

# Tango Card for Study Incentives

## *All Processes*

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**2023 SYMPOSIUM**  
FOR RESEARCH ADMINISTRATORS

# Agenda

- Getting Started in Tango
- Tango Request Process & Form
- Tango Voucher Process
- Tango Demo
- Tango Reconciliation Process

# Getting Started in Tango - Quick Reference Steps



Start by reviewing the Tango website: <https://go.unc.edu/tango>



Fill out a form for set up, user entitlement, and identify dept reconcilers.



Attach form to a campus voucher and submit it within 10 days of form approval.



Tango is funded and project is set-up in the system based on request form information.



Dept users submit/disburse participant payments in Tango.



Dept reconcile payments via intraunit other journal entry (JOT) by 15th of next month in ConnectCarolina.



# Request Process

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# Sponsored Project Tango Request Submission Process



Complete the Tango Request form and submit it to [SponsoredPrograms@unc.edu](mailto:SponsoredPrograms@unc.edu).



Request will be set-up in a [RAMTracker](#) and both the [Sponsored Programs Specialist](#) (SPS) and dept submitter will receive the RAMTracker ID.



SPS reviews the request for completeness and allowability on the project and will communicate any questions/changes with dept submitter.



If approved, the SPS will return the signed form to the submitter, **within 3 business days of receipt or last communication** with department.

**Tango Holding Account:** 559550 - sponsored projects and 119220 - non-sponsored

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# Non-Sponsored Tango Request Submission Process

1

Complete the Tango request form and submit to [Tango@unc.edu](mailto:Tango@unc.edu).

2

Tango Team reviews form submission for accuracy and Office of Clinical Research/Trials review for an approved/active IRB.

3

If approved, the approved and signed Tango request form is returned to dept for voucher submission.

# Key Items for Central Office Review

## Finance Tango Team & OCT

- ✓ Signatures completed (designees OK)
  - Principal Investigator (PI) – on IRB
  - Dept Contact – form submitter
  - Dept Finance Lead – oversight of CFS
- ✓ IRB # listed is approved and active
- ✓ Budget in CFS for amount requested
  - CFS (chartfield) is accurate
- ✓ If NEW request, users identified
- ✓ CFS provided for unreconciled

## OSP Sponsored Programs Specialist

- ✓ Signatures completed (designees OK)
  - PI – prime Lead PI or subacct PI in RAMSeS
  - Dept Contact – form submitter
  - Dept Fin. Lead – oversight of non-spon CFS
- ✓ Project and CFS are accurate
- ✓ IRB # in RAMSeS & approved/active
- ✓ Budget in CFS for amount requested
- ✓ If NEW request, users identified
- ✓ CFS (**not** project) for unreconciled



# Tango Form

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# Tango Request Form

Request a **new** project/account in Tango and assign users for that project.

Request either additional funds or add/remove users to an existing project/account in Tango.

