Vanderbilt Psychology Department
(A&S and Psychology & Human Development) Research Subject Pool

RESEARCHER DOCUMENTATION
for using the
SONA SYSTEM
EXPERIMENT MANAGEMENT SYSTEM
http://vanderbilt.sona-systems.com/

[Rev. Jan 6 2023]

Introduction

The Department of Psychology maintains a human subject pool for IRB-approved research studies. Rules for accessing the subject pool are included in the appendix to this document. The Experiment Management System is used for the scheduling and management of the subject pool. Students and paid participants, researchers, principal investigators, and instructors all use the system for their respective purposes. As a researcher, you can list your studies in the system, schedule the sessions (timeslots) when subjects 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 web browser.

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 (PIs). A PI can perform all the same functions on a study as a researcher. This allows a PI to operate in an oversight role and monitor the progress of their studies, and 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 otherwise noted

Logging In

Login at http://vanderbilt.sona-systems.com/

If you do not already have an account, you must request one from the webmaster (Mitchell Verdel - mitchell.verdel@vanderbilt.edu). Make sure to indicate that you are a researcher and who your PI is. 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, and those privileges are not appropriate for a researcher.

Retrieving a Lost Password

If you have forgotten or do not have your password, then you may choose to have your password emailed to you. You will see an option on the bottom of the main login page to do this. Your password will be emailed after you submit the form and should arrive in your email box momentarily.

Enter information about yourself and change your password and other information

The first time you login, go to the **My Profile** section and add your phone # and office information/lab location. You do not need to enter a University ID# (indeed this data input row may not show up on your screen). If you would like to change your password, type your new password (twice, for confirmation) in the provided boxes. If you do not want to change your password, simply leave the box empty.

It is important that you provide your phone number and office location, because this information needs to be available to research participants. 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, only your name will show (since the researcher is the primary point of contact for a study).

Email Notifications

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. By default, all Researcher accounts are set to receive a daily reminder (by email) with information about all of your study sessions scheduled for the following day. The last item in the **My Profile** section, gives you the option to turn this function off.

Working with Studies

You can create a new study at any time. However, the studies remain invisible to the participants until the website administrator approves them. After you have created the study, you will need to go back into the study details & click 'Send a Request' link for review & approval. Make sure the following requirements are met when sending your request:

1. An IRB protocol number must be listed in the study [despite the note next to the field, it is NOT optional]. See page 7 of this manual
2. The number of timeslots being requested for the study [for-credit studies only] must be included in the 'send a request' form.
3. For-pay study titles must begin with the word 'Paid' & must include 'Paid Studies' as a course restriction.
4. Prescreen restrictions for Q1 & Q16 must be set. See page 11 of this manual.

Note regarding credit hours for for-credit studies: You must include in your request for approval the number of timeslots you wish to have obligated for your study. Labs in A&S Psychology or Peabody P&HD with current IRB approval automatically are allocated 600 credits to work with fall semester, and 400 credits spring semester. 1 credit is worth ½ hour of time; if you set your study up for a different length of time per credit, this will affect the number of hours allocable to your study. We can typically provide more credits than this on an as needed basis during the fall, but not in the spring (see appendix for details). In the last two to three weeks of each semester the credit limits will be lifted regardless of the number of credits already used during the semester. Requests for additional credits can be directed to the Subject Pool Czar (isabel.gauthier@vanderbilt.edu). There are no credit limits for PAID studies (which do not count towards a lab's course credit hours). However, investigators still need to notify Mitchell Verdel (mitchell.verdel@vanderbilt.edu) before they can display any paid time slots. During the summer, we are usually limited to PAID studies only.

Adding a Study

To add a study, choose the **Add New Study** option, selecting the type of study

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 the study type or the compensation type once you have added it, so please be sure to select the correct options 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.

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.
		○ Paid
		◉ Credit

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.
		🏢🏢 Two-Part: ○ Paid ○ Credit
		🏢🏢🏢 Three-Part: ○ Paid ○ Credit
		🏢🏢🏢🏢 Four-Part: ○ Paid ○ Credit

Online External Study		An online study located on another website like Qualtrics, SurveyMonkey, Gorilla, PsychoPy (Pavlovia), REDCap, or any other website.
		○ Paid
		○ Credit

Multi-Part Online External Study		An online study located on another website like Qualtrics, SurveyMonkey, Gorilla, PsychoPy (Pavlovia), REDCap, 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.
		Two-Part: ○ Paid ○ Credit
		Three-Part: ○ Paid ○ Credit
		Four-Part: ○ Paid ○ Credit

Continue ▶

You will need to fill out a number of fields, which are explained in the following table. All fields must be filled out unless otherwise noted (below only shows the first few of these fields)

Isabel Gauthier (Administrator)

Study Information

Please enter information below about the study. The study name may not be the same as any other studies, to avoid confusion. All fields are required unless otherwise marked. Only the administrator may approve a new study so that it is visible to participants.

