PARTICIPANT POOL:
Manual for Researchers

Fall 2015

If you are planning to use the Sona Psychology Department Participant Pool this term, we ask that you read/reread this manual. The manual is broken into three sections. The first two sections are useful refreshers for experienced Participant Pool users. If you are new to the pool, please start with the Demonstration in Section 3.

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1. Frequently Asked Questions:

Who are the pool administrators?

The Participant Pool is administrated by two graduate students and one faculty representative from the Psychology Department. The best way to get in touch with us is by emailing ppadmin@uoguelph.ca. We will try to respond within one or two business days.

What are the start and end dates for the pool this Fall?

In the fall term the pool opens on September 21 and closes on December 4. You must submit your pre-term survey by September 7.

What are the pre-term survey, pre-screening survey, and mass testing survey?

Pre-term survey: This is a survey sent from the Participant Pool administrators to all potential researchers before the beginning of each term. You must complete this survey and return it to the admins by the deadline if you want to use the pool that term. This survey also allows you to list any questions you want included in the prescreening survey and mass testing survey. Note that this survey doesn't create a study for you on the Sona System—it is simply used by the administrators for planning purposes, and for compiling the prescreening and mass testing surveys.

Prescreening Survey: You should use the prescreening survey if you want to be able to selectively recruit participants for your study (e.g., if you only want to include male participants in your study, then you should include an item in the prescreening survey asking participants to report their sex). The prescreening survey is NOT to be used for stand-alone data collection (for that, use a standard online study). Participants do not receive any credit for completing this optional survey, and so we try to keep this survey as short as possible. To include items on the prescreening survey you should include the items when you fill out your pre-term survey. You can include Yes/No questions, multiple choice questions, and Likert-type scales. The pool admins compile the survey two weeks before the pool opens and then send the survey to the Psychology Department REB for expedited approval. Consequently, you do not need REB approval to include items in the prescreening survey; however, if you are concerned your items may not pass expedited review, you should have them preapproved through a standard REB application (**unlike the prescreening survey, mass testing items must be preapproved by the REB**). For every study in Sona, you have the option to set restrictions based on the results of the prescreening survey. These restrictions will limit who can sign up for your study, and allow you to specifically invite students who meet these restrictions to participate in your study.

Mass Testing Survey: You should use this survey if you are planning to run a study, but some of the data you want cannot be collected at the time of the actual study (e.g., if you have questions that could bias participants behavior in an unintended way). The mass testing survey is NOT to be used for stand-alone data collection (for that, use a standard online study). This survey is optional, but is completed by most participants because they receive participation credit. To include items on the mass testing survey, you should include the items when you fill out your pre-term survey. You can email a Word document with your REB certificate and questions. You can include Yes/No questions, multiple choice questions, and Likert-type scales. **These items must have been approved by the REB before sending them to us.** The results of the mass testing survey are emailed to

researchers individually after the pool closes at the end of the term. To link your study data to the mass testing results, it is important that you record every participant's uoguelph ID (i.e., their email address).

I had a study in the pool during the fall. Will it automatically be activated in the winter?

You need to do something. Every term that you want to include a study in the Participant Pool, you must complete a pre-term survey (we use the responses from this survey to guide credit allocations each term, and to create the prescreening and mass testing surveys). You will not need to create a new researcher account for the Sona website; however, your study will need to be reactivated and reapproved.

How do I link Mass Testing data to data collected during my study?

The unique identifier for mass testing data is the participant's uoguelph ID (i.e., the part before @uoguelph.ca in their email). It is important that you collect this ID for all participants who complete your study.

What is the credit limit on my study, and how can I get it increased?

A credit limit is placed on all studies to give researchers equitable access to participants. The limit is calculated based on responses to the pre-term survey, and on the number of students/participants registered with the participant pool. Throughout the term the pool administrators continuously evaluate the remaining availability of participants. If there appears to be more participants than study demand, we will send an email to all researchers letting them know that we can increase the credit limits on studies. At that point, please email us to have your credit limit increased. Note: credit limits are typically much higher in the fall than winter, so you are advised to do as much data collection in the fall as possible.

I didn't submit a pre-term survey. Can I still use the participant pool?

Before the mid-point of the term, our answer will almost always be no. Later in the term, if it looks like there are more participants than researcher demand and if you have a pressing need to use the pool (e.g., if you have a manuscript submitted and reviewers are asking for new data), we will consider requests for new studies.