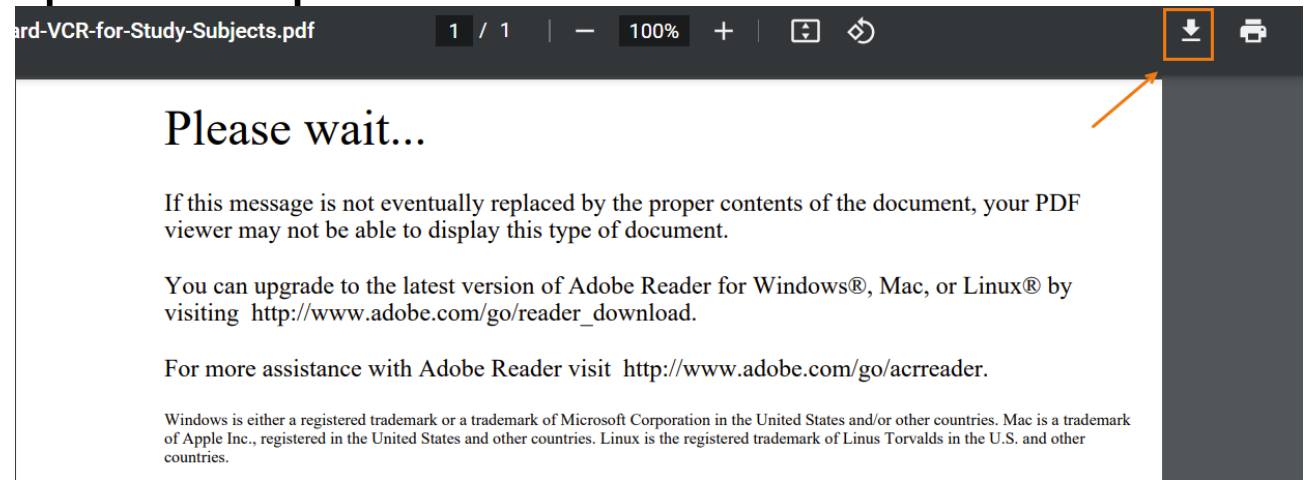
# Best Practices

- Always ensure you are using the current version on the OSP website (version date is on the bottom right corner of all forms).
- All OSP forms must be downloaded from the OSP website to the users' computer. Forms cannot be viewed or edited from a web browser.
- All OSP request forms include logic based on how questions are answered. To avoid missing information, **complete all forms beginning with the first section and make sure all required fields are answered in that section before moving to the next.**
- Ensure all appropriate signatures are completed prior to routing form for review.

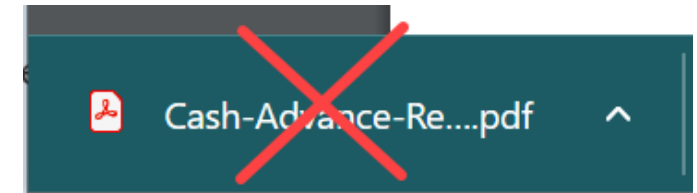
# Form Demo

# Tip: Getting this message? It's not an error.

- Download the form to your desktop to complete.



- Do not open the download from web browser window

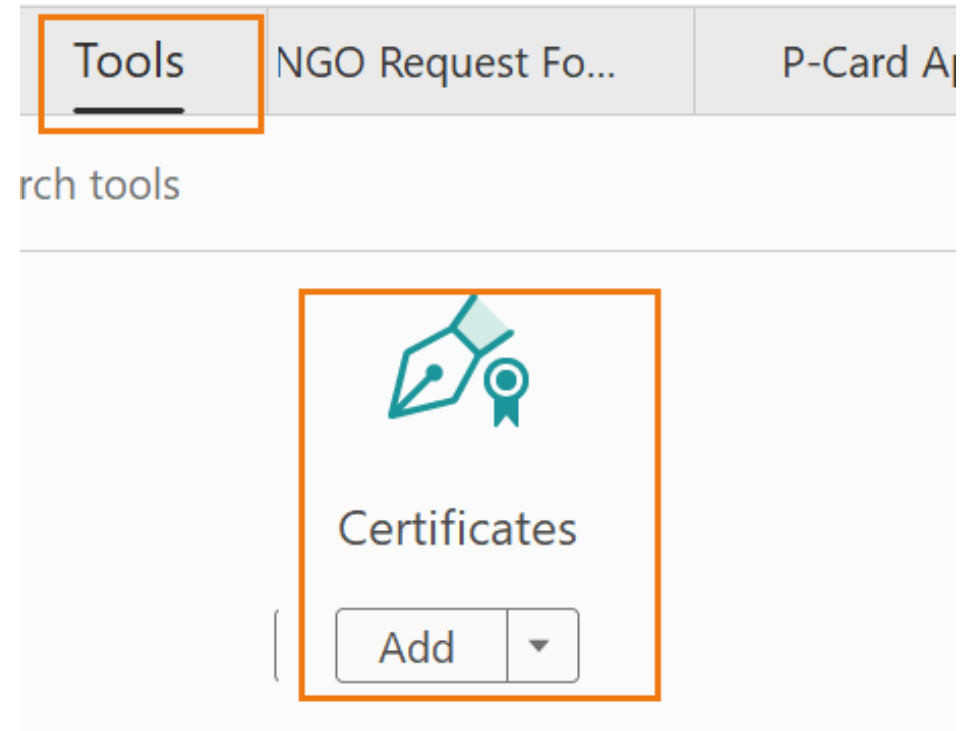


# Tip: Having trouble signing the form?

If Fill & Sign is not available, follow these steps to digitally sign the form:

- Print the form to Adobe PDF and save it on your computer
- Open the saved form from your computer
- In Tools tab, click Add Certificates
- On the form, click on digitally sign and select the area you want to sign
- Follow prompts to add digital signature

*\*Form will no longer be dynamically editable after adding a certificate and placing digital signature.*





# Voucher Process

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# Tango Voucher Request Submission Process

- Within **10 business days of dated approval on the request form**, department should submit a campus voucher.
  - **Tango:** voucher supplier short name: TANGO CARD-001; supplier # 0000136430.
- If request is on a sponsored project, assigned OSP Pre-Audit Technician will review voucher request for completeness and availability of funds at the time of review.
- If approved, the request is moved to Account Payable for approval and disbursement.

**Reminder:** Vouchers cannot be self-approved so ensure timely processing to receive all departmental approvals prior to central office review.

- Finance WorkCenter
- UNC Favorites
- Accounts Payable
- Campus Voucher Entry**
- Independent Contractor
- Payment Inquiry
- Voucher Inquiry
- Regular Entry
- Supplier Inquiry
- Approval Framework - Vouchers
- Regular Supplier
- Voucher Budget Exceptions

Find an Existing value    **Add a New value**

\*Business Unit

\*Voucher ID

\*Voucher Style

Short Supplier Name

Supplier ID

Payment Method

Invoice Number

Invoice Date

Gross Invoice Amount

Freight Amount

Misc Charge Amount

Estimated No. of Invoice Lines



Save

Save For Later

Action


Run

Calculate

Print

Copy From Source Document

Invoice Lines 

 |   1 of 1 

Line 1

\*Distribute by

Quantity

UOM

UNC Item ID

Unit Price

Line Amount

SpeedChart

Ship To


Description

Packing Slip

\*Category

Calculate

Distribution Lines


    1-1 of 1 

GL Chart

Exchange Rate

Statistics



		Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Fund	Source	Account	Dept	PC Bus Unit	Project	Activity
		<input type="checkbox"/>	1	<input type="text" value="1,000.00"/>	<input type="text"/>	<input type="text" value="UNCCH"/>	<input type="text" value="25210"/>	<input type="text" value="49000"/>	<input type="text" value="559550"/>	<input type="text" value="284000"/>	<input type="text" value="CHOSR"/>	<input type="text" value="5100002"/>	<input type="text" value="1"/>

Save

Notify

Refresh

Add

Save Save For Later Action Run Calculate Print

Copy From Source Document

Invoice Lines

1 of 1

Line 1

\*Distribute by Amount

Quantity

UOM

UNC Item ID

Unit Price

Line Amount 1,000.00

SpeedChart

Ship To 607\_2700

Description

Packing Slip

\*Category UNC00004

Calculate

Distribution Lines

GL Chart Exchange Rate Statistics

	Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Fund	Source	Account	Dept	PC Bus Unit	Project	Activity
+ -	<input type="checkbox"/>	1	1,000.00		UNCCH	25210	49000	559550	284000	CHOSR	5100002	1

Save Notify Refresh

Add

Invoice Information | Payments | Voucher Attributes

- Finance WorkCenter
- UNC Favorites
- Accounts Payable
- Campus Voucher Entry**
- Independent Contractor
- Payment Inquiry
- Voucher Inquiry
- Regular Entry
- Supplier Inquiry
- Approval Framework - Vouchers
- Regular Supplier
- Voucher Budget Exceptions
- BuyCarolina/Purchase Order
- General Ledger
- AR/Billing