If you are creating a simple study, you only need to complete the Basic Study Information section. More advanced options, including pre-requisites and email notification options are available in the other sections of the form.

Basic Study Information

Study Name	
	(Participants see the list of studies in random order not alphabetical order.)
Brief Abstract (Up to 255 characters, optional)	
Detailed Description (Up to 15,000 characters, optional)	
Eligibility Requirements	None

Field	Explanation
Study Name	This is how the study is identified throughout the system. The system is 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. Experiment names must be unique and you will be prevented from adding a study if there is already a study on the system that has the same name you are trying to enter. **For-Pay studies must start with the word PAID.**
Brief abstract	This is a short one or two line description of the study. This short description will be displayed to the participants when they view the entire list of studies, so you may want to list the most pertinent details here.
Detailed description	This can be a rather lengthy description about the study, and it will show if a participant clicks on the study to get more information, before signing up. You may include basic 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). This field is optional.
Eligibility Requirements	If there are restrictions on who may participate that are not covered by the prescreen, list them here. Otherwise, leave the field as-is. If you list any restrictions, these will be displayed on the list of studies. The system does not enforce these restrictions, but it is expected a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions, which you can do after you add the study.
Duration	The amount of time, in minutes, that each study session will take. This can be a range.
Credits/Pay (see note below)	Select whether the study is for credit or for pay*, and indicate the number of credits or amount of compensation 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, where only the final study is credit-earning (but this must be explained to the subjects. If the study has a credit value, you may specify a fractional credit value up to one decimal point of accuracy (e.g. 0.5, 1.5, etc.). *If you wish to pay some subjects and give credit to others on the same protocol, you will need to list this as two separate studies on the system.
Timeslot Usage Limit	This specifies the maximum number of credit hours available to this study. This value is set by the administrator and only the administrator can adjust it. To determine the current session usage for a study, go to the **Add A Timeslot** page for the study, and the usage will be listed there.
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 as-is.

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, then you may not change who the researcher is (the PI for the study, as well as the administrator, can change the researcher). You can specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The pulldown box lists only users who are researchers.
Principal Investigator	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 PI. The pull-down box lists only users who are principal investigators. If the PI is not in the list, contact the system administrator.
IRB Approval Code	Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies. We require this to be filled in before the study is posted. It is NOT optional, despite what is indicated in the form.
Visible to Students? Active Study?	**If this is a new study, leave this set to NO. The administrator will set it to yes, when he/she assigns you credit hours.** Once set to **Yes** the study will show up on the list of studies which participants may sign up for. A study must be **Visible** 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.

Advanced Settings

Pre-Requisites	If there are any studies a participant must participate in before participating in your study, choose them here. You may select multiple studies, by holding down the **Ctrl** key and clicking the desired studies.*

*The system is currently set to enforce pre-requisites in a lenient fashion. In lenient enforcement mode, the participant must only be *scheduled* to participate in the pre-requisite studies (it is assumed they will go on to complete the pre-requisite studies). If a participant cancels a necessary pre-requisite for your study they are warned of this situation. If you have configured your study 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.

Disqualifiers	If there are any studies 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.
Course Restrictions	You can restrict access to an experiment to a specific class. For-Pay studies must include a course restriction that includes 'PAID STUDIES'.

Sign-Up Password	If you would like to have a special sign-up password for this study, enter it here. This is a password just for this study and participants must know the password to sign up. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the password to the desired participants. If you do not need a sign-up password, leave this field blank.
Is this a web-based study?	This should almost always be answered **No**. If this is indeed a web-based (online) study, choose **Yes**. Anyone doing a web-based study needs to speak with the subject pool czar to receive specific instructions.
Study URL	The URL (web address, usually starting with http://) for your study. This is optional for most studies but essential for web-based studies.
Participant Sign-up Deadline	Number of hours before the study after which the subject cannot sign-up
Participant Cancellation Deadline	Number of hours before the study after which the subject cannot cancel using the system. (Most common value = 12 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. 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. **Note**: For large studies this can end up generating a lot of email.
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 timeslot. If set to No, then it is assumed 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.

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 participant 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 previously failed to show up for the study.

Make sure to hit 'add study' when done

Web-Based (Online) Studies

If enabled, you may set up studies that are web-based (online), and these studies may be set up internally in the system (online 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 so that it is no longer web-based (but you can deactivate or delete the study). So, make this choice carefully.

