

REQUEST FOR PROPOSAL #922577
RESEARCH PARTICIPANT COMPENSATION SOLUTION
MANDATORY MINIMUM REQUIREMENTS

	Requirements	Supplier Capability (YES = Y or NO = N)	Supplier Comments
1.	Solution Must provide flexibility and availability of using a variety of compensation amounts and methods (i.e., participants choose type of incentive and redemption options)		
2.	Solution Must indicate whether any gift/debit card options can have usage restrictions assigned (e.g., tobacco products, alcohol), and whether exceptions to restrictions can be assigned (e.g., restaurants that also serve alcohol can be designated as acceptable or unacceptable)		
3.	Solution Must provide the ability to compensate research participants multiple times during the research study, regardless of the length of the study		
4.	Solution Must provide virtual incentive compensation via email		
5.	Solution Must provide a clear fee schedule listing all fees to researchers and participants		
6.	Solution Must provide a tax exemption to MSU on fees and other charges		
7.	Solution Must provide a clear list of any fund expiration rules and specify what happens to any funds that expire or time out		
8.	Solution Must provide simple and expedited process for MSU to receive refunds for funds that are deposited but not used		
9.	Solution Must provide simple and expedited process for MSU to cancel and receive refunds for funds that are issued to participants but not redeemed within a specified period		

10.	Solution Must provide a dashboard for each department with the ability to create multiple research study accounts and monitor delivery success		
11.	Solution Dashboard Must include options for designating account partitioning and access permissions for individual research staff		
12.	Solution Dashboard Must include access permissions by role such that staff in billing/funding roles can be restricted from viewing identifiable participant information, for example		
13.	Solution Must provide downloadable reporting options		
14.	Solution Reports Must include payment information by department (i.e., research study, date, amount, totals)		
15.	Solution Reports Must include payment information by research study (i.e., recipient, date, amount, totals)		
16.	Solution Reports Must include payment information that identifies payments exceeding a specified dollar amount in a calendar year for tax reporting purposes		
17.	Solution Reports Must include monitoring of participant accounts and alerting of University contact when participant nears the specified payout amount		
18.	Solution Reports Must include automated W-9 request sent to participants when participant payments exceed specified dollar amount per calendar year		
19.	Solution Reports Must include information that identifies payments to non-US citizens		
20.	Solution Reports Must include automated W-8BEN request for participants who are non-US citizens		

21.	Solution Must specify what participant data are required to use the service, particularly regarding sensitive data such as social security numbers		
22.	Solution Must provide the ability for each department to view only their participants, research studies, and payments		
23.	Solution Must provide participants a method to view card account for available balances		
24.	Solution method Must be easy to navigate and be at no cost to the participant		
25.	Solution Must provide a user-friendly interface (front end and back end)		
26.	Solution Must provide an easy onboarding and registration process		
27.	Solution Must provide a system that is secure and protects privacy and all personally identifiable information (PII) of the participant, with clear privacy and security language and no data sharing		
28.	Respondent Must provide a current HECVAT as part of the proposal		
29.	Respondent Must provide a current VPAT as part of the proposal		
30.	Respondent must have experience working with Higher Education Institutions similar in size to University		
31.	Respondent platform/Software Must comply, where relevant, with level AA of the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.2.		