המדריך לשימוש במערכת לניהול ניסויים

המחלקה לפסיכולוגיה והמחלקה לחינוך

אונ' בן-גוריון

קישור לאתר המערכת

במסמך זה שני חלקים עיקריים: מדריך כללי קצר בעברית לשימוש במערכת הנבדקים, ומדריך מפורט באנגלית המציג ומסביר את כל הפעולות האפשריות במערכת.

הערה: ישנן אפשרויות רבות במערכת הזו וההוראות ארוכות ומפורטות. כדי להימנע מהצפה, מומלץ להתרכז בקריאה ראשונה בהוספת ניסוי ובהוספת הזמנות לניסוי. ודאו שקראתם את החלק בעברית (פחות מעשרה עמודים), לפני שאתם מתחילים להשתמש במערכת. חשוב לחזור ולקרוא את המדריך הזה בתחילת כל שנה. במשך השנה נשלחות לועדת הניסויים הרבה שאלות שהייתם אמורים לדעת את התשובות עליהן, לו קראתם מסמך זה. מומלץ מאוד גם לקרוא את המידע באנגלית, כי הוא יכול לעזור לכם לשפר את השימוש שלכם במערכת, אבל אפשר להסתדר גם בלעדיו. מומלץ גם לצפות בסרטון ההדרכה לחוקרים במערכת (באנגלית).

הערה 2: המדריך באנגלית נכתב על-ידי החברה שייצרה את המערכת. אם אתם מוצאים בו משהו שלא נראה לכם מתאים לאב"ג, יתכן שהוא נשאר במדריך זה בטעות. כִּתבו למנהל המערכת במקרה כזה.

כללים לשימוש במערכת הניסויים

מי מנהל את המערכת?

המחלקה לפסיכולוגיה והמחלקה לחינוך ממנות מרצה לניהול המערכת. כרגע המנהלת היא פרופ' נירית סופר-דודק. הסטודנט הממונה על המערכת הוא קיריל קורגנסקי. ניתן להשיג אותו בכתובת bgu.experiments@gmail.com .

מתי וממי מקבלים מענה?

פניות למנהל המערכת נקראות ונענות פעמיים בשבוע (בד"כ בימי ראשון ורביעי). במהלך השבוע יש לפנות לאחראית על המעבדה במערכת הניסויים. במקרים דחופים, אחראית המעבדה תדע ליצור קשר עם מנהל המערכת, גם בשאר ימות השבוע. מרבית המקרים אינם דחופים, ולא יידרשו פניה באמצע השבוע.

<u>מי יכול להשתמש במערכת?</u>

המערכת נועדה לניהול ניסויים תמורת קרדיט וניסויים תמורת תשלום עבור מעבדות באוניברסיטת בן גוריון ובעיקר עבור המחלקה לפסיכולוגיה.

<u>הוספת מעבדה למערכת</u>

להוספת מעבדה למערכת, צרו קשר עם מנהלת המערכת (פרופ' נירית סופר-דודק).

להרצת ניסויים בתשלום, ההצטרפות חינם. נכון לשנת הלימודים 2024-5, התעריף להרצת נבדקים: שקל אחד תמורת כל נבדק (ללא קשר לאורך הניסוי), עד 400 שקלים. כלומר, החל מהנבדק ה-401, השימוש במערכת להרצת ניסויים בתשלום הוא בחינם (הערה: באופן מעשי, מעולם לא גבינו כסף על שימוש במערכת. המחלקה לפסיכולוגיה מימנה את המערכת מאז שנפתחה. אולם, המחלקה עשויה להתחיל לגבות את הכסף בעתיד).

<u>ניהול הקרדיט (לא רלוונטי למשתמשים במערכת רק לניסויים בתשלום)</u>

על ניסויים שמתבצעים **בבן-גוריון** הנבדקים מקבלים **נקודת קרדיט אחת** על כל **10 דקות**. בכל השנים עד כה, מרבית הנבדקים יתבקשו להשלים 12 שעות, שהן 72 נקודות. נבדקים המקבלים הקלות בלימודים (מטעם הדיקאנט) בשל ליקויי למידה או שליטה נמוכה בעברית ישלימו 6 שעות (36 נקודות). **בשנת תשפ"ד ותשפ"ה ועכשיו גם תשפ"ו, הוחלט על הקלות בקרדיט**. נבדקים המקבלים הקלות בלימודים (מטעם הדיקאנט) בשל ליקויי למידה או שליטה נמוכה בעברית ישלימו 5 שעות (30 נקודות).

- **משך הזמן המינימלי לניסוי בקרדיט בשטחי האוניברסיטה הוא 20 דקות.**
- **משך הזמן המינימלי לניסוי בקרדיט online הוא 10 דקות.**

לכל מעבדה מוקצית כמות סופית של קרדיט (=שעות ניסוי). בדרך-כלל, תינתן מקדמה בפתיחת שנת הלימודים, והכמות הסופית תינתן בשבוע השני או השלישי ללימודים. שבעה שבועות לפני סוף סמסטר ב', כל המעבדות יקבלו קרדיט אינסופי. כלומר, שבעה שבועות לפני סוף סמסטר ב', לכל המעבדות יותר להריץ כמה נבדקים שירצו.
הקרדיט לא מחולק בין עוזרי המחקר השונים. כל ניסוי ששייך למעבדה מוריד לה שעות ניסוי באופן ישיר.
מנהלת המעבדה יכולה לראות כמה שעות ניסוי נותרו לה ב-my profile, תחת הכותרת Study Time Usage. הנסיינים יראו כמה שעות ניסוי נותרו למעבדה בכל פעם שהם יוסיפו הזמנה חדשה (יפורט שם כמה שעות נשארו למעבדה שאליה שייך הניסוי).

<u>אישור אתי לניסויים</u>

מעבדות לא יכולות להריץ ניסויים שאינם חלק מפרויקט שאושר אתית. האישור האתי מנותק לחלוטין ממערכת הניסויים. זוהי אחריות החוקרים להימנע מלבצע ניסויים ללא אישור אתי. זאת, בין אם הם משתמשים במערכת הניסויים הזו, ובין אם הם מגייסים את הנבדקים שלהם בדרכים אחרות.
להשגת אישור אתי במחלקה לפסיכולוגיה, ראו הוראות בנושא באתר המחלקה.
להשגת אישור אתי מהמחלקה לחינוך, ראו כאן.

נסיינים וחוקרים יכולים להוסיף כמה ניסויים שהם רוצים למערכת, ללא קשר למספר הפרויקטים המאושרים אתית. לדוגמה, אפשר להוסיף תשעה ניסויים תחת אותו פרויקט עם אישור אתי, או ניסוי אחד תחת שני פרויקטים. במערכת עצמה קיימים רק ניסויים, ואין שום דבר המגדיר את הניסוי כשייך לפרויקט זה או אחר.

כאשר מוסיפים ניסוי חדש, ניתן להגדיר שנבדקים שביצעו ניסויים מסוימים לא יוכלו להירשם לניסוי החדש. ניתן לציין באפשרות זאת ניסויים שאתם יודעים ששייכים לאותו הפרויקט, ניסויים אחרים שלכם, או אפילו ניסויים אחרים של חוקרים אחרים.

<u>זכויות וחובות הנבדקים</u>

כל מי שמשתמש במערכת חייב לשמור על זכויות וחובות הנבדקים באופן דומה. זאת בהתאם למסמך בנושא שנכתב למען הנבדקים.

חוקרים מחוץ למחלקה לפסיכולוגיה המשתמשים במערכת כדי לקבל גישה אל מאגר הנבדקים בתשלום מתבקשים לשמור על מספר כללים פשוטים:

- באופן כללי, הֱיו אדיבים והוגנים עם הנבדקים. היחסים שאתם בונים עם הנבדקים משפיעים על כלל המעבדות שמשתמשות במאגר.
- אין לשקר לנבדקים בכל הקשור לתשלום. אם הובטח להם תשלום מסוים, חובה לתת להם לפחות את הסכום שהובטח להם. אם ההשתתפות בניסוי מזכה רק בכניסה להגרלה על פרס כספי (כך מקובל בניסויי אינטרנט), יש לפרסם זאת באופן שלא משתמע לשתי פנים.
- השתדלו להימנע עד כמה שניתן מרמיית הנבדקים. בניסויים בפסיכולוגיה הדבר לעתים בלתי-נמנע, אך חשוב לצמצם זאת למינימום האפשרי. זאת כדי לא להפוך את הנבדקים לחשדנים כרוניים.
- אם אתם נתקלים בנבדקים בעייתיים, הודיעו על כך למנהל המערכת (**bgu.experiments@gmail.com**).
- אל תשברו את השוק. אין לנסות להפוך את הפרסומים לניסויים שלכם לאטרקטיביים יותר מפרסומים של מעבדות אחרות.למשל, אסור לכתוב "ניסוי מהנה ורווחי במיוחד". באופן דומה, אסור לכתוב שהניסוי/המטלה קצרה, פשוטה או קלילה. כמו כן, יש להימנע מעמימות לגבי משך הניסוי ("ניסוי עד 20 דקות"/"ניסוי של כ-20 דקות" מרמז שמשך הניסוי הינו פחות מ 20 דקות)

<u>ניסוים בתשלום:</u>

- אנחנו רוצים שלא תהיה תחרות בין המעבדות. לכן, יש להיצמד לתעריפים המקובלים בקרב המשתמשים במערכת:
  - 15 שקל ל-15 דקות
  - 20 שקל ל-20 דקות
  - 25 שקל ל-30 דקות
  - 30 שקל ל-40 דקות
  - 35 שקל ל-60 דקות
  - 55 שקל ל-90 דקות.

  - ארבעה סייגים:
    - התעריף המקובל הוא לשני הכיוונים - כלומר לא ניתן להציע סכום גבוה יותר (למשל 30 שקל ל-20 דקות), אך גם לא ניתן להציע סכום

נמוך יותר (למשל 15 שקל ל-20 דקות)
- יש הסבורים ש-35 שקלים ל-60 דקות הוא תעריף לא אטרקטיבי ויש צורך ב-40 שקלים. אני ממליץ שמי שמעריך כך יזמין את הנבדקים למספר דקות שונה מעט (למשל, 40 שקלים ל-70 דקות, או 33 שקלים ל-50 דקות), רק כדי לא להתחרות באופן ישיר עם אלו מאתנו שמשתמשים בתעריף המומלץ למעלה.
- התעריפים המדוברים נכונים לניסוים "סטנדרטיים" (=נבדקים מהפול הרגיל של הנבדקים, נעשים אונליין/מעבדה, חד פעמיים). ניתן להציע תעריפים גבוהים יותר עבור ניסוים "לא סטנדרטים" (למשל, ניסוים עם מדידה פיזיולוגית, צורך בגיוס נבדקים "חריגים", וכ'ו), לפי שיקול מנהל/ת המעבדה והמחקר, וכן של מנהל/ת מערכת הניסוים. חשוב רק לדאוג לידע בכך את מנהל המערכת כי התעריף שניתן הוא בעקבות זה שהניסוי חריג, יחד עם שליחת בקשה לאישור הניסוי..
- כאשר משלמים בתווי שי ולא בתשלום מזומן, יתכנו מצבים בהם התעריף יהיה שונה מעט, משום שסכומי התווים גמישים פחות.

- כתמורה לניסוי (במיוחד ניסויי אינטרנט), מותר גם להציע השתתפות בהגרלה. מומלץ לא לחרוג מפרס מקסימלי של 100 שקלים, עם הסתברות של 1 ל-20 לזכות בה.
- **אופן מתן התשלום אינו מתבצע דרך המערכת ה SONA** ואינו קשור למערכת ה SONA. על כל מעבדה להחליט את השיטה הרצויה לה (מזומן, ביט וכדומה) ונהל זאת באופן עצמאי מחוץ למערכת.

<u>קורסים במערכת</u>

כל נבדק שמופיע במערכת משויך לקורס. נבדקים לא יכולים להיות משוייכים ליותר מקורס אחד. הסבר קצר על הקורסים השונים. עמודת הקרדיט והתשלום מצביעה על סוג הניסויים אליהם סטודנטים בקורס יכולים להרשם:

שם הקורס	תיאור	קרדיט	תשלום
Psychology - Credit	סטודנטים לפסיכולוגיה באב"ג, שנה א'. השתתפות תמורת קרדיט.	V	
Eilat - Credit	סטודנטים לפסיכולוגיה באילת, שנה א'. השתתפות תמורת קרדיט.	V	
Social Work - Credit	סטודנטים לעו"ס באב"ג, שנה א'. השתתפות תמורת קרדיט.	V	
Communication - Credit	סטודנטים לתקשורת באב"ג, שנה א'. השתתפות תמורת קרדיט.	V	
Psy_Edu students - Credit	סטודנטים לפסיכולוגיה וחינוך באב"ג, שנה א'. השתתפות תמורת קרדיט.	V	

Education - Credit	סטודנטים בקורס מבוא לפסיכולוגיה חינוכית במחלקה לחינוך **או** בקורס שיטות מחקר במדעי החברה אב"ג, שנה א'. השתתפות תמורת קרדיט.	V	
Edu_Edu - Credit	סטודנטים בקורס מבוא לפסיכולוגיה חינוכית במחלקה לחינוך **וגם** בקורס שיטות מחקר במדעי החברה אב"ג, שנה א'. השתתפות תמורת קרדיט.	V	
Edu_Com students - Credit	סטודנטים לתקשורת המשתתפים גם בקורס שיטות מחקר במדעי החברה, אב"ג, שנה א'. השתתפות תמורת קרדיט.	V	
for money	סטודנטים מכל תחומי הלימוד והשנים באוניברסיטה, ואנשים שאינם סטודנטים (פוטנציאלית).		V
Former Credit - Payment	סטודנטים לפסיכולוגיה, עו"ס וחינוך באב"ג. השתתפות תמורת תשלום. עבור הסטודנטים בקורס זה יש רישום של הניסויים שבהם השתתפו עבור קרדיט כשהיו בשנה א'. הם נחשבים "נבדקים לא נאיבים" מאחר שחוו ניסויים רבים, וחלקם גם עוזרי מחקר כיום.		V
Psy_Edu students - Payment	סטודנטים לפסיכולוגיה וחינוך באב"ג. השתתפות תמורת תשלום. **קבוצה שאינה מתאימה לניסויים בתשלום מהמחלקה לחינוך**.		V
for m	לא פעיל.		
locations	לא פעיל		

<u>מנהלי מעבדה ונסיינים</u>

במערכת יש שני סוגי חוקרים: Researcher ו-P.I. אלו מקבילים לנסיין ומנהלת מעבדה (חוקרת ראשית). מנהלת המעבדה יכולה לראות את כל הניסויים השייכים לה, ולבצע כל פעולה שהיא רוצה בניסויים האלו (כולל לשנות קרדיט, לבטל הזמנות, ועוד). עם זאת, מנהלת המעבדה לא חייבת לעשות שום דבר. היא יכולה פשוט להורות לנסיינים להוסיף ניסויים ולהזמין נבדקים, והיא לא תצטרך לעשות דבר בעניין.

מנהלת המעבדה לא חייבת להיות המרצה שעומדת בראש המעבדה. המרצה יכולה למנות אדם אחר (תלמיד מחקר, בדרך-כלל) שיעשה זאת. ניתן להחליף את פרטי מנהלת המעבדה באמצעות פנייה למנהל המערכת.

להוספת נסיינים למערכת, על מנהלת המעבדה למלא את פרטיהם (ת.ז., שם מלא, כתובת אימייל) במסמך זה. מנהל המערכת יעדכן ממסמך זה בערך אחת לשבוע. אם עבר שבוע ולא נוצר חשבון לנסיין, פנו באימייל למנהל המערכת. שם המשתמש יהיו מספר ת.ז. של הנסיין. אם לנסיין היה חשבון במערכת בעבר, פרטי החיבור יישארו כפי שהיו, ותתווסף לו הרשאת נסיין. אם לנסיין לא היה חשבון במערכת בעבר, הסיסמה תישלח לכתובת האימייל שבמסמך.

מבחינת המערכת, אין שום קשר בין נסיינים ל-P.I. לכן, כל מנהלת מעבדה (וכל נסיינית) יכולה להקצות לניסוי חדש אילו נסיינים שתרצה. הקרדיט יגרע מהמעבדה שאליה ישויך הניסוי (שיוך הניסוי נקבע כשמוסיפים אותו). כך, קל מאוד להלוות קרדיט ממעבדה אחת לאחרת (פשוט לכתוב את שם המעבדה האחרת כאחראית לניסוי).

<u>הוספת ניסוי חדש</u>

חוקרים ונסיינים יכולים להוסיף ניסויים חדשים (חפשו במסמך זה Adding a Study להוראות מפורטות באנגלית). לאחר ההוספה, יש להשתמש באפשרות send a request תחת Study status, כדי לבקש אישור. לחילופין אפשר גם לשלוח אימייל למנהל המערכת (**bgu.experiments@gmail.com**) ולבקש אישור לניסוי. בכל מייל יש לכלול שם משתמש, ואת שם הניסוי הרלוונטי.

אין להוסיף ניסוי שלא שייך לפרויקט שקיבל אישור אתי מועדת אתיקה המחלקתית, או מועדת האתיקה האוניברסיטאית או אישור הלסינקי.

מנהל המערכת יבדוק שעמדתם בכללים הבאים:

1. ניסויים תמורת קרדיט

- משך הניסוי המינימלי בשטח האוניברסיטה הוא **20 דקות.**
- משך זמן ניסוי מקוון המינימלי הוא **10 דקות**
- משך הניסוי חייב להיות בכפולות של **10 דקות**.
- על כל 10 דקות, חובה לתת 1 נקודות קרדיט.
- אורך הניסוי תמיד מעוגל למעלה (27 דקות אמיתיות = 30 דקות ניסוי)
- נסיינים שמוסיפים ניסוי בעצמם יכולים לבחור את המעבדה (ראש המעבדה – P.I) שאליה שייך הניסוי. מהמעבדה הזו יגרע הקרדיט. ראש המעבדה יכול לראות את רשימת הניסויים שלו באתר, אז חשוב להוסיף את הניסוי למעבדה הנכונה.
- מנהל המערכת יודע לאיזו מעבדה שייכת כל נסיינית. אם הנסיינית תשייך ניסוי שלה למעבדה שהיא לא שייכת אליה, מנהל המערכת יוודא שאין מדובר בטעות.
- בכותרת ותיאור הניסוי חשוב להקפיד על ניסוחים **אובייקטיביים, תמציתיים ופורמליים**, כך שכל ניסוי יוצג במערכת באופן אחיד וברור. המטרה היא לשמור על עקביות ואחידות שתאפשר למשתתפים להבין במה מדובר בלי פרשנות או שיפוט מוקדם.
- בעת הוספת ניסוי עבור קרדיט, יש לציין לאילו קורסים יכולים הנבדקים להשתייך. **בְחרו בכל הקורסים <u>המסתיימים</u> במילה Credit, ואך ורק בהם (8 קורסים סה"כ):**

  - Psychology - Credit
  - Eilat - Credit
  - Social Work - Credit
  - Communication - Credit
  - Psy_Edu students - Credit
  - Edu_Com students - Credit
  - Education - Credit

- Edu_Edu - Credit

2. ניסויים תמורת תשלום

- כשאתם יוצרים את הניסוי קִבעו שהסטודנטים מקבלים שקלים ולא נקודות.
- משך הניסוי יכול להיות כל משך שתרצו.
- יש לפעול ע"פ נהלי התשלום הנמצאים בעמוד 3 במדריך זה.
- יש לכתוב מה התשלום גם בשדה Description
- ניסוי בתשלום חייב להיות משויך ל-P.I הבתשלום של המעבדה שלכם (למשל, "תשלום, אבישי הניק").
- בכותרת ותיאור הניסוי חשוב להקפיד על ניסוחים **אובייקטיביים, תמציתיים ופורמליים**, כך שכל ניסוי יוצג במערכת באופן אחיד וברור. המטרה היא לשמור על עקביות ואחידות שתאפשר למשתתפים להבין במה מדובר בלי פרשנות או שיפוט מוקדם.
- בעת הוספת ניסוי תמורת תשלום, בחרו באחד או כמה מבין הקורסים הבאים, על פי שיקול הדעת המחקרי שלכם:
  - for money
  - Former Credit - Payment
  - Psy_Edu students - Payment

בעת הוספת ניסוי עבור תשלום אל תבחרו בקורסים:

- Psychology - Credit
- Social Work - Credit
- Communication - Credit
- Eilat - Credit
- Psy_Edu students - Credit
- Edu_Com students - Credit
- Education - Credit
- for m
- locations
- All Courses

לאחר הסרת מגבלות הקרדיט (בערך באמצע סמסטר ב') ניתן גם להוסיף ניסוי תמורת תשלום או קרדיט. במקרה כזה, כל הכללים המפורטים לעיל יחולו גם על ניסוי זה. אנא פנו ל bgu.experiments@gmail.com על מנת לפתוח ניסוי כזה.

אחרי הוספת הניסוי, **נחוץ אישור** ממנהל המערכת בטרם הנבדקים יוכלו לראות הזמנות לניסוי. שִלחו למנהל המערכת בקשה באמצעות האפשרות Send a Request שמופיעה בפרטי הניסוי מיד לאחר ההוספה, תחת הסעיף Study Status. (**חשוב:** מנהל המערכת לא מקבל התראה על פתיחת ניסוי במערכת, אלא רק אם נשלחה בקשה לאישור).

<u>הזמנת נבדקים לניסוי בתשלום</u>

במערכת רשומים למעלה משלושת אלפים סטודנטים שנרשמו לאתר כדי להשתתף בניסויים בתשלום. הם שייכים לקורס for money והם ייראו את ההזמנות שלכם לניסויים בתשלום.

אם לא מגיעים סטודנטים, אתם יכולים כמובן לפרסם את הניסוי בדרכים שבהן השתמשתם בעבר. אם אתם מפרסמים את הניסוי בעצמכם, מומלץ לבקש מנבדקים להירשם למערכת ומשם להגיע לניסוי שלכם. החסרון בכך הוא שההרשמה מוסיפה להם עבודה והם עלולים להתעלם מההוראות שלכם ולהירשם לניסוי אחר, לאחר שנרשמו לאתר. היתרון הוא שתוכלו לנהל את ההזמנה לניסוי הזה במערכת. יתרון נוסף: אם רוב החוקרים יעשו כך, אז מאגר הנבדקים בתשלום יגדל. אתם יכולים גם לבחור לא לרשום את הניסוי במערכת כלל (אולי רק להשתמש באפשרות להזמין חדרים ללא נבדקים, כדי לשריין את החדר, ראו מידע נוסף בנושא בהמשך)

שימו לב: לכל מעבדה במחלקה לפסיכולוגיה יש מכסת שעות ניסוי. גם ניסויים בתשלום נוגסים במכסה זו. כאשר נגמרות למעבדה שעות הניסוי, מנהל המערכת אמור לבדוק אם אכן נגמרה למעבדה מכסת הקרדיט שהמעבדה שלכם יכולה לתת לנבדקים. אם היא לא נגמרה, מנהל המערכת יוסיף למעבדה שעות ניסוי.
כדי לפתור בעיה זו, יש להשתמש בחשבון ה-P.I הנפרד המוקדש לניסויים בתשלום בלבד (למשל, "תשלום, נחשון מירן"). אם מקפידים לשייך את הניסויים בתשלום ל-P.I הזה (שאין לו מגבלת שעות), אין בעיה להזמין נבדקים לניסויים בתשלום, גם כאשר נגמרות השעות בחשובון ה P.I. 'קרדיט' ("נחשון מירן").
חשוב מאוד: אין לתת קרדיט דרך ניסויים הרצים תחת ה-P.I "בתשלום".

מכסת קרדיט/שעות ניסוי

מנהלת המעבדה יכולה להיכנס עם חשבון ה PI ולראות כמה קרדיט נותר ממכסת הקרדיט של המעבדה. רק שימו לב שבמערכת זה מופיע כמגבלה של שעות ולא של נקודות. עוד עניין שצריך לשים לב אליו הוא שמשבצות זמן **עתידיות**, גם כאלה שעדיין לא נרשמו אליהן נבדקים נחשבות לחובתכם. הקרדיט על המשבצות הללו 'חוזר' למעבדה אם הגיע מועד הניסוי ואף אחד לא נרשם.

בד"כ אנחנו עושים מגבית תרומה בתחילת סמסטר ב' ואז כל מעבדה שיש לה קרדיט ספייר נותנת קצת למאגר המשותף, ואנחנו מחלקים את זה בין המעבדות שצריכות אקסטרה (על פי נוסחת החלוקה). זה בד"כ לא מספר מאוד משמעותי, אבל זה משהו. באמצע סמסטר ב' אנחנו מסירים את המגבלה על הקרדיט ואפשר להריץ חופשי, אבל אז גם יש הרבה פחות סטודנטים

שעדיין מחפשים קרדיט...

