Oliveira (TCIN).
- Provide details about associated grants in the setup email.
- Invitation to platform will be sent to PI and designated researcher via email.

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Request to use Tango Card

Hi Elaine & Aisling,

I'd like to request using Tango card for paying research participants.

Jane Smyth (Cc'd) will be the researcher managing the account. We need two separate accounts - one for our ERC grant (123456/54321) and one for our HRB grant (987654/45678).

Let me know next steps!

Best wishes,
Anna

Anna Hanlon
Lab Manager
Gift Card Compliance Policy

• Gift card compensation must align with university and government policies.
• Adherence to Trinity Staff member regulations:
  • Trinity staff limited to receiving two gift vouchers per financial year (Jan - Dec).
  • Total value of gift cards received in a year cannot exceed 1000 EUR.

• Detailed information available in the university's gift voucher policy document: https://www.tcd.ie/about/policies/assets/pdf/Gift-Voucher-Policy.pdf

• It is the responsibility of all researchers to familiarise themselves with the gift voucher policy and ensure research is compliant.
Gift Card Compliance

**Gift Card Policy**

This form is an essential part of our study as it helps us ensure compliance with the university gift card policy. We kindly request your cooperation in providing accurate responses.

You can read the full [university gift card policy here](#).

Q1a Are you currently employed at Trinity College Dublin?

- Yes (1)
- No (2)

Q1b Staff Number (displayed on Staff ID)


Q2a Since January 1st, have you received a gift card from Trinity College Dublin for participating in research studies or for any other purpose (e.g., award, prize, etc.)? Click [here for Trinity College Dublin Gift Card Policy](#).

- Yes (1)
- No (2)

Q2b Since January 1st, how many gift cards have you received from Trinity College?

- 1 (2)
- 2 (3)

Q3 What is the approx. total value of gift card you have received from Trinity College?

Q4 Name (Block Capitals)

Q5 I hereby confirm that the information provided in this form is true, accurate, and complete to the best of my knowledge and belief.

- Declaration of Accuracy (1)

*form will be shared with faculty*
Self-Issuing Payments (or the appearance of)

Remember!
- Only one member of a research lab can serve as an Authorised Researcher at any given time.
- Authorised Researchers are prohibited from participating in any paid research studies within the university.

Consequences of Non-Compliance:
- Failure to comply with these regulations will result in a hold on all future Tango Card payments for all labs.
Funding Your Tango Account
PO Requests

PI or Authorised Researcher should submit purchase order requests to Lisa Gilroy (Psychology) or Elaine Cristina Oliveira (TCIN).

The following information should be included in the PO:

• Amount in EUR
• Project Number, Award Number, Cost Centre
• Tango Card Account Number (corresponding with the specific grant's wallet) – A############
• Brief description of the associated research study.
Payment Tracking

- Researchers leading a study are not necessarily the authorised researcher for the Tango platform.
- As such, researchers should maintain an encrypted participant payment tracking file with the following fields:

<table>
<thead>
<tr>
<th>Participant Email</th>
<th>Country</th>
<th>Study Section</th>
<th>Date Complete</th>
<th>Amount Due (£/€/$)</th>
<th>Staff (*Y/N)</th>
<th>*Staff ID</th>
<th>*Num. Gift cards</th>
<th>*Value</th>
<th>Payment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:joebloggs@example.com">joebloggs@example.com</a></td>
<td>Ireland</td>
<td>Section A</td>
<td>01/09/2023</td>
<td>40 EUR</td>
<td>N</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Paid 5/9/2023</td>
</tr>
<tr>
<td><a href="mailto:janesmith@example.com">janesmith@example.com</a></td>
<td>Ireland</td>
<td>Section B</td>
<td>01/09/2023</td>
<td>40 EUR</td>
<td>Y</td>
<td>12345678</td>
<td>0</td>
<td>0</td>
<td>Paid 5/9/2023</td>
</tr>
<tr>
<td><a href="mailto:johnsmith@example.com">johnsmith@example.com</a></td>
<td>Ireland</td>
<td>Section A</td>
<td>02/09/2023</td>
<td>40 EUR</td>
<td>N</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Paid 5/9/2023</td>
</tr>
<tr>
<td><a href="mailto:jasonbrown@example.com">jasonbrown@example.com</a></td>
<td>Ireland</td>
<td>Section A</td>
<td>02/09/2023</td>
<td>40 EUR</td>
<td>Y</td>
<td>87654321</td>
<td>1</td>
<td>50</td>
<td>Paid 5/9/2023</td>
</tr>
</tbody>
</table>

- Whoever is running the study should send this file to the person in your lab appointed to make all payments.
- Researchers leading the study are responsible for ensuring that this information is accurate and in compliance with the gift card regulations.
### Sending Tango Cards

