Sona Systems for Participation in Psychological Research: Researcher/PI Information

How to request a Researcher/PI user account:

To request an account please email larsoncl@uwm.edu. You will need to:

1. Choose a user ID – only one per lab (e.g., LarsonLab)
2. Choose an email for all Sona emails to be sent. This could be a group account if you have one (e.g., brainlab@uwm.edu, HannulaLab@gmail.com).

Once your account is set up you will receive an email notifying you. Please:

1. Choose a password that is safe for multiple users in your lab to share.
2. Enter the lab phone number in the "Phone Number" spot. This is optional, but this will be used by department staff to help lost participants find their studies.

IRB Approval

Your study needs to be approved by the IRB prior to being made "active" so that potential participants can view it.

Department of Psychology Extra Credit Policy

Time value assignments should be determined in 30 min increments. Thus, a study which requires a participation time of **30 min** or **less** should award ½ extra credit hour, participation times of **31-60 min** should result in **1** extra credit hour, participation times of **61-90 min** should result in 1 ½ extra credit hour, etc. A 15 minute study is not worth 1 hour.

Some studies require students to return for multiple sessions. Extra credit hour incentives are appropriate for these studies. Participants can receive an **additional ½** extra credit hour per each two sessions of repeat participation. These sessions must be at least 1 hour apart and they must be part of the same study. Asking students to come back to participate in another study conducted by the same research group does not qualify for extra-credit incentives.

How to Set-up a Study in Sona Systems:

Login to Sona systems at http://uwmilwaukee.sona-systems.com/ using your research user account. Under Studies select "Add New Study" option from the top toolbar, and then select study type.

Add basic information (required)

1. *Choose Study type* (and whether it is paid or for extra credit):
   a. Standard (in person - not online, one session)
   b. Two-part standard (in person - not online, two sessions)
   c. Online – an online study done completely within Sona (not Qualtrics, Survey Monkey, etc.)
   d. Online External – an online study not conducted in Sona, but with some other provider (e.g., Qualtrics)
2. *Study name*: Short name of study
3. *Brief Abstract* (optional) – this will appear on the list of studies that participants see (e.g., take survey about online dating, make judgments about gambles, etc.)
4. *Detailed Description* of study
5. *Eligibility Requirements:* indicate if there are any restrictions
6. *Duration:* The maximum amount of time (in 30 minute intervals) that your study will take to complete
7. *Hours:* this is the number of hours the study takes (in units of .5 – each .5 hour = 30 minutes) and is how credit will be reported in the students account and to their instructor
8. *Researcher:* Select your lab name from the researcher list

9. *PI:* Select PI for every study (faculty supervisor)
10. *IRB Approval code: New protocols:* enter 00-000 for IRB code. The correct information should be entered after IRB approval is granted.
11. *Approved?* **Note** your study will not be visible to participants unless you check "Yes". Currently, researchers can "approve" their own studies and do not need administrator approval. So check "yes".
12. *Active Study:* when you are ready to post timeslots, select your study and then select "change study information". Scroll down to "Active Study?" section and select YES. This will make your approved study visible to participants. If you want to manually sign people up for your study and NOT let everyone with a Sona account see your study, check "NO."

Note: The following distinction: "Approved?" actually refers to the Sona Admin approving the study for potential participants to view AND the "Active study?" part refers to RESEARCHERS allowing participants to see the study information and timeslots.

<u>**Advanced Settings**</u>

1. *Prerequisites:* Should participants be limited to those who have also completed other specific studies?
2. *Disqualifiers:* Should participants be limited to those who have NOT also completed other specific studies?
3. *Course Restrictions:* Should participation be limited to students in specific courses?
4. *Invitation Code:* you may type in an invitation code (e.g., "EEG," "1234") that participants must have in order to sign up for a session. This is useful if you have specific screening requirements that cannot be tested in the prescreen.
5. *Is this a web based study:* If so, is the study done on Sona or an external website?
6. *Study URL* (for Qualtrics or other studies)
7. *Participant sign up deadline*: How many hours prior to the session may they sign up?
8. *Participant Cancellation deadline*: How many hours prior to the session may they cancel?
9. *Should the Researcher receive emails for signups and cancellations*?
10. *Researchers at timeslot-level?* NO! We are currently only having one account per lab.
11. *Research Alternative*? No
12. *Can a participant sign up for this study more than once?*

<u>**Prescreening**</u>

Each semester a BRIEF mandatory prescreen will be conducted to facilitate recruitment of participants based on particular characteristics. The prescreen feature can be used in two ways: 1) to make your study visible only to those who meet a given characteristic (e.g., male) so that you don't waste time/credits on individuals whose data you cannot use, and 2) to email participants who meet particular criteria and invite them to participate. Questions for inclusion on this prescreen will be solicited at the beginning of each semester.