אם בקושי נרשמים לניסוי בתשלום שפרסמתם, ומאוד דחוף לכם לגייס כמה שיותר נבדקים, אז אתם יכולים להזמין נבדקים באימייל כך:

- Go to the Study Info of the study to which you want to invite people.
- Click the View/Modify Restrictions link
- **Click INVITE QUALIFIED PARTICIPANTS**
- Click the View/Modify Restrictions link
- Choose how many of the potential participants you want to contact.
- You can write the message in Hebrew.
- You can choose to how many of the eligible participants the email will be sent. Invite at most X*15 participants, where is the number of open timeslots. If you have 10 timeslots, invite **no more** than 150.
- The system lets you invite participants only if you have restrictions based on prescreen responses. If you don't have restrictions, simply restrict the study to men and women, and then you could send the emails.

חל איסור חמור להשתמש באפשרות זאת לניסויים תמורת קרדיט. מי שיעשה זאת יורחק מהקהילה המדעית לצמיתות באופן מיידי.

הוספת הזמנות לנבדקים במערכת ומתן קרדיט

המדריך באנגלית מפרט את הפעולה הזו (חפשו במסמך זה Working with Timeslots). כאן יציינו רק מספר פרטים חשובים:

- כל הזמנה לנבדקים נקראת במערכת Timeslot.
- כשאתם בוחרים location להזמנה, עדיף לבחור מרשימת המקומות המוצעת ולא להקליד בעצמכם את שם המקום. זאת כי אם אתם בוחרים מהרשימה, המערכת מונעת הרשמה כפולה לאותו החדר. אם החדר שלכם לא נמצא ברשימה, שילחו למנהל המערכת בקשה להוסיף אותו. כמובן, מסיבותיכם, תוכלו להקליד את שם המקום (למשל, אם אתם רוצים שהמערכת לא תמנע התנגשות, כי אתם מריצים כמה ניסויים באותו החדר באותו הזמן).
- מומלץ להכיר את האפשרות להוספת מספר הזמנות בפקודה אחת. חפשו Creating Multiple Timeslots במסמך זה.
- להוראות למתן קרדיט חפשו Granting and Revoking Credit במסמך זה.

הזמנת חדרים ללא נבדקים

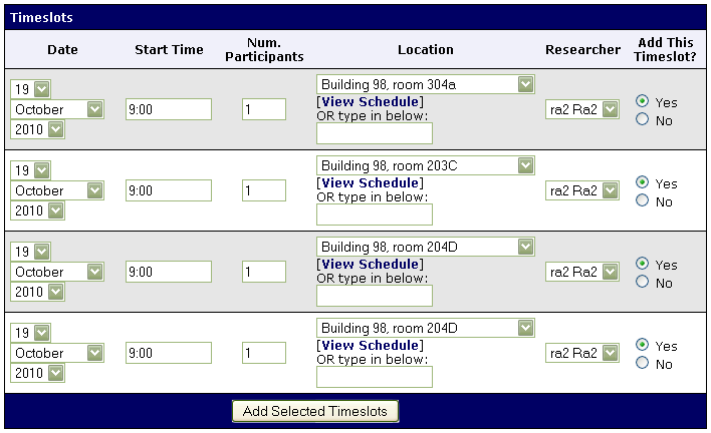
המערכת לא מאפשרת להזמין חדרים ללא נבדקים. מצאנו שתי דרכים שונות לעקוף זאת.
שיטה א':

- צרו ניסוי בשם Locations for… (תוסיפו את שם המעבדה שלכם) (למרבית המעבדות כבר יש ניסוי כזה. שאלו את מנהלת המעבדה לפני שתיצרו אותו בעצמכם).
- הגדירו את כל האנשים שיכולים להזמין חדרים במעבדה שלכם כנסיינים.
- בחרו בקורס Locations כקורס היחיד שנבדקים ממנו יכולים להירשם לניסוי (אין נבדקים בקורס זה, ולכן אף אחד לא יירשם).
- כעת, כל אחד שרשום כנסיין בניסוי יכול לפרסם הזמנות בחדר, ולחסום את שאר הנסיינים מלהזמין הזמנות לחדר זה במועד זה.

שיטה ב' (זו כנראה שיטה יותר פשוטה לביצוע, אבל קשה להסביר אותה. נסו ותיווכחו):
- בכל ניסוי שהוא, בחרו ב-Add Multiple Timeslots.
- בחרו במספר ההזמנות הרצופות שאתם רוצים (Number of Timeslots), במועד ובחדר.
- ב-Number of participants, כיתבו 0.
- המערכת תראה לכם את כל ההזמנות שהיא עומדת להוסיף ותמתין לאישורכם הסופי. אבל, המערכת תשנה את ה-Number of participants ל-1. בכל אחת מההזמנות המפורטות, שנו את ה-Number of participants חזרה לאפס. אשרו את ההזמנות. המערכת תרשום הזמנה הפתוחה לאפס נבדקים.

<u>פתיחת מספר הזמנות למספר חדרים באותו הניסוי בו-זמנית</u>

במערכת אין אפשרות לראות את הלו"ז של כמה חדרים במקביל, אך ניתן להזמין מספר חדרים במקביל בפעולה אחת. עשו זאת באמצעות האפשרותAdd Multiple Timeslots .
בצעו את ההזמנה למספר הנבדקים שאתם רוצים להזמין מבלי להתחשב בחדר ובמועד, ולחצו Add. לאחר מכן, המערכת תציג לכם את רשימת ההזמנות בטרם אישור סופי. בשלב זה, תוכלו לשנות את המועד והמיקום של כל הזמנה בנפרד. הנה דוגמה:



<u>הגבלת ניסוי לאוכלוסיות מסוימות</u>

כאשר נבדקים נרשמים למערכת, הם חייבים לענות על מספר שאלות מצומצם. בשאלון של 2018-19, הם מציינים את מינם, גילם, השפה הראשונה שלהם, האם הם משתמשים במשקפיים או עדשות, מה תחום הלימודים שלהם, באיזו שנה הם בתואר, האם השתתפו בניסויים בפסיכולוגיה בעבר ומה היד הדומיננטית שלהם. ניתן להגדיר ניסוי כך שרק סטודנטים שהשיבו באופן מסוים לשאלות האלו ייראו את הניסוי. איך? לאחר הגדרת הניסוי, כאשר רואים את פרטיו (אפילו בטרם אושר על-ידי מנהל המערכת), הקליקו על View/Modify Restrictions מול הכותרת Prescreen Restrictions. למידע מפורט יותר על אפשרות זו, חפשו Modify

Restrictions במסמך זה.

<u>הזמנות לניסוי בן יותר מחלק אחד</u>

המערכת מאפשרת יצירת ניסוי ובו מספר חלקים (חפשו במסמך זה Multi Part Studies לפרטים מדויקים בנושא).

כדי להבטיח שהנבדקים יבואו גם לחלקים האחרים, מותר לכם לתת להם קרדיט רק לאחר שהשלימו את כל החלקים. בנוסף, מותר לכם לחלק את הקרדיט כך שיקבלו קרדיט מופחת על החלק הראשון וקרדיט רב יותר על החלק האחרון בניסוי. אך, אם אתם עושים זאת, עליכם לכתוב מראש בטופס ההסכמה שזה יהיה המצב, ולהסביר שהדבר נעשה כי אין תועלת בנתונים שלהם אם הם לא משלימים את הניסוי. אם הנבדקים מעדיפים לא להמשיך בניסוי, עדיין חובה עליכם לתת להם את הקרדיט על החלקים שהשלימו, אולם אתם יכולים לבקש מהם להגיע למעבדה במועד לחלק הבא, ורק שם לתת להם את הקרדיט. אם הם לא יכולים להגיע במועד, הם עדיין יצטרכו להגיע למעבדה במועד שנוח לכם ולהם, ורק אז לקבל את הקרדיט. זאת כדי לא להקל עליהם להירשם לניסוי רב-חלקים בשביל רק חלק מהקרדיט שלו.
במערכת, אם נבדקים רוצים לקבוע מועד חדש לחלק השני, הם יכולים למחוק את עצמם מהחלק השני, אבל אז המערכת לא נותנת להם להירשם ל-Timeslot חדש לחלק השני. הם חייבים לשלוח אליכם אימייל, ואתם צריכים להוסיף אותם ידנית (ראו פרטים על הוספה ידנית במסמך זה: חפשו Manual Sign-Up במסמך זה).
אם בניסוי שלכם יש יותר מארבעה חלקים לכל נבדק, אז תצטרכו לייצר ניסוי נוסף שיהיה חלקים 5+. תייצרו אותו כך שרק מי שנרשם לניסוי הקודם יוכל להירשם לניסוי הזה (ראו Pre-Requisites במסמך זה לעוד פרטים בנושא). יתכן שתעדיפו לייצר ניסוי לכל חלק, כדי להוסיף גמישות בהרבה.

<u>זכויות וחובות הנבדקים</u>
כדי להכיר את זכויות וחובות הנבדקים, מומלץ מאוד לקרוא את המסמך "הסבר על זכויותיכם וחובותיכם" (לנבדקים) באתר ועדת אתיקה. זִכרו שאם הנבדקים לא יכולים להשלים את הניסוי בשל טעות שלכם (איחרתם, שכחתם לכתוב שהניסוי לא מתאים לנבדקים מסוימים [למשל, גברים]), הם זכאים לקבל קרדיט.

<u>קנסות:</u>

- במסמך ההנחיות לנבדקים מצוין כך: *הרשמה לניסוי מהווה התחייבות להופיע בזמן שנקבע ולהשלים אותו ברצינות וכראוי. אי-הופעה לניסוי שאליו נרשמתם, או איחור משמעותי, או זלזול בניסוי בעת ביצועו, תגרור קנס (חיוב בשעות ניסוי נוספות; בהתאם למספר שעות הניסוי שהוחמצו, עד שעה קנס לכל איחור\העדרות), אלא אם כן הודעתם לנסיין על ביטול ההשתתפות (דרך האתר) לפחות 24 שעות מראש.*
- חשוב להבין שמותר לכם אך אינכם חייבים לתת קנס לנבדקים שלא השלימו את הניסוי בשל איחור או אי-הגעה. זאת כחלק מהמלצה (ובקשה) כללית לגלות הבנה כלפי הנבדקים, בדיוק כמו שהייתם רוצים שהם יגלו הבנה כלפיכם. כדי שישלימו את הניסויים שלכם ברצינות וביושר, נדרשת מהם אמפתיה כלפיכם. כפי שאתם יודעים מנסיונכם כנבדקים, נדרשה מכם לא פעם, בנוסף לסקרנות בריאה וראויה להערכה, גם סבלנות והתחשבות רבה בנסיינים. זה לא מובן מאליו שהנבדקים הם ברובם הגדול ממושמעים, ובעלי מוטיבציה וכוח סבל לא מועטים.
- מערכת היחסים בין הנבדקים לנסיינים חשובה מאוד למחלקה והיא דורשת אמון הדדי,

הבנה הדדית, הערכה הדדית, והתחשבות הדדית. הביעו הוקרת תודה לנבדקים, כבוד והערכה. אם מסיבה כלשהי הם לא יכולים להשלים את הניסוי, נסו לבחון אם רק הם אשמים, בטרם תתנו להם קנס, או בטרם תמנעו מהם קרדיט על מוכנותם להגיע. אם איחרתם, נסו לחשוב מה אתם מרגישים כשהנבדקים מאחרים להגיע.

- מן הצד השני, אם הנבדקים התנהגו בחוסר כבוד לניסוי, איחרו איחור ניכר, לא הגיעו מבלי להודיע מראש, או ביצעו את הניסוי באופן מרושל מאוד שעלול היה לפגוע בנתוני הניסוי, כלל המחלקה תצא נשכרת אם תתנו להם קנס על התנהגותם.



Sona Systems, Ltd.

Experiment Management System

—

Master Documentation Set
6 October 2017

About This Manual

This manual covers usage of the system from a variety of perspectives: Participant (Student), Researcher/Principal Investigator, Instructor, and Administrator. The manual is broken out into sections based on the type of user. In cases where the administrator has access to features also available to the researcher/PI, the functionality is documented in the Researcher/PI section of the documentation. Only administrator-specific features are covered in the Administrator section of the documentation.

בגרסא זו של המסמך, השארנו רק את החלקים הרלוונטים לחוקרים וראשי מעבדות.

You are encouraged to modify this documentation to suit the needs of your organization. You will find that this documentation covers every feature of the software, while your organization may have chosen to disable certain features during your implementation. Your users may prefer to read documentation that covers the system exactly as they will experience it, as opposed to this documentation, which may cover features that may not be enabled for them.

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Introduction

The Experiment Management System is used for the scheduling and management of research participants and the studies they participate in. Participants, researchers, principal investigators, and instructors all use the system for their respective purposes. As a researcher, you can set up your studies in the system, schedule the sessions (timeslots) when participants may participate, and grant or revoke credit after the session. All of this is handled through a simple web-based interface that you can access at any time, from any popular web browser.

The system is highly configurable by the administrator, to enforce the rules for the research participant pool exactly as your organization desires. It should be noted that the documentation herein might refer to features that are not enabled on your system. Contact your local administrator, whose contact information appears at the bottom of every page on the system, for more information.

System Basics

In the system, you create studies. Each study may have a number of timeslots, which are the times you plan to run the study. Participants can sign up for the timeslots by viewing a list of studies and available timeslots. You can grant or revoke credit to participants after the session occurs.

Principal Investigator Special Note

This documentation applies to both researchers and principal investigators (P.I.s), when the administrator enables P.I. Support. A P.I. can perform all the same functions on a study as a researcher. This allows a P.I. to operate as an overseer and monitor the progress of their studies, as well as step in on behalf of the researcher when necessary. Because the privileges are the same, throughout this documentation the term “researcher” can be used interchangeably with “principal investigator” except where noted otherwise. If the P.I. feature is enabled, then all studies must have a P.I. specified. The main difference between a P.I. account and a researcher account is that researchers have the option to receive routine emails from the system about their study, for example, receiving a notification any time a participant signs up or cancels, while the P.I. has no such option.

Participant ID Codes

If enabled by the administrator, the system will identify participants to you only by a unique, system-assigned ID code, and not by their name or email address for privacy reasons. Participants are made aware of this, and they are reminded to bring this code along with them when participating in studies, since the researcher will not know them by name.

Getting Started

The system works best if you use any popular web browser that is less than 2 years old, like Internet Explorer, Firefox, Chrome, and Safari. It will work with other web browsers, and with older versions of the web browsers noted above, however the layout may not be as clean. No functionality will be lost by using an older web browser.

Ask your system administrator if you need help with installing or using a web browser. This documentation presumes that you have a basic knowledge of how to use the web. While using this system, it is not necessary to use the Back button. You can use the toolbar on the top of every screen to navigate the site.

Logging In

Your administrator will provide you with a username and password to login to the site, as well as the URL (web address). When you go to the front page of the site (the login page), you may see a link to request an account. This form is *only* for participants. Do not use this form to request an account, as participant accounts have an entirely different set of privileges, which are not appropriate for a researcher.

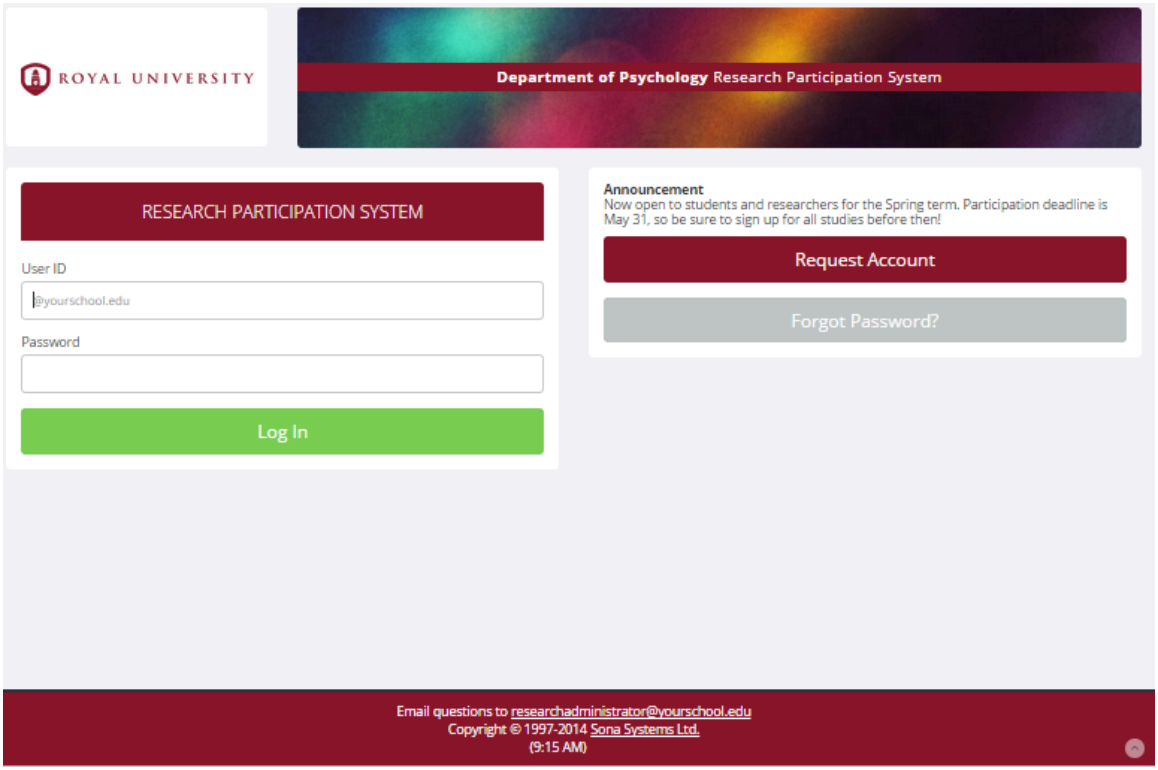


Figure 11 - Login Page

Once you log in, you may be asked to review and acknowledge your organization's human subject policy. If required by the administrator, you will need to acknowledge this once every 6 months. You will see the Main Menu after you acknowledge the policy.

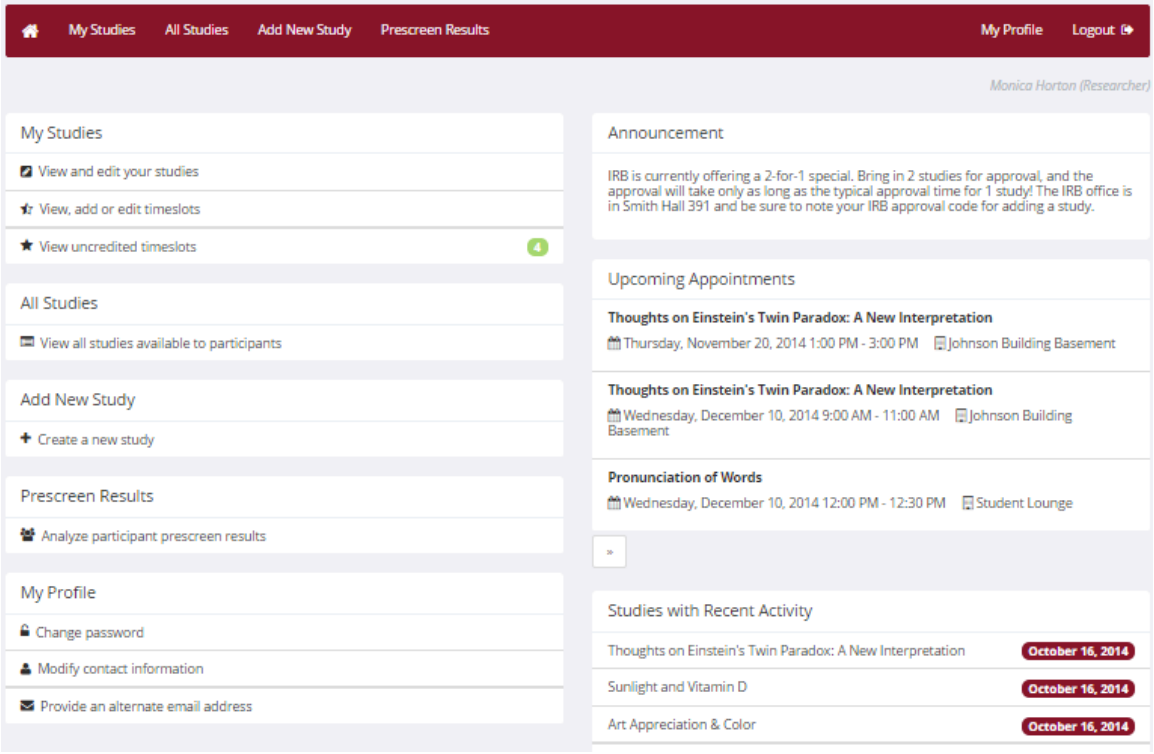


Figure 12 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, which is usually about 20 minutes. The system will warn you a few minutes before the expiration. This is done for security purposes. If this happens, you can always log in again. Once you are done using the system, it is better to fully log out, to prevent any problems that may arise if someone uses your computer before the session expires.

Retrieving a Lost Password

If you forget or do not have your password, and the feature is enabled on the system you are using, then you may choose to reset your password. With this option, a link to reset your password will be emailed to you after you make the request. This link is valid for 24 hours. Once you click the link, a new password will be generated and emailed to you. If you have provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address, which is derived from your user ID. If you requested a password reset and no email from the system has arrived after 30 minutes, then check your email program's junk mail folder in case the email was delivered there. Typically, the email is sent within a few seconds of the request, but sometimes there can be a delay on behalf of some recipient email servers.

Logging Out

Once you are done using the system, choose Logout from the top toolbar on the right side to log out. You are now logged out. It is always a good security measure to close all of your browser windows, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password (and the option is enabled), type your new password (twice, for confirmation) in the provided boxes. If you do *not* want to change your password, simply leave these boxes empty.

If you change your password, please be sure to select a password that you do not use on any other systems or websites, following good computing practice.

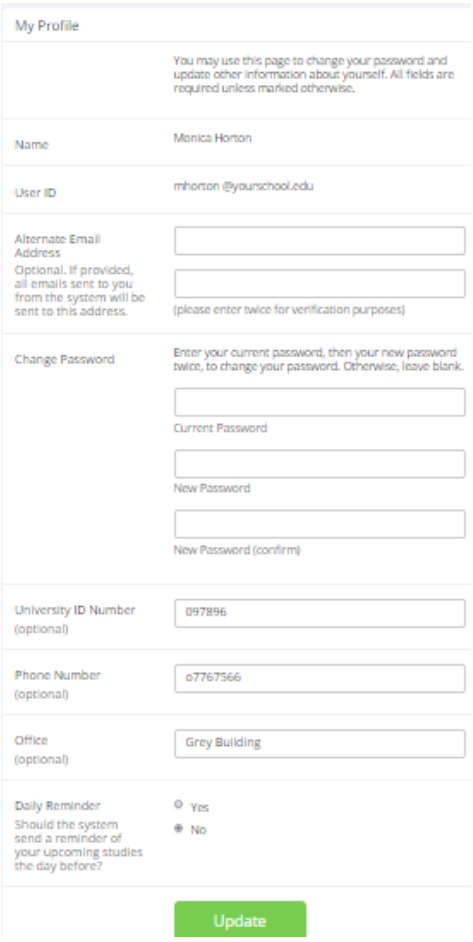


Figure 13 - Updating Your Profile

It is recommended that you provide your phone number and office location, as this information will be made available to research participants who sign up for your studies.

If you are a researcher, this contact information will be displayed to participants when they view information about the study. If you are a principal investigator, this contact information will be displayed if a participant explicitly chooses to view it (since the researcher is the primary point of contact for a study).

Researchers (but not PIs) may also choose to receive a daily reminder via email with information about all of their study sessions scheduled for the following day. If this is turned on, then a notification will also be sent about any uncredited timeslots that are awaiting action.

Email Address Options

There are certain events in the system that will cause an email notification to be sent to you. Most often, these are notifications that a participant has signed up or cancelled their sign-up for your studies, but there are a few other cases where it may be used as well. The email address is also displayed to the participant when they view information about the study, in case they need to contact you with questions.

You have two choices for your email address. When you update your personal information, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Gmail account, for instance), this is the address where all notifications will be sent and will also be displayed to other users (including participants in your studies).

If you do not provide an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain (if there is one) to the end of your user ID to form the address. For example, if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then the system would save your email address as "jsmith@yourschool.edu".

In situations where the system is configured so you may enter an email address on this page, you will be asked to enter it twice, to ensure it is typed correctly.

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as "Email Address" instead of "Alternate Email Address") and all emails to you will go to that address.

Working with Studies

Most of your time on the system will be spent using the study-related features of the system. Be sure to read this section closely and in its entirety, as there are special features and situations you should be aware of.

Web-Based (Online) Studies

If enabled, you may set up studies that are web-based (online). These studies may be set up internally in the system (online internal survey study) or outside the system (online external study). The options will vary depending on how your system is configured.

