

JP MORGAN CONCOURSE

Overview

Concourse is a Digital Payment Solution through JP Morgan Chase. Concourse is a secure and easy way to pay Research Participants. Departmental personnel will save a lot of time paying research participants as the Concourse system allows you to pay multiple research participants at one time by completing a template. The fees for the usage of Concourse are very minimal compared to other payment options. (Please see bottom for this information.) The payments to participants are made in a timely manner either on the visit date or within 24 hours of the visit date. The payment is made once the department uploads and saves the completed template file to the PI's secure Research Payment shared folder, notifies ORI that a file has been uploaded to the shared folder, ORI uploads the file to the Concourse platform and is approved by ORI. Templates will be processed after 1:30PM on the day you inform ORI that a new file has been prepared.

Researcher Processes

Request to Use Concourse:

- PI's or their assigned staff need to contact: ORI, Finance, Jeannine Reed-Heil at jr3724@drexel.edu stating they would like to use Concourse. Complete and attach the Request to Use Form below.
- ORI, Finance will then have a Secure Folder set up for your study.
- They will contact you with the Secure Folder name, the User's Guide and the template that needs to be used to pay participants.

JP Morgan Concourse Study Template

- JP Morgan created a special template for Drexel University Research, to encompass all items needed to pay research participants via the Concourse platform.
 - The template is the same for every Drexel University Research Study, it does not change.
 - The blank template should be saved by the department to be used after a file has been completed and uploaded to be paid.
 - The template needs to be saved by the department personnel; suggest using study name and date/s of service, i.e., Protocol #_1_1_11
 - When the department is ready to pay the participants on the file, they need to save the file to the PI's shared folder. (The shared file name cannot exceed 50 characters.)
 - Once the file is saved to the PI's shared folder the department needs to inform ORI so they can proceed with uploading to and approving the file in the Concourse Platform.
 - The department's study participants will be paid depending on when the department saves the file to the shared folder.

Completion of Template Payment File

- The designated department personnel (decided by department) will complete the excel file. In order to complete the template, the personnel will need to have access to the PI's Shared Folder and know the study information.
- The columns on the spreadsheet have headers stating what information is required in each column. DO NOT MAKE ANY CHANGES TO THE HEADERS.
 - Study Participant Email Address, Payment Amount, Payment Description, First Name, Last Name, Participant Study ID, Organization Number, Protocol Number, PI Name, Fund Number. (The maximum # of characters for each field are 30)
 - The fields that need to be completed are:
 - Email Address
 - Payment Amount-The max amount to pay a participant on a line is \$400 if the payment to them is greater than \$400 than they will receive two separate emails for two payments.
 - Payment Description (no more than 30 characters)
 - First Name, Last Name- Do not need to use the participants actual name can decide how you want to use those columns, i.e. Study, #
 - Participant Study ID
 - Org Number
 - Protocol Number
 - PI Name
 - Fund Number
 - ******Make sure that you inform the participant that they will be receiving an email. Let them know it will say from Chase.**
 - ******Since you are not using their real name and substituting with other information the participant will try to change their name on the notification they receive. Please tell them that their name will not be on there per study purposes and it cannot be changed. They only have to worry about completing the payment information.**
- File needs to be saved as a .xls or .xlsx file, Identifying the study and date.
 - <\\files.drexel.edu\projects\Research Payments\PI Folders\>
- Email Jeannine Reed-Heil, jr3724@drexel.edu letting her know that a new file has been saved and their folder name.

J.P. MORGAN CHASE CONCOURSE FEES

SERVICE	AMOUNT
Payment message sent out to participant (text/email)	\$0.65
Same Day payment made to participant (Files sent before 1:00 PM)	\$0.50
Next Day payments made to participant (Files sent after 1:00 PM)	\$0.05
Payment Declined or Not Accepted by participant	\$0.20

***** Please Note:** All participants who will be paid via Concourse need to be U.S. Citizens and have a bank account.