Web-based studies are typically set up so there is one timeslot, and that timeslot contains the maximum number of participants you would like to participate, and the last date and time when they can participate (often, this is the end of the term). It is not recommended that you set up multiple timeslots for a web-based studies (it confuses participants), though the system will support it. It is acceptable to have multiple timeslots where more than one is not active at a time. For example, one could have had a deadline date of the end of the previous semester (and thus is currently in the past), while the current timeslot has a deadline date of the end of the current semester (i.e., in the future).

It is generally assumed that participants will participate in an online study shortly after they sign up. Because of this, 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.

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 website until they have signed up, to ensure they do complete a sign-up in the system for the study. They can see the URL after sign-up, and 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 no longer have access to the study URL. This is done to prevent participants from accidentally clicking on the URL in a subsequent semester and participating in the study twice. This restriction regarding viewing the study URL applies only to participants, and only 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 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.

Online External Studies

Online external studies are online studies which are not hosted within the system, but instead reside on some other website. This is different from online 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 some method of linking the participant's sign-up in the system to your online study, so you know who to grant credit to. Using the Survey Code feature described later in this sections allows for increased anonymity. The most automated approach is to use the External Study Credit Granting feature, where 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, and the reason is that 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.

The notification to the system is done by accessing the Completion URL for the study. 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, this URL would be loaded by the participant clicking on a link in their browser, or the participant being redirected to this link after completing the study. This is the most common method used for commercial survey products like SurveyMonkey and Qualtrics.
2. **Server-Side Completion URL**: This URL would typically be loaded by the external study (not clicked 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 would be 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 also if you are not familiar with programming, then 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 ensure the study is set up correctly as an online external study. Then, enter the URL for the external site in 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, or Inquisit, then the system will display help text just below the URL with a suggestion for how to include this. Save your changes, and 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 something like this:
http://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8&survey_code=XXXX

The server-side completion URL will look something like this (if displayed):
http://yourschool.sona-systems.com/services/SonaAPI.svc/WebstudyCredit?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8&survey_code=XXXX

In the example, 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. For SurveyMonkey studies, the client-side completion URL will be slightly different from the example above in the names of parameters, due to a limitation in how the SurveyMonkey product handles parameter names.

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, while replacing 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, then how this is accomplished depends on the external study. Usually it involves setting up the survey code number as some type of variable that is passed in 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, since 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). As a reasearcher you can request a fake participant be created by the administrator for you to use testing your study.

External Study Credit Granting with SurveyMonkey
With SurveyMonkey, note that some of the features used within SurveyMonkey may vary depending on your subscription level with SurveyMonkey.
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. In SurveyMonkey, configure the survey to accept the survey code number, as a

collector.

3. In SurveyMonkey, configure the Survey Completion option to "redirect to your own webpage", 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=170&credit_token=9185d43 6e5f94b1581b0918162f6d7e8

These features are described on SurveyMonkey's site at the following URLs:
http://help2.surveymonkey.com/articles/en_US/SurveyMonkeyArticleType/Can-I-pass-a-unique-ID-through-the-link-and-then-through-a-redirect-URL ("Can I pass a unique ID through the link and then through a redirect URL?")
http://help2.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?")

The SurveyMonkey Completion URL provided by the system should be sufficient to paste directly into SurveyMonkey. If you prefer to derive the URL from the Client-Side Completion URL, then you simply need to remove the &c=XXXX from the end of Client-Side Completion URL and place the remaining text in SurveyMonkey.

Using the SURVEY CODE Feature
Note: If you are just 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 which are administered outside the system, there is a special facility available for advanced users to track sign-ups in their web-based study 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 also be displayed next to their signup within the system, so it's easy to match sign-ups by this number. The number can be anywhere from 4-7 characters in length, and will not contain leading 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 is code that 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, then 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, then the researcher can easily link up the sign-ups in the system with who they have collected data from within their external study, so they know who to credit. 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, since the system can then be configured so that names are not displayed next to sign-ups.

To help with setting this up, 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. Note 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 Survey Monkey, Qualtrics, or Inquisit URL in the Study URL field, then the system will provide guidance (after saving your changes) about how to use the survey code feature.

Two-Part Study Settings

Is this a 2-part study? (see note below)	Select **Yes** or **No** if this is a 2-part study. **NOTE:** You can only decide this when creating a study (not when editing it), and this setting may not be changed after the study is created. See "Two-Part Studies" for more information.

You may create a two-part study in the system. 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 second part of the study (e.g. 7 to 10 days after the first part). Participants are required to sign up for both sessions at the same time, to reduce the chance they will forget to sign up for the second part. Each part of a two-part study may have a different credit value but both are the same duration (in time).

