PBS Department SONA Protocols

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If anything is unclear, please email psychsona@umass.edu

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What is SONA? What can you use it for? What kind of participants can you expect?

- SONA is a research participation and management tool that connects undergraduate students to faculty and graduate students who need participants for their research.
- PBS classes can offer extra credit for SONA participation, so the subject pool has a high number of psychology majors. Psych100 currently requires that students in the course complete 6 SONA credits, which has increased the number of participants and has expanded the pool to include many non-psychology majors.

What you need to have before requesting SONA study approval from department

1) IRB protocol submitted & approved with necessary information
   a) Add SONA administrator to IRB protocol as administrative contact
      i) Currently (F'25) Kelly Tierney; ktierney@umass.edu
   b) SONA-compliant Consent Form (requirements below)
   c) Educational Debriefing form (requirements below)
   d) Exact wording of the SONA study description must be approved by the IRB (see below)
2) Study posted on SONA with all necessary information (requirements below)
3) Lab Personnel Form (LPF) updated (requirements below)
4) Send Approval Request: In SONA on Study main page, under Study Status -->Send a request to the administrator to approve your study.

IRB Protocol Requirements for SONA:

1) You are welcome to confirm with the SONA Administrator that your study materials meet the requirements before submitting your IRB protocol.
2) SONA-compliant Consent Form (sample here). Consent forms must:
   a. Be labeled "Consent Form" not "Informed Consent."
      i. Studies involving deception cannot use "informed," so we need to be consistent throughout the department
   b. Include the study name and IRB # in the heading
   c. State the required time & SONA credits
   d. Contain contact for the student (if applicable), Primary Investigator, the Department Chair, and the University IRB, in that order. Here's an example:
      i. If you have any questions or concerns regarding this study, its purposes or procedures, or if you have a research-related problem, please feel free to contact the researcher(s), **NAME** at **EMAIL** or Dr. **NAME** at **EMAIL**. If you would like to contact someone at the university not directly involved in the study, you may contact the Psychological and Brain Sciences Department Chair via Laura Wildman Hanlon at (413) 545-2387 or lwildman@psych.umass.edu. If you have any questions concerning your rights as a research subject, you may contact the University of Massachusetts Amherst Human Research Protection Office (HRPO) at (413) 545-3428 or humansubjects@ora.umass.edu.
   e. The consent form must have the following language when utilizing SONA:

        i. "Your participation in the experiment is voluntary and you can withdraw at any time without penalty. You will still get credit for the time you participated. If you are earning extra credit through research participation, there are other ways to do so. Please consult your syllabus or find alternative sessions on SONA for alternative opportunities."

3) Educational Debriefing Forms ([sample here](#)) are required for SONA. You must:
   a. Include the study name and IRB # in the heading
   b. Contain contact for the student (if applicable), Primary Investigator, the Department Chair, and the University IRB, in that order.
   c. Be educational. Educational might include:
      i. Written in non-technical language
      ii. Provide definitions of terms used
      iii. State the questions, hypotheses, or general background leading to the research question.
      iv. Describe the experimental conditions and how they relate to the study's hypotheses.
      v. State how the data address the hypotheses.
      vi. An accessible reference for further reading. This reference must be found easily by students and should not take the place of the educational text.
   d. Ask participants if they wish to be kept informed of the results of the experiment. You can say, "If you would like to receive a report of this research when it is completed (or a summary of the findings), please contact (name) at (email)."
   e. Studies with audio/video taping should provide subjects with information on withdrawing their data if they so wish.
   f. For Deception Studies: Subjects must be completely debriefed regarding the deception and offered an option to withdraw their data.

Posting a Study on SONA

When approving a study, the SONA administrator looks at the following aspects on SONA:

1) The **title** of the study on SONA: You cannot duplicate a name on SONA. If you are running multiple sets of the same study, you can indicate Study 1, Study 2; 60 Min Study, 30 Min Study, etc.
2) The **brief abstract** should include a brief description of what the student will be asked to do and how many credits they will receive.
3) The **detailed description** must **exactly match the description submitted in the recruitment materials section of the IRB protocol**. This is not optional. This section should broadly cover what the participant will be asked to do, how long it will take, and how many credits they will receive. See other researchers' studies on SONA for examples.
4) Your **eligibility requirements** should at least include that only participants who are 18+ can participate.

5) **Credits:** One SONA Credit is granted for every 30 minutes of research participation, rounded up to the nearest half hour. i.e., 0-30 min =1 credit, 31-60 = 2 credits, 61-90 = 3 credits, etc. See additional questions below for handling "Bonus" credits.
   a. SONA has the ability to grant .25 and .5 credits. This should be used for studies that have diary entries that happen on different days and involve minimal time to complete, i.e. 5 minutes.
6) **Timeslot Usage:** Researchers cannot change this, when approving your study, the SONA administrator will update this with the corresponding information from your LPF (see below).
7) **Psych HSRB Approval Code**: Protocol number from IRB/ Kauli
8) **Psych HSRB Approval Expiration**: Continuing Review Date on Kauli
9) **Active Study:** Make active once approved/ ready to post timeslots.
10) **Participant Sign-Up/ Cancellation Deadline:** Set these to 12 hours if your study will allow for this.
11) **Researchers at Time-slot Level:** If you indicate "yes" here, enable email notifications, add all of your RAs in the "Researcher" section, and add them to the appropriate time slot, they will receive email notifications for signups/ cancellations directly. You must request SONA accounts on the LPF for all RAs to use this feature (see below).
12) If you are screening your participants with the Long Departmental Prescreening, you will want to use an Invitation Code.
13) All other settings are explained in the SONA manual.
   a. Or this video: https://www.youtube.com/watch?v=ec8S3xfO-a8

