Finance Systems Management

HEALTH SCIENCES CENTER

TEXAS TECH UNIVERSITY

The Swift's Order Management System (OMSI) can be accessed from:

- Swift Card OMSI
- <u>WebRaider portal</u> > Business Affairs tab > Links to Financial Systems > System Links > Swift Card OMSI

A Welcome page will be displayed. To access the system, enter the username and temporary password provided by your administrator. Click the **Login** button.

| OMS | | Your Integrated Order Management System |
|--|--|---|
| | Welcome to Swift Prepaid Solutions' Integrated Order Management System | |
| PLEASE LOGIN Username: Password: | | |
| Light | Enter Temporary Password | |
| If you are n immediate result in pro- any and all activity upon entry into this system. ALI | his site system may clientsupport@swiftprepaid.com. | team or email |

Upon the initial login, read and accept the Terms & Conditions. Simply click **Accept** to proceed.

After accepting the Terms & Conditions, you will be prompted to change your password for security purposes. Choose your **New Password** and be sure to confirm your entry by clicking **Update**.

| Welcome to Swift Pi | repaid Solutions' Integrated Order Management System | | | |
|--|--|--|--|--|
| Please login to manage your prepaid programs | | | | |
| └ YOUR PASSWORD HAS EXPIRED. PLEASE CHANGE YOUR PASSWORD: | | | | |
| Swift Prepaid Solutions has recently become PCI compliant. PCI better protect your data, cardholder information and account r | I (Payment Card Industry) compliance is an industry standard with many facets designed to numbers, and access and entry into the systems that house such data. | | | |
| You will be required to change your password to a minimum o numeral. You will be prompted to change your password ever the OMSI website, select the Forget Password option, where your secret question. Thank you for making OMSI safer and more secure. | Enter New Password the least one upper case letter, one lower case letter, and one password. As always, if you forget your password, please visit ord delivered to you via email by providing the correct answer to | | | |
| | ↓ | | | |
| New Password: | | | | |
| Confirm New Password: | Update Click Update | | | |

You will also be asked to select a security question and answer to verify your identity should you need to reset your password at a later date.

Note: Your security answer is case sensitive.

Upon initial login you will see the Home Screen. You should verify all the information is accurate. If changes are required, contact your program administrator.

| Nome Contact Us Image FAQs Log Out Manage Orders Manage Orders Image Orders Image Orders Image Activate Cards View History Client ID: TEX01 Very View History Company Name TEXAS TECH UNIVERSITY HEALTH Scicules Center Book -743-1724 Ext: UserExt Image Orders Image Copyright 2004-2018 Swift Prepaid Solutions, Inc. Location ID LUB Phone # 806-743-1724 Ext: UserExt Image Orders Image Orders Image Orders Image Orders Image Orders Image Orders Verify Your Image Orders Image Orders Image Orders Image Orders Image Orders Verify Your Image Orders Image Orders Image Orders Image Orders Image Orders Verify Your Image Orders Image Orders Image Orders Image Orders Image Orders Verify Your Image Orders Image Orders Image Orders Image Orders Image Orders Verify Your Image Orders Image Orders Image Orders Image Orders Image Orders Verify Your Image Orders Image Orders Image Orders Image Orders< | UNIS | - | Your Integrated Order Management System |
|--|--|--|--|
| Manage Orders Place New Orders Activate Cards Vew History Copyright 2004-2018 Swift Prepaid Solutions. Inc. Terms & Conditions Terms & Conditions Email Address TIFFANY. Manage Orders Wew History Copyright 2004-2018 Swift Prepaid Solutions. Inc. Terms & Conditions Email Address TIFFANY. @ Edit Address Phone # Boor 743-1724 Ext: UserExt Image: Conditions Email Address TIFFANY. @ TUHSC.EDU Image: Conditions Manage: Conditions Marce Source Year Orders Store 6209 LUBBOCK. TX-TEXAS Terms Administrator Program Administrator Phone Store damage WHAT IS YOUR PET'S NAME | 🔶 Home 🔝 Contact Us 🕜 FAQs 📀 | Log Out | |
| B Copyright 2004-2018 Swift Prepaid Solutions, Inc. Terms & Conditions Copyright 2004-2018 Swift Prepaid Solutions, Inc. Terms & Conditions Location ID LUB Phone # 806-743-1724 Ext: UserExt Cledit Email Address TIFFANY, ©TTUHSC.EDU Cledit Address PAYMENT SERVICES Scientexts TOP 6209 LUBBOCK, TX-TEXAS 79430 Program Administrator Program Program Program Program Program Program Program Program Program Program Program Program Program Program Program Program Program | Main Menu Manage Orders Place New Orders Activate Cards View History | Client ID: Your Name Company Name | TEX01 TIFFANY TEXAS TECH UNIVERSITY HEALTH UNIVERSITY HEALTH |
| Terms & Conditions | © Copyright 2004-2018 Swift Prepaid Solutions, Inc. | Location ID Phone # | UB 806-743-1724 Ext: UserExt Information |
| Address PAYMENT SERVICES 3601 4TH ST 'STOP 6209 LUBBOCK, TX-TEXAS 79430 Program Administrator Program Admin 806-743-7399 ext: ClientExt | Terms & Conditions | Email Address | |
| Program Administrator Program Admin 806-743-7399 ext: Phone ClientExt Security Question WHAT IS YOUR PET'S NAME | | Address | PAYMENT SERVICES 3601 4TH ST ŚTOP 6209 LUBBOCK, TX-TEXAS |
| Security Question WHAT IS YOUR PET'S NAME | | Program Administrator Program Admin Phone | 806-743-7399 ext: ClientExt |
| | | Security Question | WHAT IS YOUR PET'S NAME |
| Decurity Answer Cit | | Security Answer | Z Edit |

Single Activation

To activate cards via the single-card activation method, you will need the following:

- 1. An inactive Mastercard Card
- 2. First and last name of the participant

To activate a card, click the **Activate Cards option** in the upper left corner of your screen under the Main Menu.

