# Using TruCentive for Research Incentives

Complete the card request form and send it to the Research Incentive Coordinator (RIC) at researchincentive@ilstu.edu or bjrexro@ilstu.edu. *(Be sure it has a Datatel account number, approved IRB number, and fiscal agent approval.)* With that, a project will be created on TruCentive for you and you will receive an email from TruCentive allowing you to create a login. It will be funded for the gift cards and the per card delivery fees that are charged by TruCentive.

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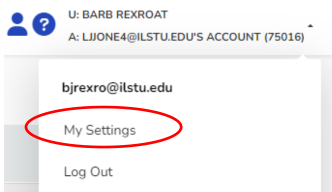
Create your login, then adjust your **User Settings**




- Click on your name in the top right corner and click on My Settings
- Fill in the fields marked with *
    - Those are required before you can send real incentives.
- Don't forget to update the time zone

Your project(s) will be on the Home page. You can click the tile or click actions and select from the menu. To set up the project click the tile or select Edit Project from the Actions list.

You can also access your project by clicking the button that looks like a letter and envelope in the left-hand ribbon. Click View All and then the blue link in the name column.

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## Overview Tab

The first thing you'll see when you go into your project is an **overview tab**. It shows you information about deliveries and funds. TruCentive calls the gift cards "envelopes". Sent is self-explanatory. Viewed means the participant opened the email but did nothing else. Claimed means they clicked the button to get the card. They don't have to spend it when they click the button. Committed is what has been sent but not claimed. Spent is what has been claimed plus the fees.

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## Settings Tab

Next, go to the **settings tab**. The following describes the items on the screen from top to bottom.

## Project Setup

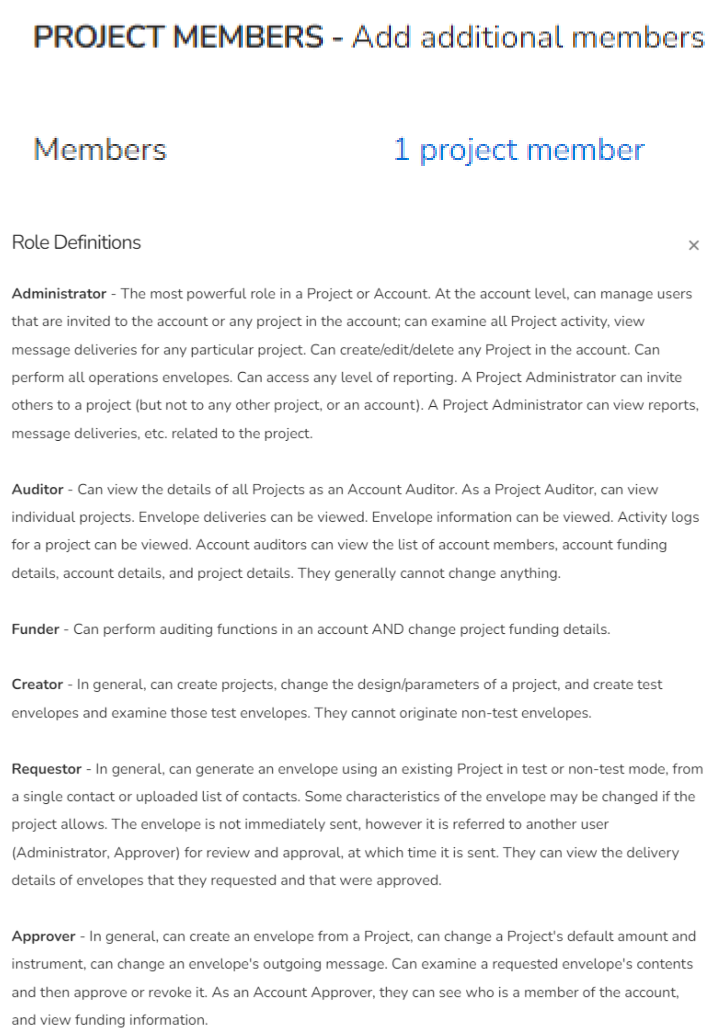
You can change the project name and description. Please leave your name there somewhere so the RIC can identify it.

Be sure to click the save project button often. It reminds you.

Your project starts in test mode. This is handy so you can set up the emails and send yourself one to see how it looks. When you're ready to send cards to participants, you will toggle that to off and your project will be live.

## Project Members

If there is someone else you want to work on this project, such as a GA or co-PI, you can click the blue project members link, then click the invite project member button in the top right corner. You enter the email address and select the project, if you have more than one. There are choices for their role. You may want them to be requestor (see below for the roles). Then click send invitation.



