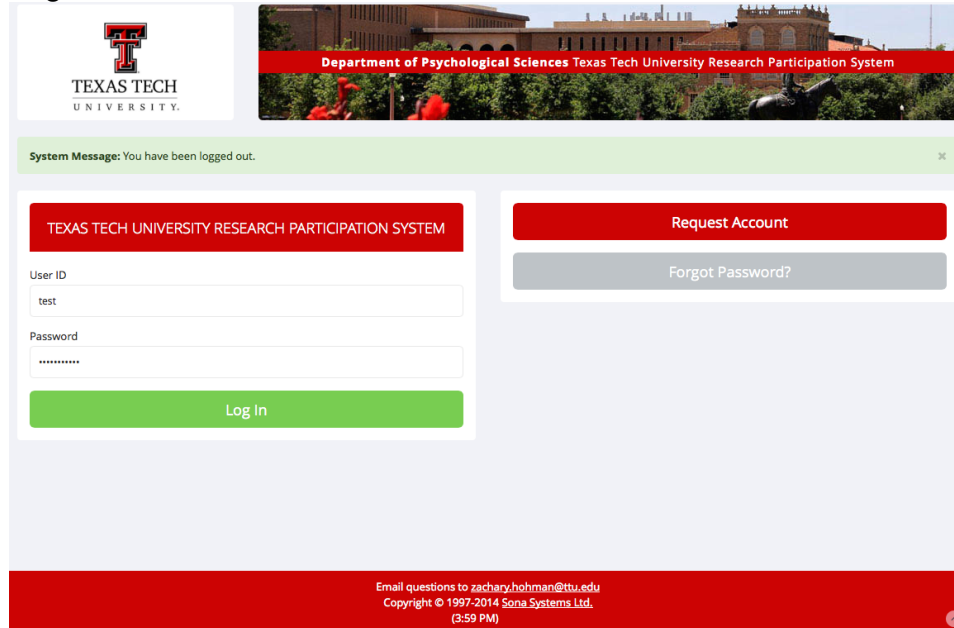


SONA INSTRUCTIONS

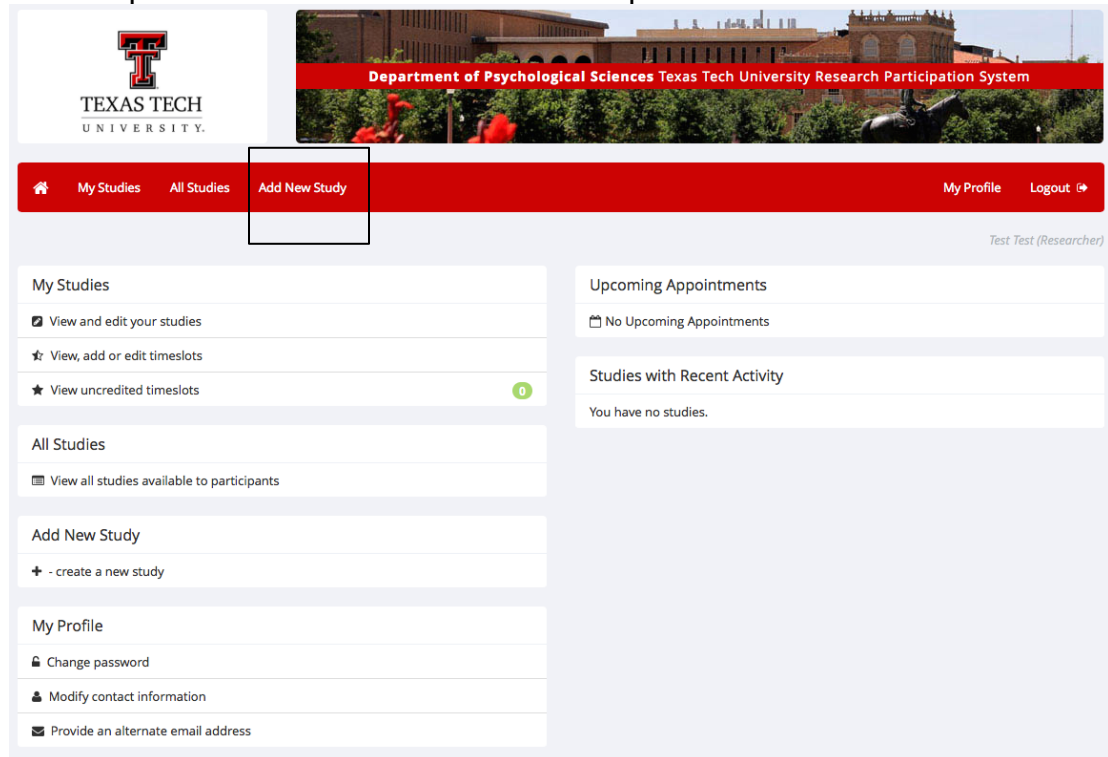
Instructions for creating an in-person study:

