Mailing WePay™ Cards to Participants

Individual WePay™ cards may be sent to participants through the U.S. mail, but must not be loaded before mailing. The process will require some record-keeping on the part of the WePay™ user and would work as follows:

1. Enter the participant in the WePay™ system and link them to a particular study. Participant information must include full legal name, SSN and mailing address. (e.g., John Smith, 123-45-6789, 123 Main Street, Anywhere, PA, 15111). [However, see Alternative Process below.]

2. Select a card from your physical card inventory and mail it to the participant.

   It is critical that the WePay™ User record the card admin number and participant name (on paper, or in a word or excel document) until confirmation is received from the participant that the card has been received.

   Also, please advise your participant in the cover letter when sending the card that it is important they do not attempt to use the card or contact the card processor until after you have activated and loaded the card. Otherwise, you will not be able to activate and load the card through the WePay™ system and the process will need to be repeated.

3. The WePay™ User must also be certain that this card is NOT assigned to anyone else in WePay™ while waiting for the participant to confirm its receipt. The WePay™ system has no way to know that the card was mailed to the participant and considers it an unassigned card that is still in your custody.

4. When the participant confirms receipt of the card, the WePay™ User must then access the “Make a Payment” function, enter the dollar amount, select the card admin number of the card sent to the participant, assign that card to the participant, then activate and load the card.

Alternative Process

As an alternative, the WePay™ User may use the “Make a Payment” function both to enter the participant into WePay™ and to assign a card to that participant without loading it. By following this alternative, the additional record-keeping noted in #2 and #3 above is eliminated as the card will already be assigned to the participant. When the card is received by the participant and they notify the WePay™ User of its receipt, the card may then simply be loaded.

Simply follow the normal “Make a Payment” process for a new study subject (see Chapter 8 of the WePay™ User Guide) through and including the “Activate a Card” screen. Upon reaching the “Review and Load Card” screen, do not click Load Card. Instead, click the Cancel button to abandon the payment. The card is now assigned to the participant but not loaded. At this point, the card may be sent to the participant. When they confirm receipt, the payment sequence can be followed again and the loading process completed.