PROJECT MEMBERS - Add additional members

Members 1 project member

Role Definitions

**Administrator** - The most powerful role in a Project or Account. At the account level, can manage users that are invited to the account or any project in the account; can examine all Project activity, view message deliveries for any particular project. Can create/edit/delete any Project in the account. Can perform all operations envelopes. Can access any level of reporting. A Project Administrator can invite others to a project (but not to any other project, or an account). A Project Administrator can view reports, message deliveries, etc. related to the project.

**Auditor** - Can view the details of all Projects as an Account Auditor. As a Project Auditor, can view individual projects. Envelope deliveries can be viewed. Envelope information can be viewed. Activity logs for a project can be viewed. Account auditors can view the list of account members, account funding details, account details, and project details. They generally cannot change anything.

**Funder** - Can perform auditing functions in an account AND change project funding details.

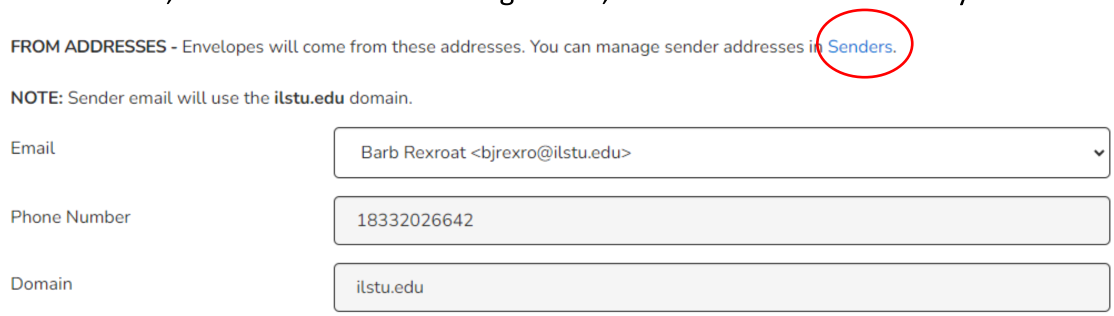
**Creator** - In general, can create projects, change the design/parameters of a project, and create test envelopes and examine those test envelopes. They cannot originate non-test envelopes.

**Requestor** - In general, can generate an envelope using an existing Project in test or non-test mode, from a single contact or uploaded list of contacts. Some characteristics of the envelope may be changed if the project allows. The envelope is not immediately sent, however it is referred to another user (Administrator, Approver) for review and approval, at which time it is sent. They can view the delivery details of envelopes that they requested and that were approved.

**Approver** - In general, can create an envelope from a Project, can change a Project's default amount and instrument, can change an envelope's outgoing message. Can examine a requested envelope's contents and then approve or revoke it. As an Account Approver, they can see who is a member of the account, and view funding information.

### From Addresses

Moving on down the Settings tab to the From Addresses section, select your email address. If your email address isn't listed, click the Senders link just above the email address. Select your email address, click on Actions on the right side, and select edit. The fill in your information.




*You can't change the phone number or domain. The emails that go to participants will show that they are coming from you. That should help keep them out of junk folders.*

### Envelope Expiration

It's a good idea to put an envelope expiration date. This is especially important when funds expire at the end of the fiscal year or a grant period. The expiration could be a couple weeks before the end date of the funding. There is a drop-down menu to select a specific date or period of time and a place to see the date.

### Project Dates

Project dates are good too, but not required. If you give access to a GA help you, the end date will stop them from sending out more gift cards after a certain point.

### Gated Deliveries

Not part of our package.

### Require Envelope Approvals

If you have a GA helping with participant email addresses, you can choose to turn on Require Approvals. That way you will approve the envelopes (gift cards) before they are sent.

### HIPAA Compliance

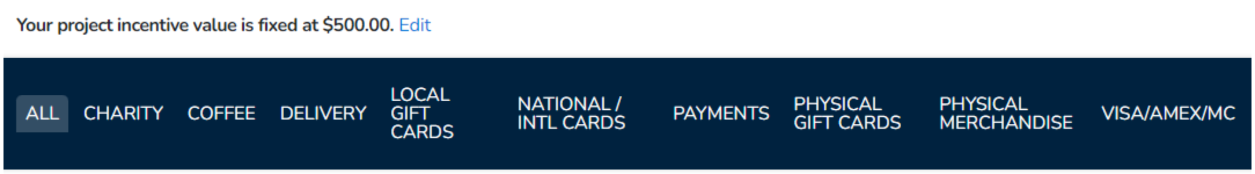
Not part of our package.