2. Procedural Overview for Using the Participant Pool

Before the term begins:

1. **Account setup.** If you don't already have a Sona researcher account, email your first name, last name, and your *uoguelph* email address the ppadmin@uoguelph.ca. Within 2 business days you will receive instructions on how to login to the Sona Participant Pool website.
2. **Secure ethics approval for your research.**
   a. *Prescreening.* Once the prescreening survey is compiled, we (the pool admins) put the survey through expedited REB review. This means your prescreen questions do not need to be preapproved; however, if they don't pass the expedited review they will not get included. If you are concerned that your items will not pass the expedited review, you should have your prescreen questions preapproved using a standard REB application.
   b. *Mass testing.* You must have ethics approval to include items in the mass testing survey two weeks before the pool opens. Submit a copy of your Ethics Certificate with your questions.
   c. *Standard and online studies.* You must have ethics approval for a study before it can be activated (i.e., opened for participants to sign up). Please ensure that you have entered the correct REB number and expiration date before setting 'Study Active' to yes, and before clicking 'Send Request' in SONA to have you study approved by the pool admins.
3. **Complete the pre-term survey and list any prescreening or mass testing items.** This pre-term survey is emailed to all faculty and grad students in the Psychology department a few weeks before each term. It must be submitted by the specified deadline if you want to use the pool that term.
4. **Create your study in the Sona website**. See tutorial in Section 3. Once your study is prepared, *don't forget to click the "Send Request" button in Sona to have the pool admins approve your study.*
   a. If you are offering a choice of money or participant credit, please set the study up as a credit study, and write in the description that they have a choice between credits or money.

While the term is underway:

1. **Updating timeslots.** Researchers have four options when updating timeslots: a) Grant credit, b) No- show, no-penalty, c) No-show, penalty, d) Variable credit grant.
   a. *Credit Option:* If a participant attends your study please grant them a credit.
   b. *Money Option*: If you are paying your participants please assign a no-show no-penalty and write a note in the comments sections indicating the participant accepted money instead of a credit.
   c. *Additional Credit Option:* If a participant (legitimately) takes longer to finish your study than anticipated, you can use the variable credit granting to make sure they receive 0.5% for every half an hour they attended your experiment. To use the variable credit granting just click on the box that shows the credit value. You can change this value within 25% to 175% of the original credit value for your study. Then click on grant credit.
2. **When Participants Fail to Show Up.**
   a. A student may cancel their appointment or contact the researcher to reschedule

without any penalty (i.e. no penalty if they contact you before the time of the appointment). If this happens please assign a "no-show, no-penalty".

b. If a student does not come at the appointed time, no credit will be given and the researcher *may* give the participant a "penalty". Penalties increase the number of credits a participant needs to obtain their 4% bonus credits (regardless of the credit value of your study, each penalty is valued at 1% - meaning that the participant would need to participate in 5% worth of studies in order to receive their full 4%).

> ***Please note*** - Once you have assigned a penalty, you should send the participant an email explaining why you assigned the penalty ***and offer to reverse the penalty***. If the participant agrees to attend your study at a later date, then you can reverse the penalty and assign them the credit (once they have participated). Once you have agreed upon a time for them to participate, post a time slot in SONA and manually sign the participant up for the new time slot.

3. **If you (the Researcher) Fail to Show Up.** If you are unable to make a scheduled appointment with the participant and are unable to contact the participant prior to the scheduled time (i.e. you sent the participant an email but have not received a reply email yet) the participant is entitled to full credit. As we limit the number of credits assigned to researchers, please try to avoid this at all costs by contacting participants as soon as you know you are unable to keep the appointment. Keep records of your attempts to contact the participant (i.e. send yourself a copy of the email addressed to the participant) and ask the participant to indicate they received the message. If you are unable to resolve an issue with a participant please inform the administrator.

4. **Recording Participation for in-Class Testing.** When recruiting participants outside of Sona Systems it can be difficult to assign participants' credit without the following information. Therefore, you always record: a) the participant's first and last names, b) the participant's student number, and c) the course the participant is registered in that they want the credit assigned to. If for any reason you are having difficulty assigning credits to certain participants please contact the administrator with all the information provided above as soon as possible. The administrator will help you assign the credits to the appropriate participants. ***Please note*** – When recruiting participants outside of the Sona System and assigning them credit, it is ***in your best interest*** to first go into the Sona System and figure out what information you will need from your participants in order to be able to assign them their credits.

