OREGON CLINICAL & TRANSLATIONAL RESEARCH INSTITUTE

Best Practices for Research Participant Compensation

WHY COMPENSATE PARTICIPANTS?

Financial concerns matter to potential participants and impact enrollment and retention. According to a patient perceptions survey by Greenphire[1], 60% of participants expect reimbursement for their efforts and 56% of those who have never participated cited compensation as impacting their decision. Compensation matters to:

- Increase enrollment numbers and retain participants
- Recognize participant contributions and show appreciation
- Ensure equitable outcomes through broader representation
- Avoid exploitation, especially of those from vulnerable populations
- To reimburse expenses

Participant compensation is important to the recruitment, engagement, and retention of participants.

FINANCIAL AND OTHER PARTICIPANT CONCERNS

In addition to the financial cost to a participant, other concerns and barriers exist to their study participation. Think about your study population – what does their life look like?

- Work
- School
- Family/children
- Economic status
- Insured or not
- Geographic location
- Mode of transportation

When developing a compensation plan for a study, consider the concerns and barriers your participants may experience.

ADDRESSING NON-MONETARY CONCERNS

To minimize concerns and barriers to study participation, consider and include non-monetary compensation in your study. Based on your population, ideas could include:

- Provide childcare
- Transit passes, taxi vouchers, or schedule a ride share
- Flexible/later in day study visits to accommodate their schedule
- Limit on campus time, moving to online and telehealth as able
- Provide internet or cell phone service or reimbursement based on study type

DETERMINING MONETARY COMPENSATION

When developing a financial compensation plan, consider monetary amount, varying payments, and payment schedule.

When determining the monetary amount, factor in:

- Participant's time commitment to study (e.g. number of visits, travel time, outside visit study activities)
- Their inconvenience and burden to participate (e.g. time off work, procedure prep)
- The standard of care for disease/condition (e.g. what is SOC vs study-related activities)

In some cases, it may be acceptable to vary payments among participants based on the costs they individually incur (e.g. hotel, travel costs). This allows individual participant needs to be met without over incentivizing those who don't have the same costs. The aim is to be a break even for participants.

Once you have determined the amount(s), plan for when you will issue compensation. Payment schedules should consider:

- Length of study
- Amount of study visits over a time period
- Key time points of study
- Completion of visits or certain procedures
- Timing of payments per visit, month, quarter, etc.
- Varying amounts per timing of payment
- Payments at end of study to increase retention

METHOD OF COMPENSATION

Once you have decided on the compensation amount and payment schedule, consider this and your study population in determining the best and allowable compensation method for your study. At OHSU, ClinCard, check and gift cards are acceptable participant payment methods.

- ClinCard
  - Reloadable prepaid debit card
  - Payments over $150 require SSN to be collected
- Disbursements/checks

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1. Greenphire. (2024). *Global Patient Perceptions & Engagement Preferences in Clinical Research* [White paper].

- Gift cards
    - Only allowed for one-time payments up to $150
    - Does not require SSN to be collected, but study teams must track gift card disbursement

For more information and FAQs on compensation methods, please visit OHSU Finance's Research Subject Payments 02 page.

COMMUNICATING ABOUT COMPENSATION

Confusion and misunderstanding around compensation can lead to participant frustration and complaints and impact engagement and retention. When communicating with participants about compensation, it's best practice to:

- Ensure consent form clearly describes the details of compensation, not only amount and method, but other relevant information that could be a source of confusion

- When providing required or supporting documents for the compensation method, take the time to point out details that are often overlooked, but impactful to participants (e.g. expiration dates, fees)

- During the compensation discussion, be very clear with participants on details, amounts, and timing to manage their expectations and leave time for questions to minimize confusion

- As paperwork is easily lost, email participants a copy of all compensation related documents you provide in-person or by mail

- Have your contact details included across all communication to ensure participants can easily reach you with questions and concerns

RESOURCES

For additional relevant information on participant compensation, please visit:

-OHSU Finance Research Subject Payments
-OHSU IRB policies and forms
-OHRP Research Participant Guidance
-NIH Subject Recruitment and Compensation Policy

For more information, additional resources, and to request a complimentary recruitment consultation, please visit our webpage
or email us at OCTRIrecruitment@ohsu.edu.

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