1. Log in:



The screenshot shows the login interface for the Texas Tech University Research Participation System. At the top left is the Texas Tech University logo. To its right is a banner image of a building with the text "Department of Psychological Sciences Texas Tech University Research Participation System". Below the banner is a green system message: "System Message: You have been logged out." The main login area has a red header "TEXAS TECH UNIVERSITY RESEARCH PARTICIPATION SYSTEM". It contains two input fields: "User ID" with the text "test" and "Password" with masked characters. A green "Log In" button is below the password field. To the right of the login fields are two buttons: a red "Request Account" button and a grey "Forgot Password?" button. At the bottom of the page is a red footer with contact information: "Email questions to zachary.hohman@ttu.edu", "Copyright © 1997-2014 Sona Systems Ltd.", and "(3:59 PM)".

2. At the top of the screen click on add new experiment




The screenshot shows the dashboard of the Texas Tech University Research Participation System. At the top is the same banner as in the login page. Below the banner is a red navigation bar with a home icon, "My Studies", "All Studies", "Add New Study" (highlighted with a black box), "My Profile", and "Logout" with an external link icon. The main content area is divided into several sections. On the left, under "My Studies", there are three links: "View and edit your studies", "View, add or edit timeslots", and "View uncredited timeslots" (with a green circle containing the number 0). Below this is the "All Studies" section with a link "View all studies available to participants". Further down is the "Add New Study" section with a link "+ create a new study". At the bottom left is the "My Profile" section with three links: "Change password", "Modify contact information", and "Provide an alternate email address". On the right side, under "Upcoming Appointments", there is a link "No Upcoming Appointments". Below that is the "Studies with Recent Activity" section with the text "You have no studies."

3. Choose the standard study option and click the continue box at the bottom

Select Study Type


To add a new study, you must first select the type of study you would like to add. You may not change a study to a different type once you have added it, so please be sure to select the correct type of study now.

☒ Standard Study





A study that is scheduled to take place at a specific place (i.e. not online), and where there is only one part to the study that participants will participate in.


☐ Multi-Part Standard Study




A study that is scheduled to take place at a specific place (i.e. not online), in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time.

☐  Two-Part

☐  Three-Part

☐  Four-Part

☐ Online External Study



An online study located on another website like Qualtrics, SurveyMonkey, or any other website.

Continue

4.

a) Provide the IRB name for the study in Study Name box. This will be replaced with a generic name and number once approved.

b) Provide any eligibility requirements for the study (if any) in the appropriate box.

c) Make sure that the duration and credits of the study are correct (.5 credits for each 30 minutes of participation).

d) Provide any preparation necessary for the study (if any).

e) Select the researchers who will be administering timeslots and granting credit for participation, more than one researcher can be selected.

f) Choose the principal investigator (psychology faculty member) – same as the principal investigator on the IRB application.

Basic Study Information

Study Name

STUDY NAME

Eligibility Requirements

None

Duration

30

Minutes

Credits
(Credits must be evenly divisible by 0.5)

.5

Preparation

None

Researcher

search...

Adams, Nijah

Alquist, Jessica

Armstrong, Miriam

Becerra, Alexis

Bess, Cecilia

Borowa, Dominika

Boudreaux, Blake

Boyd, Kristin

Broadwell, Katy

...

Available

Selected

Principal Investigator

Hohman, Zachary

5. You must provide the IRB approval code (found on your IRB approval form emailed to you from the IRB office) and the IRB approval expiration date (found on your informed consent form – if your study is exempt then please select one year after the date that the IRB was email to you – e.g., if the IRB approval was emailed to you on August 29, 2014 the expiration date would be August 29, 2015). Next select Yes to make the study active (NOTE: this will make the study active though it will not appear as a study to participants until it is approved and there are active timeslots). Finally if there are any pre-requisites please list them in the correct box.