There are a few things to note about web-based studies:

- Once you indicate to the system that the study is web-based, you will not be able to change it to where it is no longer web-based. However, you can deactivate or delete the study, so be sure to make this choice carefully.
- Web-based studies are typically set up so that there is one timeslot. That timeslot contains the maximum number of participants you would like to participate, and the *last* date and time when they can participate (this is often at the end of the term). It is not recommended that you set up multiple timeslots for web-based studies. Though the system will support it, it confuses participants. It is acceptable to have multiple timeslots, where only one study is active at a time. For example, one could have had a deadline date at the end of the previous semester (currently in the past), while the current timeslot has a deadline date at the end of the current semester (i.e., in the future).
- It is generally presumed that participants will participate in an online study shortly after they sign up. In this case, the system will expect you to grant credit to them soon after they sign up. If you are creating an online survey within the system, credit will be granted automatically, immediately after the participant completes the survey.
- In the case of an external web study, if you are using a survey product like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, etc., then you may be able to set up credit granting, where it occurs automatically as soon as the participant completes the study. See External Study Credit Granting for more information.

Throughout the sign-up process, participants are notified that the study is online.

If the study is not administered by the system (online external study), then participants are not given the URL for the study website until they have signed up. This is to ensure they complete a sign-up in the system for the study. Participants can see the URL after sign-up, while the timeslot they signed up for is still in the future. Once the timeslot they have signed up for is in the past, they will no longer have access to the study URL. There is also an option when setting up the study where the URL will no longer be available as soon as the participant is marked as having participated in the study (regardless of the timeslot date). This restriction regarding viewing the study URL applies only to participants and to web-based studies administered outside the system. Online external studies are discussed in more detail in the section Online External Studies, later in this document.

Online internal survey studies (surveys administered by the system) are discussed in great detail in the section Online Survey Studies, later in this document. Please read it carefully before setting up an online survey study.

Studies for Pay

In cases where participants are compensated for their participation in the study, you may set it up as a paid study and specify the compensation amount. The payment field is text, so you do not need to type in an exact amount, but can type in anything like "Amazon Gift Card", or even indicate a variable payment based on performance.

If participants are compensated *and* they receive credit, you should set it up as a credit study and indicate additional compensation in the study's information section.

Regardless of the type of study, after a participant participates in a study (including studies that are for pay only), you should still go into the system and indicate their participation by noting either their participation or no-show when viewing their sign-up. This allows the system to properly enforce certain restrictions on the participant and their studies, such as pre-requisite and disqualifier study restrictions. It also ensures a proper record is kept in the system of their participation.

Multi-Part Studies

You may create a multi-part lab study in the system, up to 4 parts. Often these are studies involving memory research, where the participant must return a specified number of days after the first session. When creating a study, you may specify the day range for the each part of the study (e.g. 7 to 10 days after the previous part). Participants are required to sign up for all parts at the same time, to reduce the chance of forgetting to sign up for all parts. Each part of a multi-part study may have a different credit or payment value, and duration, but each part must be the same compensation type. All parts must be for credit or all parts must be for compensation. Online studies may not be multi-part studies because there is no concept of making an appointment to take an online study at a specific date and time. If one part of the study is an online study, create two separate studies (one for each part) and set the first study as a pre-requisite for the second study.

With multi-part studies, you may specify that each part of the study must be scheduled to take place at exactly the same time as the previous part, or at any time on the dates that are within the specified number of days after the previous part. You may also specify that the next part take place on the same day as the previous part, by setting the day separation to 0 days. In that case, the system will ensure the next part takes place on the same day, but after the previous part.

You should ensure that there are enough available timeslots for all parts of the study or participants will be prevented from signing up for the study Participants may cancel any part of their sign-up if necessary. If they cancel the one part, all subsequent parts are automatically cancelled as well. If they cancel any part other than the first part, you will

need to manually sign them up (if you are allowed to do so) to participate in the cancelled parts of the study at a later date. You may also ask the administrator to handle this.

If you grant a no-show for the one part of a multi-part study, the subsequent parts of that participant's sign-up will *not* be cancelled automatically. However, you will be reminded of the situation in case you would like to cancel the subsequent parts. The cancellation is *not* automatic as there are some situations where automatic cancellation is not desirable.

Multi-Part Study Configuration Scenarios

Listed below are some common scenarios and how to configure them in the system. The example used below is for a two-part study for simplicity, but would apply just as well to studies with more parts.

Scenario	**Configuration (Part 2)**
Second part to take place a week later, at any time during that day.	Scheduling Range: 7 and 7 Scheduling Leniency: No
Second part to take place three days later, at exactly same the same time as part 1.	Scheduling Range: 3 and 3 Scheduling Leniency: Yes
Second part to take place one to two weeks later, at any time during the day.	Scheduling Range: 7 and 14 Scheduling Leniency: No
Second part to take place later on the same day as the first part.	Scheduling Range: 0 and 0 Scheduling Leniency: No

The system will enforce the configuration for the each part in terms of ensuring participants only sign up for timeslots that meet the multi-part study restrictions. As the researcher, you also have additional control in deciding which timeslots to create for each part of the study. You want to ensure that there are sufficient timeslots for each part. For example, if you have a two-part study set up so the second part must occur exactly one day after the first part, and you have set up the Part 1 timeslots on Monday, then ensure you have some Part 2 timeslots set up on Tuesday. Participants will have trouble signing up for the Monday timeslots for the first part because there is no corresponding timeslot for the second part to sign up for.

Adding a Study

Some researchers choose to set up their studies in the system before they have received the proper approvals (usually from their IRB) to run the study. This is supported in the system. You can set up a study but specify that is it not visible to participants (this is the Approved setting). That way, as soon as your approval is received, you can simply make the study visible and everything is already prepared. You can also post a study and make it visible immediately, if that is appropriate. Some systems will be configured in such a

manner that only the administrator can approve the study, in which case you will need to contact the administrator to do so.

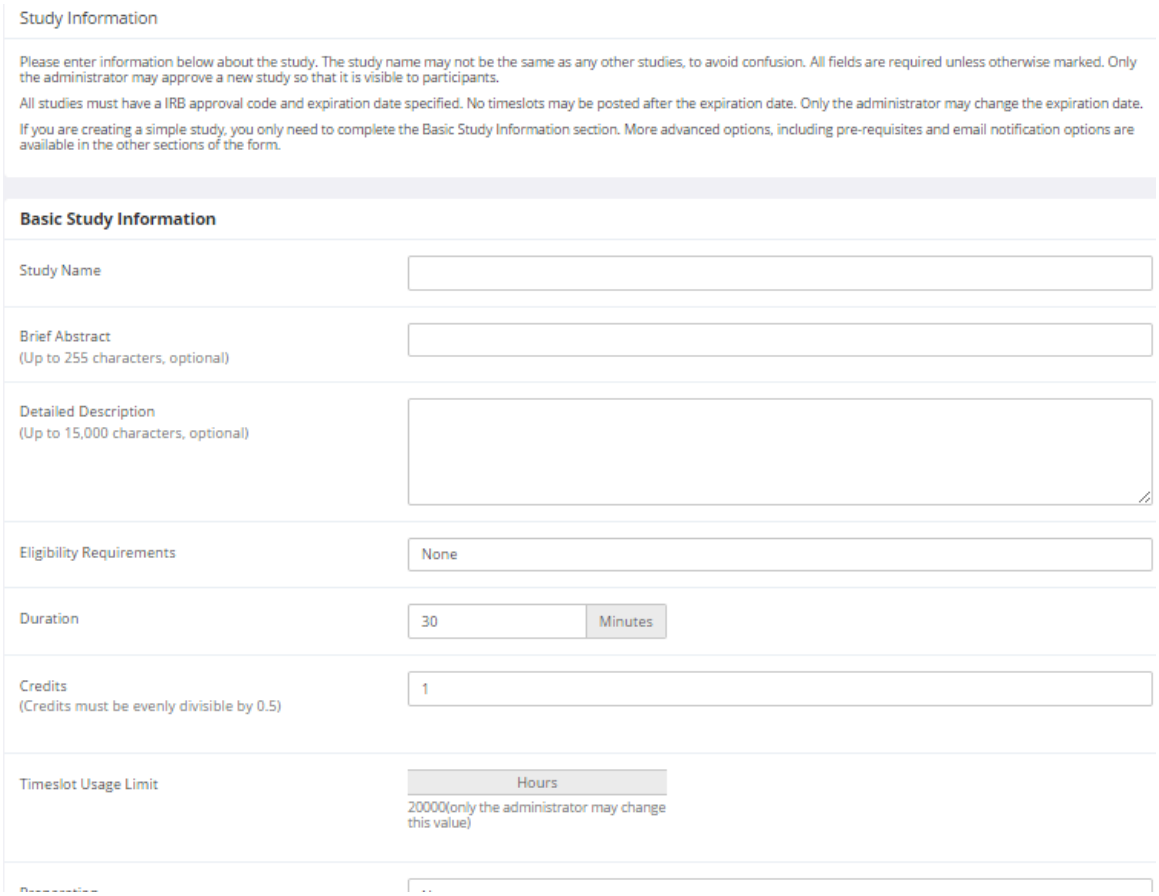


Figure 14 - Adding a New Study

To add a study, choose the Add New Study option from the top toolbar. You will have the option to pick from four possible types of studies. You may need to specify if the study is for credit or payment. Please choose these options carefully as you will not be able to change them later.

After you choose the study type, you will see a form asking for more information. You will need to fill out a number of fields, which are explained in the following table. Some of the fields listed below may not appear depending on how your system is configured, and the type of study you selected. All fields in the Basic Study Information section must be filled out unless otherwise noted.

Basic Study Information	
Field	**Explanation**

Study Name	A short name for the study. This is how the study is identified throughout the system. Most systems are configured so studies show in a random order to participants (choose Your Studies on the toolbar and it will state at the bottom of the resulting page if they are displayed in random order), so there is no advantage in choosing a study name that might put it at the top of an alphabetical list. You should consult with your administrator if there is a naming convention to be followed when naming studies. Study names must be unique, and you will be prevented from adding a study if there is already another study in the system with the same name. A study name may be up to 100 characters in length.
Brief Abstract (this feature might be disabled on your system)	This is a short one or two line description of the study. This short description will be displayed to participants when they view the entire list of studies, so it may be beneficial to list the most pertinent details here. Studies configured for payment often have the compensation information included in this section, particularly if the payment varies based on certain outcomes. This field may be optional, and can be up to 255 characters in length.
Detailed Description (this feature might be disabled on your system)	This can be a more long-form description about the study, and it will show if a participants clicks on the study to get more information before they sign up. You may include basic HTML in this area (ask your IT department for help if you are unsure of how to do this). If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). This field may be optional, and can be up to 15,000 characters in length.
Eligibility Requirements	If there are any restrictions on who may or may not participate (for instance, only those who are left-handed), list them here. Otherwise, leave the field as-is. If you list any restrictions, these will be displayed on the list of studies when participants view a list of all available studies. Note the system does *not* enforce these restrictions, but it is expected that a participant will only sign up for a study in which they are qualified, as they would

	otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions instead (those are enforced automatically), which you can do after you add the study. This field may be up to 245 characters in length.
Duration	The amount of time, in minutes, that each study session will take. If you are setting up a multi-part study, then there will be the option to specify the duration for each part of the study. For online studies, this should be an estimate of how long participants can expect the study to take, so that they can plan accordingly.
Credits (applies to credit studies only)	Enter the number of credits a participant will earn for the study. A value of 0 is acceptable and may be desired in cases where the study is part of a set of studies, and only the final study is credit-earning. The credit value specified must be evenly divisible by the credit increment specified. For example, if the increment is 0.5, then the study can have credit values like 1 and 1.5, but not 0.75. If you are setting up a multi-part study, there will be options to enter credit values for each part of the study. The system will compute the total credit value of the study automatically. After a study has sign-ups, you may not change the credit value of the study. However, the administrator can still change the credit value of a study with pending sign-ups. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. A study may not be changed between a study for credit and for payment, after it has been created.
Payment (applies to paid studies only)	Enter the compensation for the study. This is a text field, so any text may be entered like “Amazon Gift Card” or “Up to $20” and so on. Please see the

	Studies for Pay section of this documentation for more information on how to fill out this field in the case of paid studies. If you are setting up a multi-part study, there will be options to enter compensation values for each part of the study, as well as a total compensation value. You can change the payment text at any time. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. This field may be up to 30 characters in length. A study may not be changed between a study for credit and for payment, after it has been created.
Timeslot Usage Limit	Depending on how your system is configured, you may see an item that specifies the maximum number of study session hours available to this study. The administrator sets this value, and is the only one who can change it. To determine the current session usage for a study, go to the Add A Timeslot page for the study, or to the Timeslot Usage Summary.
Preparation	Enter any advanced preparation a participant must do here (e.g. “do not eat 2 hours before session”). If there are no preparation requirements, leave this field blank.
Researcher(s)	Select the researcher for this study. Most likely, this is you, and your name will automatically be selected. If you are a researcher, you may not remove yourself as the researcher (the P.I. for the study, as well as the administrator can change the researcher). Depending on how your system is configured, you may be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study.

	The selection box lists only users who are researchers.
Principal Investigator (this feature might be disabled on your system)	Select the Principal Investigator for this study. The person you select will have full access to the study. If you see this option, then you must select a P.I. The selection box lists only users who are principal investigators.
IRB Approval Code	Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies. Depending on how your system is configured, this field may be required. If it is required, then only the administrator can change the IRB approval code once it has been entered.
IRB Approval Expiration Date	The date when the IRB approval expires. This field may *not* appear, depending on how your system is configured. If it *does* appear, you must provide a valid expiration date. The system will prevent you from adding new timeslots to take place after this date, and your study will become inactive (not approved and thus not visible to participants) after this date. You may not make a study active if the IRB approval has expired. Only the administrator can change the IRB approval expiration date once it has been entered. This is the reason why it defaults to blank to force you to choose a date. You may specify a date up to 5 years in the future.
Approved?	Select Yes if this study should show up on the list of studies that participants might sign up for. Ensure you have received the necessary approvals to run the study before choosing Yes. A study must be Approved and Active to show up on the list of studies that participants may sign up for. If you select No, the study will not be visible to participants. Some systems are configured in a way that only the administrator can approve a study. If that is the

	case, you should contact the administrator when you are ready to make the study visible to participants (a form is provided on the page to do so). As a researcher, you can always make an approved study invisible to participants (by making it not approved), but you may need the administrator to make it visible again. In addition, if you change key items about the study, specifically the name or descriptions, the study will automatically be made invisible to participants until the administrator reapproves it (depending on how your system is configured). The reason for this is that many IRBs approve very specific language for study names and descriptions, so the administrator needs to ensure the study is in proper compliance.
Email Approval Notice? (Visible to administrators only)	This Yes/No option will appear if the administrator is adding or updating the study that is not already approved. If they select Yes to Email Approval Notice *and* they approve the study (set Approved to Yes) at the same time, then an email will be sent to all researchers for the study, notifying them that their study was just approved.
Active Study?	Select Yes if this study is in progress. You must select Yes and the study must be Approved if you want the study to available for participants to sign up for. If a study is Not Approved but *is* Active, then it does not show up to participants on the listing of studies, but it is accessible through other links if the participant has participated in it before and are viewing their participation history (in case the participant has follow-up questions about the study). It will also show up on the study information page (for an individual study) where it is listed as a pre-requisite or disqualifier for a study. The reason to select No is if the study is being kept for historical purposes, but should not show up on the list of studies participants can sign up for. Often, this is done so the system can enforce

	pre-requisites where the inactive study is a pre-requisite for an active study.
Advanced Settings	
Field	**Explanation**
Pre-Requisites (this feature might be disabled on your system)	If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies. You may specify that participants must have participated in *at least one*, if not *all* of the studies specified. The system will handle enforcement of the pre-requisites in a strict or lenient fashion, depending on how your system is configured. In strict enforcement mode, the participant must have *received credit for* (participated in) the pre-requisite studies. In lenient enforcement mode, the participant must only be *scheduled* to participate in the pre-requisite studies (it is presumed that they will go on to complete the pre-requisite studies). You can ask your administrator how this is configured, if it is of concern. If your system is in lenient enforcement mode and a participant cancels a necessary pre-requisite for your study (they are warned of this), and your study is configured so that the researcher will receive notifications of cancellations or sign-ups, then the researcher will receive notification of the pre-requisite problem and can contact the participant if necessary. Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as pre-requisites when they view your study.
Disqualifiers (this feature might be disabled on your system)	If there are any studies that a participant must *not* have participated in, please select them here. You

	may select multiple studies. The system will handle enforcements of the restriction during the sign-up process. If a participant has signed up for, or participated in, at least one of the studies specified as a disqualifier, then they will not be eligible to sign up for your study. Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as disqualifiers when they view your study.
Course Restrictions	If you would only like participants enrolled in certain courses to participate in your study, select the eligible courses here. Participants who are not in at least one of the courses you selected will not see the study when they view the list of available studies. You may choose No Restrictions if you would like to make the study available to participants in any course. There is a limit to how many courses can be listed as course restrictions for a study, and the limit is somewhere between 60 and 80 courses. The limit is varied depending on a few factors, in addition to the system will simply not save the course restrictions for any courses that would take it over the limit. Note that course restrictions do not function as a disqualifier but rather a qualifier. For example, if a participant is in both Course A and Course B, and the study is restricted to only those in Course A, the participant is eligible because they are in Course A, despite the fact Course B is not listed as a course restriction. In addition, using the same example above, the participant may assign the credit from the study to any of their courses, including those courses not listed in the course restriction (Course B in this example). Course Restrictions function solely to qualify participants for a study, and not to restrict their ability to assign credits to courses.

Invitation Code (this feature might be disabled on your system)	If you would like to have a special sign-up password for this study, enter it here. This is known as an invitation code and applies just for this study. Participants must know the invitation code to sign up for this study. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants. Invitation codes are *not* case sensitive, and are in no way connected to any passwords users use to log in to the system. If you do not need an invitation code, leave this field blank.
Is this a web-based study? (This feature might be disabled on your system)	This will list if the study is an online study, and the type of online study. This setting cannot be changed after a study is added.
Should participants be identified only by a unique, random ID code?	If enabled, then researchers will not see participant names, but instead an ID code to identify them. This setting only applies for online studies, and only if ID codes aren't already enabled system-wide by the administrator. For external web studies, this setting is useful primarily in conjunction with placing `%SURVEY_CODE%` in the Study URL. Once this setting is enabled (to show ID codes), it cannot be changed back to showing names again.
Study URL	The URL (web address, usually starting with https://) for your study. This is only required for web-based studies administered outside the system. If you are setting up a web-based study outside the system and would like the system to pass a unique identifier in the URL so that you may easily identify participants and even have the system grant credit automatically, add the text `%SURVEY_CODE%` in the URL where you would like the identifier to be placed. This feature is most commonly used with online survey products like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, and similar products. This is discussed in further detail

	in the Web-Based (Online) Studies section of this documentation.
Study URL Display (external web studies only)	If set to Yes, then participants may still access the Study URL even after they have been marked as having participated in the study. If set to No, the URL will not be available to them. In all cases for external web studies, the URL will not be displayed until they have signed up for the study. Regardless of this setting, the URL will not be displayed after the timeslot is in the past.
Participant Sign-Up Deadline (this feature might be disabled on your system)	Enter the deadline date (before the study is scheduled to occur) that is the last possible date a participant may be allowed to sign up, in whole hours.
Should the Researcher receive an email notification when a participant signs up or cancels?	If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up or cancels their sign-up for this study. The email notification will be sent to an email address based on the information the researcher has provided. See the Email Address Options section of this documentation for more information on how the email address is determined. Emails will contain the first 50 characters of the study name as part of the subject line in order to make it easier to sort the emails within an email program. If set to Yes, researchers will also receive a notification if the system is in lenient pre-requisite enforcement mode; and a participant cancels a study that was a pre-requisite for the current study. Read the section on Pre-Requisites in this table for more information about this situation. Emails are sent to all researchers specified for the study, unless a specific researcher is assigned to the timeslot that the email notification is being sent about. See Timeslots Linked to Specific Researchers for more information.

Researchers at Timeslot-Level	If set to Yes, it will be possible (but not required) to assign a specific researcher from the list of researchers for the study to a specific timeslot. If set to No, then it is presumed that all researchers assigned to the study are responsible for all timeslots. See Timeslots Linked to a Specific Researcher for more information. This option only appears if the system is configured to allow multiple researchers per study.
Automatic Credit Granting	If set to Yes, timeslots that are more than a specified number of hours old and still in the Awaiting Action state will be changed to a credit grant. The check for timeslots in this situation is made only once per day. If an automatic credit grant is done, you may still change it later if necessary. For online external web studies, the credit grant will take place (the specified number of hours) after the timeslot (participation deadline) has occurred (as opposed to being based on when the participant signed up. This feature is generally not useful in this situation. The option will not appear for online survey studies (within the system) because credit granting generally occurs automatically, immediately after the participant completes the survey.
Can a participant sign up for this study more than once? (This feature might be disabled on your system)	If you would like to allow participants to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No. If No is chosen, participants may only sign up for the study more than once if they had previously failed to show up for the study (a no-show).
Shared Comments	This is an optional area where you may enter any comments or notes about the study. These are visible to any researchers and PIs in the system, but not to participants. This field is useful if you want to make the technique used in the study visible to other researchers, so they can set your study as a

	disqualifier if necessary. This field can be up to 1,000 characters in length.
Private Comments	This is an optional area where you may enter any comments or notes about the study. These are only visible to the researchers (and PI) for this study. These are not visible to participants or to other researchers or PIs in the system. This field can be up to 1,000 characters in length.
Research Alternative?	If set to Yes, then this study is considered a research alternative study. For various reasons, some participants may be restricted to participate in regular studies (typically, for accruing too many unexcused no-shows or being unable to consent), meaning that they can only sign up for research alternative studies. Only an administrator may change this value (the default is No).
Multi-part Study Settings (only applies if you select Multi-Part Standard Study on the Select Study Type page)	
Field	**Explanation**
Total Payment (paid studies only)	Enter the amount of total compensation for the study, typically the sum of the payment values for each part. The system cannot compute this automatically since it is possible to enter non-numeric values (e.g., “Amazon Gift Card”) in the other payment fields.
Part X Scheduling Range	Specify the number of days (as a range) after the previous part is scheduled, that this part should be scheduled. The range may be the same value (e.g. “between 7 and 7 days”) if desired, but must be a whole number. See “Multi-Part Studies” for more information.
Part X Scheduling Leniency	In some cases, you may want to ensure that the participant schedules the next part of the study to take place at exactly the same time (on a different date) as the previous part. If so, choose Yes for this option. If there is some flexibility to sign up any

	time within the Part X Scheduling range, choose No for this option.

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information. If you would like to add participation restrictions based on prescreen responses, you can do so when you update the study (see Prescreen Participation Restrictions). Otherwise, your next step is to add timeslots (sessions). See the Working with Timeslots section of this documentation for more information.

If you need to update this study, see the Updating a Study section of this documentation.

Updating a Study

You may update any of your studies at any time. To do so, choose My Studies from the top toolbar and you will see a list of your studies. Click on the desired study, and choose the Change Study Information link.
You will see a form similar to the one you used to add the study. A few options may no longer be editable depending on the status of the study (e.g., if participants have already signed up for it). The fields shown are all the same as when you added the study. See the Adding a Study section of this documentation for an explanation of those fields.

The changes you make will take effect immediately after they are saved. When changes are made, if administrator re-approval is required before a study is made visible to participants, then you should contact the administrator to request re-approval once you have made all your changes. Changing the following fields may require a re-approval: study name, brief abstract, detailed description, eligibility requirements (the text field, not specific restrictions like prescreen restrictions, study pre-requisites/disqualifiers, or course restrictions), duration, preparation and credit value (for credit studies only). There will be a notice on the Change Study Information to warn if re-approval may be required. The system will also notify you after making changes if the study is now in need of re-approval. If re-approval is required and you are ready to request such approval, you may use the option to send such a request via the system, which is the same function you would have used to request initial study approval.

If you need to change the credit value for a study and there is no option to do so, this means the study already has at least one participant signed up for it. You cannot change the credit value when a study is in this situation because there is no way to handle past credits for the same study (e.g. should old credit grants for the same study be adjusted to reflect the new credit value or be kept the same?). If the study is nearing the end of its run and variable credit granting is enabled, then the easiest solution is to grant the new credit value to participants who sign up in the future. If you prefer that the credit value be changed for the entire study, contact the administrator who can make that change for you. Note that if the study's credit value is changed while there are pending

sign-ups, those participants are *not* notified of this change. You will need to notify those participants of the change in credit value if necessary.

Deleting a Study

You may delete a study only if there are no pending sign-ups (awaiting action) or active (non-zero) credits linked to it. If you need to delete a study that already has pending sign-ups or active credit grants, a better option may be to make it Inactive if you do not want it to be visible to participants.

If you want to delete a study that has sign-ups and are unable to do so, please contact the administrator. The administrator can delete a study with sign-ups, but only if the sign-ups are all without credit values (this usually occurs when study participation history from a previous semester was retained, but credits were zeroed out). If the study has sign-ups where the sign-ups have (non-zero) credit values linked to them, then the administrator cannot delete the study until all those credit grants are changed to a 0 value (or the participants for the sign-ups are deleted). This restriction is to ensure that the credit count for participants and where they have earned credits is accurate. This also means that the studies that contributed to their credit earnings must be kept intact.