5. **Updating Ethics Numbers and Expiry Dates on SONA.** All ethics protocols at the University of Guelph expire after one year from the date of issue. You must submit a status report to the ethics committee which either closes the study or extends the clearance for another year. Once you have a new certificate please log onto the Sona System and click on your study's name. Then click on *Change Study Information.* There will be text on that page beside the IRB Approval Expiration that reads *Send a Request*. Please click on the text and write the ethics number and new expiry date in the text box before submitting the request. The system will include all other relevant information to update your study. *Please do not email the administrator.* You will not be able to post timeslots on SONA System if your ethics number has expired. The expiry date for your study is listed at the top of your certificate.

At the end of the term:

1. **Download all collected data.** Usually two weeks after the subject pool closes we remove all data from the Sona website. It is important that your download all data you collected

through Sona before that date (we always send a reminder email before removing data). This includes any pre-screening data you collected, and any data from online studies run through Sona.

2. **Mass testing data.** Once the pool closes, the pool administrators will collate the mass testing data and email the responses for each researcher's items directly to them.

3. Demonstration: Setting up an account and a new study

Getting Started

This demonstration was designed as a walk through that will allow you to experience, in a limited capacity the 'Researcher Experience':

- Researcher sign in
- Study management
- Study options
- Student scheduling

For researchers, the Sona System is simple to use and interact with. A number of services are provided to inform and assist researchers in their data collection through on-site or online studies.

Creating an account

To access the Sona System, you will first need to create a researcher account. To create an account, send your First Name, Last Name, and email address (must be @uoguelph.ca or @mail.uoguelph.ca) to ppadmin@uoguelph.ca, and ask them to create a researcher account for you. It can take a couple of days, so you might as well do this now.

Log-in

- Website address: uoguelph.sona-systems.com
- Login with the username and password provided by the Participant Pool administrators.

Note: Researchers must read and accept the "Human Subjects/Privacy Policy" when using the system for the first time

Research Home Screen

Every time a researcher logs into Sona, he or she is brought to this home page. You can return to the home page at any time by clicking on the tiny house at the top left of the screen.

My Profile

Researchers can review their personal information and, on a limited basis, can change information. In the event of a forgotten password, the system can automatically generate a new password, which is sent to their U of G email account.

All Studies

Researchers can keep up-to-date with what other studies are available to student participants. Clicking on each study will give a brief overview of that study with all the pertinent info.

Add New Study

Researchers can add their own studies to the Sona System through an easy to use interface. From your home screen, under 'Add New Study', click 'create a new study'.

Step 1: Create your study

What type of study are you preparing? For the sake of this demonstration, let's pretend to create a standard study, which would be used to recruit participants to come to a lab and take part in an experiment. You can actually create this fake study if you want, although you will have to get in touch with the pool administrators afterwards to have them delete if from the system. Sona can also be used to create online survey studies—details on the process can be found on the department website.

- Select Standard Study and Credit, and then click Continue.
  - Note that in addition to running studies where you compensate participants with course credit, you can also use the Participant Pool to run studies where participants are paid money.

To contact the administrator email: ppadmin@uoguelph.ca

Select study type

To add a new study, you must first select the type of study you would like to add as well as the compensation type. You may not change a study nor the compensation 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.

- ○ Paid
- ● Credit

Two-Part Standard Study

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

- ○ Paid
- ○ Credit

Online Survey Study

An online survey study that is set up in the system, and administered by the system.

- ○ Paid
- ○ Credit

Online External Study

An online study that is set up outside the system (i.e. on another website).

- ○ Paid
- ○ Credit

CONTINUE ❯

- You are now asked to fill in your study information.
- Basic Information:
  - Participants see the brief abstract when they are deciding whether or not to take part in your study, so this recruitment material should have been part of your REB application.
  - The eligibility requirements you list here are not enforced by the system. Participants can choose to ignore them if they want. Strict requirements can be implemented under advanced options, and through the prescreening survey.
  - Studies under 30 minutes should be worth 0.5 credits. Studies between 30-60 minutes should be worth 1 credit. Studies 60-90 minutes should be worth 1.5 credits, etc.
  - When creating your real survey, you must specify your REB approval code and expiry date. If your REB approval expires, you will not be able to continue recruit participants.
  - You should set 'Active Study' to 'Yes'. You cannot post timeslots to recruit subjects until your study is active.