IRB Approval Code	<input type="text" value="12345"/>
IRB Approval Expiration	<input type="text" value="Wednesday, January 1, 2014"/>
Approved?	Currently not approved -- Approval is required.
Active Study?	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>(inactive studies are sometimes kept for historical purposes; a study must be active and approved to show up on the list of available studies to participants)</p>
<input type="button" value="Add This Study"/>	

Advanced Settings

Pre-Requisites	<p><input checked="" type="radio"/> Participants must participate in ALL of these studies before they may sign up <input type="radio"/> Participants must participate in AT LEAST ONE of these studies before they may sign up</p> <p><input type="button" value="My Studies"/> <input type="button" value="All Studies"/></p> <p><input type="text" value="search..."/></p> <div><div></div><div></div></div> <p>Available Selected</p>
----------------	--

6. List any disqualifiers should there be any for the study. You can also select any course restrictions. If you have an invitation code you can provide it here, this restricts participants from signing up for your study unless they have the code. For Participant Sign-up deadline and Cancellation Deadline please set the minimum amount of time before a timeslot is to occur that a participant can sign up and the minimum amount of time before a timeslot that a participant can cancel their participation before receiving an Unexcused No-Show. Next, set if you want to be emailed when a person signs up for a timeslot. Finally, if there are multiple-researchers select Yes for Researchers at Timeslot-Level so that the researchers can put in their own timeslots.

Disqualifiers	Participants must not have participated in ANY of these studies before they sign up:
	<div>My Studies All Studies</div> <div>search...</div> <div></div> <div></div> <div>Available</div> <div>Selected</div>
Course Restrictions	Participants must be in one of these courses:
	<div>PSY 1300 001 PSY 1300 002 PSY 1300 003 PSY 1300 004 PSY 1300 005 PSY 1300 006 PSY 1300 007 PSY 1300 008 PSY 1300 009 PSY 1300 010</div> <div></div> <div>Available</div> <div>Selected</div>
Invitation Code	<div></div> <div>(leave blank if participants do not need a special password to sign up for this study)</div>
Is this a web-based study?	No
Study URL (optional)	<div></div>
Participant Sign-Up Deadline	<div>24</div> hours before study is to occur
Participant Cancellation Deadline	<div>24</div> hours before study is to occur
Should the Researcher receive an email notification when a participant signs up or cancels?	<div><input checked="" type="radio"/> No <input type="radio"/> Yes -- for sign-ups and cancellations <input type="radio"/> Yes -- for cancellations only</div>
Researchers at Timeslot-Level	Can researchers for this study be assigned to specific timeslots? Only applies if the study has more than one researcher. <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div>

7. You can provide comments in the boxes. These are not shared with the participants and can be helpful if you have multiple studies on SONA to know

which one it is, or if there are multiple researchers so that they know which study this is. Finally, click on “Add This Study” and you are done. After this you will need to email the IRB approval form (emailed to you from the IRB) to Zachary Hohman (Zachary.hohman@ttu.edu).

Shared Comments (Up to 1,000 characters, optional)	<div></div> <div>Visible to all researchers and PIs in the system, but not visible to participants</div>
Private Comments (Up to 3,000 characters, optional)	<div></div> <div>Visible only to researchers and PIs for this study, but not visible to participants or other researchers/PIs in the system</div>
Research Alternative	No
<div>Add This Study</div>	


To Create a Study hosted by Qualtrics on SONA

1. After clicking on “Add New Study” on the home page select the “Online External Study” option and then click continue.

Select Study Type


To add a new study, you must first select the type of study you would like to add. You may not change a study to a different type once you have added it, so please be sure to select the correct type of study now.

☐ Standard Study





A study that is scheduled to take place at a specific place (i.e. not online), and where there is only one part to the study that participants will participate in.


☐ Multi-Part Standard Study




A study that is scheduled to take place at a specific place (i.e. not online), in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time.

☐  Two-Part

☐  Three-Part

☐  Four-Part

☒ Online External Study



An online study located on another website like Qualtrics, SurveyMonkey, or any other website.