Invoice Information | Payments | Voucher Attributes

Business Unit UNCCH Invoice No 2023-07-03 12-3456

Voucher ID NEXT Accounting Date 07/03/2023

Voucher Style Regular Voucher Pay Terms 60 Net 60

Invoice Date 07/03/2023 Basis Date Type Inv Date

Invoice Received

TANGO CARD, INC. A73718765

Supplier ID 0000136430 Control Group

ShortName TANGO CARD-001

Payment Method 1 Automated Clearing House ---0978

\*Address 1  Incomplete Voucher

Invoice Total

Line Total	1,000.00
Currency	USD
Miscellaneous	
Freight	
Total	1,000.00
Difference	0.00

Comments(0)  
ImageNow Attachments  
Advanced Supplier Search

Save Save For Later Action Run Calculate Print

Invoice Information

Payments

Voucher Attributes

Business Unit UNCCH

Voucher ID NEXT

Voucher Style Regular Voucher

Invoice Date 06/21/2023

Invoice Received

TANGO CARD, INC.

Supplier ID 0000136430

ShortName TANGO CARD-001

Payment Method 1

\*Address 1

Save

Save For Later

Copy From Source Document

Invoice Lines

Line 1

\*Distribute by Amount

Quantity

Ship To 607\_2700

Description

Voucher Attachment page



Help

Business Unit: UNCCH

Voucher ID: NEXT

Attachments

Navigation controls including search, list view, and pagination (1-1 of 1) with 'View All' link.

	View	Add	Delete	Added On	*Document Type	
1					Supporting Doc	

Note: Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments. Save the transaction before viewing or deleting newly added attachments.

Please ensure sensitive information, including HIPAA data, is redacted.

OK

Cancel

Refresh

# Tango Project Set-Up & Funding

- Once a voucher has been fully approved, the Tango Team will review the voucher and assign a pay date to the voucher.
  - **Beginning this 9/22/23, the pay cycle for Tango is now weekly on Thursdays.**
- Once funds from UNC have been sent to Tango, the Tango Team will also process the set-up of any new projects with requested users.
- For existing Tango projects, the process is the same, any new funds added to the project or the addition/removal of users is processed by the Tango Team after the voucher payment to Tango is complete.
- Email [Tango@unc.edu](mailto:Tango@unc.edu) for any assistance with expediting any part of the process.

# Tango Platform Tour





# Reconciliation Process

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# Reconciliations

1. Obtain a report from the Tango platform
2. Provide it to your departmental accountant or finance support staff
3. Reconcile your previous month's loads by the 15<sup>th</sup> of the next month, e.g. July payments are reconciled on or before August 15<sup>th</sup>.
4. Create an intraunit – other campus journal entry (JOT)
5. Attach a load report and reconciliation form to your journal entry



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



# Sponsored Project Tango Reconciliation Reminder

- Complete and attach the following documents to the journal:
  - [OSP Advance Reconciliation Form](#)
  - Tango order history report (remove any PHI identifiers)
- OSP Pre-Audit Technician reviews the journal for completeness and allowability; transaction are subject to rejection without all required documents.

# Tango Final Reconciliation Process

If there is a remaining balance in Tango at the end of the project period, complete the [OSP Advance Reconciliation Form](#) and select that it is the final reconciliation.

- If all distributed funds have been reconciled to the project, only email the completed form to [Tango@unc.edu](mailto:Tango@unc.edu) and the Tango Team will process a journal entry to return the remaining funds to the project.
- If on the final reconciliation you have expenses to reconcile to the project and anticipate a remaining balance, complete the [OSP Advance Reconciliation Form](#) and submit the journal reconciliation in addition to emailing the same form to [tango@unc.edu](mailto:tango@unc.edu).



# Resources

- [OSP Study Subject Payments webpage](#)
- [Tango Request Form](#)
- [OSP Operating Standard & Procedure 500.17 - Tango - PrePaid](#)
- [Finance Tango Card Program webpage](#)
- OSP Contact: [SponsoredPrograms@unc.edu](mailto:SponsoredPrograms@unc.edu)
- Tango Team: [Tango@unc.edu](mailto:Tango@unc.edu)

# Questions





THE UNIVERSITY  
*of* NORTH CAROLINA  
*at* CHAPEL HILL