You should ensure there are enough available timeslots for both parts of the study or participants will be prevented from signing up for either part. Participants may cancel either part of their sign-up if necessary. If they cancel the first part, the second part is

automatically cancelled as well. If they cancel only the second part and the first part has already occurred, and they would like to participate in the second part later, you will need to manually sign them up for the second part (if you are allowed to do so), or ask the administrator to handle this.

Credits/Pay, Part 2	Enter the number of credits or compensation for part 2 of the study, if this is a two-part study (the value is ignored otherwise). A value of "0" is acceptable and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning.
Part 2 Duration	Can be different than Part 1 duration
Part 2 Scheduling Range	Specify the number of days (as a range) after part 1 is scheduled, that part 2 should be scheduled. This setting only applies to two-part studies. The range may be the same value (e.g. "between 7 and 7 days") if desired, but must be a whole number.

Studies with more than 3 or more session: If your study has more than two parts, there are several possibilities. First, you may have a separate study listed for each session, but with each subsequent study using the earlier study/studies as a prerequisite for signing up. Alternatively, you could ask subjects to participate in an initial study, and then have a second study listed which either requires a password or requires a the first study as a prerequisite, AND allows subjects to sign up for the same study multiple times. This second option may be easier from a management standpoint in that you would not have to juggle more than two studies on the systems.

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. If you scroll to bottom of the page, underneath the study information, you will see options which depending upon the studies status, may include **administer timeslots**, **change study information**, **contact participants**, and **delete study**.

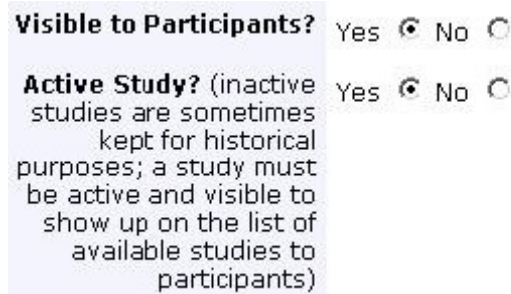Choose the **Change Study** Information link.

You will see a form remarkably similar to the one you used to *add* the study. A few options may no longer be changeable 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.

The changes you make will take effect immediately after they are saved. 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 easy way to handle past credits for the same study (in other words old credit grants for the same study would be adjusted to reflect the new credit value). If the study is nearing the end of its run, then the easiest solution is to add a note in the study description regarding the modified value, and then grant the new credit value to the new study participants using the variable credit option in the modify (administer timeslots screen (see Giving and Revoking credit below). If you prefer that the credit value is changed for the entire study, contact the administrator, who will contact Sona Systems technical support and make this change for you.

Note: With the latest version of the software, once the initial study has been made visible by the administrator it will stay visible even if you make modifications. However, you need to notify the administrator if you make a radical change (such as IRB # etc.). Also, only the administrator can alter the total number of credit hours allotted to a study.

Making a Study invisible or inactive and Deleting a study

To make a study invisible to students after it has previously been visible, select the study from the **My Studies** menu. Click on it, scroll to the bottom of the study information and choose **Change Study Information**. Near the bottom of the study information page is an option to make a study invisible to students. This option is useful in two situations. One, if you do not plan to use this study for a while, or two if you have completed running subjects in the study.
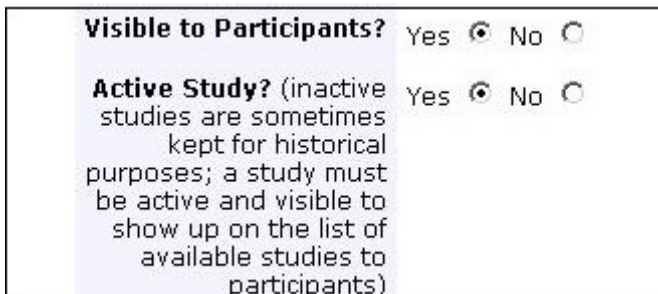
Visible to Participants? Yes ⦿ No ○

Active Study? (inactive studies are sometimes kept for historical purposes; a study must be active and visible to show up on the list of available studies to participants) — Yes ⦿ No ○

You may **delete a study** only if participants have not signed up for it. If you already have had subjects sign-up, you should make it **Inactive** instead, if you do not want it to be visible to participants. Studies that have had participants in them will only be deleted after the end of a semester.

To delete a study that has not had subjects in it, choose **My Studies** from top toolbar, click on the desired study, then choose the **Delete Experiment** option. You will see a confirmation page. Choose **Yes** (at the bottom of the page) to delete the study.

NOTE: Once a study is deleted, it cannot be restored, so use this feature very carefully.