Continue

2. Next do the following:

- a) Provide the IRB study name in study name.
- b) In the Eligibility Requirements provide the following:

“This study must be completed or canceled in 24 hours of sign-up or you will receive an Unexcused No-Show.”

- c) Next set the duration and credits so that they are correct (.5 credits per 30 minutes).
- d) Next select the preparation (if any), researchers, and PI (same PI as the IRB proposal).

Basic Study Information	
Study Name	<input type="text" value="STUDY NAME"/>
Eligibility Requirements	<input type="text" value="This study must be completed or canceled in 24 hours of sign-up or you will receive an Unexcused No-Show."/>
Duration	<input type="text" value="30"/> <input type="button" value="Minutes"/>
Credits (Credits must be evenly divisible by 0.5)	<input type="text" value=".5"/>
Preparation	<input type="text" value="None"/>
Researcher	<div><div><input type="text" value="search..."/><ul style="list-style-type: none">Adams, NijahAlquist, JessicaArmstrong, MiriamBecerra, AlexisBess, CeciliaBorowa, DominikaBoudreaux, BlakeBoyd, KristinBroadwell, KatyBrown, Jennifer</div><div>Available</div><div><div>Test, Test</div><div>Selected</div></div></div>
Principal Investigator	<input type="text" value="Hohman, Zachary"/>

3. You must provide the IRB approval code (found on your IRB approval form emailed to you from the IRB office) and the IRB approval expiration date (found on your informed consent form – if your study is exempt then please select one year after the date that the IRB was email to you – e.g., if the IRB approval was emailed to you on August 29, 2014 the expiration date would be August 29, 2015). Next select Yes to make the study active (NOTE: this will make the study active though it will not appear as a study to participants until it is approved and there are active timeslots). Finally if there are any pre-requisites please list them in the correct box.

IRB Approval Code	<input type="text" value="12345"/>
IRB Approval Expiration	<input type="text" value="Wednesday, January 1, 2014"/>
Approved?	Currently not approved -- Approval is required.
Active Study?	<input checked="" type="radio"/> Yes <input type="radio"/> No
(inactive studies are sometimes kept for historical purposes; a study must be active and approved to show up on the list of available studies to participants)	
<input type="button" value="Add This Study"/>	

Advanced Settings

Pre-Requisites	<input checked="" type="radio"/> Participants must participate in ALL of these studies before they may sign up <input type="radio"/> Participants must participate in AT LEAST ONE of these studies before they may sign up
<div>My StudiesAll Studies</div> <div><input type="text" value="search..."/></div> <div><div><div></div></div><div></div></div> <div><div></div></div> <div></div>	

Available

Selected

4. List any disqualifiers should there be any for the study. You can also select any course restrictions. If you have an invitation code you can provide it here, this restricts participants from signing up for your study unless they have the code.

Next for the Study URL provide the Qualtrics link for your study (found on the Qualtrics website).

***** ALL ONLINE STUDIES THAT USE QUALTRICS MUST LINK QUALTRICS AND SONA. PLEASE REFER TO THE DOCUMENT ON LINKING THE TWO. *****

Disqualifiers	<p>Participants must not have participated in ANY of these studies before they sign up:</p> <div><div>My StudiesAll Studies</div><div>search...</div><div><div></div><div></div></div><div>AvailableSelected</div></div>
Course Restrictions	<p>Participants must be in one of these courses:</p> <div><div><div>PSY 1300 001</div><div>PSY 1300 002</div><div>PSY 1300 003</div><div>PSY 1300 004</div><div>PSY 1300 005</div><div>PSY 1300 006</div><div>PSY 1300 007</div><div>PSY 1300 008</div><div>PSY 1300 009</div><div>PSY 1300 010</div></div><div></div></div> <div>AvailableSelected</div>
Invitation Code	<div></div> <p>(leave blank if participants do not need a special password to sign up for this study)</p>
Is this a web-based study?	<p>Yes -- study is administered outside the system</p>
Study URL	<div>QUALTRICS SURVEY LINK HERE</div> <p>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.</p>
Study URL Display	<p>After participants complete this study, can they still access the Study URL? They will not be given the URL until they have signed up for the study. This setting controls if they can still see it after they have participated.</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p>

5. For Participant Sign-up deadline put 0 and for Cancellation Deadline please put 24. This means that participants can sign up for your study assuming there are slots up until the end of your online study date (usually the last day of class that semester). Next, set if you want to be emailed when a person signs up for a timeslot. If there are multiple-researchers select Yes for Researchers at Timeslot-Level so that the researchers can put in their own timeslots. You can provide comments in the boxes. These are not shared with the participants and can be helpful if you have multiple studies on SONA to know which one it is, or if there are multiple researchers so that they know which study this is. Finally, click on “Add This Study” and you are done. After this you will need to email the IRB approval form (emailed to you from the IRB) to Zachary Hohman (Zachary.hohman@ttu.edu).

