

Gift Card Request Form Job Aid

The Gift Card Request Form should be used to request gift cards for any legitimate university business purpose that is in compliance with Iowa State University policies regarding [cash, gift certificates, and other property](#).

Gift cards are for research participant payments, awards, prizes, and/or recognition and cannot be used to pay suppliers for goods or services, to pay any type of wages or compensation, or be used for personal purchases.

Gift cards are the same as cash and must be handled accordingly ensuring adequate controls are in place to safeguard, store, and prevent loss. Until disbursed, gift cards should be secured and locked or stored in a location appropriate for money storage.

If requesting electronic gift cards you will need to have the appropriate template completed and ready to attach when submitting the request:

- **Electronic Reward Link to Tango Card Rewards Catalog:**
 - [Reward Link Recipient Template](#) for submitting email address and full name of each card recipient.
- **VISA Electronic Gift Cards:**
 - [VISA Gift Card Recipient Template](#) for submitting full legal name, address, and email address of each card recipient.
- **Amazon Electronic Gift Cards:**
 - [Amazon Gift Card Recipient Template](#) for submitting full name and email address of each card recipient.

These completed templates may also be used as documentation in lieu of the Research Participation Receipt and Property Receipt Form for any Electronic Reward Link to Tango Card Rewards Catalog, VISA Electronic Gift Card, or Amazon Electronic Gift Card with an amount less than \$100.

If requesting electronic gift cards for research participants, or any other university business purpose, that are valued at \$100 or more OR requesting Amazon Gift Card Claim Codes or physical (plastic) gift cards of any value for research participants, the [Research Participation Receipt and Property Receipt Form](#) for each gift card will also need to be completed and submitted.

To complete the [Gift Card Request Form](#) on the Procurement Services website you will need to provide the following information:

1. **Requester Name** - Enter the name of the Iowa State Employee responsible for the gift cards.
2. **Requester Department Name** - Enter the department of the Iowa State Employee responsible for the gift cards.

Gift Card Request Form Job Aid

3. **Requester University Phone Number** - Enter the University Phone Number of the Iowa State Employee responsible for the gift cards.
4. **Requester University Email Address** - Enter the University Email Address of the Iowa State Employee responsible for the gift cards.
5. **Worktag(s)** – Enter the Worktag(s) that will be used to pay for the gift cards - If multiple Worktags will be used, provide the dollar amount or percentage to be charged to each Worktag. You must enter a valid Program/Project/Gift/Grant Worktag(s).
6. **Business Purpose** – Enter a detailed [business purpose statement](#) describing why the University is purchasing the gift cards.
7. **Date Needed** – Use the calendar to mark the date by which the gift cards are needed.
8. **Why are you requesting gift cards?** Use the drop down to indicate if they will be provided as an award or prize, as an incentive for a research participant, or other. If other is selected, please describe the purpose for which they are being purchased.
9. **Determine the type of gift card you need.** All of the options and limitations for each type of gift card can be found on the [Purchasing Gift Cards Webpage](#).

Choose one of the following six options from the pull down menu (a separate request form will need to be completed for each type of gift card you would like to request):

A. Electronic Reward Link to Tango Card Rewards Catalog

- i. Select the country where the recipients of the gift cards live. You will need to complete a separate Gift Card Request Form for each recipient country.
- ii. Upload the required [Reward Link Recipient Template](#) (containing information for each recipient).
- iii. Additional Documentation Required:
 - For rewards links **for an amount less than \$100**, the uploaded Reward Link Recipient Template will serve as the necessary documentation. No additional documentation is needed.
 - For **each** rewards link **for an amount of \$100 or more**, a signed [Research Participation Receipt and Property Receipt Form](#) must be emailed to cardservices@iastate.edu. **OR**, if you are still completing or obtaining signatures on these forms, they can be attached to the Journal Entry in Workday by emailing finance_delivery@iastate.edu (please make sure to include the JE Number that is emailed to you by cardservices@iastate.edu).

AND the signed forms for each rewards link must be sent to the Tax Office, 2423 ASB or via email to taxoffice@iastate.edu, in order to meet IRS tax reporting requirements.

Gift Card Request Form Job Aid

B. VISA Physical (plastic) Gift Card

- i. Provide the number of VISA gift cards needed and the dollar amount of the cards. If you need cards for more than one dollar amount, please provide the number of cards needed for each dollar amount.
- ii. Additional Documentation Required:
 - For **each** gift card with an **amount less than \$100** a signed [Research Participation Receipt and Property Receipt Form](#) must be emailed to finace_delivery@iastate.edu (please make sure to include the JE Number that is emailed to you by cardservices@iastate.edu).
 - For **each** gift card with an **amount of \$100 or more** a signed [Research Participation Receipt and Property Receipt Form](#) must be emailed to finace_delivery@iastate.edu (please make sure to include the JE Number that is emailed to you by cardservices@iastate.edu).