Lab Personnel Form (LPF) & SONA

1) Each lab has an LPF that is shared with the lab PI.
2) A SONA Researcher Account is requested through a lab's Lab Personnel Form (LPF). Please see your PI or LPF Manager to make the request & send an email to psychsona@umass.edu
   a. Compliance must be up to date (CITI training for all & Ethics training for undergrads) before being granted a SONA researcher account
3) There is a helpful video about updating your LPF here
4) In the Protocol Info & SONA HR tab of your LPF, add each study once you receive IRB approval. Include the protocol number & title for SONA.
5) **Study Name:** Should match SONA name. If you are running a multiple-part study, clearly identify each title/description with multiple lines on the LPF
6) Each semester you must update the following columns, unless it is noted as AUTOCALCULATED. Please email psychsona@umass.edu whenever you update your LPF to make your requests.
   a. **Active on SONA**: Indicate if Study is active on SONA or not
   b. **Semester Active on SONA:** Indicate the semester (i.e., Spring 2023) that your study will be active

   c. **Online SONA study:** Indicate if your study is a fully online study (i.e., participants do not have to come into the lab OR meet online at a certain time)

   d. **Expiration Date:** Include the expiration date/ continuing review date from Kauli

   e. **Date of Request Currently Being Made:** This field contains the date that the last request for Sona hours was made. When making a new request, update to the current date and highlight the cell in yellow.

   f. **# of subjects approved by the IRB:** Number of subjects approved by the IRB. If additional subjects were requested, they should be added in.

   g. **# of minutes per subject per study:** Minutes per subject approved by the IRB.

   h. **# of subjects already run for cash or non-credit:** Number of subjects to date, that you have run for cash or non-credit.

   i. **Total # of subjects left that can be run on SONA:** AUTOCALCULATED

   j. **# of subjects in a previous semester run for Credit on SONA:** # of subjects run on SONA in all previous semesters on SONA. This field does NOT include subjects you have run during the current semester if this is a second or third request for more hours this semester.

   k. **# of Subjects left available to run this semester:** AUTOCALCULATED

   l. **How many subjects do you want to run this semester?:** Number of subjects you want to run this semester. There is no limit to the number of participants you can request.

   m. **# Sona Hrs being requested this semester:** AUTOCALCULATED

   n. **Is this an open study (does not need prescreen)?:** Studies that do not have prescreening restrictions will be prioritized if there are too many studies relative to participant availability.

   o. **Hours to be posted on SONA:** AUTOCALCULATED --> this is what the SONA admin will put in your timeslot usage on SONA

Additional Questions:

1) What types of studies can be posted on SONA and are there special considerations?
   a. In person (lab)
      i. This captures any "synchronous" study; it includes studies that require participants to come into the lab and studies that utilize zoom (video conferences on SONA).
   b. Online external
      i. Links to survey platforms like Qualtrics and Survey Monkey can be linked through SONA. You still must provide 1 SONA credit for each 30 minutes of estimated time.
         1. Students are restricted to 3 or 4 (depending on the semester) credits of online studies each semester. If you are having trouble getting participants- consider having students come to your lab to complete the study; this would count as an in-person study.
      ii. SONA can automatically assign credit after the survey is completed.

1. If the text %SURVEY_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study. You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add ?id=%SURVEY_CODE% to the end of the URL to make use of this feature.
2. See the SONA manual for more information.

c. Online internal
   i. SONA also offers the option for data collection right in SONA. Most researchers chose the online external option instead.

2) SONA prescreen vs Departmental Prescreen
   a. The SONA system has a built-in "prescreen" that allows all SONA researchers to restrict who can participate in their studies. These are limited and mainly demographic questions (e.g., gender). To restrict based on the SONA prescreen, select "set prescreen restrictions." See the SONA manual for additional help.
   b. The departmental long prescreen is put together before the start of every semester. An email will be sent out at least a month or two in advance that requests questions from researchers in the department. Then, after receiving IRB approval, the departmental SONA organizer will put the questions into Qualtrics and create an online study via SONA for the first 3 weeks of the semester. After the 3 weeks have passed, researchers who submitted questions (and who have received their own IRB approval to recruit in this way) will request the data. Then, they can invite participants who qualify to their studies.

3) Offering bonus SONA credits.
   a. No Mention of Bonus may be in the SONA description or advertisement, but you can give credit if it is approved by the IRB.
      i. SONA credits for performing well on a task with a maximum of 25% of the time-based credits.
         1. Example: A 2-hour 4-credit study could offer a 1-credit performance bonus.
      ii. Money for performance with a maximum of $10 or $2.50/hour (whichever is more).
         1. Example: A 1-hour study could offer a performance bonus of $10 or less. A 5-hour study could offer a performance bonus of $12.50 or less.
      iii. Money for returning for a subsequent session after completing a previous session with a maximum of $10 or $2.50/hour (whichever is more).
         1. Example: Students who completed the first session of a two-session experiment could be offered $10 in addition to the SONA credits already earned for participating in a 1-hour 2nd session.
      iv. A chance to win money or a prize for performance or multi-part study completion.

4) Classroom Announcements for a Weak Subject Pool
   a. If during the semester researchers feel that recruiting is lagging, they can request the SONA administer to send out an email to professors requesting a classroom announcement be made reminding students of the SONA extra credit option.