#### Send rewards

<table>
<thead>
<tr>
<th>Search</th>
<th>Country</th>
<th>Currency</th>
<th>Reward type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a brand or reward</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rewards (15)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amazon.co.uk Ireland</strong></td>
</tr>
<tr>
<td>£0-£1,000 GBP</td>
</tr>
<tr>
<td><strong>Global Hotel Card Powered by Expedia</strong></td>
</tr>
<tr>
<td>£50-£250 EUR (3 denom.)</td>
</tr>
<tr>
<td><strong>Kigso Games EUR</strong></td>
</tr>
<tr>
<td>€5-€15 EUR (3 denom.)</td>
</tr>
<tr>
<td><strong>Reward Link Argentina</strong></td>
</tr>
<tr>
<td>$50-$110,000 ARS</td>
</tr>
<tr>
<td><strong>View redemption details</strong></td>
</tr>
<tr>
<td><strong>Reward Link Australia</strong></td>
</tr>
<tr>
<td>$1-$2,000 AUD</td>
</tr>
<tr>
<td><strong>View redemption details</strong></td>
</tr>
<tr>
<td><strong>Reward Link Brazil</strong></td>
</tr>
<tr>
<td>R$15-R$6,500 BRL</td>
</tr>
<tr>
<td><strong>View redemption details</strong></td>
</tr>
<tr>
<td><strong>Reward Link Canada</strong></td>
</tr>
<tr>
<td>$0-$2,000 CAD</td>
</tr>
<tr>
<td><strong>View redemption details</strong></td>
</tr>
<tr>
<td><strong>Reward Link Germany</strong></td>
</tr>
<tr>
<td>€0-€2,000 EUR</td>
</tr>
<tr>
<td><strong>View redemption details</strong></td>
</tr>
<tr>
<td><strong>Gillianlabat Trinity College Dublin Reward Link</strong></td>
</tr>
<tr>
<td>€0-€2,000 EUR</td>
</tr>
<tr>
<td><strong>View redemption details</strong></td>
</tr>
<tr>
<td><strong>Reward Link India</strong></td>
</tr>
<tr>
<td>₹15-₹10,000 INR</td>
</tr>
<tr>
<td><strong>Reward Link Netherlands</strong></td>
</tr>
<tr>
<td>€0-€2,000 EUR</td>
</tr>
<tr>
<td><strong>Reward Link Preferred</strong></td>
</tr>
</tbody>
</table>

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Trinity College Dublin, The University of Dublin
Sending Tango Cards

• Payments are issued via the ‘Send Rewards' tab on the Tango Card platform.
• Select the country you would like to send a reward to.
• Mandatory fields for issuing payments: Amount, Name, Email Address.
• For data protection, use 'Research Volunteer/Research Participant' in the 'Name' field.
• As per TCD requirements, also provide reference to the study, and staff ID, number of gift cards received, total value received to date (if applicable)
Sending Tango Cards

Send rewards / Rewards & Recipients

Gillanlabat Trinity College Dublin Reward Link

14 redemption options

View all reward details

Recipients

- [ ] Different amounts per recipient
- [ ] Recipient last name
- [ ] Notes (internal)

- [ ] Reward amount
  - € 50.00

<table>
<thead>
<tr>
<th>First name</th>
<th>Email address</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Volunteer</td>
<td><a href="mailto:joebloggs@example.com">joebloggs@example.com</a></td>
<td>Staff: No; Study: ABC</td>
</tr>
<tr>
<td>Research Volunteer</td>
<td><a href="mailto:janesmyth@example.com">janesmyth@example.com</a></td>
<td>Staff: Yes; No gift cards: 0; Value: 0; Study: ABC</td>
</tr>
</tbody>
</table>
Customisation Options

Researchers can select ‘Edit/Change' and update the Tango Card template with a personalized message (e.g., 'Thank you for participating in our study')
Key Points

- Select country
- Mandatory fields: Amount, Name, Email Address.
- TCD required fields (‘Notes’): Study; Staff; N Gift Cards; Value
- Use 'Research Volunteer/Research Participant' for participant names.
- Customisation options for personalised messages.
Monitoring & Reporting
Monitoring & Reporting

• Users with administrative permissions, PIs, and authorised researchers can monitor if/when participants redeem their Tango Cards.
• They can also access reports of all transactions processed through the platform within a given period.
• Reports available in Excel format.
• Include information such as who processed the transaction, type of reward, date processed, recipient, amount, and notes (if any).
• Recommended that the PI reviews the account quarterly to ensure spending aligns with expectations.
Authorised Researcher's Responsibility:

• Each time a new PO is requested, the Authorised Researcher must reconcile the last PO on the wallet (80%)
Reconciliation

Transaction Report Generation:

• Login to Tango Card account and select 'Report'.
• Choose 'Account' (specific wallet for a grant), set date range, and provide a report name.
• Generate an Excel file for the information provided.
• Submit reports to either Aishling Hume (TCIN) or Lisa Gilroy (Psychology) in advance of requesting new purchase order.
• Once the report has been received a new PO can be requested.
Questions...?