Visible to Participants? Yes ⦿ No ○

Active Study? (inactive studies are sometimes kept for historical purposes; a study must be active and visible to show up on the list of available studies to participants) — Yes ⦿ No ○

Prescreen Participation Restrictions

The system contains an online prescreen that participants must complete. You may place participation restrictions on your study based on prescreen responses. Students are unaware which restrictions are placed on any given 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 simply not be listed to them. Note – participants never know why a study was or was not listed to them.

All studies MUST have a prescreen restriction for item Q1, so that participants who are only interested in paid studies do not see for credit studies listed and participants who are only interested in for credit studies do not see paid studies listed. Note you should select more than one answer for a prescreen response. **This is particularly important for item Q1**: If you are running a For Credit Study, you will want to select both subjects who are only interested in for credit studies AND subjects who are interested in both for credit and paid studies. Similarly, if you are running a PAID study, you will want to select subjects who answered PAID studies only, AND subjects who said they are interested in both for credit and paid studies.

Example below:

Choices:

- ☐ Only experiments offering course credit
- ☑ Only experiments that pay money
- ☑ Both experiments offering course credit and experiments that pay money

Prescreen Q16 should also be set. Any study that does not include a prescreen restriction for Q16 "How old are you?" or that has restriction set to accept minors [Less than 18 years old], will be required to submit to Cris Zerface a copy of your approved IRB documentation stating that you are approved for research with minors. Also, keep in mind that any such studies require parental consent before working with the subject. To set this prescreen restriction for only adult participants, simply check all boxes for all age groups except "Less than 18 years old". **Failure to set this prescreening or failure to submit IRB documentation if required will prevent your study from being approved.**

You may restrict a study on any question or questions on the prescreen. When 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 "18-25 years old" to the "How old are you?" question AND "Left-handed" to "Are you right handed, left handed, or ambidextrous" then they must meet *both* requirements to participate. In other words, only participants who are left-handed *and* aged 18-25 are eligible. There is no support for a logical "OR" restriction across multiple questions. Within individual questions, you may restrict to one or multiple answers. For instance, on item 1, if you want to get all participants who are interested in for credit studies, you should indicate that you want both subjects who say they are "only interested in for credit studies" AND subjects who say they are interested in "both for credit and paid studies".

To set participation restrictions, go to **My Studies**, and click on your study. Click on the **View/Modify Restrictions** option, which appears just under the study description**.** You will see a list of eligible questions that you may use for your restrictions.

Section 1

☑ The experiment scheduling system is used by Vanderbilt students receiving credit for classes and par...
☐ No experiments offer both course credit and pay for the same session. However, a few studies may off...
☐ Some of the experiments listed on this system are multi-session studies. Are you interested in parti...
☐ Are you male or female?
☐ Are you right handed, left handed or ambidextrous?
☐ How old are you?
☐ What is your highest level of education?

Section 2

We will now ask you a few questions about your vision, hearing and language abilities. You may skip any of these questions if you do not feel comfortable answering them, but a failure to respond may exclude you from certain experiments.

☑ Do you have 20-20 vision (or close to 20-20 vision)?
☐ Are you color blind?
☐ Do you have any hearing- or speech-related problems?
☑ Are you a native English speaker?

Section 3

You will now be asked some questions about your health. You may skip any of these questions if you do not feel comfortable answering them, but a failure to respond may exclude you from certain experiments.

☐ Have you ever had any neurological problems, such as seizures, multiple sclerosis or head trauma?
☐ Do you have a history of major depression, anxiety disorders, substance dependence, attention defici...
☐ Are you currently taking any prescribed psychotropic medications. By psychotropic medications we mea...
☐ Some of the experiments listed on this system involve magnetic resonance imaging (MRI). Because of t...
☐ Several additional situations may cause you to be excluded from MRI studies. First, people with seve...
☐ Thank you for answering the above questions. Sometimes experimenters request that the system send a

If the study already has some restrictions, those will be checked. 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: if you change the restrictions, it will *not* remove the study sign-ups for participants who qualified under the previous set of restrictions.** For this reason, you should probably decide on your restrictions before making the study available to participants.

Notes regarding the prescreen:

-Think twice before employing restrictions that you do not have IRB approval for. For instance, if you did not specify that taking psychotropic medications was an exclusion criterion, you would probably be in violation of your IRB approval if you now placed this as a restriction on the prescreen. In contrast, if you are recruiting both males and females, and you have already reached your quota of female subjects, it would be reasonable to use the prescreen to only recruit male subjects.

-**Under no circumstances may you view an individual subject's prescreen responses**. The system is setup to specifically keep this information confidential. If you placed restrictions based on the prescreen, then you can assume that your subjects had certain characteristics, based on the fact that they could sign up for your study. However, you cannot go back to their prescreen to directly verify their responses. In the unlikely case that you ever see a link to a subjects prescreen response, report it to both the system administrator and the subject pool czar immediately, because this would indicate a severe breach of security.