Participant Sign-Up Deadline	<input type="text" value="0"/> hours before study is to occur
Participant Cancellation Deadline	<input type="text" value="24"/> hours before study is to occur
Should the Researcher receive an email notification when a participant signs up or cancels?	<input checked="" type="radio"/> No <input type="radio"/> Yes -- for sign-ups and cancellations <input type="radio"/> Yes -- for cancellations only
Researchers at Timeslot-Level	Can researchers for this study be assigned to specific timeslots? Only applies if the study has more than one researcher. <input type="radio"/> Yes <input checked="" type="radio"/> No
Can a participant sign up for this study more than once? (at different times)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Shared Comments (Up to 1,000 characters, optional)	<div><div></div><div>Visible to all researchers and PIs in the system, but not visible to participants</div></div>
Private Comments (Up to 3,000 characters, optional)	<div><div></div><div>Visible only to researchers and PIs for this study, but not visible to participants or other researchers/PIs in the system</div></div>
Research Alternative	No

Add This Study

Creating a Timeslot in SONA for an in-person study

1. From the homepage in SONA click on “My Studies”
 - a) Find the study in which you would like to create a timeslot.
 - b) Click on “Timeslots” for that study.

The screenshot shows the SONA 'My Studies' page. The top navigation bar is red with links for 'My Studies', 'All Studies', and 'Add New Study'. On the right, there are links for 'My Profile' and 'Logout'. Below the navigation bar, there's a sub-header with 'All', 'Active', and 'Inactive' tabs. A secondary bar contains links for 'View Your Uncredited Timeslots' and 'View Printer-Friendly List of Signups', along with a 'Sort by' dropdown set to 'Study Name'. The main content area features a table with columns for 'Study Information', 'Approved', and 'View'. The table lists 'Study 107 (1 Credits)' with an 'Approved' status of 'Yes' and a 'View' link that includes 'Study Info' and 'Timeslots'. Below the table, a note states: 'Participants viewing this page will see restrictions listed with each study, when applicable, except for prescreen and course restrictions, which are always hidden from participants. They will also see studies listed in random order. Inactive studies that are approved will not appear on the list of available studies, but may be viewed when participants are checking their progress or other actions related to that study.'

2. To add a timeslot click on “+ Add A Timeslot”.

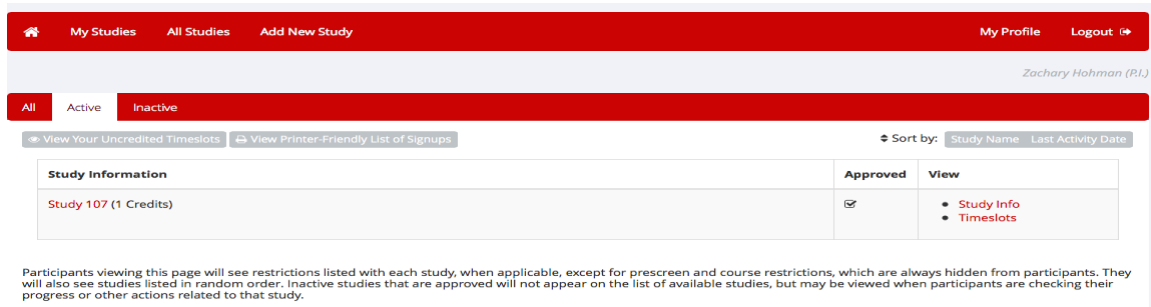
The screenshot shows the 'Add Timeslot' page for Study 107. The top navigation bar is red with links for 'My Studies', 'All Studies', and 'Add New Study'. On the right, there are links for 'My Profile' and 'Logout'. Below the navigation bar, there's a sub-header with 'All Timeslots', 'Recent Timeslots', 'Upcoming Timeslots', and 'Older Timeslots' tabs. A secondary bar contains links for '+ Add A Timeslot', 'Add Multiple Timeslots', 'Delete Multiple Timeslots', 'View Printer-Friendly List of Signups', and 'Print'. The main content area is titled 'Timeslots : Study 107' and includes a note: 'Timeslots for this study are listed below, with any sign-ups listed below the timeslot. View timeslots on: Friday, August 29, 2014 GO'. Below this, it states 'There are no recent timeslots for this study.'