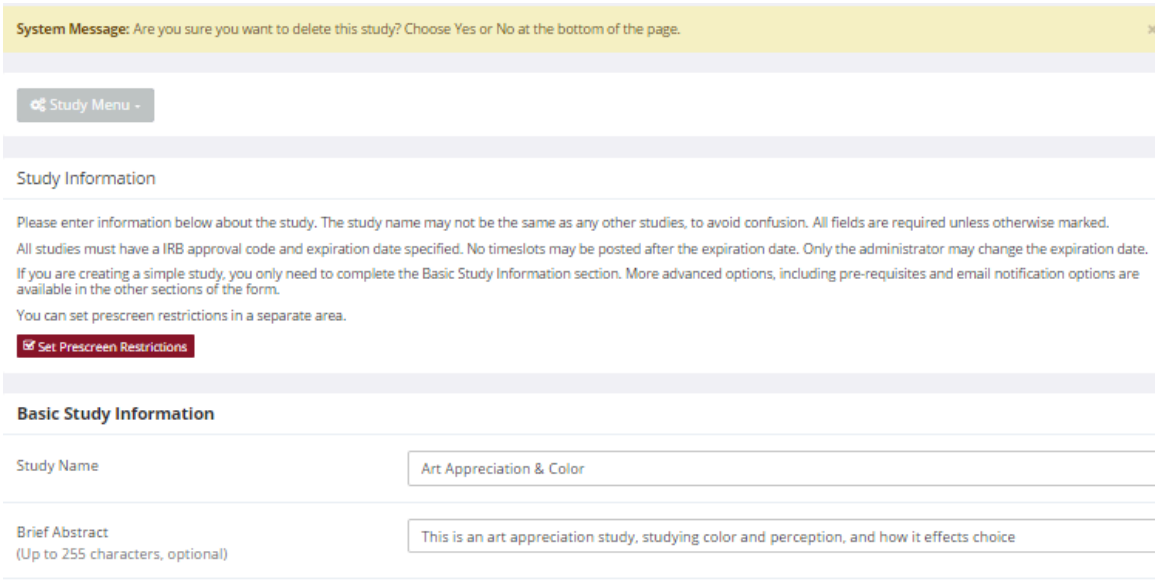


Figure 15- Deleting a Study

To delete a study, choose My Studies from the top toolbar and click on the desired study. Then choose the Delete Study option. You will see a confirmation page. Choose Yes (at the bottom of the page) to delete the study.

Once a study is deleted it cannot be restored, so use this feature very carefully. If you delete an online survey study, the survey and all data collected will also be deleted.

Advertising Your Study

Sometimes it may be useful to advertise your study on social media channels or by other methods outside the system. Go to Study Information and copy the Direct Study Link URL. Participants who go to that link will be taken directly to your study after they log in, assuming they are qualified for the study. If they are not qualified, they will be taken to the participant dashboard as usual.

The Direct Study Link URL is also displayed on Invite Qualified Participants for your convenience.

Timeslot Usage Summary

When viewing your study, the timeslot usage summary will be available. This gives some basic information about timeslot utilization in the past and in the future, as well as some basic no-show information. It also gives information on timeslots for the study by location (if the study is not an online survey study or external web study) and by researcher (if the study is configured to allow researchers to be assigned to specific timeslots).

For credit studies, the system also provides a summary of how many credits were granted. This summary accurately computes credit usage, taking into account any variable credit grants (if Variable Credit Granting is enabled in System Settings). This summary is useful in cases where some participants may have received credit in a different amount than the study's listed credit value.

If timeslot usage limits are enabled, the system will provide an estimate of how many timeslots can be added. Note that if the study is a multi-part study, it will estimate based on allocating the entire limit to the each part (estimates for each part are provided). However in practice, it's more likely a researcher will want to add timeslots to all parts of the study. This should be taken into account when viewing these estimates, especially if each part of a multipart study has a different duration.

Download Participant List

The download participant list feature allows you to download or easily print a list of all participants for the study. You can restrict this list based on date range and also on participation status.

Bulk Mail Summary

The system tracks whenever any type of bulk email is sent (by a user) related to the study. This includes inviting qualified participants based on the study's prescreen participation restrictions, or contacting those who have already signed up for the study. This information is kept for 6 months and is tracked to ensure that all users follow the generally accepted Internet practices for responsible use of email. The administrator also has access to this information.

Prescreen Participation Restrictions

If enabled on your system, the system might contain an online prescreen that participants may (or must, depending on your system configuration) complete. You may place participation restrictions on your study based on prescreen responses. Participants are unaware that such restrictions are placed on the study. These restrictions are never listed to them. If they do not qualify to participate in a study because they do not meet the prescreen participation restrictions, then the study will not be shown to them. This is important to note – participants never know why a study was or was not shown to them, because they are unaware of the prescreen restrictions.

You may restrict a study on any question or questions on the prescreen that allowed for a multiple-choice answer where only one choice could be selected. You may also restrict a study based on a computed section sum or average score for a participant, if the prescreen was set up in such a manner. You may restrict to one choice or many choices for any question. If you restrict on multiple questions, it is the same as a logical “AND.” For example, if you setup the prescreen restrictions so that participants must have answered “Yes” to the question “Do you wear glasses?” question and “Blue” or “Grey” to “What color are your eyes”, then they must meet *both* requirements to participate. In other words, only participants who wear glasses and have either blue or grey eyes are eligible.

There is no support for a logical “OR” restriction across multiple questions. The restrictions are inclusive, meaning that if you select a choice as a restriction, participants must have answered at least one of the choices selected for each question that is part of the restriction in order to see and participate in the study. This is as opposed to being exclusive where checking the choice as a restriction would exclude them from participation.

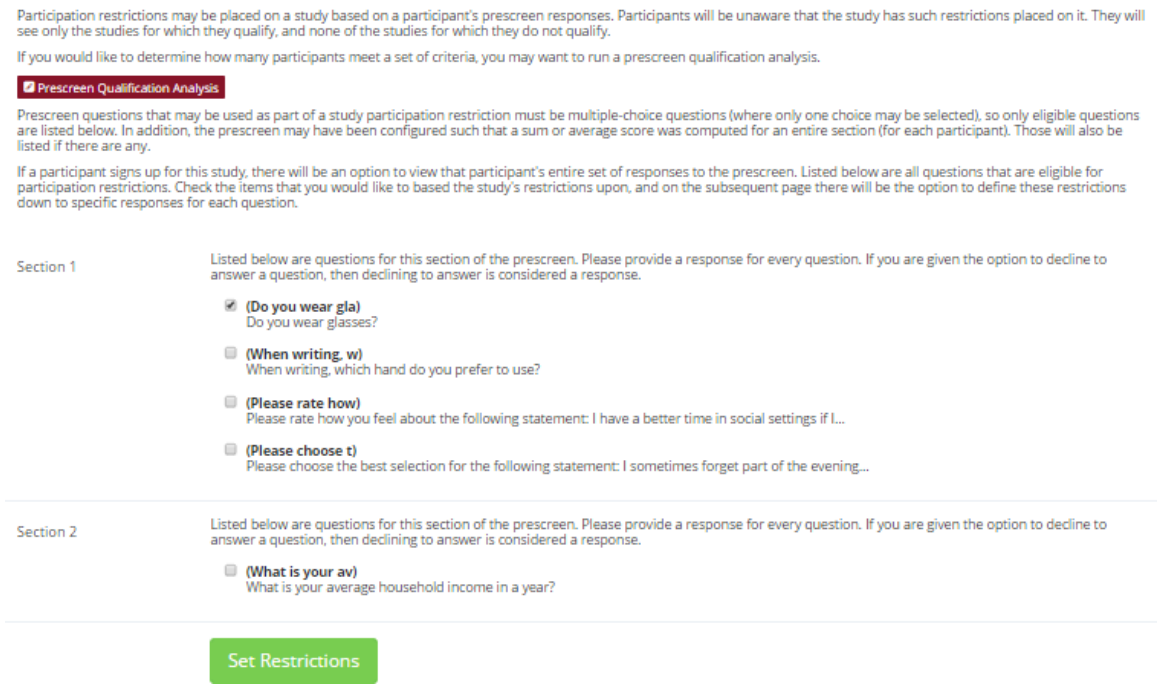


Figure 16 - Prescreen Restrictions Question Selection

To set participation restrictions, view (do not choose edit) your study and choose View/Modify Restrictions. You will see a list of eligible questions that you may use for your restrictions. If the study already has some restrictions, those will be checked. You will see how many participants currently meet the restrictions. Choose the questions you would like to restrict upon (and keep the existing checked restrictions checked, unless you want to remove that restriction), and click on the Set Restrictions button. On the subsequent page, you can select each value that is acceptable for each question you have chosen. Once you have selected all the acceptable values, save your changes and they will take effect immediately. It is important to note that if you change the restrictions, it will *not* remove the study sign-ups for participants who qualified under the previous set of restrictions as restrictions are enforced at the time the participant signs up for the study. For this reason, you should decide on your restrictions before making the study available to participants.

If you have restriction requirements where you would like to restrict participation to a percentage of the population (e.g. the responses that were chosen by the top 25% of people), but you are unsure which responses meet this requirement, you can use the Prescreen Response Analysis feature to determine the valid responses. See Prescreen Response Analysis for more information. You may also use Analyzing Prescreen Responses to get an idea of how many participants are potential candidates for participation in your study, based on a specified set of restrictions.

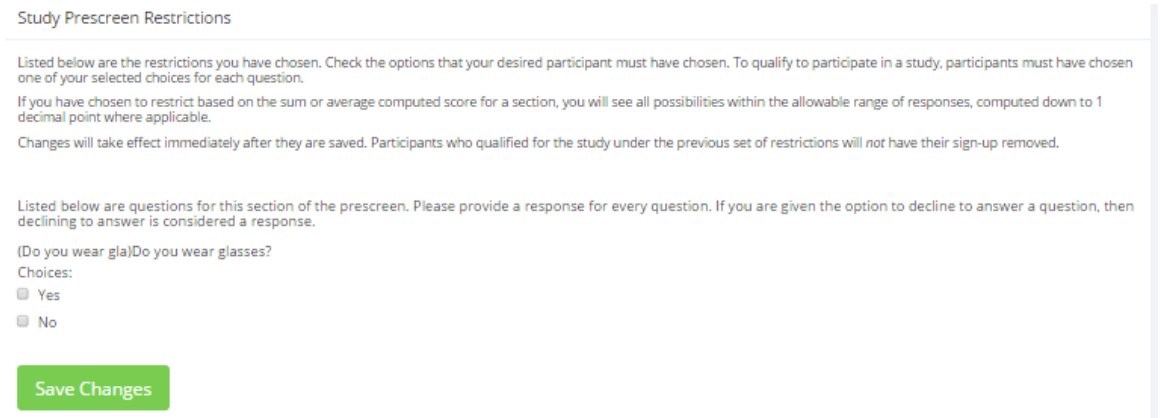


Figure 17 - Prescreen Response Restrictions

Inviting Qualified Participants to a Study

While viewing the list of prescreen restrictions currently set for a study and the number of participants who meet those restrictions, you may see the option to Invite Qualified Participants. Using this option, you are able to craft an email to be sent to all qualified participants. You can choose to exclude those who have already signed up for, or participated in any studies you specify. This disqualifier list will be pre-populated based on any disqualifiers already set for the study. The system will automatically exclude all participants who have participated or are signed up for the current study (no-shows are not excluded though, since they may sign up again). If the study is not a research alternative study, the system will also automatically exclude participants with limited accounts, as they are ineligible to participate in studies not marked as a research alternative study.

The system will pre-fill the email text with useful information like the name of the study and how many timeslots are currently open. If you include the text %FIRST_NAME%, %LAST_NAME%, or %USERNAME% in the email text, the system will substitute it with the recipient's first name, last name, or username. Note this text must be in upper case and surrounded by % symbols.

You cannot include attachments in the email, so if you have a document you would like to include, you should post it on some other website and provide a link to the document in the email that you send.

There is also a Direct Study Link URL displayed for your convenience, so you can easily copy and paste it into your message. See Advertising Your Study for more information.

If you have set participation restrictions for the study based on course enrollment, those restrictions will be taken into consideration (i.e. abided by) when determining which participants receive the email.

There is also an option to choose a random percentage from the overall list of matching participants to email. It is important to note that the system does not keep track of which random percentage of the group of matching participants is sent to each time. This means that if you send email to a random 30% now, and a random 30% an hour later, it could very well be the case that many participants receive the email on both of those occasions.

The Sender address on the email will be the administrator's email address, which is done to prevent the email from being blocked by junk email filters. The "Reply To" address of the email will be that of the user who is actually sending the email. When a participant chooses to reply to the email, the reply will be sent to that "Reply To" email address.

There is an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of day (e.g., during the evenings) when the email will be sent. The emails are generated at the time you use the emailing function, but are stored on the server's outgoing email queue until the specified sending time. They cannot be removed from the queue once this emailing function is used.

In some cases, the administrator may have imposed a limit on how many participants may be emailed. This is often done to prevent abuse of the system. Such cases include when researchers invite too large a number of participants, which is not in accordance with the generally accepted Internet principles for sending email. If there is such a limit, the system will look at the number of participants the researcher plans to email and block the sending of the email entirely, if the number of participants is over the limit. To get around this limitation, the researcher can further restrict whom they plan to send the email to (perhaps choosing a smaller random percentage of users, or more closely defined prescreen participation restrictions). The researcher may also ask the administrator to send the email for them, as the administrator is not subject to such limitations. Regardless, any use of this bulk email function will be logged. That information will be kept for approximately 6 months. The administrator can also pull up a report of how many emails a specific researcher has sent, so it is wise to not abuse this feature. In addition, Sona Systems reserves the right to temporarily remove the right to log in from a researcher if there are verifiable reports of abuse of this feature. Typically before doing so, the administrator will be notified by Sona Systems as it is preferred to have the administrator deal with such problems.

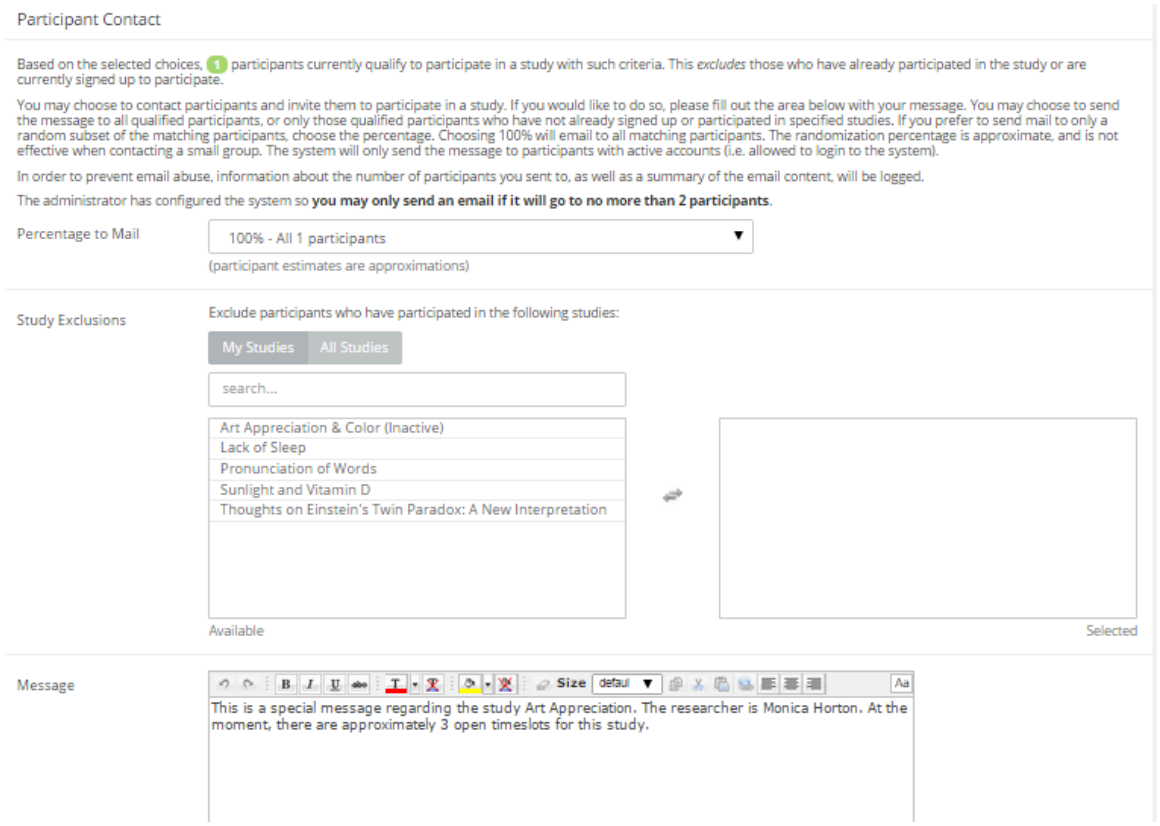


Figure 18 - Contacting Qualified Participants

Viewing Your Studies

To view your studies (and not the studies of others), choose the My Studies option on the top toolbar. The system will list all your studies in alphabetical order by study name, then will be grouped by studies that are active and inactive. You may use the tabs along the top to toggle between viewing all your studies, to viewing only those that are active or inactive.

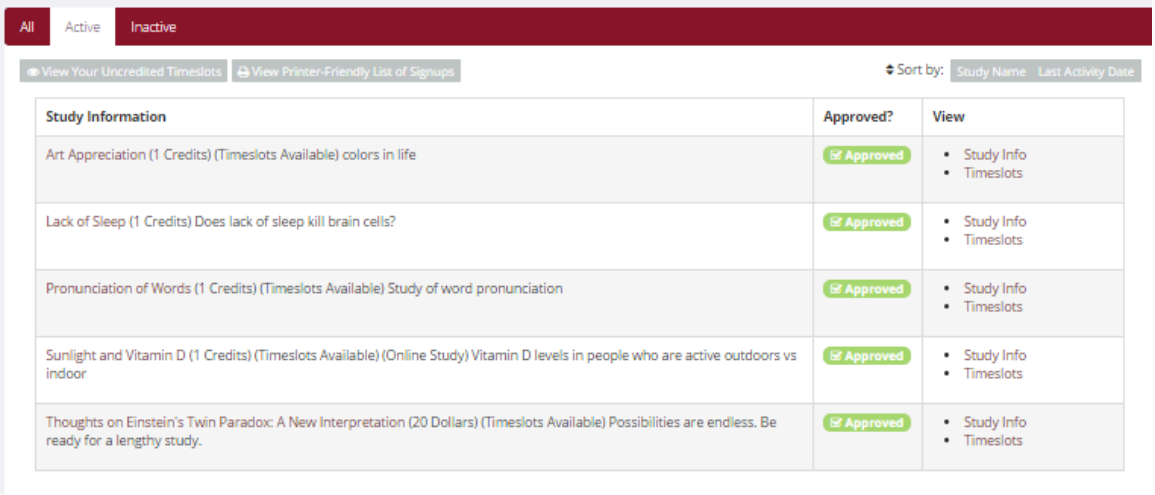


Figure 19 - Your Studies

Participant Study View

If you would like to see how your study appears when participants view it, find your study and choose the Participant Study View option. This will show exactly how the study appears to participants. With the exception of a participant who views a study, next to each pre-requisite and disqualifier study is a status indicator about whether they have met that requirement. In Participant Study View, the pre-requisite and disqualifier studies are listed, but there is no status indicator next to each study in the list.

If for some reason you think your study is not visible to participants, it may be due to various restrictions you have set on the study; such as prescreen participation restrictions where too few (or none) of the participants in the pool qualify. You can ask the administrator to use the Check Study Configuration tool (available to them when they view your study) to provide advice on why your study may or may not be visible to participants. Administrators there also have an option to input a specific participant to see if that participant would qualify for your study.

Viewing Other Studies

To view all studies that are visible to participants, choose the All Studies option from the top toolbar.

You will first see a list of all Active studies. These studies will show up to participants on the list of available studies. The next group of studies (if there are any) is Inactive studies. These will *not* show up on the list of available studies (to participants) but participants are able to access information about these individual studies on links from the page that tracks their progress (if they have participated in the study) or if another study has the Inactive study listed as a pre-requisite or disqualifier.

Online External Studies

Online external studies are online studies that are not hosted within the system, but instead reside on another website. This is different from online internal survey studies (detailed later in this documentation), where an online survey is set up directly in the system and no other website is involved.

For online external studies, you may want to develop a method of linking the participant's sign-up in the system to your online study, so you know who to grant credit to. One way to do this is to ask for the participant's name (or some other identifying information) that will make it easy to locate their sign-up within the system and grant them credit once they have completed your online study. Another method of tracking, which reduces the chance of human error, is to use the Survey Code feature described later in this section. The most automated approach is to use the External Study Credit Granting feature, in which the participant receives credit automatically as soon as they finish the study.

Note that if External Study Credit Granting is not used, the system will *not* automatically grant credit once the participant has finished the study. The reason behind this is the system does not know when something occurred on a website outside the system. In this case, researchers should routinely login and grant credit as necessary.

External Study Credit Granting

With External Study Credit Granting, a participant can receive credit as soon as they finish the online external study. This is accomplished by having the external study notify the system that the participant has completed the study and thus deserves credit.

If you are using a popular commercial product like Qualtrics, SurveyMonkey, SurveyGizmo, LimeSurvey, QuestionPro, MySurveyLab, Gorilla survey, FluidSurveys, Unipark, or Inquisit, then skip this section and go to one of the following sections that provide specific instructions for each product. In addition, it may be easier to use the online integration instructions available for each product at http://www.sona-systems.com/help instead of this documentation. The reason is that those products may have been updated since this documentation was produced, and the online integration instructions are updated more frequently.

What follows in this section is a general description of the integration process if you are *not* using one of the commercial survey products listed above. If you *are* using one of those products, then skip to the relevant section (or the online integration instructions) instead.

Accessing the completion URL for the study sends the notification to the system. A properly configured study will have up to two Completion URLs:

1. **Client-Side Completion URL**: If this URL is loaded, the participant will receive credit. Typically, the participant clicking on this link in their browser, or the participant being redirected to this link after completing the study, would load this URL. This is the most commonly used method for a commercial survey product where there is not already a built-in integration.
2. **Server-Side Completion URL**: This URL would typically be loaded by the external study (not clicked on by the end-user participant) and is a server-to-server communication between the external study and the system. The results are returned in XML format and may be parsed by the external study. This method is used when you have full control over the external study, like if it is programmed from a Perl script. It also provides more control and security than the client-side method.

You should use only *one* completion URL to achieve credit granting. For most commercial online survey products, and if you are not familiar with programming, the client-side completion URL is likely the most appropriate option. To avoid confusion, the system will only display the client-side completion URL if a commercial survey product is being used and is known to support only the client-side completion URL.

To see the completion URLs for your study, first you need to ensure the study is set up correctly as an online external study. Then, enter the URL for the external site into the Study URL field in Change Study Information and save your changes. Next, click on Change Study Information again and modify the Study URL to include `%SURVEY_CODE%` in the URL in the appropriate place. If you entered the URL for a commercial product like SurveyMonkey, Qualtrics, SurveyGizmo, Unipark, or Inquisit, then the system will display help text just below the URL with a suggestion for how to include this. Once you save your changes the completion URLs should now appear on the resulting study information page. In short, the completion URLs will appear as long as there is `%SURVEY_CODE%` anywhere in the Study URL.

The client-side completion URL will look like this:
`https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=9185d436e5f94b1581b0918162f6d7e8&survey_code=XXXX`

The server-side completion URL will look like this (if displayed):
`https://yourschool.sona-systems.com/services/SonaAPI.svc/WebstudyCredit?experiment_id=123&credit_token=9185d436e5f94b1581b0918162f6d7e8&survey_code=XXXX`

In the example above, the XXXX at the end is to show where the survey code number should be placed (in place of XXXX) by the external study website.

The next step is you'll need to configure the online external study to receive the survey code number *from* the system at the start of the study, and also to load one of the completion URLs at the end of the study. You will need to replace XXXX with the survey code number and pass that *to* the system in the completion URL. Because this involves

configuring the external study, which is not part of the system, how this is accomplished depends on the external study software. Usually it involves setting up the survey code number as some type of variable that is passed via the URL, and then configuring a redirect URL at the end of the study to be loaded, with this variable in the URL.

As this is a complicated feature, the best method to test it is to actually login to the system as a fake participant. The entire credit granting process is not possible to test as a researcher, as researchers cannot sign up for studies. To ensure other (real) participants do not sign up for the study while you are testing it, add an Invitation Code to the study (you can remove it later).

The configuration directions for some popular survey products are below, based on information from those vendors.

Testing External Study Credit Granting

Once you have external study credit granting set up, you will want to test it before going live with real participants. The best way to do this is to test with a real participant account. During testing, you can set up the study with an Invitation Code (password) so real participants can't sign up for it while you do your testing.

It's also possible to test while logged in as a non-participant (like a researcher). Go to https://www.sona-systems.com/help/integration_test.aspx for information on how to test and troubleshoot any problems with credit granting.