Group Emails to subjects with certain prescreen responses:

If you are trying to specifically recruit subjects with specific characteristics and are having trouble recruiting them, you may contact the administrator or the subject pool czar, and request that they have the system send out a blind email to all people in the system that meet certain criteria (for instance all left-
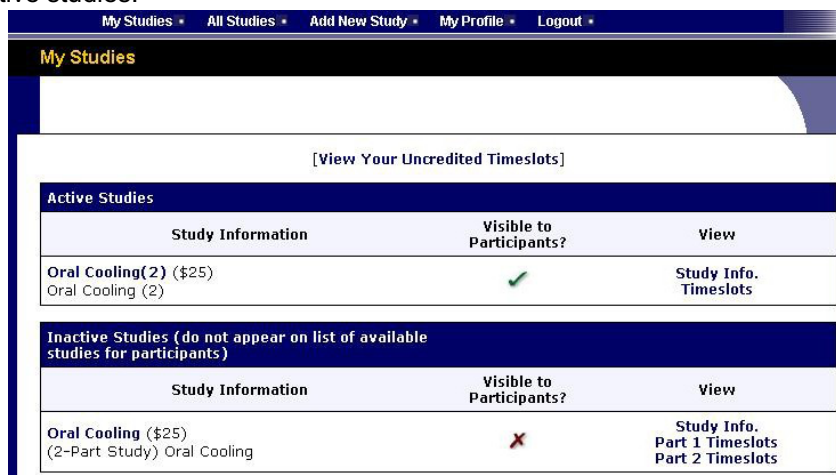
16

handed women over 25 years old). We will consider each request on a case-by-case basis.

Analysis of Prescreen responses.

It is sometimes useful for investigators to find out how many participants meet particular prescreen criteria within the subject pool (for instance, how many participants are left-handed). If you would like this information, please feel free to contact the administrator or the subject pool czar.

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, grouped by studies that are active, then inactive studies.

Viewing Other Studies

To view all studies that are visible to participants, choose **the All Studies** option from top toolbar. You will see a list first 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 can access information about these individual studies on links from the page with their progress (if they participated in the study) or if another study has the Inactive study listed as a prerequisite or disqualifier.

Working with Timeslots (Sessions)

Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study. Timeslots allow you to specify a date, time, location, and maximum number of participants for a session. If you are setting up timeslots for a web-based study, please see the administrator. All others see below.

Timeslot Usage Restrictions

You may find 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, and then adding all timeslots in the future, regardless of credit status. You may find that the usage goes down over time, as time progresses and timeslots that were in the future had no participants signing up for them. The usage and limit is listed whenever you add a timeslot, if usage restrictions apply

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** option in the **view** column.

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

Your current timeslot usage will be listed, and you will be prevented from adding a timeslot that would exceed you timeslot usage time limit. To ease 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 you add a timeslot at the same time as another timeslot (for any study that occurs at the same location), you will receive a warning (but the addition will be allowed).

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, 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 that timeslots that would occur outside normal business hours be shifted to the next business day. On the subsequent page, you may change any of it 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 would do not want to add a specific timeslot that is listed, choose No in the Add This Timeslot? Column.

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 **View** option in the timeslots column for the desired study. You will see a list of all recent timeslots. To work with timeslots more than a few days old, 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. 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 need to modify the timeslot, modify the desired information and click the **Update** button just below the timeslot information. It should be noted that participants will *not* be notified (by email) of any changes you make to the timeslot, so you should contact them if information needs to be passed on to them (a link is provided on the same page to do so). Also, if you change the maximum number of participants to a lower number than before, the system will *not* cancel the sign-ups for any participants who are over the new limit of participants. 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 is for course credit, the system will enforce timeslot usage limits, and prevent you from increasing the number of participants in a timeslot if that would result in exceeding the timeslot usage limit.

Deleting Multiple Timeslots

If you would like to delete multiple timeslots at once, you may do that as well. Such a feature is only available for timeslots which have no participants signed up. To do so, select the desired experiment and choose Timeslots. At the bottom 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 because of a lack of available timeslots to delete.

After going to that page, you will see a list of timeslots eligible for deletion. Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to proceed.

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 **Timeslot** option on the **View** column for the desired study. (In the example below there is only a single timeslot, but you could see many).

Recent Timeslots			
Date	# of Participants	Location	Modify
Thursday, August 19, 2004 3:15 PM – 4:30 PM	1	219 Wilson Hall	Modify
	subject name	: Awaiting Action	

Select the timeslot you would like to see details on, and click the **Modify** button. The participant's name, email and phone number will be shown.