3. Choose the date in which you want the timeslot, choose the start time, how many participants you want to be able to sign up for this timeslot, the location of the experiment (typically say Psychology Building Room 123 for example), select the researcher who will administer this timeslot/grant credit for participating, and then select “Add This Timeslot”.

The screenshot shows the 'Add Timeslot' form for Study 107. The form is titled 'Add Timeslots : Study 107' and includes a note: 'Use this page to add a single timeslot for your study. You may not add a timeslot that takes place after the December 3, 2014 study schedule deadline. You may also add multiple timeslots at once.' The form fields are: 'Date' (Sunday, August 31, 2014), 'Start Time' (9:00 AM), 'End Time' (60 minutes after start time), 'Number of Participants' (1), 'Location' (LOCATION OF EXPERIMENT), and 'Researcher' (ALL). A green 'Add This Timeslot' button is at the bottom.

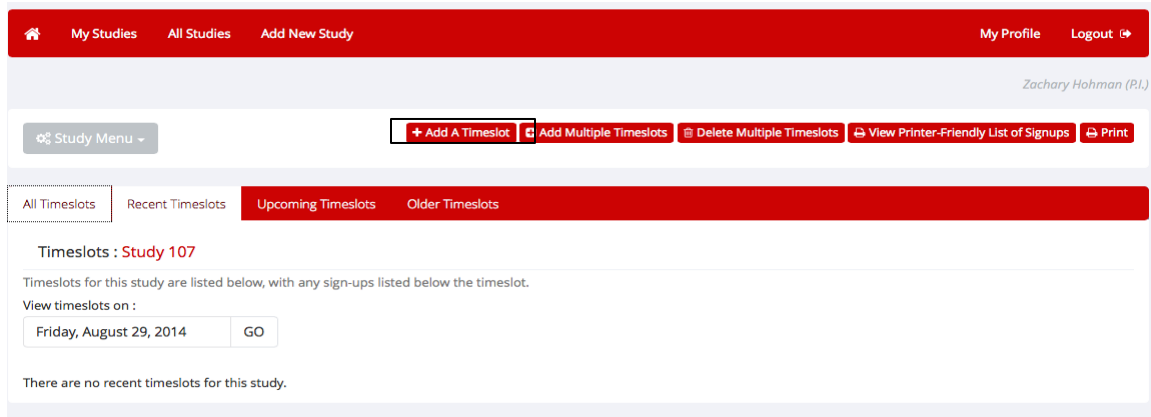
Creating a Timeslot in SONA for an online study

4. From the homepage in SONA click on “My Studies”
 - c) Find the study in which you would like to create a timeslot.
 - d) Click on “Timeslots” for that study.



The screenshot shows the SONA homepage with a red navigation bar at the top containing 'My Studies', 'All Studies', and 'Add New Study'. On the right, there are links for 'My Profile' and 'Logout'. Below the navigation bar, the user's name 'Zachary Hohman (PI.)' is displayed. The main content area has tabs for 'All', 'Active', and 'Inactive', with 'Inactive' being the selected tab. There are two sub-tabs: 'View Your Uncredited Timeslots' and 'View Printer-Friendly List of Signups'. A table lists studies, with 'Study 107 (1 Credits)' highlighted. The table has columns for 'Study Information', 'Approved', and 'View'. The 'Approved' column shows a checkmark, and the 'View' column has links for 'Study Info' and 'Timeslots'. Below the table, a note states: 'Participants viewing this page will see restrictions listed with each study, when applicable, except for prescreen and course restrictions, which are always hidden from participants. They will also see studies listed in random order. Inactive studies that are approved will not appear on the list of available studies, but may be viewed when participants are checking their progress or other actions related to that study.'