The three most common problems when setting up external credit granting are:

1. Study is set up as wrong type in our system. Be sure to set it up as an Online External Study (where participants are not given the URL until after they sign up).
2. The URL participants get sent to at the end of the survey is incorrect. This URL is unique for each study in our system. So if you are re-using an old survey and created a new study in our system, be sure to update the URLs in that survey for crediting.
3. Typo when adding in %SURVEY_CODE% to the Study URL field. Read the instructions carefully, as it needs to be set up exactly as specified or it won't work.

External Study Credit Granting with SurveyMonkey

For the latest instructions on integration with SurveyMonkey, along with detailed screenshots, go to https://www.sona-systems.com/help/surveymonkey.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

It is important to note that some of the features used may vary depending on your subscription level with SurveyMonkey. In most cases, you will need to have their Gold or

Platinum package in order to make use of the Custom Redirect feature necessary for study credit granting to work properly.

Here are the basic steps, which are subject to change (since the product is controlled by SurveyMonkey):

1. In the system, change the Study URL so it includes `%SURVEY_CODE%` in the URL. So if the SurveyMonkey URL is `http://www.surveymonkey.com/s/H2Y9H27` then change it to `http://www.surveymonkey.com/s/H2Y9H27?c=%SURVEY_CODE%`
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "SurveyMonkey Redirect to a URL". In SurveyMonkey, configure the survey to accept the survey code number, as a collector. Click on the "Collect Responses" tab.
3. In SurveyMonkey, configure the Survey End Page option to “On, show a custom end page upon survey completion”, and provide the SurveyMonkey Completion URL from the system. By doing this, SurveyMonkey will put in the survey_code number passed to the collector. If Steps 1 and 2 were completed correctly, then SurveyMonkey will add in the parameter automatically when it redirects the user. So if the SurveyMonkey Completion URL will look something like this: `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=9185d436e5f94b1581b0918162f6d7e8`

These features are described on SurveyMonkey’s site at the following URLs:

- https://help.surveymonkey.com/articles/en_US/kb/What-are-the-Survey-Completion-options (“What are the Survey End Page options?”)
- https://help.surveymonkey.com/articles/en_US/SurveyMonkeyArticleType/Can-I-redirect-respondents-to-a-different-website-upon-completion (“Can I redirect respondents to a different website upon completion?”)

External Study Credit Granting with Qualtrics

For the latest instructions on integration with Qualtrics, along with detailed screenshots, go to https://www.sona-systems.com/help/qualtrics.aspx.The product may change more often than we update our documentation, so the help page will contain the very latest information.

Here are the basic steps, which are subject to change (since the product is controlled by Qualtrics):

1. In the system, change the Study URL so it includes `?id=%SURVEY_CODE%` in the URL. So if the Qualtrics URL (Anonymous Survey Link) is `https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE` then change it to

`https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE?id=%SURVEY_CODE%`

2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "Qualtrics Redirect to a URL". In Qualtrics, configure the survey to accept the survey code number, as an embedded data field named "id". Remember to use lower-case as this is case-sensitive. To do this, go to Survey Flow | Add a New Element | Embedded Data and type in "id" and save your changes.
3. In Qualtrics, configure the Survey Options | Survey Termination | Redirect to a Full URL option, and provide the Qualtrics Redirect to a URL value from your Sona Systems site. (You may simply copy and paste the unaltered value from Sona into Qualtrics).

   Note: If you have an End of Survey element set up in Survey Flow, you will need to add the URL there also. Go to Survey Flow | End of Survey | Customize and enter the Qualtrics Redirect URL value from the system into the Redirect to a URL field in Qualtrics.

These features are described on Qualtrics' site at the following URL:

- https://www.qualtrics.com/support/integrations/api-integration/passing-information-through-query-strings/ ("Passing Information Through Query Strings")

External Study Credit Granting with SurveyGizmo

For the latest instructions on integration with SurveyGizmo, along with detailed screenshots, go to https://www.sona-systems.com/help/surveygizmo.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with LimeSurvey

For the latest instructions on integration with LimeSurvey, along with detailed screenshots, go to https://www.sona-systems.com/help/limesurvey.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with Inquisit

For the latest instructions on integration with Inquisit, along with detailed screenshots, go to https://www.sona-systems.com/help/inquisit.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with Unipark

For the latest instructions on integration with Unipark, along with detailed screenshots, go to https://www.sona-systems.com/help/unipark.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with QuestionPro

For the latest instructions on integration with QuestionPro, along with detailed screenshots, go to https://www.sona-systems.com/help/questionpro.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with Fluidsurveys

For the latest instructions on integration with Fluidsurveys, along with detailed screenshots, go to https://www.sona-systems.com/help/fluidsurveys.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with MySurveyLab

For the latest instructions on integration with MySurveyLab, along with detailed screenshots, go to http://www.sona-systems.com/help/mysurveylab.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

External Study Credit Granting with Gorilla

For the latest instructions on integration with Gorilla surveys, along with detailed screenshots, go to http://www.sona-systems.com/help/gorillasc.aspx. The product may change more often than we update our documentation, so the help page will contain the very latest information.

Client-Side Completion URL Responses

For help with testing, listed below are the possible messages that the participant will see when they are redirected to the Client-Side Completion URL. It is important to note that if the system has a language enabled other than English, then the message will be

displayed in the participant's preferred language, instead of English (unless their language preference is English).

Status Message	**Explanation**
Web study credit successfully granted.	The credit was granted successfully.
No credit given because you are not a participant, and therefore cannot sign-up for this study.	A non-participant account (e.g., the researcher) accessed the URL, but the URL was accessed correctly. Usually this happens when a non-participant clicks on the Sample Link with Embedded ID Code link from the study. This message will occur when testing the credit granting setup. This signifies that everything is set up correctly.
Invalid experiment_id or credit_token.	The experiment_id or credit_token in the completion URL was invalid. As this does not change for each participant, this is most likely to occur if the completion URL was somehow incomplete or truncated.
Invalid survey_code.	The survey_code was not specified at all, or was blank. This may indicate the external study is not properly placing the survey_code in the completion URL.
Invalid survey_code. ## [some number]	The survey_code was provided, but is not valid for this study.
You have already received credit for this study. / You have already participated in this study.	The participant has already participated in this study and received credit/been marked as participated.
You are not eligible to participate in this study.	The participant has already signed up for this study, but has been marked as a no-show, and has no other signups for this study, which are in Awaiting Action state.
Web study credit grant error. ## [some number]	Some other generic error. Please contact Technical Support for more information.

Server-Side Completion URL Responses

For help in testing, listed below are the possible messages that the system will give if the Server-Side Completion URL is loaded. For consistency, this feature is documented using the same format as the general documentation for the API interface. See Automating Tasks – API for information about how to locate the API documentation.

Input Parameters

Below are the following input parameters for use with the WebstudyCredit API function. These are included automatically when the system generates the Server-Side Completion URL. Note the parameters must be specified as part of the URL (an HTTP GET) and not via an HTTP POST request.

Parameter	Description / Possible Values
experiment_id	The Experiment ID of the study.
credit_token	The credit token used to identify/reference the study.
survey_code	The code that identifies the participant from the external web study.

Error Codes

Below are the possible error messages encountered and their respective descriptions. If the request was successful, there will not be an Error object returned, only a Result object. See Sample Output for an example.

Error Type	Error Code	Description
Authentication failed	0	unspecified error
Invalid experiment_id	-1	An invalid experiment_id value has been entered
Invalid credit_token	-2	An invalid credit_token value has been entered
Participant already granted credit	-3	The participant has already been granted credit
Participant already marked participated	-4	The participant has already participated
Participant not eligible (no-show)	-5	The participant is not eligible for credit
Invalid survey_code	-6	An invalid survey_code value has been entered

Sample Input

https://yourschool.sonasystems.com/services/SonaAPI.svc/WebstudyCredit?experiment_id=123&credit_token=9185d436e5f94b1581b0918162e8&survey_code=XXXX

Sample Output

The output is in XML format. Below is an example of a successful request. Most of the Result object will contain null or empty values, as it is part of an object used for other API calls. There are two options to check that the credit grant was successful:

1. The Result object exists
2. The Result object exists and the credit_status field has a value of G

If there was an error, then the Errors object will contain data instead of being null.

```
<WebstudyCreditResponse>
	<WebstudyCreditResult>
		<a:Errors i:nil="true"/>
		<a:Result>
			<a:anon_id_code i:nil="true"/>
			<a:credit_status>G</a:credit_status>
			<a:email i:nil="true"/>
			<a:first_name i:nil="true"/>
			<a:last_name i:nil="true"/>
			<a:phone i:nil="true"/>
			<a:signup_id>123</a:signup_id>
			<a:student_id_num i:nil="true"/>
			<a:survey_code>XXXX</a:survey_code>
			<a:user_id i:nil="true"/>
		</a:Result>
	</WebstudyCreditResult>
</WebstudyCreditResponse>
```

Security Considerations

There is one potential risk with using the Client-Side Completion URL. Because the URL is typically accessed directly by the participant (their browser is redirected to it), they also have access to view the parameters in the URL. The completion URL contains a key specific to your study, as well as an ID (the survey code number) to indicate which participant should be granted credit.

The risk is that a participant could use this URL and start trying other ID (survey code numbers) to grant other participants credit. In order for this scheme to work, *all* of the following must be true:

- They must be able to guess an ID number used by another participant. The ID numbers are not necessarily sequential.
- The other participant must be signed up for this study.
- The other participant must not already have received credit for this study (i.e. they are in Awaiting Action state).

It's fairly unlikely that all three situations will occur, and it's a lot of work for a participant to guess all possible ID numbers, although this can be automated. If this is of concern the best option is to use the Server-Side Completion URL, since that is a communication from server to server. Thus participants will not see the communication. The drawback is

that most commercial survey products do not support the use of the Server-Side Completion URL; so additional programming would be required.

Using the SURVEY CODE Feature

Note: If you are only interested in external study credit granting, then this section may not be applicable. This section describes how to use the survey code feature to link a sign-up in the system to data collected in the external study. However, it also describes the foundation for how the survey code feature works, which is useful in better understanding the external study credit grant feature.

For web-based studies administered outside the system, there is a special feature available for advanced users to track sign-ups in their web-based study. All while still preserving confidentiality. This feature applies only to web-based studies administered outside the system.

Before going further, it is important to note that this is an advanced feature and may require some programming skills. Sona Systems is unable to provide technical support for any programming questions.

The way this feature works is that if the text `%SURVEY_CODE%` is placed anywhere within the Study URL field, the system will automatically replace this text with a unique number for the participant. This unique number will be displayed next to their sign-up within the system, making it easier to match sign-ups by this number. The number can be anywhere from 4-7 characters in length, and will not contain numbers leading with zeroes (1234 is possible, but 01234 is not).

The external study will then need to be set up to process this code and log it appropriately. Sona Systems cannot provide detailed technical support on how to program an external study, as that code is external to our software.

Here is an example of how this works. Let's say the study URL is:
`http://www.myschool.edu/mysurvey.html`

If the Study URL is entered in the system as:
`http://www.myschool.edu/mysurvey.html?id=%SURVEY_CODE%`
Then when a participant clicks on that URL, the system will replace `%SURVEY_CODE%` with a unique numeric value to identify the participant. For example, the URL may be changed to:
`http://www.myschool.edu/mysurvey.html?id=30039`

If that is the case, on the page in the system listing sign-ups for this study (i.e., in the timeslot), the code 30039 will appear next to that participant's sign-up.

If this code is parsed and handled by the external study, the researcher can easily link up the sign-ups in the system with which they have collected data from within their

external study, so they know who to give credit to. It is important to note that the crediting still will not occur automatically. The purpose of this feature is to provide a way to identify participants without compromising privacy, as the system can then be configured to not display names next to sign-ups.

If a participant is not viewing the URL (for example, the researcher is viewing the URL), this special survey code text will simply be removed. It is important to note that this special text must be in all capital letters, and surrounded by percent signs. You may confirm it was entered correctly because a sample URL will be displayed when you go to view (not edit) the study, below the normal study website link.

If you provide a SurveyMonkey, Qualtrics, Inquisit, LimeSurvey, SurveyGizmo, or FluidSurveys URL in the Study URL field, then the system will provide guidance (after saving your changes) about how to use the survey code feature.

Online Survey Studies

Introduction

This system includes a rather extensive online survey feature (if enabled on your system). It allows you to set up an online survey as a study within the system, so participants who sign up for the study will be immediately asked to complete the survey. Upon completion of the survey, they will be granted credit automatically by the system. You may then analyze their survey responses on an individual basis, or download the raw data across all participants who completed the survey for further analysis. There is a chance that you may notice a discrepancy in the number of responses when analyzing a single question compared to downloading the entire set of responses. This can occur if a participant is currently taking the survey, but has not completed it. Their data is included in the single-question analysis (when available) but not in the full download of responses, as there is not a full set of data for an in-progress survey. The system will prevent participants from completing the survey more than once, removing the risk of duplicate entries for participants.

In compliance with research ethics guidelines, the participant is given the opportunity to withdraw from the survey at any time. See Participant Withdrawal from a Survey for more information.

There is space to provide closing text for the survey, which is displayed to participants after they successfully complete the survey. This means after they have saved all their responses and cannot go back and edit. This is an ideal place to include any relevant debriefing information.

The online survey feature is complex due to the many features it contains. In addition, your ability to modify the survey after participants have started to take the survey is limited. Because of this, you should plan out your survey well in advance to make sure it

is finalized before you make it available to participants. You may find it helpful to plan out the survey on paper before entering it into the system.

A survey may have an unlimited number of sections and an unlimited number of questions per section. We recommend limiting surveys to fewer than 300 questions total, 15 sections total, and 15 questions per section. This is to reduce participant fatigue and to ensure proper system performance. Participant fatigue can be an issue, as they must complete the entire survey all at once. In addition, you should make participants aware that their session may time out because of inactivity. Usually, this means they will be logged out after 15 minutes of inactivity. Inactivity would happen if they load up a section of questions but do not complete and save their responses for that section within that period of time. It is a good idea to structure sections accordingly, especially if a section contains lengthy text or complex questions. The system will warn participants a few minutes prior to this inactivity logout, and provide them with the opportunity to extend their session.

Questions may be free-entry (requiring the participant to type in an answer) or multiple-choice (pick only one or pick many from the list of choices). You may also specify that the system compute participant's results for an entire section, as either a section sum or average score. This computed sum or average can be computed only for numeric, multiple-choice (pick only one) questions in the section. Such computing is often useful when a participant's aggregate score is more important, such as with a depression battery.

For free-entry questions where the participant is asked to enter a free-form text answer, the size of the entry field cannot be resized in terms of dimensions. It can only be resized in length. Participants may enter up to 255 characters in their response.

Sections can be displayed in any order, whether that is specified, random or combination of both. Each section may contain introductory text introducing the section. The survey itself may also have introductory text introducing the survey, as well as closing text that is displayed upon completion of the survey. You may specify that questions within a section be displayed in a random order, or in the order you specify. Multiple-choice questions can have their choices displayed in the entered order or random order. This is specified on a per-question basis. Multiple-choice question choices can be displayed horizontally (across the page) or vertically (down the page).

It is important to note that while the survey feature is quite extensive, there are some things it does not support. It cannot do question timing, where the speed of a participant's response (typically in milliseconds) to each question needs to be measured. It also cannot do branching, where the questions being presented to a participant will vary depending on their answer to other questions within that same survey. For example, asking a question like "Do you smoke cigarettes?" and then presenting a different set of questions based on their response. The reason that advanced features like this are not currently supported is that our software is primarily a participant pool

software product that happens to have an online survey feature within it. We asked our customers which features in an online survey were most important to them, and those features exist within the product. There are numerous products on the market specifically for doing online surveys (with no participant pool component), which contain more advanced features. These products can easily be linked from the Sona Systems product by setting up your study as an online study conducted outside the system.

Creating or Modifying a Survey

To create a survey, first create an online internal survey study. After you create it, you will see the option Update Online Survey when you view the study information. You may not create multi-part online survey studies.

It is important to note that while you are making changes to a survey, it is deactivated so participants may not participate in it. When you go to the Finalize Survey option after you have finished your work with the survey, you will have the opportunity to save your changes and make the survey Active (available to participants) or Inactive (not available to participants). You should always choose the Finalize Survey option when you finish your work with the survey, as the system saves all changes and computes some additional important data when you finalize the survey. If you would like to continue work on the survey at a later date, you should still choose the Finalize Survey option to ensure your changes during the current session are properly saved. It is presumed you would choose to keep the survey inactive in this situation.

General Survey Information

Choose the General Information option (if creating a new survey, this is the first page you will see) to provide some basic information about the survey. The fields are explained below:

Field	**Description**
Introductory Text	Optional, up to 10,000 characters in length. Provide a set of text that will be displayed when a participant starts the survey. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). When you first create the online survey, the system may automatically insert some basic default text in this area. You may change any of this text as much as you like – the system will not change it back later as long as you save your changes.

	This is a good place to place any text for informed consent purposes. You may view how this text is displayed to participants by saving it, then going to Preview Introductory Text, which is available from the Section List page.
Closing Text	Optional, up to 7,000 characters in length. Provide a set of text that will be displayed after a participant completes the survey and saves their responses. This is an ideal place for debriefing information. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). You may view how this text is displayed to participants by saving it, then going to Preview Closing Text, which is available from the Section List page.
Display sections in random order?	You may specify a specific ordering for all sections or have the system randomize the order for all sections. You may also specify the order of some sections and a random order for other sections. If you specify the order for only some sections, you may also specify for each section, whether it should be displayed before or after the random-ordered sections. The system does not keep track of the random order sections were displayed for each participant.
Mobile Devices Allowed?	If set to Yes, the participants accessing the system using the mobile version (app) on a mobile device like a smartphone or tablet will be allowed to participate. If the survey makes use of images or question and choice layout is important, it may be better to set this to No as the layout may be rendered differently on devices. Especially on devices like smartphones with small screen sizes. For technical reasons, there is no easy way to preview how questions will look on a mobile device except to login as a test participant using an actual mobile device.

Participant response review/change	If set to Yes, then participants may review and change responses just before they complete the online survey. They are given this opportunity after they complete the last section of the survey, before any closing text is shown. At this point, they can see all their responses and go back to any section to change them. Once they complete the online survey, they cannot go back at a later date and change any responses. It may be useful to set this option to No (so that they are not allowed to review or change their responses at the end of the survey) if sections are somehow dependent on one another. Meaning that allowing participants to change their responses may affect the integrity of data collection.

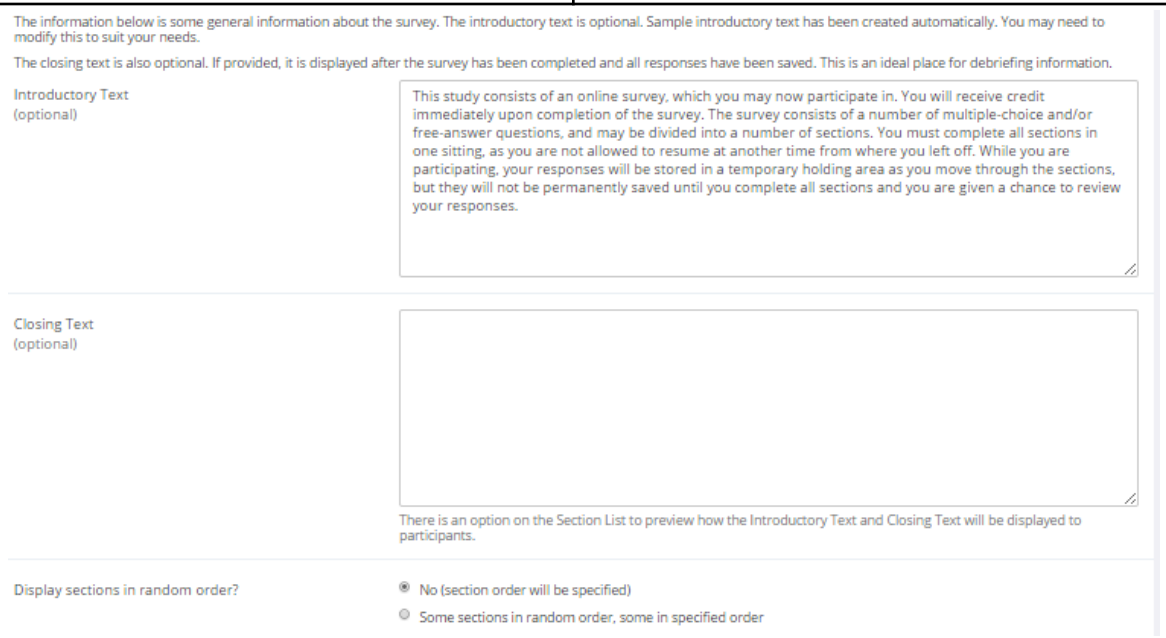


Figure 20 - Survey General Information

Section List

Depending on if you are adding or editing the survey, you will be taken to the list of sections for the survey. Here you can change the order that sections will be displayed, if you have not enabled full random section ordering for the survey, and see a quick review of each question. From here you can also add a question to any section and edit any question. To add a new section, choose the Add a New Section choice at the bottom of the page.

If you have enabled partial random section ordering, then you can specify a section order for the sections you would like displayed in a specified order. For the sections you

would like displayed in random order, leave the Section Order item blank. When you specify a section order, use each number once. Use the numbers 1-98 if you would like the section to be displayed *before* the random-ordered sections, and the numbers 100-199 if you would like the section to be displayed *after* the random-ordered sections. Be sure to use each number only once, or leave the number blank to make the section part of the random-ordered section. Sometimes it is useful to use partial random ordering if you want to ask basic (e.g. demographic) information in the first few sections, while asking more analytical questions in the random-ordered sections. You may also want to ask about the previous random-ordered sections after they are completed. It is not possible to intersperse ordered sections within the set of random sections, like having 2 ordered sections, then 3 random sections, the 1 ordered section, then 2 random sections, etc. The random sections are treated as an entire block of sections, and other sections cannot be placed at specific places within that block.

There is also a Preview Section option so you are able to preview the survey, as participants will see it.

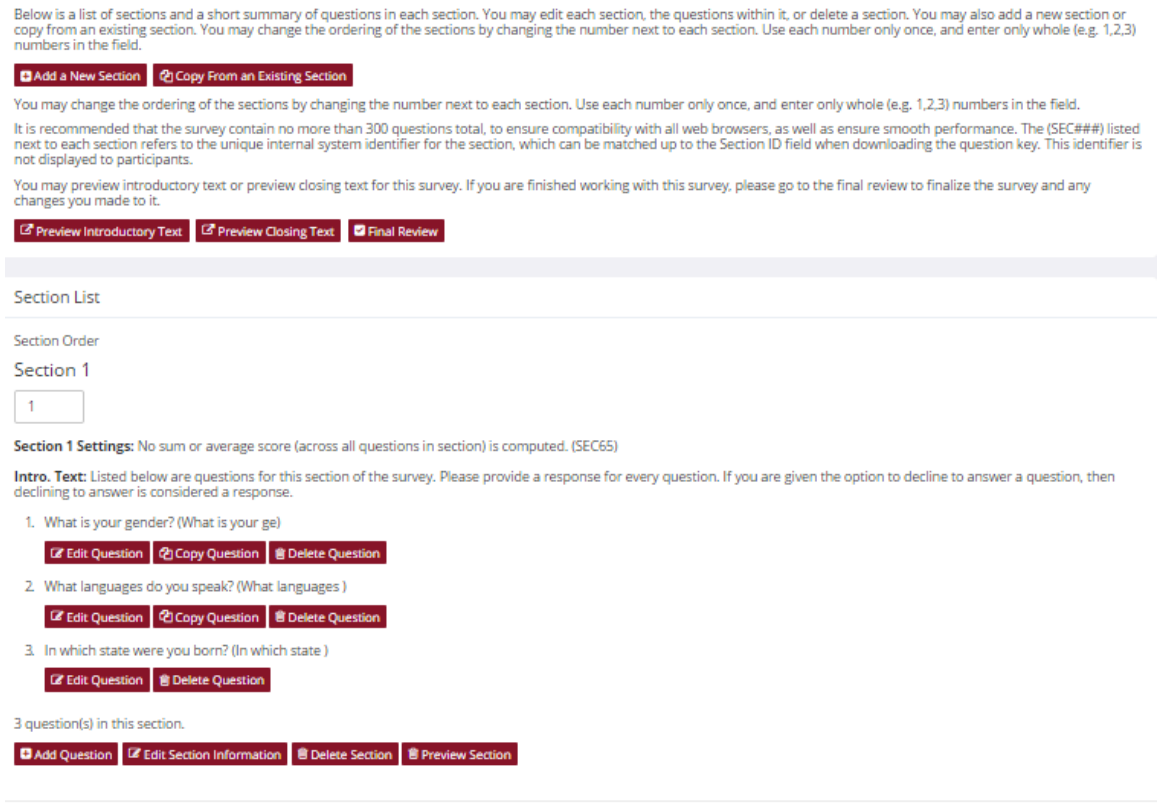


Figure 21 - Survey Section List

Adding or Modifying a Section

To add a new section, choose the Add New Section link at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.

