



SOP-03 | Participant Recruitment

Standard Operating Procedure

Document	SOP-03
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

Standardize participant recruitment so that invitations are fair, auditable, minimally burdensome, and consistent with study eligibility and pool integrity.

2. Recruitment channels

- BEER pool/ORSEE for approved pool-based studies.
- Approved external platforms for online studies.
- Institutional, school, community, or partner channels for field studies when covered by ethics and site authorization.
- Direct recruitment by individual researchers is not permitted when it bypasses a BEER-controlled pool or uses participant contact data obtained from BEER.

3. Invitation content

- Study/session label that does not reveal the hypothesis.
- Location or online modality.
- Expected duration and arrival requirements.
- Compensation structure or truthful payment range.
- Eligibility conditions participants need to know.
- Cancellation method and deadline.
- Accessibility or device requirements where relevant.

4. Pool recruitment procedure

1. Confirm Ready-to-Recruit status.
2. Apply approved eligibility and experiment-history filters.
3. Select eligible invitees randomly unless the design requires a documented sampling rule.
4. Send invitations in controlled batches to avoid unnecessary oversolicitation.
5. Use standardized reminders.
6. Close recruitment once the required number of confirmed participants is reached, allowing only the approved level of overbooking.
7. After the session, update attendance promptly.

5. Overbooking

Overbooking may be used to manage expected no-shows but must be reasonable and documented. Participants who arrive on time and are turned away because too many people appeared receive the applicable show-up payment.

6. Recruitment in courses or organizations

When recruitment occurs through a course, employer, school, government agency, or community organization, the invitation must make clear that participation is voluntary and that declining will not affect grades, employment, benefits, services, or standing. Where power asymmetries are material, recruitment should be conducted by someone other than the direct evaluator or supervisor whenever feasible.

7. External platforms

Projects using platforms such as Prolific must comply with platform rules in addition to BEER rules. Platform identifiers should be mapped to project IDs rather than merged unnecessarily with direct identifiers.

8. Prohibited practices

- Misrepresenting expected duration or payment.
- Repeatedly contacting people who opted out.
- Recruiting participants known to be ineligible.
- Offering unapproved side payments or incentives.
- Using personal relationships or academic authority in a coercive manner.

9. Records

- Eligibility filters
- Invitation text
- Recruitment batches
- Confirmation counts
- Overbooking level
- Attendance results

10. Related documents

- SOP-02 Participant Pool and ORSEE
- SOP-04 Participant Compensation
- Participant No-Show Policy