



SOP-02 | Participant Pool and ORSEE

Standard Operating Procedure

Document	SOP-02
Status	Draft for internal approval
Version	0.1
Effective date	Upon approval
Owner	BEER Lab Manager
Review cycle	At least annually
Applies to	Projects and personnel within the scope of this SOP

Behavioral & Experimental Economics Research Lab · Tecnológico de Monterrey

1. Purpose

Protect and administer the BEER participant pool as a shared scientific resource and establish controlled access to ORSEE or any successor recruitment system.

2. Core rule

Researchers receive access to eligible participants for an approved project; they do not receive unrestricted access to participant identities or contact data.

3. Access roles

- Pool Administrator/Lab Manager: manages participant records, permissions, tags, attendance, and system configuration.
- Authorized Recruiter: may create approved sessions and recruitment batches but may not export contact lists.
- Researcher/PI: receives project-level counts and attendance outputs needed for the approved study.

4. Participant records

- Maintain only information justified by recruitment or scientific needs.
- Separate contact information from experimental identifiers whenever feasible.
- Record attendance and experiment-class history centrally.
- Maintain opt-out and do-not-contact status.

- Correct demonstrable record errors without deleting valid historical participation.

5. Experiment history and contamination control

1. At registration, the PI assigns relevant taxonomy tags and declares prior exposures that make a participant ineligible.
2. The Lab Manager configures eligibility filters before invitations are issued.
3. Restrictions may be study-specific, time-limited, or permanent where scientifically justified.
4. Participation history is not reset at the request of a project team.

6. Prohibited uses

- Exporting or copying participant contact lists for independent use.
- Contacting pool members outside authorized recruitment channels.
- Sharing ORSEE credentials or participant-level information with unauthorized persons.
- Using pool data for unrelated research without approval.
- Creating a parallel participant database from BEER records.

7. Participant rights

- Participants may leave the pool at any time.
- Participants may request correction of attendance/no-show records.
- Participants may ask how their contact information is used and stored, subject to applicable privacy notices.

8. Auditing

BEER may audit recruitment logs, exported files, permissions, and attendance practices. Access may be suspended if pool integrity is at risk.

9. Related documents

- Governance Rules
- SOP-03 Participant Recruitment
- Participant No-Show Policy
- Experiment Classification Taxonomy
- SOP-09 Data Protection and Participant IDs