5. To add a timeslot click on “+ Add A Timeslot”.



The screenshot shows the 'Add Timeslot' page for Study 107. The red navigation bar at the top is the same as in the previous screenshot. Below it, the user's name 'Zachary Hohman (PI.)' is displayed. The main content area has a 'Study Menu' dropdown and a row of buttons: '+ Add A Timeslot', '+ Add Multiple Timeslots', '- Delete Multiple Timeslots', 'View Printer-Friendly List of Signups', and 'Print'. The '+ Add A Timeslot' button is highlighted. Below the buttons, there are tabs for 'All Timeslots', 'Recent Timeslots', 'Upcoming Timeslots', and 'Older Timeslots'. The 'All Timeslots' tab is selected. The page shows 'Timeslots : Study 107' and a message: 'Timeslots for this study are listed below, with any sign-ups listed below the timeslot. View timeslots on : Friday, August 29, 2014 GO'. Below this, it says 'There are no recent timeslots for this study.'

6. Choose the date in which you want the timeslot (this is typically the end of the semester), choose the start time (this should be midnight), how many participants you want to be able to sign up (this should match the sample size desired from your IRB proposal), and then select “Add This Timeslot”.

Add Timeslots : Study 105

This study was created as an online (web) study. Because a participant may participate in an online study at any time, most researchers create a single timeslot. The single timeslot contains the maximum number of participants who may participate, and has a final participation date of the last date that participants may participate. You may not add a timeslot that takes place after the December 3, 2014 study schedule deadline.

Final Participation Date: Sunday, August 31, 2014

Final Participation Time: 9:00 AM

Max. Number of Participants: 1

Add This Timeslot

How to Assign Credit/Excused/Unexcused No-Shows in SONA

1. From the home page click on “View uncredited timeslots”.

The screenshot shows the SONA system home page. The top navigation bar is red with links for Home, My Studies, All Studies, and Add New Study. On the right, there are links for My Profile and Logout. The main content area is divided into several sections: My Studies (with options to view/edit studies, timeslots, and uncredited timeslots), All Studies (with an option to view all studies), Add New Study (with a link to create a new study), and My Profile (with options to change password, modify contact information, and provide an alternate email address). The 'View uncredited timeslots' option is highlighted with a red box. The right sidebar shows 'Upcoming Appointments' (No Upcoming Appointments) and 'Studies with Recent Activity' (You have no studies).

2. Find your study and participants in which you want to provide credit/give an excused or unexcused no-show, then choose the correct option and hit save.

The screenshot shows the 'Uncredited Sign-Ups' page. The top navigation bar is red with links for All Sign-Ups and Uncredited Sign-Ups. Below the navigation bar, there is a message: 'Listed below are all the participants who have signed up for this timeslot. If you would like to grant or revoke credit, simply choose the desired option next to each participant. If for some reason you need to cancel a sign-up, you can click the Cancel link next to the sign-up you would like to cancel. A sign-up must be in "No Action Taken" status before it can be cancelled.' Below this message, there is a note: 'You may grant Credits ranging from 0 to 1.0 Credits. The standard value in Credits for this study is 0.5 Credits.' Below the note, there is a table with the following columns: Name, Participated, No-Show, No Action Taken, and Comments. The table contains four rows of data. The first row shows a participant with a 'Participated' value of 0.5 Credits, 'No-Show' options for 'Unexcused' and 'Excused', and 'No Action Taken' status. The second row shows a participant with a 'Participated' value of 0.5 Credits, 'No-Show' options for 'Unexcused' and 'Excused', and 'No Action Taken' status. The third row shows a participant with a 'Participated' value of 0.5 Credits, 'No-Show' options for 'Unexcused' and 'Excused', and 'No Action Taken' status. The fourth row shows a participant with a 'Participated' value of 0.5 Credits, 'No-Show' options for 'Unexcused' and 'Excused', and 'No Action Taken' status. The table also indicates 175 participants and 25 available spaces.

Name	Participated	No-Show	No Action Taken	Comments
	<input checked="" type="radio"/> 0.5 Credits	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input type="radio"/>	
	<input checked="" type="radio"/> 0.5 Credits	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input type="radio"/>	
	<input checked="" type="radio"/> 0.5 Credits	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input type="radio"/>	
	<input checked="" type="radio"/> 0.5 Credits	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input type="radio"/>	