Study Information

Study Name
A sample experiment

Brief Abstract
(Up to 255 characters, optional)
This abstract is used for recruiting participants, so it should have been part of your REB application.

Detailed Description
(Up to 15,000 characters, optional)

Eligibility Requirements
Between 20 and 35 years of age please.

Duration
60 | Minutes

Credits
(Credits must be evenly divisible by 0.5)
1

Timeslot Usage Limit
100 hours (only the administrator may change this value)
hours already used or scheduled

Preparation
None

- Advanced Settings
  - o Most of these settings can likely be left alone, although the Pre-Requisites and Disqualifiers settings can be useful. For example, if another member of your lab is running a very similar study to yours and you don't want participants to take part in both, you can add your lab mates study as a disqualifier. This will prevent participants from signing up for your study if they already completed your lab mates.

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...

test

Available | Selected

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

My Studies | All Studies

search...

test

To contact the administrator email: ppadmin@uoguelph.ca

- Once you are ready to move on, click the 'Add This Study' button. You will be taken to the dashboard for your new study where you can review the settings for your study. You can also access the two final steps in creating your study from this screen.

- Setting prescreen restrictions. If you only want your study to be visible to certain types of participants (e.g., if you only want male participants to complete your study), you should use our prescreening survey which is run at the beginning of the term (see FAQ above). Click on the 'View/Modify Restrictions' button to specify eligibility requirements for your study based on prescreen questions. Even if you didn't include prescreen questions in this terms survey, you can still use the questions added by other researchers.
- The final step in creating your study is to get the study approved by the pool administrators. Once you are ready, click the 'Send Request' button from the study dashboard (see image above). Approval can take a couple of days, so don't wait until the last minute.

Step 2: Recruiting participants for your study

The way that recruitment works in the Sona System is that you post timeslots for when you would like to run participants in your experiment (you usually do this a few days in advance), and then students who want to participate sign up for the slot.

- To add some time slots, go to your study dashboard and from the 'Study Menu' select 'View/Administer Time Slots'.

- Click on 'Add a Time Slot'

- Enter the requested information and then click 'Add This Timeslot'
  - Make sure that you are available at the time you specify. Once you post a timeslot you are responsible for meeting any participant that signs up for the designated time and place.
  - Make sure to specify a location and instructions on how to get to the location.
  - Note, on the right side of the screen is a handy option for adding multiple timeslots. Also listed are how many credits you have used for this study, and how many credits you can still run (to ensure that all researchers have equitable access to credits, every study received a limited number of credits—this limit may increase later in the term if there are a lot of participants).

- If your study has been set to 'Active' and has been approved by the pool administrators, participants will now be able to sign up for your study.

Step 3. Assigning credits after participation.

As soon as a participant has taken part in your study, you should immediately assign credit.

- Go to the dashboard for your study and from the 'Study Menu' select 'View/Administer Timeslots'. Here you will see a table listing the timeslots that you posted. Find the timeslot associated with the participant you ran, and click 'Modify' to resolve the credit assignment for that participant.

To contact the administrator email: ppadmin@uoguelph.ca

- You have three options for resolving the timeslot. Select the appropriate option and then click the 'Update Sign-Ups' button. The three options are:
  - o Participated: the participant is awarded the number of credits specified in the drop down list.
  - o No-Show Unexcused: the participant is penalized one credit.
  - o No-Show Excused: the timeslot is resolved without awarding or penalizing the participant
- Detailed procedures for chosing how to resolve timeslots can be found above in Section 2, in the subsection on While the Term is Underway.

Step 4: Delete the fake study you just created and then go make your real one.

- If you created a fake study, you will need to let the pool administrators know to erase your study. Send an email to ppadmin@uoguelph.ca, and let them know:
  - o "I just completed the demo and want my fake study removed from the system"
  - o The name of your study.

Now that you have read through the demonstration, it's worth reading through sections 1 and 2 of this manual. If you have further questions you can contact the pool administrators at ppadmin@uoguelph.ca.

GOOD LUCK WITH YOUR RESEARCH!!