1. **Create your account:** Contact the Human Subjects Lab Pool Administrator (Ruth Kim, ssreslab@uci.edu), and request an application for a Researcher Account.
   - Complete the HS Pool Application form and turn it in at the front desk in SSL 488.
   - Please also email the following UCI IRB-approved documents to ssreslab@uci.edu:
     1. Protocol Narrative
     2. Social Science HS Lab Pool Ad
     3. Consent Form *or* Study Information Sheet (if a waiver of written consent has been granted)
   - *NOTE:* This research account will allow you to post MULTIPLE experiments on Sona. This means you will no longer need a separate experiment number for each experiment you choose to advertise.

2. **Log-in:** Go to [https://uci.sona-systems.com](https://uci.sona-systems.com), enter the account name and password that you have been issued. You can change your password later if you choose.

3. **Welcome screen:** You will be able to make selections such as:
   - My studies- view and edit all your studies; view, add, or change timeslots; grant or deny participant credit.
   - All studies- view all studies available to participants.
   - Add new study- create a new study.
   - Pretest Results- analyze participant pretest results (demographic data).
   - My Profile- change your password; modify contact information; change your e-mail address.

4. **Add new study:** To create a new study, click on “Add new study” along the top menu bar. Select which type of experiment: standard or two part.
   - Setting up the details –
     - Study name: Give your study a name that will be easy to remember when talking about it. We no longer use “experiment numbers” when referring to experiments, so a simple name will make things easier when discussing different experiments.
     - Remember that each experiment in the system must be unique. Keep within the guidelines and refrain from using words that would attract students to your study over another (e.g., “fun”, “easy”, “quick”).
     - Examples of a good study name: “Relationship Study,” “Research on personal views,” or even “Johnson Lab Study #1.”
   - Brief Abstract –
     - Students will see this description right under the study name on the list of experiments, so make sure this is clearly written.
   - IRB approval code –
Type in your HS number and expiration date here. Information will be verified to ensure accuracy.
Experiments will be removed from view once the expiration date has passed, so keep this number up to date once you receive your approvals.

- Active Study?
  - Choose YES to make the study viewable by students.

- Advanced Setting –
  - Select your options and then click “Add the study” when you have finished.

- You can edit these settings at any time in the “My studies” section along the top menu bar.

5. Making your study viewable:

- Your experiment will not be viewable immediately.
- The Subject Pool Administrator MUST verify your IRB approval information before students will see your experiment listed. This typically takes ~ 1 working day.
- You may edit your experiment and create appointment time slots while awaiting this approval.

6. Creating appointment time slots:

- From the “My Studies” area, select “Study Info” next to the experiment for which you would like to create time slots.
- Time slots can be made to accommodate single students or groups of students.
- Select View/Administer Time Slots (if you have a 2-part experiment, it will give you the Part 1/ Part 2 option).

7. Adding timeslots:

- Towards the bottom of the page, you will see the option to add single or multiple timeslots. If you have a two part experiment, it will give you the option to work on the slots for Part two.
  - Note: Two-part experiments will be allowed to indicate the criteria for the second timeslot, such as “one week from the first timeslot,” etc.

- Adding a multiple timeslot –
  - You may create a series of timeslots on any given day.
  - Set the number of timeslots, date and time for the first timeslot, then set the time between timeslots.
  - When it asks you if you would like to move timeslots to business hours, select NO in most cases.
  - Set the number of participants allowed at each timeslot and set the location.

- Copy timeslots from one week to another:
  - This feature is found when you select the CREATE MULTIPLE TIMESLOTS option.
  - It is a very helpful feature if you would like to copy all of the timeslots from any given week to a new week.
  - Select the week which you would like to copy the timeslots of and then select the new week that you would like to create.

8. Manual Sign-Up

- This option is available in the timeslot management area.
If you wish to make an appointment for a participant in a timeslot that already exists, go to the timeslot and choose “Modify.”
At the bottom of the page, you will see the Manual Sign-Up option.
Use either their User ID/Login or their Last Name.
If the timeslot that you wish to register a participant for does not exist, you will need to create the timeslot first.

9. My Studies: In the My Studies area, you can manage each experiment:
   - To view study info: Click on any of your experiments to show the details.
   - To issue credits & penalties: Click on “View Your Uncredited Timeslots.”
   - To work on timeslots: Click “Timeslots.”

10. Managing Credits & Penalties
   - Click My Studies on top menu.
   - To grant credit, select the “Grant Credit” option for the selected students, and update the selection by pushing “grant credits” on the bottom of the page.
   - To give a penalty or an alternate amount of credit: select the DATE/TIME and you will then see a listing of all participants for that exact timeslot.
   - Always make sure to click the “Update Sign-Ups” at the bottom when you are done.
   - The “No Action Taken” option is used when you DO NOT wish to grant a credit or penalty at this time.
   - Use the “Comments” area if you wish to explain the action taken. The Student will see the comment.

11. Batch credit: Giving credit to multiple students at one time.
   - First, choose a timeslot, or create one for your batch credit
   - Click on “View/Administer Timeslots.”
   - Click on “View All Timeslots.”
   - Locate the timeslot in question.
   - Choose “Modify.”
   - In the area towards the bottom where it says “Manual Sign-Up,” you will see a link called “Batch credit grant.” This link will allow you to issue batch credit.
   - *Note: Batch credit must be listed by USER ID, which is a unique log-in name that the subject created.

12. Changing Credit & Penalties
   - Go to “My Studies” on the top menu bar
   - Click on the “Timeslots” next to the experiment in question
   - Click on “View All Timeslots”
   - Locate the timeslot in question
   - Choose “Modify.”

13. All Studies
   - This is a listing of ALL the studies that are available and viewable to participants. It includes not only your experiments, but the experiments of all researchers.
14. **Pretest result – for entire subject pool**
   - Demographic Data: Participants are required to fill out a short questionnaire when they log-in for the first time. The information collected is as follows:
     - 1. Gender
     - 2. Ethnicity
     - 3. Year in School
     - 4. Is English your native language?
     - 5. Age
   - You can view the results of this data collection for the entire subject pool, or by your individual experiments.
   - To view the entire subject pool data, click on “Pretest Results” on the top menu bar.
   - Select which data you would like to view, and select “View Response Data.”

15. **Pretest results – for single study**
   - Click on “My Studies” on the top menu bar.
   - Click on the “Study Info” for the experiment you wish to view.
   - On the bottom, select “Download Pretest Responses.”

16. **Cancellations:** How to cancel a scheduled appointment
   - If you need to cancel an appointment, view the timeslot of the appointment and select “Modify.”
   - Select “Cancel” next to the student’s name.
   - The student will receive an automatic e-mail from the system announcing the cancellation.
   - *NOTE:* If you cancel without giving 24 hours’ notice, the participant is due ONE CREDIT by default. Do this on the same page with a comment.

17. **Contact Information:**
    If you have any questions or concerns about the use of the Human Subjects Lab Pool, please contact Ruth Kim, HS Lab Administrator.

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    University of California, Irvine  
    488 Social Science Lab  
    Irvine, CA 92697-5100

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