Sign-Ups (1 Participant) 0 available spaces		Credit Granted	No-Show (Penalty Assessed)	No-Show (No Penalty)	No Action Taken	Comments
Name email phone	[Cancel]	○ 1 ▾ credit(s)	○	○	⊙	
		Update Sign-Ups				

Granting or Revoking Credit

The system is set up to automatically grant credit during the evening, on the day following the study. If you must change the amount of credit given from the default setting (variable credit studies) or if a subject no-shows for a study, it is critical that you submit this information within 24 hours of the session.

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 by name. If the participant properly participated in the study, click the **Credit Granted** button next to their name. If the participant did not appear for the timeslot, choose the **Student No-Show** button. For credit studies, you should see two "No-Show" options. One option allows you to assess a penalty, and the other does not. Studies that are for pay only will always have only one type of No-Show option. You may choose not to assess a penalty in the rare situation in which the participant had an acceptable reason for failing to attend the study.

Variable Credit: If the study is for credit there will also be 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 (if they deserve a lower credit grant), 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. When giving a different credit value than the default, you may enter from .5 credits (the minimum, equivalent to 15 minutes of subject time) to twice the default value for the study. If your study has highly variable completion time, we suggest list in the description a range of values, so that subjects are not misled about the amount of time or credits associated with the study.

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.

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) receive an email when you do this.

If you leave any sign-up for a timeslot that in the "No Action Taken" stage, the system will warn you upon your next login about the offending timeslot that has not been dealt with yet. This is usually not a major concern, because the system automatically will 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 change the automatic credit grant later if it was in error.

Canceling a Sign-Up

In rare occasions, you may need to cancel a participant's sign-up. If you go to the timeslot in question, an option to cancel appears after the participant's name. The system should automatically send the subject an email. However, it does not provide the participant with any information about why the study was cancelled (which is sort of rude), so we recommend that you first send them an email explaining why you are canceling the study (see below). If you must cancel the timeslot less than 24 hours before the study, we recommend also phoning the subject. **Do not cancel an experiment in the last two weeks of the semester without granting credit!** The participants may not be able to find another slot to replace it. If you need to cancel an experiment during the last two weeks of the semester, then grant the subject credit and notify them that the experiment will not occur as scheduled but they have received credit due to the timing within the semester.

No Shows: Make sure to indicate if a subject fails to show for a study. Students are penalized one credit for failure to show for an experiment. If participants fail to show three time for experiments, an email is sent to the administrator who may revoke that person's logon permissions. If a participant contacts you before the study, but after the cancellation deadline, **you may choose to cancel the study, rather than having them get a no show penalty.** This is up to the researcher, and is usually done when the participant has a reasonable excuse and clearly tried to notify the researcher that they could not make the study.

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 to contact an individual participant. If you have multiple participants for the same timeslot you can send them a bulk email by clicking the **Contact All Students** 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.

Note: Participants will already be receiving a reminder about upcoming studies the day before they are scheduled to participate. Ask your administrator for more information.

Viewing Uncredited Timeslots

You may view a list of all your completed timeslots that have not been credited yet by choosing the **View Uncredited Timeslots** option from the **My Studies** page (it is near the top of the page) Click the **View** button to deal with any of the timeslots listed. (See administrator for special instructions regarding online studies.

Manual Sign-Up

You may manually sign up participants for your study. There are a number of situations where this is desirable. If the participant happens to show 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. The participant in many cases cannot sign up on their own in this situation, because the sign-up deadline has passed. You may also sign up a participant for a study that has already occurred, if necessary.

A manual sign-up overrides any restrictions you have placed on the study (e.g. pre-requisites), though you will be warned if you are overriding any restrictions. The participant will receive an email when you sign them up for a study. You may only sign up participants for your own study.

To sign up a participant for a timeslot, you must first create or find the desired study and timeslot. Choose the **My Studies** option from the top toolbar. Click on **Timeslots** in the **View** column for the desired study, then select the timeslot you would like to deal with, and click the **Modify** button.

At the bottom of the page, you will see a **Manual Sign-Up** option. You can sign the subject up using either the participant's **User ID** or their last. After submitting the form, you will see a confirmation page that also lists any restrictions on the study. Choose **Sign Up** to complete the sign-up.

Manual Sign-Up

You may sign up a specific participant for this timeslot, using the feature below. You may also sign up and immediately credit participants in bulk for this timeslot, using the [**batch credit grant**] feature.

