

# SONA INSTRUCTIONS

Instructions for creating an in-person study: <https://ttupsy.sona-systems.com/>

## 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 a red overlay containing the text "Department of Psychological Sciences Texas Tech University Research Participation System". Below the banner is a green system message bar that says "System Message: You have been logged out." with a close button. The main content area is divided into two columns. The left column contains a red header "TEXAS TECH UNIVERSITY RESEARCH PARTICIPATION SYSTEM" and a login form with "User ID" (text: test) and "Password" (masked with dots) fields, and a green "Log In" button. The right column contains a red "Request Account" button and a grey "Forgot Password?" button. The footer is a red bar with white text: "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

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

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	<input type="text" value="STUDY NAME"/>
Eligibility Requirements	<input type="text" value="None"/>
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 style="display: flex; align-items: flex-start;"><div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;"><input type="text" value="search..."/></div><div style="border: 1px solid #ccc; padding: 2px;"><ul style="list-style-type: none"><li>Adams, Nijah</li><li>Alquist, Jessica</li><li>Armstrong, Miriam</li><li>Becerra, Alexis</li><li>Bess, Cecilia</li><li>Borowa, Dominika</li><li>Boudreaux, Blake</li><li>Boyd, Kristin</li><li>Broadwell, Katy</li><li>...</li></ul></div><div style="margin-left: 10px;">➡</div><div style="border: 1px solid #ccc; width: 150px; height: 80px; margin-left: 10px;"></div></div> <p style="font-size: small; margin-top: 5px;">Available <span style="float: right;">Selected</span></p>
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, 2020 the expiration date would be August 29, 2021). 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

12345

IRB Approval Expiration

Wednesday, January 1, 2014

Approved?

Currently not approved -- Approval is required.

Active Study?

- Yes  
 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)

Add This Study

### Advanced Settings

Pre-Requisites

- Participants must participate in ALL of these studies before they may sign up  
 Participants must participate in AT LEAST ONE of these studies before they may sign up

My Studies All Studies

search...

Available



Selected

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:

My Studies All Studies

search...

Available Selected

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Course Restrictions

Participants must be in one of these courses:

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

Available Selected

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Invitation Code

(leave blank if participants do not need a special password to sign up for this study)

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Is this a web-based study? No

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Study URL (optional)

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Participant Sign-Up Deadline 24 hours before study is to occur

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Participant Cancellation Deadline 24 hours before study is to occur

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Should the Researcher receive an email notification when a participant signs up or cancels?

No  
 Yes -- for sign-ups and cancellations  
 Yes -- for cancellations only

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Researchers at Timeslot-Level

Can researchers for this study be assigned to specific timeslots? Only applies if the study has more than one researcher.

Yes  
 No

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)

Visible to all researchers and PIs in the system, but not visible to participants

Private Comments  
(Up to 3,000 characters, optional)

Visible only to researchers and PIs for this study, but not visible to participants or other researchers/PIs in the system

Research Alternative

No

Add This Study

## 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.

[Home](#) [My Studies](#) [All Studies](#) [Add New Study](#) [My Profile](#) [Logout](#)

Zachary Hohman (Researcher)

### 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 the study type once you have added it, so please be sure to select the correct option now.

 If you are conducting your study over **videoconference**, like Zoom, Webex, or a similar tool, set it up as either a  Standard Study or a  Multi-Part Standard Study.

<input checked="" type="radio"/> Standard Study		A study that is scheduled to take place at a specific time, in a specific place or over videoconference, and where there is only one part to the study that participants will participate in.
<input type="radio"/> Multi-Part Standard Study		A study that is scheduled to take place at a specific time, in a specific place or over videoconference, 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. <input type="radio"/>  Two-Part <input type="radio"/>  Three-Part <input type="radio"/>  Four-Part
<input type="radio"/> Online External Study		An online study located on another website like Qualtrics, SurveyMonkey, or any other website.
<input type="radio"/> Multi-Part Online External Study		An online study located on another website like Qualtrics, SurveyMonkey, or any other website, 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. <input type="radio"/>  Two-Part <input type="radio"/>  Three-Part <input type="radio"/>  Four-Part

[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 <small>(Credits must be evenly divisible by 0.5)</small>	<input type="text" value=".5"/>
Preparation	<input type="text" value="None"/>
Researcher	<div style="display: flex; align-items: flex-start;"><div style="flex: 1;"><input type="text" value="search..."/><ul style="list-style-type: none"><li>Adams, Nijah</li><li style="background-color: red; color: white;">Alquist, Jessica</li><li>Armstrong, Miriam</li><li>Becerra, Alexis</li><li>Bess, Cecilia</li><li>Borowa, Dominika</li><li>Boudreaux, Blake</li><li>Boyd, Kristin</li><li>Broadwell, Katy</li></ul></div><div style="flex: 1; border: 1px solid #ccc; padding: 5px; margin-left: 10px;">Test, Test</div></div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"><span>Available</span><span>Selected</span></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
<small>(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)</small>	
<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	
<input type="button" value="My Studies"/> <input type="button" value="All Studies"/>		
<input type="text" value="search..."/>		
<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	⇄	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></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

Participants must **not** have participated in ANY of these studies before they sign up:

My Studies All Studies

search...

Available Selected

---

Course Restrictions

Participants must be in one of these courses:

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

Available Selected

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Invitation Code

(leave blank if participants do not need a special password to sign up for this study)

---

Is this a web-based study?

Yes -- study is administered outside the system

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Study URL

QUALTRICS SURVEY LINK HERE

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.

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Study URL Display

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.

Yes  
 No

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 style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>Visible to all researchers and PIs in the system, but not visible to participants</p>
Private Comments (Up to 3,000 characters, optional)	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>Visible only to researchers and PIs for this study, but not visible to participants or other researchers/PIs in the system</p>
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.

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”.

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”.

Add Timeslots : Study 107

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.

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

Researcher: ALL

Add This Timeslot

## 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.

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”.

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:

Final Participation Time:

Max. Number of Participants:

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

1. From the home page click on "View uncredited timeslots".

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.

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