There are three pieces of information you may provide for each section. First, you may specify some introductory text to be displayed at the beginning of the section. When participants take the survey, they view one section at a time with all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in that section. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). The introductory text is up to 15,000 characters in length.

You may choose if the questions for that section are displayed in random order or in the order you specify.

You may also choose to have the system compute a section sum or average (for each participant) for the section. These scores are computed only for all the multiple-choice, numeric questions in a section, where only one choice may be chosen. Think carefully about setting this value, because you are very limited in your ability to change it after participants have started to take the survey.

Computed section sums or means are often useful when all the questions are using a unidimensional scale (1-5, for example), but a participant’s average score response to the section is more useful to account for their outlier responses.

Depending on if you are editing or adding a section, after you save your changes, you will be taken to a page to add a new question or to the section list.

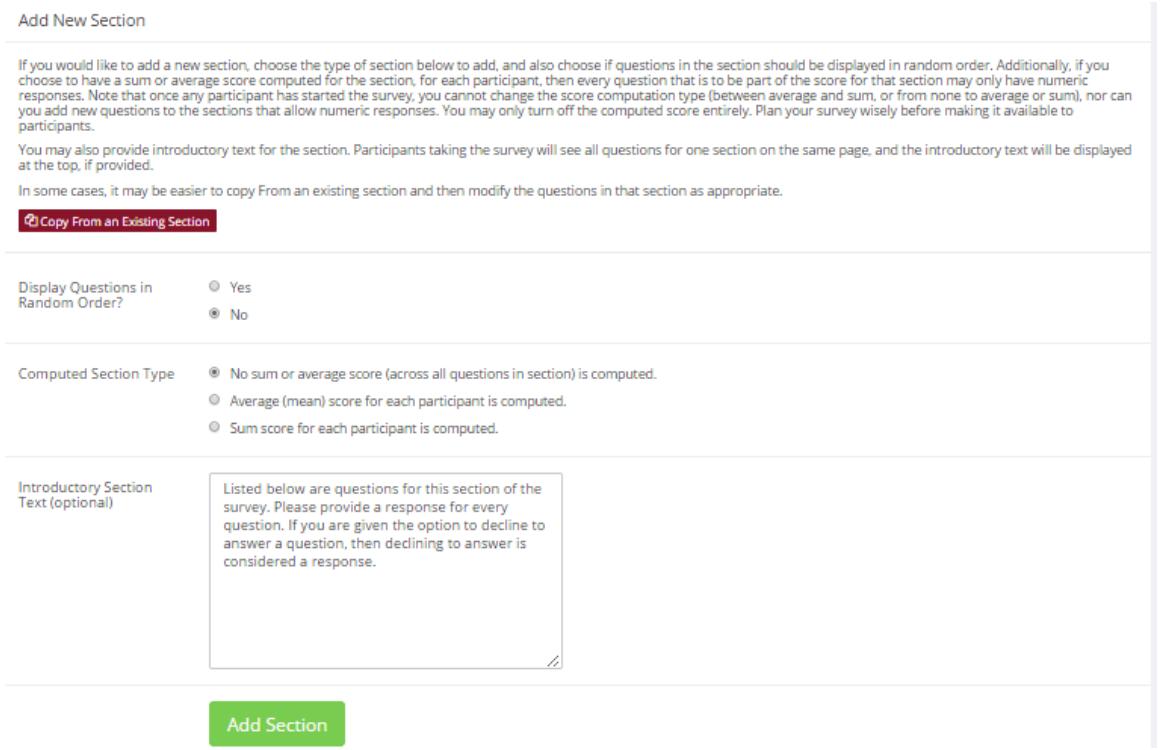


Figure 22 - Add New Section

Adding or Editing a Question

To add or edit a question, choose the appropriate choice from the Section List, next to the desired section. Questions will be displayed in the order they are added to a section or in a random order, depending on the section settings, and you may reorder the questions later. Depending on the state of the section and if participants have taken the survey, some options will be automatically set for you, and not changeable. All fields must be filled out.

Field	Description
Question Text	The text for the question. This will be displayed above each question's choices. Up to 15,000 characters maximum.
Abbreviated Question Name	A 15-character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format. Many statistical analysis programs limit column names to 15 characters.

Question Type	Multiple-Choice (select one), Multiple-Choice (select many) or Free Entry. If the section has a computed average or sum, you may be limited in your ability to add Multiple-Choice (select one) non-numeric questions. Free entry choices may contain a response up to 255 characters in length.
Display length of Free-Entry field	Specifies the length (size) of a free-entry field when it is displayed. Acceptable values for this setting are 5-85, and the field will always allow participants to type in up to 255 characters in length. The height of the field cannot be adjusted. This setting only applies to Free Entry questions.
Display choices in random order?	If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple-choice questions.
How should the choices be displayed?	Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed. Often, the horizontal display is effective when the question involves a scale. This setting applies only to multiple-choice questions.
Can participants decline to provide an answer for this question?	If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question. The default when adding a new question (not copying an existing question or section) is set to Yes for ethical compliance.
Are all choices numeric?	If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple-choice questions. Sections with a computed section sum or average may not contain non-numeric multiple-choice (select many) questions.
Display numeric value?	If set to No, the numeric value of the choice is not displayed to participants. This only applies to numeric, multiple-choice questions where each choice includes both a numeric value and associated text (e.g. “5

	Strongly Agree"). This is useful when running a reverse scale.

If the question is a multiple-choice question, you must also fill out the choices section that is part of the same form. A minimum of one choice must be provided for the question. Each choice may be up to 255 characters in length. When adding a question, there is space to add up to 10 choices. If you need to add more choices than this, simply add the question and go back to update it, and there will be an option to add more choices.

If the question is specified as numeric, you must provide a numeric choice. That choice must be a whole number (e.g. -5, 1, 0, 349). If you would like to provide descriptive text to accompany each numeric choice, you may do so by typing in the numeric choice and leaving one blank space after it, then type in the descriptive text. For example "5 Strongly Agree". If you provide descriptive text along with the numeric choice, then you have the option of hiding the numeric value from participants, by choosing No to the "Display numeric value?" setting for the question. This is useful in reverse scale or other situations where the numeric value for the choices is not important.

When adding a question, if the choices you specify do not conform to the configuration of the question (e.g. specifying a non-numeric choice for a numeric question), the system may change the question configuration to ensure that the choices are then valid.

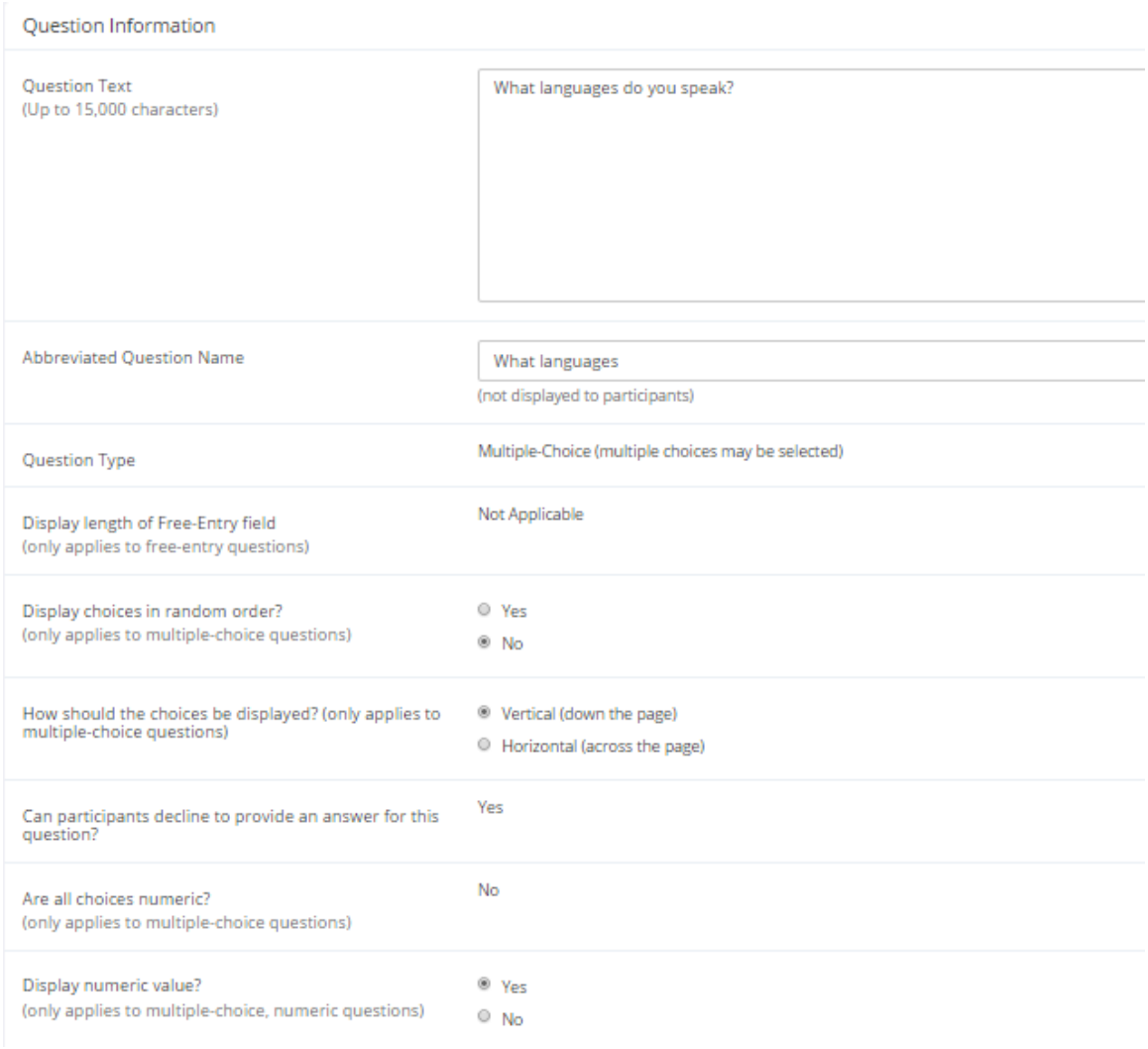


Figure 23 - Edit a Question

Copying a Section

You may copy a section from any of your own surveys into your current survey, by choosing Copy From an Existing Section in the Section List. You will see a list of eligible surveys to copy from. After you choose which survey to copy from, you will see a list of eligible sections in that survey. Once you choose a section, it will be copied into the survey you are currently editing. You may copy only one section at a time. This is due to the system performance impact when copying sections.

The administrator also has the ability to copy to or from the prescreen, so ask the administrator to do this for you, if you need it done.

Copying a Question

For multiple-choice questions in particular, it is often the case that many questions have the same measures (choices). To make entry of similar questions easier, you may use the Copy Question feature to copy a question of any type. To copy a question, select the question you would like to copy when viewing the Section List. You will then be taken to a list of sections where you may copy this question. The default is set to the section the question came from. After you decide which section you would like to copy the question to, you will be taken to a page where you can make any final changes to the copy of the question before saving it.

Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing of the survey later, it is **imperative** that you go to the Final Review step. The system needs to save certain special changes and make some computations. If you do not want participants to participate in the survey yet, you can save changes but keep the survey inactive. Once you save your changes it may take a moment to save all the changes, as the system is performing a number of computations on the survey. Please be patient, as these computations are done to make performance for participants as fast as possible. The system tracks which user last made the survey active or inactive and when they did this. This information is displayed on the setup page.

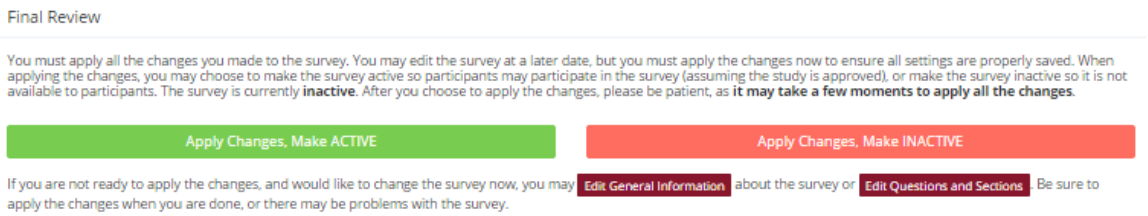


Figure 24 - Saving Survey Changes

Viewing a Survey as a Participant

If you would like to see how the survey would be displayed to participants, that can easily be done while setting up the survey. Next to each section in the section list, there will be a Preview Section link so you can view the section exactly as participants would see it. You may also view how the introductory and closing text will appear to participants, by choosing the Preview Introductory Text and Preview Closing Text options that appear on the Section List page.

Participants will see a basic progress display on the top right corner of each page. This display lists the section they are on (ordinal counting), and how many sections total are in the survey. When using Preview Section, you will see this progress display as well. Everything except the current section number will appear as “X” in preview mode since

it is not an actual participant taking the survey (and randomization of section order may be involved).

If you find it necessary to go through the entire process as a real participant, you can do so by creating a test participant account. Set the online survey study so it has an invitation code, this way no other participants can sign up (since they will not know this invitation code). Then, sign up with your test participant account and take the survey. You can remove the invitation code later if necessary.

Participant Withdrawal from a Survey

At any time while participating in the survey, participants have the option to withdraw from the survey. A Withdraw button will appear at the top right corner of each page.

When a participant withdraws, they have the option to withdraw *without* the option to receive credit, or *with* the option to receive credit.

If they choose to withdraw *without* the option to receive credit, all their survey responses as well as the record of their sign-up will be deleted. Participants are told that this option should be used if they want to later participate in the survey. This scenario would likely be used when a participant starts a survey but realizes they won't have sufficient time to complete it at the moment, but would like the opportunity to participate later. Notification will not be sent to researchers in this scenario.

If they choose to withdraw *with* the option to receive credit, then all their survey responses will be deleted, but a record of their sign-up will be kept and be in awaiting action state. The researcher will receive an email about the withdrawal, as well as some basic information about how far along the participant was when they chose to withdraw, both in time spent and number of questions completed. This information is provided in case there is a policy of granting credit for early withdrawals based on time spent or percentage completed. Participants also have the option of including a message that will be sent to the researcher to explain their withdrawal. However, such a message is not required. The researcher should then grant credit to the participant if necessary, by going to the timeslot and finding that sign-up.

Participants are informed that if they are unsure which of the withdrawal options to choose, they should choose the withdraw option that retains their ability to receive credit.

The withdrawal option cannot be removed, as it is there to ensure compliance with research ethics guidelines.

Viewing Survey Data Usage and Deleting Survey Data

The system has a limited amount of storage space and you are expected to download the survey data you have collected on a routine basis, and then delete it from the system. By going to View Survey Data Usage, you can see how much database space is

being used. You can then download the survey data (a link is provided), and delete it from the system.

When you delete the data from the system, all survey data collected within the last 5 minutes will *not* be deleted, as a precaution. This is to ensure that you have had adequate time to download the survey data before deleting it (to account for the time between downloading the data and deleting it).

If you choose to delete the survey data in this manner, the record of participant sign-ups *will* be retained. That way you can ensure the participant does not complete the same online survey again.

Deleting a Single Participant's Survey Responses

On rare occasions, you may want to delete a participant's survey responses, usually so they can participate again. To do this, cancel their sign-up and that will delete their responses. Note this will also remove any credit they earned. See Manual Cancellation for more information.

Analyzing Survey Responses

You may analyze a specific survey question on-screen by selecting the survey and choosing the Analyze Survey Responses option. From there, you may choose a specific question and view or download the response data. This will include data from participants who are still in the process of completing the survey, but have not yet completed it. The Download Survey Responses option, which provides the entire set of survey responses for all participants, includes only data from participants who have completed the survey. This is done to ensure easier data analysis.

In rare cases, you may notice that a few responses for certain questions appear (or disappear from) the Analyze Survey Responses while never showing up in Download Survey Responses. In this situation, a participant has started an online survey but never fully completed it or withdrew from it (they more than likely just closed their web browser). The system goes through all "orphaned" responses in this situation and clears them out once they are more than 2 days old.

It is presumed that you will want to analyze the survey data across all questions. In this case, you should choose the Download Survey Responses option.

To successfully analyze the data, you will need to download 2 sets of data. The first is the question key, which lists a unique numeric identifier for each question, along with the question text and abbreviated question name. It also includes the section number that each question was in. Note the section number listed is merely a unique identifier for each section, and has no correspondence to the order in which sections were presented. Also note that section mean and sum values, if calculated, will normally be at the end of the list of questions. This data is in CSV format and is available by clicking the Download Question Key link on the Download Survey Responses Page.

After you download the question key, you can download the survey data. The data may be separated into parts if there is an excess of data to download. The system will adjust the size of each part based on how many questions are in the survey. A survey with a large number of questions will be broken into more parts, with fewer rows of data per part. The default option is to download the entire set of survey data, meaning all parts at once. If you receive an error when doing so, then download each part one at a time. There may be too much data in the combined download for the system to process.

You may also choose to limit the download based on date range. This is based on when the participant completed the survey. If you choose a date range, this merely filters each existing part of the download. This means that some parts may be empty if no participants whose responses would normally be included in that part completed the survey during the specified date range.

There are three options for downloading and viewing the data (both the question key and responses):

1. Download as CSV File. This is the most popular option. It allows you to save the data on your computer and load it in your preferred data analysis tool.
2. View On-Screen (CSV Format). This option lets you view the data on-screen instead of downloading it. The data is still displayed in CSV format, and is a good way to view the format of the data, as well as ensure all the data you expect is there. Often with larger datasets, downloading and viewing the data with some tools like Excel may make it appear as if not all the data is there, when in reality it's a limitation of the tool and not a problem with the data download. The on-screen option is also useful if data was collected in a language that uses Unicode character sets, like Hebrew.
3. View On-Screen (Table Format). This option provides an easy way to view the data on-screen (to visually analyze the data) but is not very useful for purposes of loading the data into an analysis tool.

The data is presented as one row per respondent, with each of their responses in a different column. The first row includes the column headings, and the column heading maps to the abbreviated question name. Since there is no feature to specify an abbreviated question name for the computed section sum/mean item, the system automatically assigns a unique name to those columns. The naming convention is SECXXX where XXX maps to the system's internal section identifier for that section (section_id). You can use the question key to determine which question maps to which column. The order of columns (questions) in the data download is not necessarily the same as the order of questions in the survey. These columns are ordered based on how the data is stored internally in the system. The data also includes the exact time the participant started and completed the online survey. You can use any common data analysis tool to compute how long it took the participant to complete the survey, using this information. There is also a column listing how many minutes it took the participant to complete the survey, rounded to the nearest minute.

There will be an option to include only the numeric response portion of questions that are multiple-choice with numeric choices. This is useful if the numeric question was set up with associated text, but that text should not be included in the analysis file. One example would be where the response selected was “5 Strongly Agree” but only the number 5 (and not the associated text) is useful during analysis. If you choose this option and download data and find that the associated text is included with the numeric response, then have a closer look at the survey. More than likely the question was not actually set up as a numeric question. The easiest way to deal with this downloaded data is to use a data analysis tool to do a search and replace to change the response in your downloaded data into a numeric format. Your IT department can provide assistance with such tools.

If your survey has a lot of questions (and thus columns in the output file), you may have trouble loading the data with some spreadsheet programs. Those of which are not equipped to handle such large datasets. Your best option is to use a full-featured statistical analysis package, like SPSS or SAS. Those packages handle large CSV-format data imports with ease. Your IT department can help you to select the best tools. In particular, Excel has trouble dealing with datasets with more than 250 questions (columns).

Frequently Asked Questions about Online Surveys

Is it possible to have multiple versions of an online survey? Will participants be randomly assigned to one version of the survey at the start of the survey?

The best way to do this is to create multiple online surveys and use a prescreen participation restriction that is unrelated to your research. To save time, you can easily do this by copying questions between them with the Copy Section Feature. For example if there is a prescreen question asking for the last digit of the participant’s university ID number, assuming this is randomly distributed, then you can use that to easily break up the pool into random tenths by using that as a prescreen participation restriction for each version of the study.

Is there a way to post images, graphics, or videos in the online survey, so that participants can respond to questions referring to the image or video?

Yes. You will need to have the ability to post images on a webserver (most likely at your school), and know a small bit of HTML. Let's say your graphic is located at `http://www.yourschool.edu/myimage.gif`

Put this in the place where you want the image to be displayed:
`<IMG SRC="http://www.yourschool.edu/myimage.gif">`

If you're unfamiliar with HTML, you may want to ask your IT department for assistance with this.

You can use a similar process to post videos, but you'll need to ask the person in charge of the webserver where you post the video for the best HTML method for linking to it, as there are several different methods to link to videos.

You cannot upload images or videos directly onto the Sona Systems server, but every university provides a facility to post content on webservers at the school. This method is better for participants as the data (images and videos are usually quite large) will be stored on the high-speed network within the university.

Can certain sections be presented for a specified period of time (e.g. 60 seconds)?

No, this feature is not offered. There are technical limitations and inaccuracies in how web browsers interact with web servers, as well as Internet latency factors that make this difficult to do.

Can I make an online study a multi-part study?

Online studies cannot be multi-part studies. The reasoning has to do with what multi-part studies are intended for. They are used when the researcher needs to ensure a fairly strict separation between each part. For example, in memory research, a researcher may want to set up each part exactly 14 days apart.

The issue with online studies is that they are not scheduled to take place at a certain date and time, so it's impossible to enforce any kind of strict separation between each part.

If the goal is a follow-up to a study, then the time separation presumably is not very important. In that case, the best solution is to set up two studies and set the first study as a pre-requisite for participation in the second study.

Is there a method to upload a survey into the system (from Word, Excel, etc.)?

For online survey studies, there is no method to upload the data. There is no standard format for survey data representation, so there was no format to support for uploading.

In the online survey feature, there is the ability to copy questions and sections. This may make it easier to set up the survey if many questions have the same sets of choices, for example.

When a participant is taking an online survey study, when is their sign-up actually recorded in the system?

The system will not record completion or sign-up of an online survey study until it is actually completed, or if the participant chooses to withdraw early. Participants are shown the closing text as the last step of the online survey study, just after their responses have been saved and their sign-up is recorded.

When they start the online survey study, it is noted to participants that their responses are not fully saved until they complete the study. Only then will they be properly recorded. This is for both technical and IRB reasons.

I have created my online survey and participants cannot see it. I have ensured that all the prescreen restrictions, course restrictions, and pre-requisite/disqualifier restrictions are set correctly. Why is it not showing up?

You need to set up at least one timeslot. The standard method for an online survey is to set up only one timeslot for the survey, to specify the participation deadline. If you still have problems, contact the administrator and ask them to run Check Study Configuration on your study. That will explain why a study is or is not showing up.

My online survey had 5 spaces in a timeslot, and somehow 6 people signed up and received credit. How did this happen?

This is a rare situation that occurs, usually with online surveys that take a long time to complete on a system with a high rate of study sign-ups. What happens is that all 6 people, or at least the last 2 people, started the online survey at around the same time, before any of them could finish it. The system checks at the point of sign-up to see if there are open spaces for the online survey, but does not consider someone who has already started the online survey but not finished it, as taking up one of those places. This is done just in case that person abandoned early without properly withdrawing. In this rare situation, there is no choice but to credit all participants who successfully completed the survey. It is the only fair outcome for participants. It is important to note that this situation is quite rare. It is most likely to occur when the survey is lengthy, and there are many participants vying for a limited number of available timeslots in the system.

Working with Timeslots (Sessions)

Timeslots, also referred to as Sessions, are the available times when a participant may participate in the study. If you are setting up timeslots for a web-based study, please read the section in this documentation on Web-Based (Online) Studies for additional information.

Timeslots allow you to specify date, time, location, maximum number of participants, and researcher information for a session.

Timeslot Usage Restrictions

If enabled on your system, you may find that there is a limit to the amount of time available for scheduling timeslots. This usage is computed by adding up all the past timeslots where credit was granted (or participation marked in the case of paid studies) or is in awaiting action status, then adding all timeslots in the future, regardless of credit status. Depending on how your system is configured, the system may only look at all timeslots after a certain date, instead of all timeslots.

You may find that the usage goes down over time, as time progresses and timeslots that were in the future, which had no sign-ups are now in the past and no longer count towards usage (empty timeslots). The timeslot usage and limit is listed whenever you add a timeslot, if usage restrictions apply. It may also be listed when you view your profile, depending on how your system is configured.

Timeslots Linked to Specific Researchers

If your system is configured to allow multiple researchers per study, you will also have an option to link timeslots to a specific researcher. This is done primarily for organization purposes, and has no effect on who can view and modify the study, as well as any timeslots for that study.

This feature is useful when there are a number of researchers running a study, and researchers are responsible for running specific timeslots. If a timeslot has a specific researcher linked to it, then only that researcher will be listed as the point of contact when a participant receives any emails related to their participation in that timeslot. Only the researcher connected to that timeslot receives related notification emails, such as participant cancellation notifications, and reminder emails, assuming such emails are enabled.

It is also possible to have some timeslots where a specific researcher is linked to them, and others where all researchers who are assigned to the study are responsible for the timeslot. It is not possible to link more than one, but not all of the researchers for the study to a specific timeslot. The options are to either link one researcher to the timeslot, or all of them.