AND the signed forms for each rewards link must be sent to the Tax Office, 2423 ASB or via email to taxoffice@iastate.edu, in order to meet IRS tax reporting requirements.

C. VISA Electronic Gift Card

- i. Upload the required [VISA Gift Card Recipient Template](#) (containing information for each recipient).
- ii. Additional Documentation Required:
 - For electronic gift cards **for an amount less than \$100**, the VISA Gift Card Recipient Template will serve as the necessary documentation. No additional documentation is needed.
 - For **each** electronic gift card **for an amount of \$100 or more**, a signed [Research Participation Receipt and Property Receipt Form](#) must be emailed to finace_delivery@iastate.edu (please make sure to include the JE Number that is emailed to you by cardservices@iastate.edu).

AND the signed forms for each rewards link must be sent to the Tax Office, 2423 ASB or via email to taxoffice@iastate.edu, in order to meet IRS tax reporting requirements.

D. Amazon Physical (plastic) Gift Card

- i. Choose the card amount you are requesting from the pull down list. You may choose more than one dollar amount or combine dollar amounts to reach the dollar amount needed.
- ii. Enter the number of cards needed for each dollar amount.
- iii. Additional Documentation Required:
 - For **each** gift card with an **amount less than \$100** a signed a signed [Research Participation Receipt and Property Receipt Form](#) must be emailed to finace_delivery@iastate.edu

Gift Card Request Form Job Aid

(please make sure to include the JE Number that is emailed to you by cardservices@iastate.edu).

- For **each** gift card with an **amount of \$100 or more** a signed [Research Participation Receipt and Property Receipt Form](#) must be emailed to finace_delivery@iastate.edu (please make sure to include the JE Number that is emailed to you by cardservices@iastate.edu).

AND the signed forms for each rewards link must be sent to the Tax Office, 2423 ASB or via email to taxoffice@iastate.edu, in order to meet IRS tax reporting requirements.

E. Amazon Electronic Gift Card

- i. Amazon Electronic Gift Cards may be purchased through Amazon Business on cyBUY. ([Quick Reference: cyBUY Ordering](#))
- ii. Additional Documentation Required:
 - For electronic gift cards **for an amount less than \$100**
 - i. The [Amazon Gift Card Recipient Template](#) must be attached to the PCV transaction in Workday.
 - ii. A copy of the Amazon confirmation screen showing who the electronic gift cards were sent to must also be attached to the PCV transaction in Workday.
 - For **each** electronic gift card **for an amount of \$100 or more** a signed [Research Participation Receipt and Property Receipt Form](#) must be attached to the PCV transaction in Workday **AND** sent to the Tax Office, 2423 ASB or via email to taxoffice@iastate.edu, in order to meet IRS tax reporting requirements.

F. Amazon Gift Card Claim Code

- i. Provide the number of Amazon Claim Codes needed and the dollar amount of the claim codes. If you need claim codes for more than one dollar amount, please provide the number of claim codes needed for each dollar amount.
- ii. Additional Documentation Required:
 - For Amazon Claim Codes with an **amount less than \$100** a signed [Research Participation Receipt and Property Receipt Form](#) must be attached to the PCV transaction in Workday
 - For **each** Amazon Claim Code **for an amount of \$100 or more** a signed [Research Participation Receipt and Property Receipt Form](#) must be attached to the PCV transaction in Workday **AND** to the Tax Office, 2423 ASB or via email to taxoffice@iastate.edu, in order to meet IRS tax reporting requirements

10. Select whether or not you would like an emailed copy of your responses.

11. Click Submit.

Gift Card Request Form Job Aid

Following a Successfully Submitted Gift Card Request Form

- Gift Card Request Form will be sent to the Card Services Team, who will order the requested gift cards.
- The Business Manager in Procurement Services will initiate a Journal Entry (JE) in Workday to charge the Worktag(s) provided on the Gift Card Request Form.
 - Debit: Ledger: 6650 Supplies
 - Spend Category: SC10921 – Monetary Awards or Gift Cards
 - Driver Worktag: Worktag provided in Gift Card Request Form
 - Credit: Ledger: 6650 Supplies
 - Spend Category: SC10921 – Monetary Awards or Gift Cards
 - Driver Worktag: Procurement Services PG
- Once the JE has been created cardservices@iastate.edu will email the requester the JE Number.
- If physical (plastic) gift cards are requested, the Card Services Team will email the requester when the cards are ready to be picked up and an appointment will be set up for the requester (or their designee) to pick up the requested gift cards at ASB.
 - The email will also provide instructions for the requester to sign a form in DocuSign agreeing to terms associated with receiving the gift cards.
 - The requester or their designee will sign a statement of receipt when the gift cards are picked up.
- Any unused physical (plastic) VISA or Amazon Gift Cards, may be returned to Procurement Services by contacting the Card Services Team at cardservices@iastate.edu. The Business Manager in Procurement Services will request a new JE to refund the charges once the physical (plastic) gift cards have been returned.