Username Manual Sign-Up:
Sign up participant with User (Login) ID [   ] [Sign Up >>]

Last Name Manual Sign-Up:
Sign up participant with the last name [   ] [Sign Up >>]

Feedback requirement (for credit studies)

Researchers **must** provide their for credit participants with feedback about the nature of the experimental question after the study is complete. This is a critical component of the student's learning and therefore it is essential that we provide this information. You may ask the student not to divulge the nature of the experiment to their classmates if you are concerned about the experiment becoming compromised. Failure to provide feedback compromises the mission of the subject pool, so please take this rule seriously!

Problem Subjects;

If you suspect that a subject has provided bogus data for your study, please report this immediately to the webmaster or subject pool czar. We will ask for details. This is not a breach of confidentiality because the on-line consent statement that participants acknowledge specifically addresses this issue. Participants are aware that they may be barred from using the system if there is sufficient evidence that they did not provide appropriate and honest effort when completing the study.

Manual Sign-Up

You may sign up a specific participant for this timeslot, using the feature below. You may also sign up and immediately credit participants in bulk for this timeslot, using the [**batch credit grant**] feature.

Username Manual Sign-Up:

Sign up participant with User (Login) ID [   ] Sign Up >>

Last Name Manual Sign-Up:

Sign up participant with the last name [   ] Sign Up >>

Appendix: Subject Pool Rules

1. Who is in the human subject pool?
There are 3 principle groups of subject who participate in the pool.

a) Students in Gen. Psych. (e.g., 101, 115, 1200, and 1630) who must meet a research participation requirement (typically 12 credit (6 hour) requirement).

b) Students in other Psychology classes who are participating to receive extra credit for their classes

c) Paid research subjects who are recruited from the general Vanderbilt or Nashville community

2. Who may access the subject pool?
The pool is open to all psychology faculty (A&S and Peabody), their graduate students, and post-doctoral fellows. Investigators with secondary appointments in the department may also access the pool with special permission. Individuals who are not directly working with a member of the psychology department faculty may not access the pool of subjects receiving course credit. However, upon permission of the subject pool czar (isabel.gauthier@vanderbilt.edu) they may be allowed to post for PAID studies.

3. Credit Distribution:
The total number of subjects in the pool is variable*. In the Fall, labs of primary faculty members in the two Psychology Departments are given 600 credits. In the Spring (the pool is smaller) and each lab is granted 400 credits. (1 credit = a half hour of student time). In the Fall, we can usually grant extra credits, but in the Spring the subject pool is usually too limited to provide extra credits. Larger labs (those with more graduate students and post-docs) may request more than their allotted credits, and these will be granted presuming the subject pool for the semester can handle it. However, the subject pool directors may hold off freeing up the additional credits until the middle of the semester depending upon the level of demand within the subject pool. In the last few weeks of the semester the credit limits are lifted to allow unrestricted use of the pool.

If you have a secondary appointment, you should speak to the subject pool czar directly if you or your graduate students wish to access the pool. This is granted at the Subject Pool Czar's discretion, and is limited to individuals who facilitate student enrollment in the pool (for example, by offering extra credit for research participation), or in rare cases because the individual provides substantial extra service to their department.

* The following procedures will be used over the course of the semester to allocate credits to labs and to make adjustments in the initial allocations:

    (a) Based on the total number of students and available credit hours across both psychology departments and historical use, a maximum limit per participating lab will be set by the two faculty liaisons at the beginning of the semester. At this stage, the maximum limit per lab will be the same for all labs irrespective of department (typically 600 credits in the fall and 400 in the spring).

    (b) Starting in week 6 of the semester (or earlier if they deem it necessary) and continuing on a weekly or bi-weekly (every other week, not twice a week) basis, the two SONA faculty czar will get together with the staff SONA manager to review the usage counts for each lab participating in the current semester. The focus of the review will be potential departmental inequities in usage vs. contributions to the pool that appear to be systematic and not just due to random fluctuations.

    (c) Over the course of the semester, any PI's whose labs are approaching or anticipated to approach the lab credit limit and who would like to raise the limit can make a request to the two liaisons for more credits. This request will be reviewed at the next meeting of the liaisons and the staff SONA manager. Final decisions concerning increases or decreases in limits rest with the SONA faculty czar.

4. Paid Studies:

In contrast to the For-Credit subject pool, we are much more liberal in allowing access to the For-Pay subject pool. This is open to behavioral studies conducted by members in other departments, at the discretion of the Subject Pool Czar. In return for accessing the pool, researchers outside of the department of psychology are asked to help defray the cost of advertising for the subject pool. In the summer, members of the psychology department who intend to use the For Pay subject pool are requested to contribute to paying for advertising the pool.

5. Missed appointments

Please try to not miss appointments. Subjects may be awarded 1 credit if they show up for a study and the researcher fails to show up within 15 minutes of the scheduled appointment.