### Text Scale Size

If you want to change the text scale size, I recommend sending a test email to yourself to see how it turned out.

## Incentive Tab

You can pick what gift cards you will send to your participants on the **incentive tab**.  Above the dark blue band across the top there is a statement about the incentive value.  Click the Edit button to update for your project.




*TruCentive charges a per card delivery fee.  Some cards have merchant fees that will be charged on top of the delivery fee.  Those charges are passed on to your account, so you probably want to toggle "**Restrict Project to incentives without fees**" to **ON**.*

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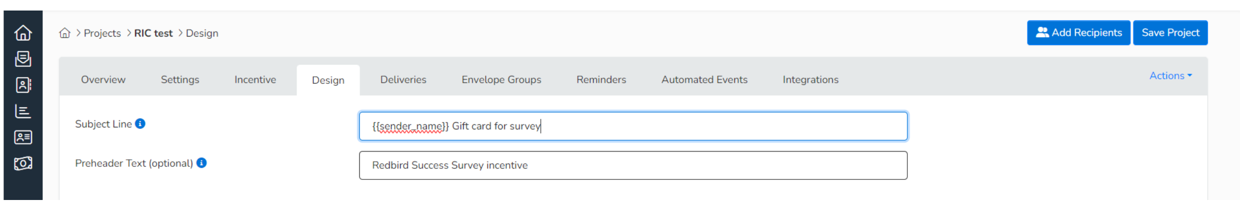
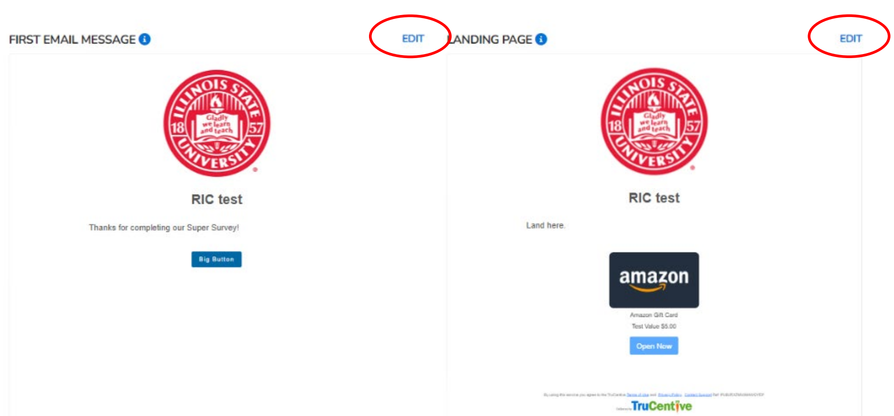
## Design Tab

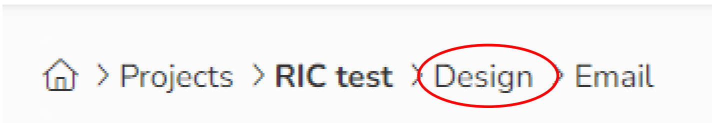
You can edit the email messages on the **Design tab**.  The first field is the subject line.  It will insert the name from the Settings tab > From addresses.  You don't need to update that.  To the right of that you can edit where it says, "sent you a message".  You could give the name of the study or something the participant will recognize.  You can enter preheader text in the next field.  It's optional.




Below that you can do more editing to the emails. (*We do not have SMS in our package.*) The edit buttons are in the top right corner in the section for FIRST EMAIL MESSAGE and LANDING PAGE.



When you click the EDIT button it will take you to a page where you can insert text, images, etc.  The ISU logo is there for you.  The email has a button for the participant to go to the incentive. You can change what the button is labeled.  When that is clicked it goes to what they call the landing page.  That shows the card vendor and value.  It also has a button to claim the incentive.  You can edit the landing page as well.  Click on Design to exit the editing screen and go back to that tab.




*Both of the screens for editing the emails have a preview button in the top right corner so you can see the email.  The email and landing page are good places to say things like "thank you for your participation in the survey' or "contact [name@ilstu.edu](mailto:name@ilstu.edu) to participate in an interview…". If you put an expiration date to claim the card, you can inform the participant on these messages.*

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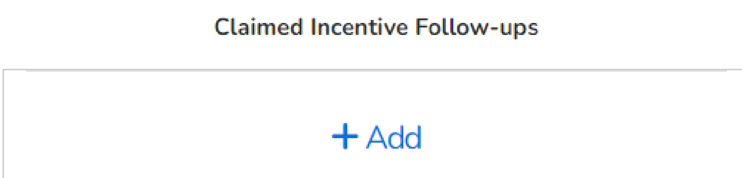
## Reminders Tab

If you want to send a follow-up email to participants who have not claimed their card, you can do that here.  Click the plus sign and fill in the fields.