If a researcher were removed from a study, then any timeslots that were linked to them for that study would be changed. In this case, all researchers for the study are now responsible for those timeslots.

To use this feature, the system must be configured to allow multiple researchers per study. Then the study itself must be configured to allow researchers to be linked to specific timeslots. The study must have more than one researcher connected to it.

Creating Timeslots

To add a timeslot for a study, you must first choose the study that you would like to add a timeslot for. To view your studies, choose the My Studies option on the top toolbar. Click on the desired study and choose the Timeslots choice.

You will see a list of any existing timeslots, and the Add a Timeslot option on the top of the page. Click on Add A Timeslot.

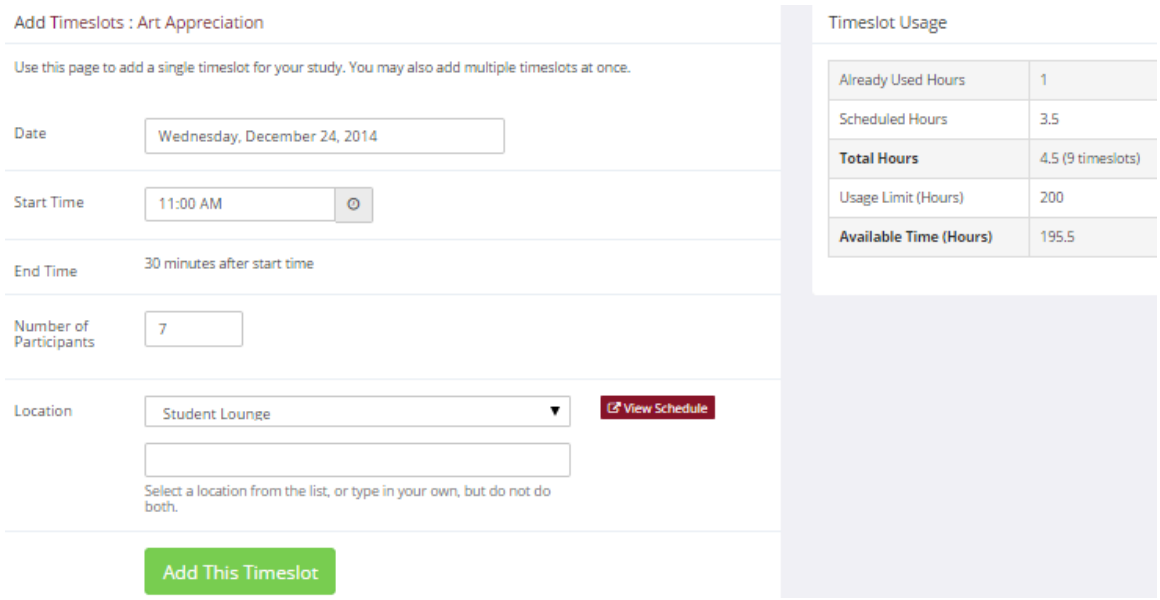


Figure 25 - Adding a Timeslot

The following table lists the information you may enter about a timeslot, along with an explanation. All fields are required.

Field	**Explanation**
Date	The date for the timeslot.
Start Time	The time when the timeslot will start. A sample time will be provided. If you want to change the time, please use the same format as the time you see presented. Note in particular how “a.m.” and “p.m.” are handled (if such a format is enabled on your system).
End Time	The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.

Number of Participants	The number of participants for this timeslot. This number is *not* visible to participants. They will only see whether the timeslot is full or not. The maximum number is 999.
Location	The physical location where the study will take place for this timeslot. It will be automatically filled with the location of the previous timeslot, when available, to assist in data entry. Depending on how your system is configured, you may see a list of pre-configured locations. You may choose any of those locations and click on View Schedule to see the schedule for a location. The system will automatically prevent you from adding a timeslot using a location that is already in use at the time you try to schedule the timeslot. If you do not see the location in the list that you plan to use, simply type in the location in the text field below it. The location field does not apply for web-based studies.
Researcher	The researcher assigned to this specific timeslot. The list will contain a list of all researchers for the study. Choose ALL if all researchers for the study should be assigned to this timeslot. See Timeslots Linked to Specific Researchers for more information.

To assist in data entry, the system will automatically fill in the date, time, and location based on the ending time of the last timeslot for this study. If applicable, your current timeslot usage will be listed, and you will be prevented from adding a timeslot that would exceed your timeslot usage time limit. A convenient calendar is provided next to the form, and you can click on any date and that date will be transferred to the form.

If you add a timeslot and there is another timeslot, for any study, which occurs at the same time and location, you will receive a warning. The addition will be allowed, unless the location was chosen from the pulldown list of locations, in which case the addition will be blocked. If you add a timeslot that will take place outside of normal hours (for example, at 1:00 am), the system will provide a warning but will allow it to be scheduled. You may not schedule a timeslot to occur after the IRB expiration date for your study, if Strict IRB mode is enabled by the administrator. The system allows adding timeslots to a study that is not available to participants, meaning not active or not approved. However, it will give a warning because participants are not able to sign up for the timeslot.

If you are running a web-based (online study), you should create a single timeslot with the participation deadline equal to the last day you would like to run the study. For number of participants, specify the maximum number of participants who may participate. If you are running a web-based study and you plan to collect data from more than 999 participants (999 is the maximum allowed in one timeslot), then once that timeslot is close to filling up, create a second timeslot at a slightly different time and/or date as the first timeslot.

Creating Multiple Timeslots

If you would like to add multiple timeslots at once, choose the Add Multiple Timeslots link. You may choose to add a specified number of timeslots, or copy the timeslots from another week to a specified week. If you choose to copy timeslots, the system will copy the time, location, and number of participants for the specified week to the desired week, for each day of that week (starting with Monday).

If you choose to create a specified number of timeslots, you can choose the number of timeslots you would like to add, the start time and date, and the amount of time between each timeslot (to allow for breaks). You also may specify timeslots that would occur outside normal business hours be shifted to the next business day, and specify when business hours occur. The system considers Monday-Friday to be business days.

On the subsequent page, you may change any of this information to deal with special cases. Timeslots that you attempt to add that either have errors, or would result in exceeding the timeslot time usage limit will not be added. This feature is not available for web-based (online) studies, as web-based studies rarely have more than one timeslot.

If you do not want to add a specific timeslot that is listed, choose No in the Add This Timeslot? column.

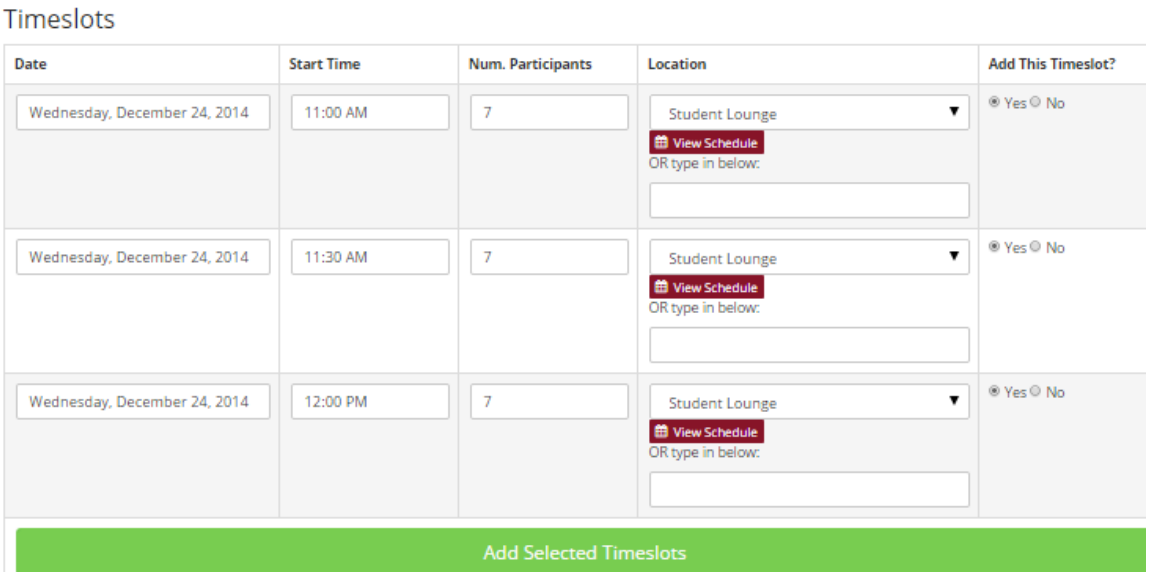


Figure 26 - Creating Multiple Timeslots

Modifying and Deleting Timeslots

To modify or delete a timeslot for a study, you must first choose the study that you would like to deal with. To view your studies, choose the My Studies link from the top toolbar. Choose the Timeslots option in the View column for the desired study. You will see a list of all recent timeslots. Timeslots that are in the past with no participants signed up will not be displayed. To work with timeslots more than a few days old and to see all timeslots, you will see a link to view all timeslots for the study. Select the timeslot you would like to deal with, and click the Modify button.

If the timeslot has no participants signed up for it, you will see a Delete button. You may not delete a timeslot that has participants signed up for it. You would need to first cancel all existing signups for the timeslot. If you would like to delete the timeslot, click the Delete button, and you will see a confirmation page. Choose Delete again to delete the timeslot.

If you would like to modify the timeslot, modify the desired information and click the Update button just below the timeslot information. It is important to note that participants will *not* be notified of any changes you make to the timeslot. You should contact them via email, if information needs to be passed onto them. A link is provided on the same page to do so. If you change the date or time of the timeslot, you will be warned that this was changed, in the event the change was unintended. You may not update the size of the timeslot, meaning the number of participants, to a value lower than the current number of participants signed up for the timeslot. Generally, researchers only update timeslots with sign-ups to update the location if it was not available when the timeslot was originally created.

If the study or researcher is subject to timeslot time usage restrictions, the system will enforce them. This prevents you from making changes that would result in exceeding the timeslot usage limit, for example by increasing the number of participants.

Timeslot Change Tracking

The system automatically tracks certain changes that occur with a timeslot. This includes information about any time the timeslot's key information (date, time, etc.) is changed, as well as any time a manual sign-up or cancellation is performed, but not a sign-up or cancellation done by the participant. This information is tracked for the last 3 months of changes for each timeslot.

To view this information, choose the Timeslot Modification Log when viewing a timeslot, and you will see this information.

Deleting Multiple Timeslots

If you would like to delete multiple timeslots at once, select the desired study and choose Timeslots. At the top of the Timeslots page, you will see a Delete Multiple Timeslots option. The option may not appear in certain cases where such an option is not available due to a lack of available timeslots to delete.

After going to that page, you will see a list of timeslots eligible for deletion. You can choose to view only empty timeslots (timeslots with no sign-ups), or all timeslots including those with sign-ups. If a timeslot has sign-ups, it will only be listed if there are no pending (Awaiting Action) sign-ups, no (non-zero) credit grants, and no unexcused no-shows.

Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to continue. If you would like to delete all empty timeslots, there is a Check All option at the bottom of this page that will automatically select all timeslots listed on the page for deletion. Click the Uncheck All button to revert the effect of choosing the Check All option.

The system routinely deletes all empty timeslots more than 3 months old to preserve database space.

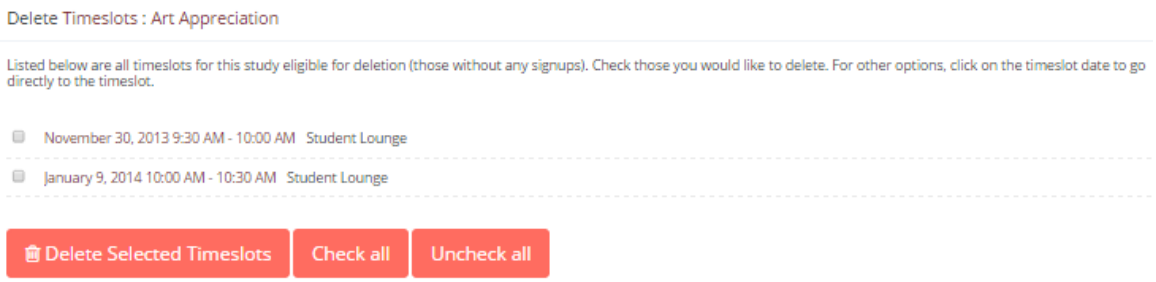


Figure 27 - Delete Multiple Timeslots

Manual Sign-Up

If enabled on your system, you may manually sign up participants for your study on their behalf. There are a number of situations where this is desirable. If the participant shows up for a timeslot they were not signed up for, and you elect to let them participate, you can sign them up on the spot for the timeslot. In this situation, participants may not be able to sign-up on their own, because the sign-up deadline has passed. You may also sign up a participant for a study that has already occurred, if necessary.

It is important to note that a manual sign-up overrides any restrictions you have placed on the study (e.g. pre-requisites). However, you will be warned if you are overriding any restrictions. You may not sign up a participant for the same timeslot that they are already signed up for. You are allowed to sign them up for a study, even if they are already signed up for a different timeslot for that same study. You will receive a warning when doing this. You may not sign up a participant for a study if it causes them to exceed their maximum credit or study limit. If it is necessary to do so, please ask the administrator to do this. They are allowed to do a manual sign-up even when it will exceed maximum credit or study limits.

You may not sign up a participant whose account is Limited, if your study is not a research alternative study. Those participants whose account is Limited are ineligible for your study. However, the administrator can still do this.

If the system is configured as such, the participant will receive a confirmation email when you sign them up for a study. In that case, you also have the option to enter comments to be included in this email that may better explain to the participant why they were signed up. If you are signing up a participant for a timeslot more than one year old, a confirmation will *not* be sent despite the system configuration. This is to make it easier when transitioning from an existing system, as you may sign up old participants for the purposes of preventing them from signing up for the same study again in Sona. You may only sign up participants for your own study.

To sign up a participant for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on Timeslots for the desired study. Then, select the timeslot you would like to deal with, and click the Modify button.

If it is enabled, at the bottom of the page you will see a Manual Sign-Up option. Type in the participant's User ID (you may have to ask them for this) and click Sign Up. If enabled, you may also choose to sign up a participant using their unique ID code. You may have the choice to enter their last name and choose from a list of participants. In all cases, after proceeding, you will see a confirmation page that also lists any restrictions on the study. Choose Sign Up to complete the sign-up.

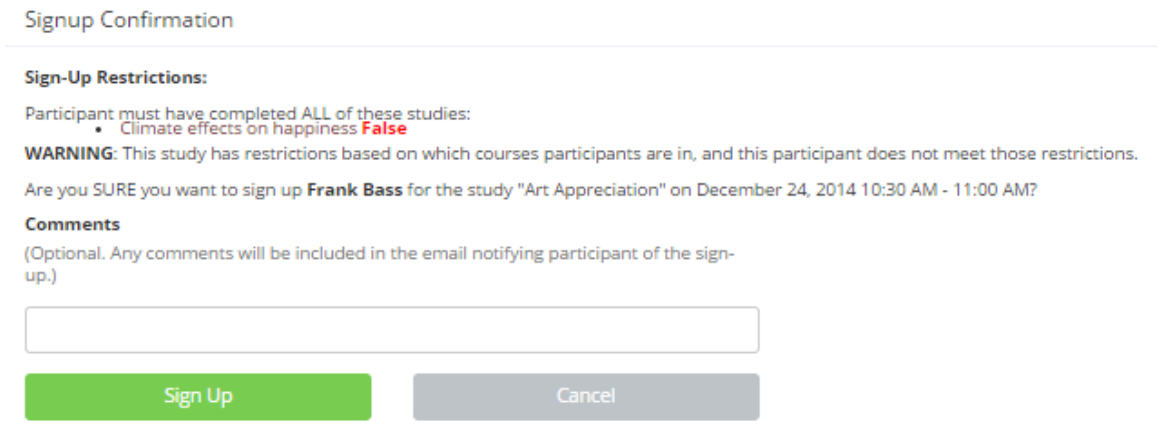


Figure 28 - Manual Sign-Up Confirmation

If you are subject to timeslot time usage restrictions, the system will enforce them and prevent you from signing up a participant in the timeslot if that results in exceeding your timeslot usage limit.
If you are doing a manual sign-up for a multi-part study, you must do a manual sign-up for each part separately. The system will overlook the scheduling range restrictions as well.

You cannot use the manual sign-up feature for online survey studies because the sign-up for the study is integrated with the administration of the survey.

The manual sign-up feature will not appear for a researcher if the study requires approval by the administrator, and it has not yet been approved. This is to ensure that sign-ups don't occur for a study that has not yet been approved, as research should not take place prior to approval.

Manual Cancellation

If enabled on your system, you may have the opportunity to cancel a participant's sign-up. You may only cancel sign-ups that are in a No Action Taken state. To cancel a sign-up, find the desired timeslot and participant. Click Cancel next to their name. The participant will be sent an email about the cancellation, and who performed it, along with a confirmation code. Their sign-up will be immediately cancelled. The administrator may also receive a copy of this cancellation email, depending on how the system is configured.

You may cancel all participants for the same timeslot at one time, when applicable. The option will appear below the list of sign-ups. This is done in cases where there are two or more participants signed up for the timeslot who are eligible for cancellation (No Action Taken state).

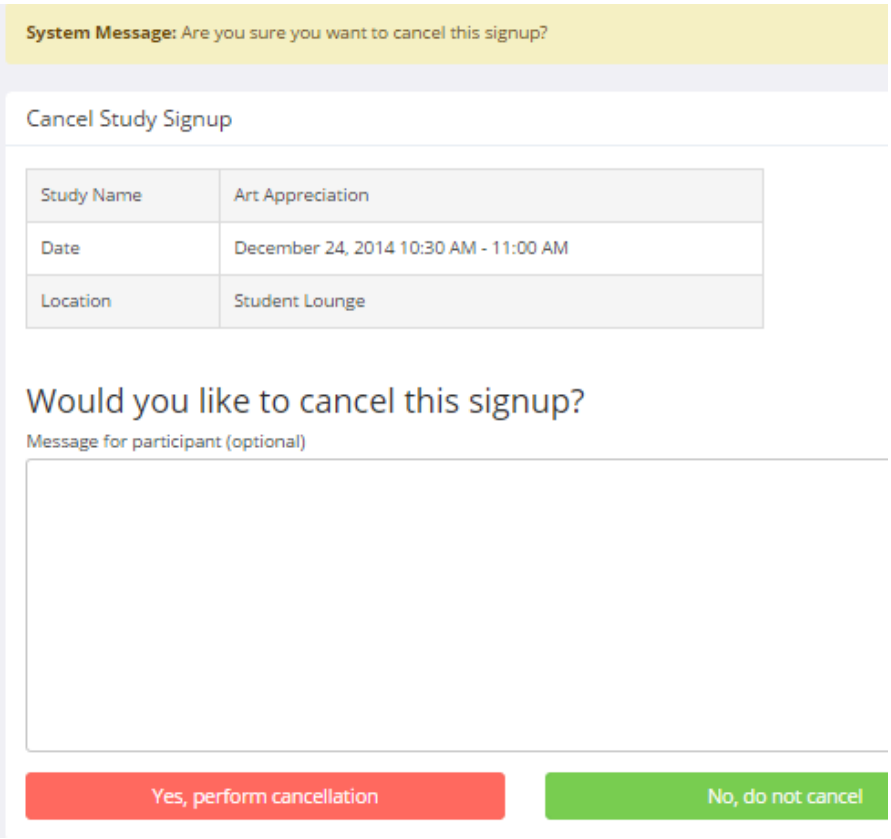


Figure 29 - Manual Cancellation

Viewing the Participant List

To view the list of participants who have signed up for your study, you must first select the study and timeslot you wish to see. To view your studies, choose the My Studies option from the top toolbar. Click on the timeslots link in the View column for the desired study. Then, select the timeslot you would like to see, and click the Modify button.

The list of participants, along with their email addresses will be listed. If ID codes are enabled, you will only see an ID code and no name or email address for each participant. In this case the list will be sorted by ID code.

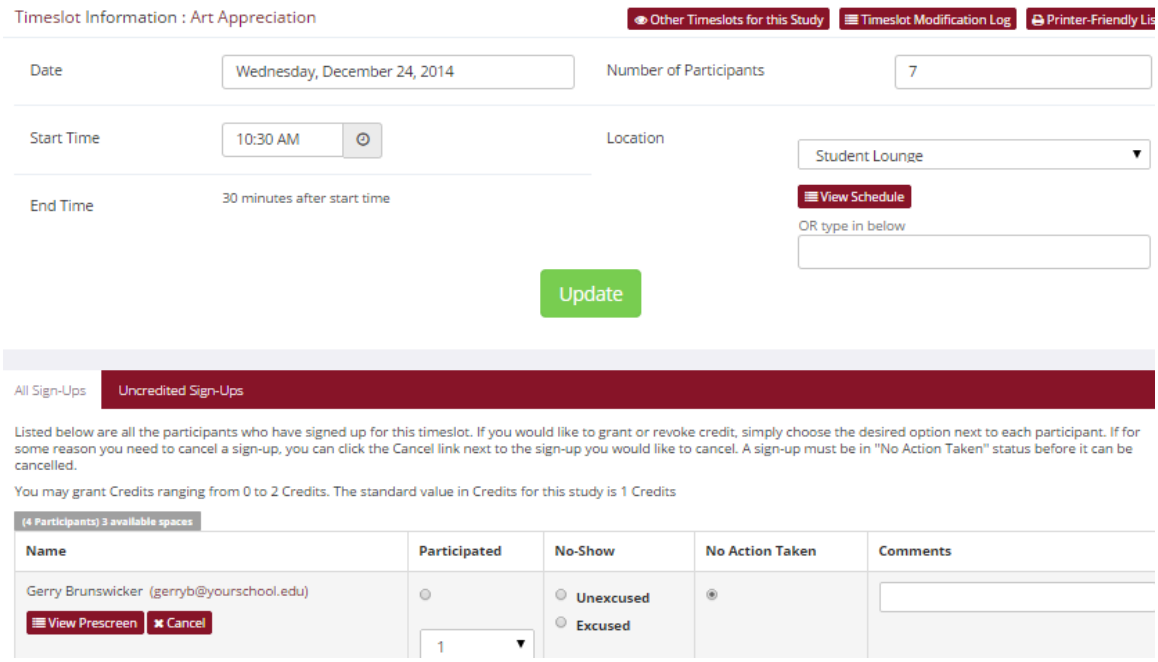


Figure 30 - Modifying a Timeslot / Participant List

Viewing Prescreen Responses

If online prescreening is enabled on your system and you are also allowed to view an individual participant's prescreen responses, then you will see a Prescreen link next to each participant's name (or ID code) when viewing information for a timeslot. Click on that link to view the participant's prescreen responses.

If you would like to download the prescreen data for all participants in your study, choose the Download Prescreen Responses option after clicking on your study in the Study Menu. That will allow you to download all the data at once, in CSV (comma-separated) format, for further analysis. The download will not contain data for participants marked as a no-show.

If you would like to analyze responses in aggregate, meaning across all participants in the system, see Analyzing Prescreen Responses in this documentation.

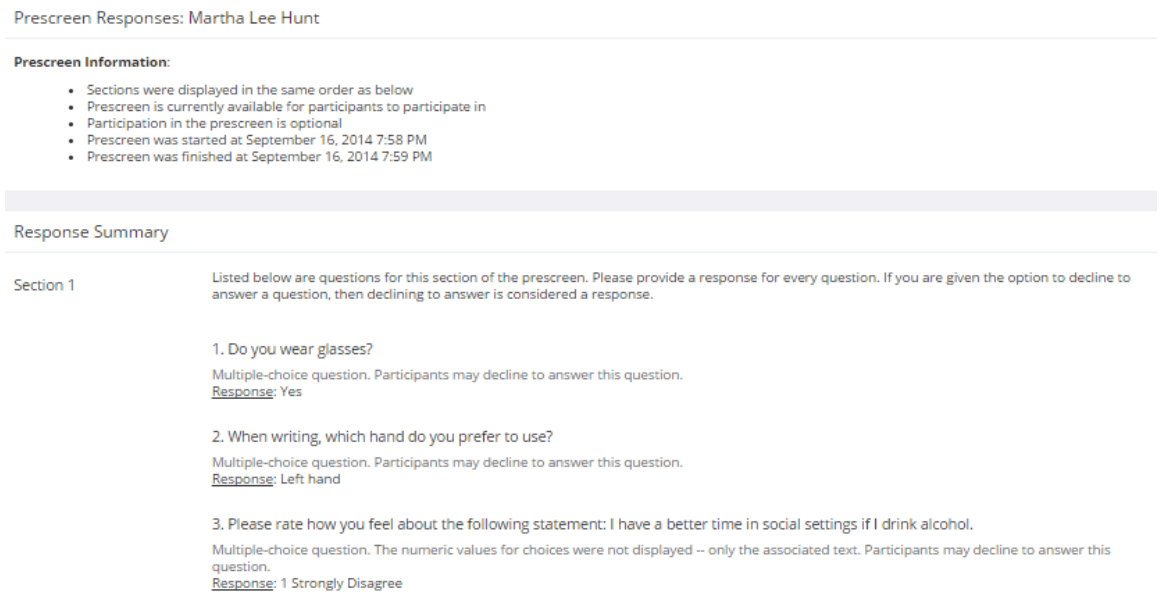


Figure 31 - Viewing Participant Prescreen Responses

Granting or Revoking Credit

At the completion of a session, you should promptly mark the attendance status of participants in the system to ensure proper credit grants. The reason for the prompt handling of this situation is in the event your study is a pre-requisite for another study, as well as other situations. You do not want to hold up other studies that are waiting on your response to the study you just ran.