Manually type in the account number from the card to activate but please remember to double-check the account number for accuracy before you continue.

| Main Menu Manage Orders Place New Orders Activate Cards View H tory | Select A Product For Card Activation/Funding > Request Confirmation Card Activation/Funding To activate a card, please swipe the card using your card reader to populate the account number; then continue with selecting your options and product. If you do not have a card reader, you may manually type in the account number but please remember to double check the account number for accuracy before you continue. Note: Your cards will not be activated until you complete all of the associated steps and receive an activation confirmation number. Please retain a copy of that receipt for your records. |
|---|---|
| © Copyright 20 1-2020 Swith Prepaid Solutions. Inc. Click Activate | Program TTUHSC_LUB Location ID LUB, TTUHSC LUBBOCK Enter Card Number to Activate & Funding |
| Cards | Enter Card Number to Activate: Card Number to Activate: Amount to fund: |

You will need to fill in the required fields to activate the card. A Social Security Number is required on cards funded with amounts more than \$25.

| Card Number to Activate: | Enter Requir |
|--------------------------|------------------------------------|
| Amount to fund: | Information |
| First Name: * | |
| Last Name: * | |
| Address 1: * | |
| Address 2: | |
| City: * | |
| State: * | Select One 💙 |
| Zip: * | |
| Social Security Number: | |
| Non-resident Alien: * | Please select Non-resident Alien 🗸 |
| Amount Withheld: | |
| Fund * | |
| Orgn: * | |
| Account * | Please select account |
| Prog * | |
| IRB#/ Study#/Program * | |
| PI Employee ID * | |

After submitting your data, a message will appear confirming the Card Load Amount. Click **OK**.



The confirmation number displayed is a verification of the funding and activation of the card and will be used for identification purposes. The confirmation number will automatically be stored in the View History section of the site for later reference.



You can now choose to **Activate Another Card**, **Print Activation & Funding Confirmation** or select **Done** and return to the home page.

Copy Previous

When funding multiple cards for the same amount, study, etc., save time by using the **Copy Previous** link. The previously entered amount and client-assigned fields will be automatically populated for you.

All information entered on the previous card in the fields below the **Amount Withheld** field are designated as our client assigned fields, Fund, Orgn, Account, Prog, etc., and will be copied to each card to save time when you choose the Copy Previous feature. When using this feature, please be sure to validate the information on your first activated card to ensure that the correct information will be populated on all your following cards.

| Program TTUHSC_LUB Location ID LUB, TTUHSC LUBBOCK Finter Card Number to Activate | Click Copy Previous |
|---|------------------------|
| Card Number to Activate: | |
| Amount to fund: | |

You will be able to view the history of all funding activity on your account. This feature is available so that you can confirm if a card has been activated or run custom reports by date range or client-assigned data. Select **View History** under the Main Menu, then select **Search Card Funding Transactions**.

| TRANSACTION HISTORY Transaction History To view transaction status, please select a clier Narrow your results by selecting a Location ID or Click "Run Filter" to view the filtered results. Note: To view the transaction details or to print a | nt and program. specified a Date range or by selecting Tra receipt, click on the Transaction#. Please r | Select Search Card Funding Transactions |
|--|---|--|
| Select a Program: | View History | Search Card Funding Transactions |
| Location ID Filter Criteria | All V All V Run Filter | |

Select Search or choose to customize your search by name, date, project, etc.

| - VIEW HISTORY > CARD FUNDING TRANSACTIONS Search Card Funding Transactions Narrow your results by selecting one or more options! Click "Search" to view the filtered results. | Enter Search Criteria (optional) | |
|---|--|-------------------|
| Virtual Bank Balance: \$23,280.00 TTUHSC_LUB V PI Employee ID: | Search Call Funding Transactions First Name: | Last Name: |
| Program: - ALL - 🗸 | Location: LUB 🗸 | Funded: From - To |
| Transaction Initiated By: - ALL - | Card Number: | Select Search |

You may export the results into an Excel, Word or Notepad document.

Nonresident Withholding Fee

At the time a Swift Card is activated for nonresident alien participants, a 30% federal tax withholding must be deducted from the participant payment (see <u>OP 72.19</u> for more information). *The OMSi program will not automatically calculate the final award value*. Reference the <u>Nonresident Alien Withholding Chart</u> for help determining withholding and card funding amounts. The "Amount to fund" field in the Swift Card OMSi Program should be the adjusted award value (participant fee less the 30% withholding fee). You must also enter the 30% withholding fee in the "Amount Withheld" field in OMSi.

Example:

\$25 Original Participant Fee (before applying foreign tax withholding)

| Calculation | Amount |
|-----------------|---------------------------|
| \$25 x 30% = | \$7.50 Withholding Fee |
| \$25 - \$7.50 = | \$17.50 Final Award Value |

Entries in OMSi

| Field | Amount |
|------------------|---------|
| Card Fund Amount | \$17.50 |
| Amount Withheld | \$7.50 |

If you have additional questions, contact Swift Card at swiftcard@ttuhsc.edu.