1. If you would like to select or screen out participants based on prescreening characteristics (currently just age, gender, ethnicity, handedness), you can make your study visible only to those who meet certain characteristics:
   a. Click on your study
   b. Under Restrictions and Prescreen Restrictions, select "View/Modify Restrictions"
   c. On the next screen check the questions/characteristics you would like to set restrictions for (e.g., gender) and select "Set Restrictions"
   d. On the next screen check the choices that you wish to use as INCLUSION criteria for the study

    e. Select “Save Changes”
2. To email a group of subjects who meet particular prescreen characteristics
    a. Click on your study
    b. Under Restrictions and Prescreen Restrictions, select “View/Modify Restrictions”
    c. Click on the “Invite Qualified Participants” link
    d. Select the percentage of currently available qualified participants you would like to email as well as any people to exclude based on participation in other studies. Please note the email could be sent to 100% of participants who meet these criteria or some smaller number of potential participants. Please judge according to your needs so we’re not SPAMming participants.
    e. Compose your email message and send

<u>Adding Time Slots for a Study</u>
After under My Studies, select View, add or edit timeslots. Click on the study and then choose the Timeslots option. Click on the ADD A TIMESLOT button at the top of the page.

<u>To Manually Add Participants</u>
Select “My Studies” from the top toolbar. Click on the desired study and choose the Timeslots option. Find the appropriate timeslot (you may need to create one – see above) and Click “Modify.” Under Manual Sign-up at the bottom of the page enter either the participants UWM epanther ID or last name (**NOTE:** they must have a SONA account) and select “Sign Up.” Confirm on the next page. Please note that this will only sign them up. You must still grant them credit once they have completed the session.

<u>Granting Credit Hours</u>

***Please award credit within 24 hours of the student’s participation – for multiple session studies this can be after the final session of the study.**

For a Single subject
After the participant has completed your study/experiment, select “View, add or edit timeslots” under "My Studies" . Next to the participant’s name, you can grant hours for participation or indicate if they did not show up (No-Show). Click “Update Signup” to save changes.

For Multiple Subjects
1. Select “View, add or edit timeslots” for your study.
2. Select modify for any past timeslot; edit the number of participants to reflect the number of batch credit participants you will add for that timeslot
3. Under the manual-signup section (last portion of the page); select BATCH;; select BATCH CREDIT GRANT; type in student user IDs (UWM epanther ID used in email) and provide comment (optional); you can copy user IDs from a Excel or Word document; **NOTE:** you can only batch credit 20 participants at one time; Click “go to confirmation page”; the default credit amount will be the one you selected for your study.

Some FAQs for Researchers/PIs

What if my study involves more than two sessions?

Currently Sona does not have a straightforward process for managing studies that involve more than two sessions. Here is one proposed approach. There may be others. You could set up either a standard study (one session) OR a 2 part study and make it VERY clear in your study description that the study involves X sessions and that they can either sign up for them under a different study name or that you, the researcher, will contact them to schedule those sessions. Immediately after they sign up for the study I would send them a separate email making it very clear that additional sessions are involved and how they should go about scheduling them. At this point either one or two of the sessions will have been schedule, depending on whether you selected standard or 2-part study. Then, to schedule the remaining sessions you can create a separate study or studies for each remaining session an leave them as inactive (don't mark as "active"). You can then manually sign students up for sessions. This will prevent other students from signing up for those sessions and will allow you to grant credit separately for each session. Students will still receive reminder emails and other email notifications even though the study is inactive. Another option is to make each session a separate study (clearly numbered in order) and make each study/session a prerequisite for participating in the next session.

How do I setup web-based questionnaires?

You can setup a web-based questionnaire in the system or provide a link to an external URL. For documentation on how to set up a questionnaire in Sona see the Sona Master Documentation available on the department webpage. You should setup the questionnaire with one timeslot containing the maximum number of participants as well as the last date and time that they can participate. **NOTE:** you will need IRB approval to post questionnaires online. Also, I highly recommend that you try using the automatic awarding of credit function in Qualtrics. See the Department Sona webpage for a link to this information

What if a participant no-shows and then contacts me to reschedule?

When a participant no-shows they lose the opportunity to earn 1% of extra credit. We are currently allowing participants to earn that credit back by rescheduling. Sona is currently set up so that participants may not sign themselves up for the same study twice. Thus, in order to reschedule they will email the researcher and the researcher can manually add the participant to a timeslot (see instructions above). Don't forget to mark them as show or no-show for the second appointment.