

## **Participant Gift Card and Cash Incentives**

### **Overview:**

- **Types of Gift Card Incentives**
- **How to order**
- **How to reconcile**

## **4 Types of Gift Card/Cash Incentives**

### **FSU Gift Cards**

- SpearMart, Cash Advance, Tango, Prolific,
- An approved IRB letter and protocol are needed at the time of the request.
- In most cases, sponsored projects should have listed as a line-item budget item. There are exceptions, in which case additional info may be needed before processing.
- SpearMart gift cards and Cash Advances are considered prepaid/cash assets until they are distributed to participants and reconciled to the appropriate project account.
- Tango and Prolific is a pay-as-you-go service on PCard. Participants must have already completed the required components of the study to receive their incentive. Tango is CON preferred method for incentives.
- CON Faculty are responsible for any unused gift prepaid/cash assets. They will either need to issue a check for repayment or find another suitable party willing to assume liability for the remaining cards.
- **Approved fund codes to purchase gift cards with are 110, 140, 520-560 (except 556), and 599.**

### **Blackhawk Network**

- **Overview**
  - Offers both physical and digital Visa and Merchant Cards (Amazon, Walmart, Applebee's, etc.)
  - Not able to consolidate purchase requests from the four options above into one order. 1) Plastic Visa, 2) Virtual Visa, 3) Plastic Merchant and 4) Virtual Merchant are considered separate and will require separate Purchase Orders.
  - Visa cards are valid for 12 months from the date of purchase.
  - Merchant cards do not expire
  - Physical gift cards will incur a shipping cost- varies by quantity and shipping method
  - Physical Visa cards have \$2.75 fee per card
  - Physical Merchant cards are offered at a discounted rate.
  - Once an order is submitted, you are not able to cancel it or make any adjustments to shipping choice, card quantity, denominations, etc. No return orders. All sales are final.

- Any unused cards must be paid using [Department Deposit Form and](#) personal check from the Faculty
- **How to Order: Spearmart**
  - Send an email to your grant's administrator with your IRB approval and protocol and provide the following:
    - Type: Physical or E-Gift Card
    - Merchant or Visa. If merchant, which?
    - Quantity and Value
    - Project #
  - Grants Admin will initiate Spearmart requisition for order
- **How to Reconcile**
  - Must provide a signed human subject log. This will be provided by the grants administrator once the order has been fulfilled.
  - Per policy, orders should be reconciled within 90 days. It is recommended not to order any more than what can be distributed within 90 days.
  - The grants admin will process journal entry for distributed gift cards to expense to the project account

### EPRF Cash Advance

- **Overview**
  - Offers a cashable check written to the investigator for participant incentives.
  - Only human-subject incentive payments requiring cash payments will be allowable as an Employee Cash Advance. This must be in IRB protocol.
  - Employee Cash Advances can only be requested by permanent employees (OPS students and graduate students are unable to request Employee Cash Advances).
  - A maximum of 2 open cash advances per funding source are allowed.
  - Cash advanced can be replenished with additional funds; however, it must be closed within 6 months of initiating or within 60 days of project close- whichever comes first.
  - Any unused funds must be repaid using [Department Deposit Form](#) and personal check from the Faculty
- **How to Order**
  - Send an email to your grant's administrator with your IRB approval and protocol and provide the following:
    - i. Advance amount:
    - ii. Project ID #
  - Employee receiving cash advance must be set up as supplier- [Cash Advance Custodian Set Up](#)
  - Must complete [Cash Advance Request Form](#)
  - Grants Admin will initiate EPRF for Cash Advance
- **How to Reconcile**
  - Must provide a signed human subject log. This will be provided by the grants administrator once the order has been fulfilled.
  - Cash advances should be reconciled monthly.

- Grants Admin will initiate EPRF to partially or fully close cash advance

## Tango

- **Overview**

- Offers pay-as-you-go via Pcard for Visa and Merchant digital gift cards
- Tango charges a 3.5% fee
- Funds are uploaded as needed and must be reconciled by the following Monday from when funds are uploaded.
- Tango bulk orders are not allowed. You cannot use the P-Card to pre-pay for future participant incentives). User accounts who do not comply with this requirement will be disabled immediately.
- Funds are available for participant email distribution immediately after the Pcard transaction has processed.

- **How to Order**

- Email your grants admin about your intent to initiate a Tango account with your IRB approval and protocol. Admin will help complete the required documents. Will need project ID#, Tango team roles, and participant incentives budget amount.
- Must complete two required forms
  - **Request to use PCARD for Research Participants Form**- approval need from SRA or FSURF. This form will be needed for every project utilizing Tango
  - **Tango Research Participant Account Request Form**- approval needed from OVPR. This form notes the project team roles
    - **Admin:** Users with the Admin role can place orders, view the account balance, view the account order history, resend rewards, create sub-accounts, add and manage sub-account users, add funds and credit cards, and run reports. Recommended for Project/Lab Manager
    - **Standard:** Users with the Standard role can place orders, view the account balance, view the account order history, resend rewards, and run reports. Recommended for research staff that assist in distributing participant incentives
    - **Support:** Users with the Support role can view the account order history and run reports. Recommended for P-Card Proxies.
- Once forms are approved. Contact P-Card administrator to upload funds. Card info does save to your Tango account; however, you will need to contact P-Card admin anytime you need funds uploaded. Do not upload funds without first contacting them.
- Once funds are uploaded, you can utilize the Tango platform to send incentives directly to participants.

- **Tango Platform Demo**

- **How to Reconcile**

- Provide **Tango Order-History Report** (notes participant distribution) and **Funding History Details Receipt** (notes pcard upload amount) to your pcard proxy.

- To generate Order-History Report. Select reports>account>group name, account name, and data range>select generate report.
- Order History Report must match Funding History receipt less the 3.5% credit card processing fee charged by Tango
- All Pcard charges must be reconciled by the following Monday from when ordered.

## **Prolific**

### **Overview**

- Prolific is a web-based service that provides human-derived data through an online database.
- Studies are paid up-front by adding money to your workspace in advance of running the studies. Prolific manages the payments to your participants.
- For this reason, proper reconciliation often requires reconciliation to be split between pcard expense and prepaid assets in ledgers.

### **How to Order**

- Email your grants admin about with completed **Request to use PCARD for the Research Participants Form** and approved IRB
- Once approved, Pcard admin can upload requested funds up to the maximum amount.

### **How to Reconcile**

- PCard upload amount must be reconciled by the following Monday from order.
- Must provide distribution reports and upload receipt
- Any undistributed amount will need to then be journaled as a prepaid asset- 191000.
- Funds listed as prepaid assets will need to be expensed upon incentive distribution using human subjects log/distribution form.