To grant or revoke credit for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on the Timeslots link in the View column for the desired study. Then, select the timeslot you would like to see, and click the Modify button.

You will see a list of participants, identified either by name or ID code. If the participant properly participated in the study, click the radio button next to their name in the Participated column.

If the participant did not appear for the timeslot, you may choose to mark their no-show as excused or unexcused. Depending on how your system is configured, an unexcused no-show may result in a penalty being assessed for the participant (the system will compute this automatically), or their privileges to use the system may be restricted. You should ask your administrator for guidelines about when to grant an excused no-show or an unexcused no-show. Generally, excused no-shows are granted for extenuating circumstances, like if the participant was involved in a car accident on their way to the appointment. An unexcused no-show is generally used when the participant did not show up and had no reasonable excuse. For most schools, many of the no-shows are unexcused and are due to carelessness on the part of participants.

Depending on how your system is configured, you may see an option to grant a credit value that is different from the standard credit grant. This is useful when you want to grant a participant a lower credit value because they left the study early, or a higher credit value if the study ran longer than expected. The default value that is selected is the study's standard credit value. If this is enabled, then you may also grant 0 credits. This is useful if you do not want to grant credits to the participant, but also want to prevent them from participating in the study again. If a participant is granted 0 credits, and the study is set to prevent duplicate sign-ups, then the participant will not be able to sign up for that study again.

If desired, enter any comments about the session in the Comments section. Generally, this is used to indicate the reason for denying credit. Participants will see anything you enter in the Comments section for their sign-up, and these comments will be included in the email sent to participants when a credit grant/revocation occurs, if notification emails are enabled on your system.

Click on the Update Sign-Ups button at the bottom of the list of sign-ups to save your changes. Credit will be granted or a penalty assessed, as necessary. The participant(s) will be emailed about this, depending on how your system is configured.

It is not recommended to leave any sign-up for a timeslot that has occurred in the "No Action Taken" stage. This is a credit "limbo" and the system will warn you upon your next login that the timeslot has not been dealt with properly. Note that if Manual Cancellation is enabled and you would like to cancel a participant's sign-up, the sign-up must be in No Action Taken state.

Depending on how your system is configured, the system may automatically grant credit to participants for timeslots that are more than an administrator-specified number of hours old, and where the researcher has taken no action. You can always change the automatic credit grant later if it was in error. The automatic credit grant takes place once a day, usually overnight. Your administrator can let you know if such a feature is enabled on your system.

If you need to do a simple credit grant or no-show across many timeslots, see the Uncredited Timeslots section, which offers such a feature.

Batch Credit Granting

In some cases, you may wish to automatically sign up and immediately credit a group of participants. This is useful if you administer a study on an ad-hoc basis, and want to credit participants after the fact.

To do so, go to the appropriate timeslot. You may want to create a timeslot specifically for this purpose, and click on Modify Timeslot. In the Manual Sign-Up section, if enabled, you will see a Batch Credit Grant link. Click that link and you can provide the list of User IDs of users you would like to sign up and credit. Users will be signed up and

credited immediately. This feature overrides any sign-up restrictions on the study, just as a manual sign-up does.

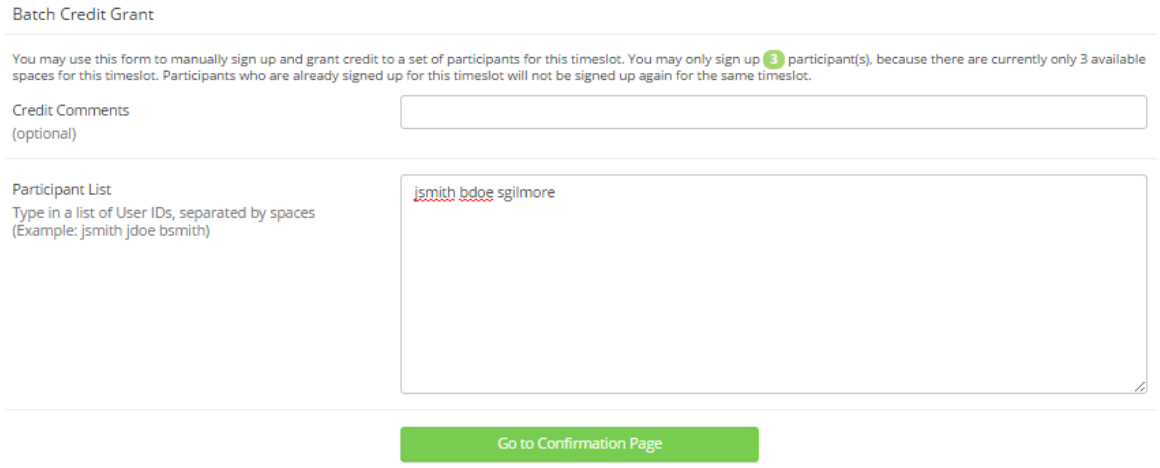


Figure 32 - Batch Credit Grant

The batch credit grant feature will not appear for a researcher if the study requires approval by the administrator and it has not yet been approved. This is to ensure that sign-ups don't occur for a study that has not yet been approved. You may provide a list of up to 50 participants or as many participants as there are available spaces for the timeslot, whichever is less. Any participants listed past that limit will be ignored, but you are able to run the batch credit again with additional participants.

If you are signing up a participant for a timeslot more than one year old, a sign-up confirmation will *not* be sent despite the system configuration. This is to make it easier when transitioning from an existing system, as you may sign up past participants for the purposes of preventing them from signing up for the same study again in the system.

Emailing Participants

If you wish to contact participants in a particular timeslot for any reason, you may click on the Contact link that will appear next to each participant's name or ID code, to contact an individual participant. To email the group of participants for a particular timeslot, click the Contact All Participants choice at the bottom of the Modify Timeslot page for that timeslot.

You will be taken to a page where you can fill out a message that the system will send to the selected participants. The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to. You may remove this information if desired. If you include the text %FIRST_NAME%, %LAST_NAME%, or %USERNAME% in the email text, the system will substitute it with the recipient's first name, last name, or username. Note this text must be in upper case and surrounded by % symbols.

You may choose to receive a copy of the email that you send.

Depending on how your system is configured, participants may already be receiving a reminder about upcoming studies the day before they are scheduled to participate. Ask your administrator for more information.

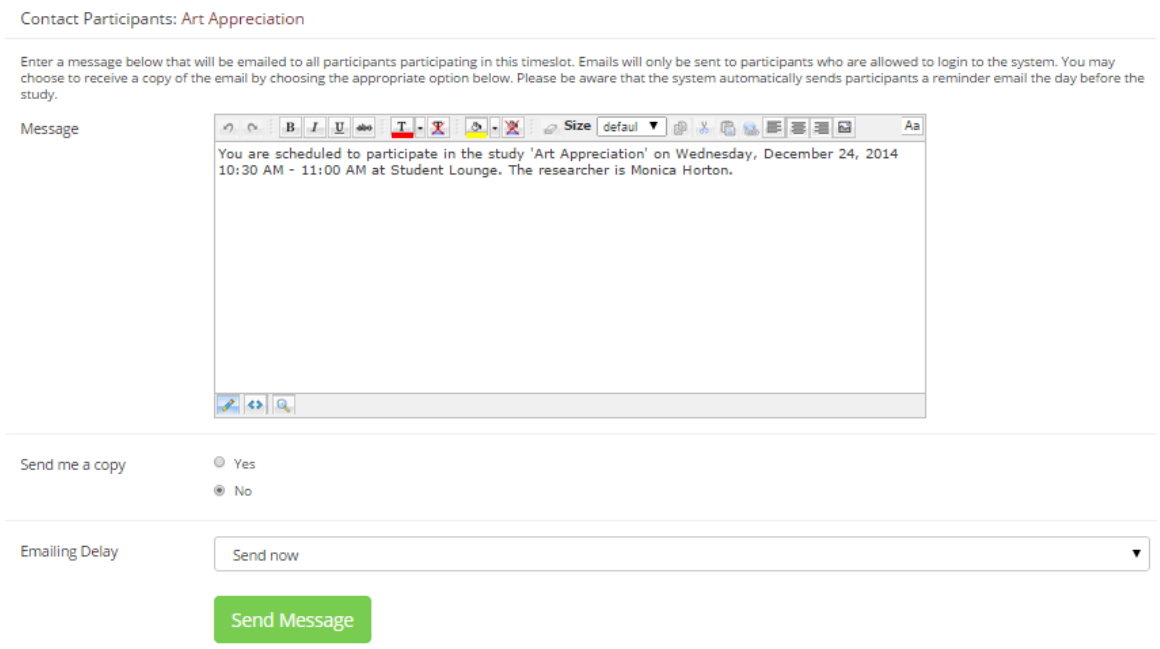


Figure 33 - Contacting Participants

In some cases, you may find it useful to contact all participants for the study, across all timeslots. This feature may be particularly useful if you are sending debriefing information when a study has concluded. To do so, go to My Studies, click Study Info next to the desired study, and choose the Contact Participants option (in the Study Menu). You will then be able to select which group of participants to send to, and a message to send. Messages will be sent in batches of 3,000 at a time, to avoid overloading email servers. You cannot include attachments in the email, so if you have a document you would like to include, you should post it on another website and provide a link to the document in the email you send.

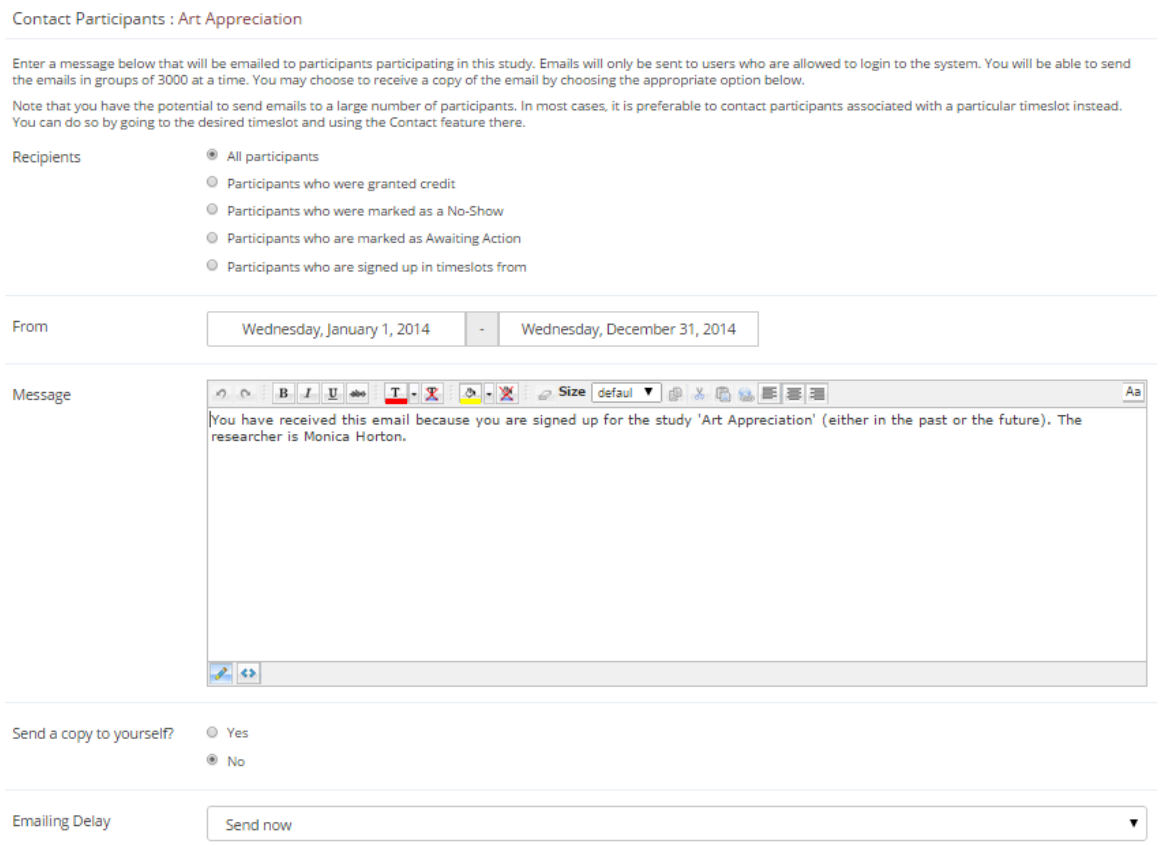


Figure 34 - Contact Participants

The Sender address on the email will be the administrator email address, which is done to prevent the email from being blocked by junk email filters. The “Reply To” address of the email will be that of the user who is actually sending the email. When a user chooses to reply to the email, the reply will be sent to that “Reply To” address.

There is also the option to restrict the emails so that they only go to participants who signed up for timeslots in a specified date range. The date range is based on the date of the timeslot, not when the participant signed up for, completed, or received credit for the study.

Finally, there is an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of day (e.g., during the evenings) when the email will be sent. The emails are generated at the time you use the emailing feature, but are stored on the email server queue until the specified sending time. These emails cannot be revoked once this emailing feature is used.

In most cases, summary information about the email you sent, in particular, to how many recipients it was sent to, will be logged and made available to the administrator. This is done to ensure that there is no abuse of the email feature in the system, and to ensure compliance with generally accepted Internet practices for sending emails.

Viewing Uncredited Timeslots

When you log in to the system, you will receive a warning if you have any timeslots that are more than two days old that have not been dealt with. You may view a list of all timeslots that have not been dealt with by choosing the View Uncredited Timeslots option from the My Studies page. The default view will show in-person studies with timeslots in the past, as well as all uncredited timeslots for online studies. Timeslots for online studies, including those in the future, are always considered in need of a response. See the Web-Based (Online) Studies section of this documentation for more information.

If you would like to do a simple credit grant (standard credit grant, no comments) or no-show (of either type), you may do so directly from this page. Select the desired sign-ups/timeslots, and then choose the desired option.

If you need to do something more complex, like add comments or perform a special credit grant with a non-standard credit amount, you can easily click on the timeslot's date and time and go directly to that timeslot.

In cases where a study has timeslots linked to specific researchers, you will see the warning only for timeslots that are specifically linked to you, or to everyone in the study (i.e., not timeslots linked to someone else in the study). However, when you view uncredited timeslots, you will see all uncredited timeslots for your studies, even if someone else is linked to one of the timeslots for your study. This is done to make it easier to give your fellow researchers assistance in dealing with uncredited timeslots.

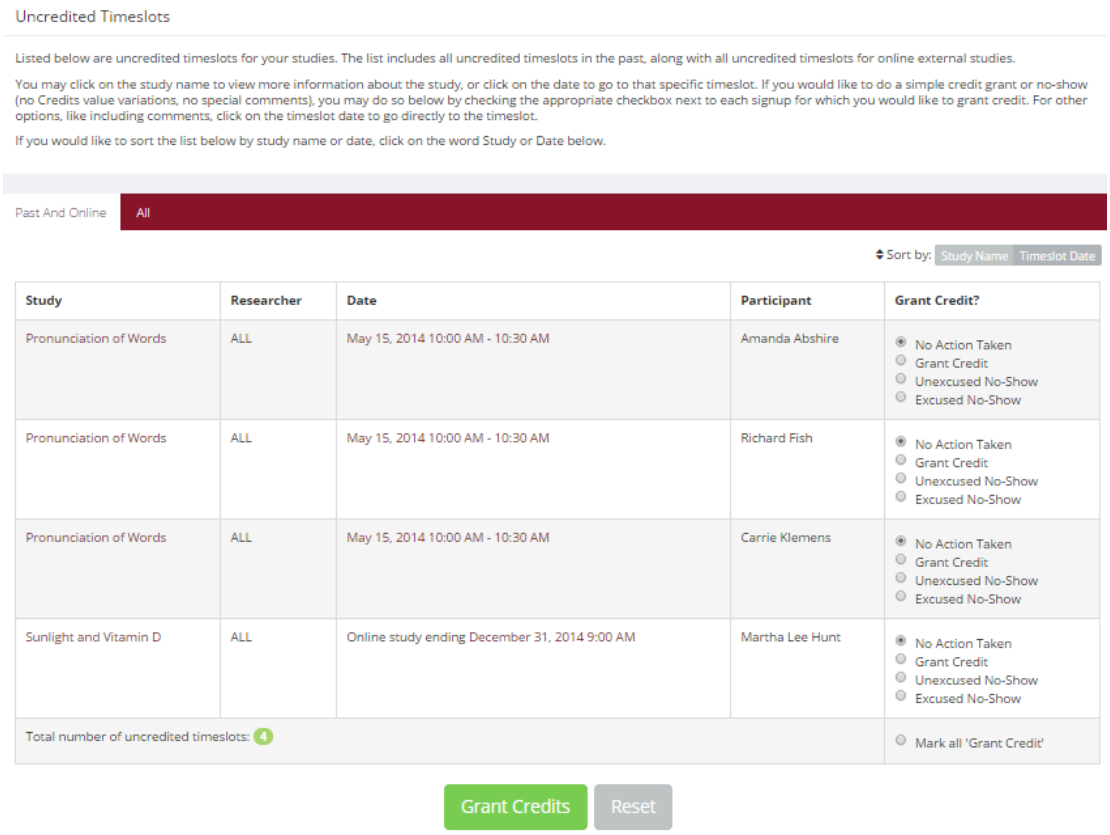


Figure 35 - Uncredited Timeslots

Analyzing Prescreen Responses

If online prescreening is enabled on your system, then you might also have the opportunity to analyze prescreen responses in aggregate or as raw data. Choose the Prescreen Results option from the top menu bar. You can then select which question you would like to analyze, and whether you would like to see summary data or raw data (in CSV format) for the selected question. The raw data will identify each participant only by a unique ID code and not by their name, for privacy reasons. If for some reason you need the participants' real names, ask the Administrator to run the same analysis. They are able to pull the real names with their report. This gives you access to all prescreen data across all participants in the system.

If you would like to analyze the prescreen data for just those who participated in your study, select the Download Prescreen Responses after clicking on your study. See Viewing Prescreen Responses in this documentation for further information.

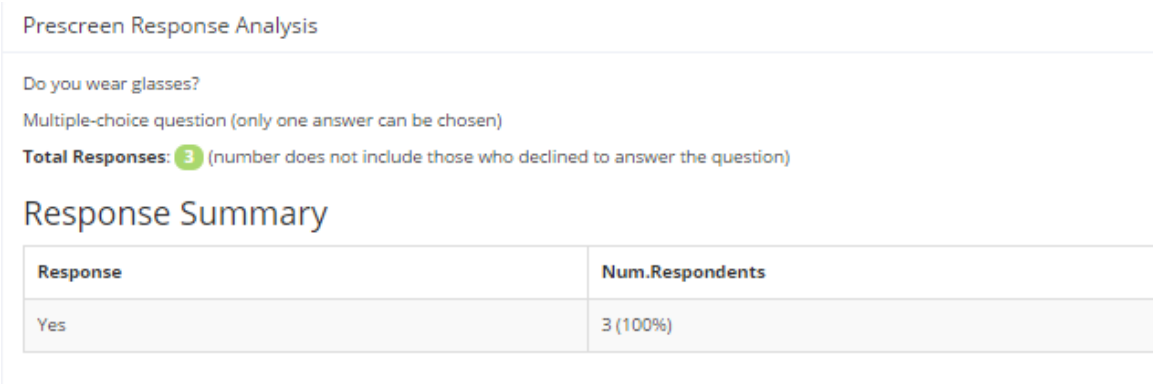


Figure 36 - Prescreen Response Analysis

Prescreen Qualification Analysis

If you would like to get an idea of how many participants meet a set of requirements for help in setting prescreen restrictions on your study use the Prescreen Qualification Analysis link from the Prescreen Responses page. Using this feature, you can select multiple questions (only those that qualify for study participation restrictions are listed) then the desired responses for those questions, and you will see how many participants meet that criterion.

If enabled, you may also contact participants and invite them to participate in any of your studies. See the Invite Qualified Participants to a Study section in this documentation for more information on how this works. The functionality is the same as the functionality described in that section, though a few options may be unavailable when not inviting directly from a study, as those options do not apply. Be sure to include information about how to sign up for the study in your communication to them, as a direct link to the study is not provided in the email.

Frequently Asked Questions (FAQ)

Why do I have to acknowledge the Human Subjects Policy?

Certain regulations and research guidelines either require or recommend it. You only need to do it once every 6 months, so it should not be intrusive. You will not be asked to acknowledge the policy if this feature is disabled by your administrator.

I want to set up a study so that participants can choose to receive credit or payment. How do I set this up?

Set it up as a study for credit, and note in the study description that participants may opt to receive payment instead. They should notify the researcher of this when they come to their appointment. If the participant at that time chooses to receive monetary

compensation, the researcher should grant credit, but mark the credit as 0 credits (Variable Credit Granting must be enabled in System Settings by the administrator), and then note in the comments for the timeslot that payment was received.

The monetary compensation a participant receives for a study depends on decisions they make during the study. How do I indicate this?

You may type any value into the payment field when setting up the study, so you could type in a range of compensation values.

I want a participant to participate in an upcoming session, but the system says it is too late for them to sign up. What do I do?

If enabled, you can perform a manual sign-up. See the Manual Sign-Up section of this documentation. If not enabled, your administrator can still perform a manual sign-up.

Where are email notifications to me sent?

Email notifications (e.g. sign-up notices) are sent to either an address derived from your user ID or your alternate email address. See the Email Address Options section of this documentation for more information.

How do I deal with dyads?

A dyad is a study, which requires a pair of people to participate. Often, the second participant is not a “real” participant, but rather a colleague of the researcher who is “colluding” with the researcher as part of the study itself.

You do not need to deal with dyads in the system itself. Participants cannot see how many people have signed up for a timeslot, or how many spaces are available for a timeslot. So, your “fake” participant can just act like a real participant and the real participant will be unaware of this.

I have finished running my study. What should I do?

So it does not clutter the list of studies for participants, you should make the study Inactive or delete it. See the Updating a Study section of this documentation for more information.

Who has access to my studies?

All users can see the information about your studies and the available timeslots. Administrators, the principal investigator (if applicable) and the researchers for the study are the only people who can see who has signed up, and modify the study.

Regulatory Compliance Guidelines

Introduction

This software complies with all major regulations governing human subject research and privacy of data stored online. The system complies with both HIPAA and Common Rule for customers in the United States. For customers in Canada, it complies with the Personal Information Protection and Electronic Documents Act, as well as the Tri-Council Statement. For customers in the European Union or in countries that follow OECD rules, it complies with OECD privacy rules and the European Union Directive of Data Protection. Your organization may or may not need to comply with the relevant regulations. Your research administrator can advise you on this situation.

Even if you are not required to comply, compliance is always a good idea. Protecting sensitive data is always a good thing. Compliance in the context of this system is as simple as reading the remaining paragraphs of this section, that apply to your organization, and following the guidelines contained therein. The software handles all the remaining compliance issues involving software, privacy and electronic data storage automatically. You should still consult with your IRB or organization to learn about additional compliance rules you must follow outside of use of this software. For example, the handling of the data you collect during your study.

Some regulations, particularly the US HIPAA regulations) are focused primarily on health data. You may think the system does not store confidential health data (in HIPAA terms, it is called PHI -- Protected Health Information), but depending on how your organization uses the software, there may very well be confidential data in the system. Consider the case of a study that requires a participant to come from a family that has a history of mental illness. Merely knowing who signed up for that study could be considered confidential because that type of information should not be revealed to the public. It may turn out that your studies are not of such a nature, but it applies in even more benign situations. For example, a study that requires that participants be regular contact lens wearers can be construed as confidential information. Organizations typically err on the side of caution given the criminal and civil penalties for violation of these types of regulations.

Data Handling and Security Guidelines

In your role, you have access to your studies and you can see who has signed up for those studies. You may also have access to prescreen responses. Because of these privileges, you should follow these simple guidelines:

- Secure Your Account. Use a password that is difficult to guess. The most secure passwords contain a combination of letters and numbers, do not spell a real word, and are at least 8 characters long. Your university IT department can provide you with assistance on choosing a secure password.

- Secure Your Work Area. If you are logged into the system and you leave your computer, you should logout of the system or use a password lock on your computer. Ask your network administrator for help with setting up a password lock.
- Handle Paper Documents Carefully. Any printouts from the system should be kept reasonably secure. Store them in a locking desk drawer out of the public view. Documents you decide to discard should be shredded if possible.

Human Subjects/Privacy Policy Acknowledgment

Upon your first login to the system, and every 6 months thereafter, you may be required to acknowledge your organization's policy on these matters. This acknowledgement will be logged. Ask your research administrator if you have any questions.