*There is a dropdown menu to choose days, weeks, or months and a field to enter the number. You can put the study name and your name in the email subject field.  You can enter a preheader such as "only a few days left to claim your incentive".   SMS message doesn't apply to us.*

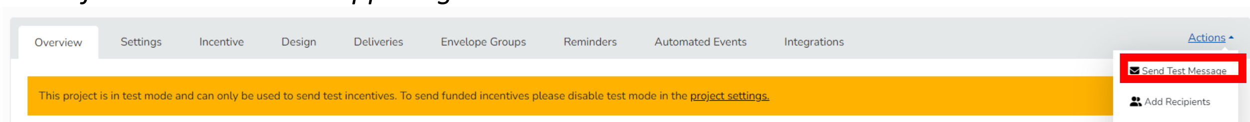
After you've made any changes, click create.  It takes you to reminder message design where you can edit the text and preview it.  Click save if you made changes.  Click on Reminder Settings tab.  Click Update Reminder. It shows you the reminder and you can see the +Add button underneath to add another.  You can set multiple reminders.

*Reminders increase the claimed rate and are useful to the participant especially if there is an expiration date.*

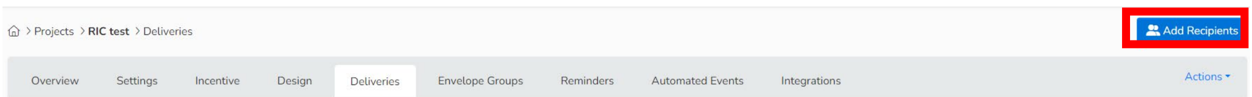
If you want to contact the participant after they have claimed the incentive, there is a place to set up a follow-up for that on the Reminders tab.  *You might use it to invite them to do an interview or take the follow-up survey.*

*We don't have access to use the* ***automated events*** *tab.* ***Integrations*** *works with things like SurveyMonkey. If you want to integrate with Survey Monkey, we'll have to find out how to do that.*

*Send a test email to yourself or your GA. You can do that from any tab using the dropdown menu from Actions in the upper right corner.*




When you're happy with the test emails and landing pages, you can add recipients.




The Add Recipients button is located in the top right corner of all the tabs. You can enter the email addresses one at a time or you can use a CSV file to upload them. After you click add recipients, you'll see a CSV bulk upload button in the top right corner. Click on that and you'll see where you can download the template. You don't have to fill in all the fields on the template. Then you can drag the completed file to that same box or click and then select the file. It populates the add recipient screen for you.

(***Do not add any contacts only recipients***. *Contacts are visible to anyone with a TruCentive project*.)

Once you have the participants' email addresses entered, click on the send envelopes button in the top right corner. (Below that button is a summary of the incentives and delivery fees.) It will alert you if you have a duplicate email address. When you're ready to send, click yes, send to all recipients. It takes you to a review screen so you can check it one more time. Click send envelopes. (It will say test envelopes if you're in test.)

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## Envelope Groups Tab

You can see the history of what you sent on the **envelope groups tab**. It saves recipients that have been added. The status will be draft for unsent envelopes, queued for envelopes you just sent, and finished for those that have been sent. You can see if it was sent in test or live. Click on Actions at the right. For a draft envelope group, lick edit to see and edit the list. Click delete if it's no longer needed. For finished envelope groups, click Actions then view to see each participant in that group. It will show you the status. (sent, viewed, claimed) It will alert you to undeliverable email addresses.

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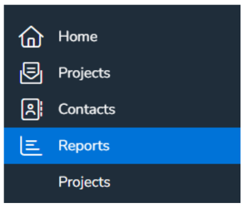
## Deliveries Tab

Click on the **Deliveries** tab to see a list of the incentives that were sent. You can see the amount and card type, such as Amazon. Scroll to the right to see if the participant viewed it and/or claimed it. You can export to CSV or PDF. *You can rearrange the columns by clicking and dragging.*

**Reports > Projects**: (from menu in the black strip on the left side of the screen) You can generate a bar graph that shows envelopes that have been opened. You can also generate a report that shows each envelope sent, the value, and the delivery fee. It shows the status (claimed, sent) You can download a CSV.




Contact researchincentive@ilstu.edu or bjrexro@ilstu.edu if you have questions. This is a new program so the RIC is learning too.

Reconciliation forms are no longer necessary when using TruCentive because the RIC can see the cards that are claimed in order to charge your account.