SONA SYSTEMS INSTRUCTIONS

1. Requesting a Researcher Account:

- In order to post your study/studies on Sona Systems, you will need to obtain a Researcher Account.
- To request an account, please submit the following documents to the HS Lab Pool staff at: ssreslab@uci.edu

| 1. HS Lab Pool Application Form |
| 2. IRB Approval Letter (for Expedited Protocols) *or* IRB Confirmation Letter (for Exempt Registration) |
| 3. Protocol Narrative |
| 4. HS Lab Pool Ad Form |
| 5. Consent Form *or* Study Information Sheet (if a waiver of written consent has been granted) |
2. Log-in:

- Go to the SONA Systems website https://uci.sona-systems.com and login.
- You will receive an e-mail regarding your login account information from Sona Systems. When you login, change your temporary password.

3. Welcome screen:

<table>
<thead>
<tr>
<th>My studies</th>
<th>view and edit all your studies.</th>
</tr>
</thead>
<tbody>
<tr>
<td>All studies</td>
<td>view all studies available to participants.</td>
</tr>
<tr>
<td>Add new study</td>
<td>create a new study.</td>
</tr>
<tr>
<td>Prescreen Results</td>
<td>analyze participant prescreen results (demographic data).</td>
</tr>
<tr>
<td>My Profile</td>
<td>change your password; modify contact information; change your e-mail address.</td>
</tr>
</tbody>
</table>

4. To Setup a New Study:

Select “+ Create a new study” under “Add new study”.
Next, carefully select the type of study and the compensation type.

1. **Standard** – takes place at a specific place with only one part.
2. **Multi-part Standard** – not online, takes place in multiple parts. Participant must sign up for all parts.
3. **Online Internal Study** – online study set up within the Sona System.
4. **Online External Study** – online study set up outside the system (i.e. Qualtrics, Survey Monkey, etc.).

5. Input Study Information:

The study name may not be the same as any other studies currently running in Sona Systems. This is to avoid confusing the study participants. All fields are required unless otherwise marked. All studies must have an approved IRB number (i.e., HS#) and expiration date. No timeslots may be posted after the expiration date.* If you are creating a simple study, you only need to complete the Basic Study Information section. More advanced options, including prerequisites and email notification options are available in the other sections of the form.

*Only the HS Lab staff may approve a new study (so it’s visible to participants) or make changes to the expiration date.

- **Can edit in “Change Study Information” under Study Menu**

### Study Information

- **Study Name**—Title of your experiment.
- **Brief Abstract** – One-line description of the study. Be clear and concise.
- **Detailed Description** – Information about the study. You may include basic HTML in this area. For example, if you would like to add a carriage-return (paragraph break), simply type `<p>`.
- **Eligibility Requirements** – List any qualifiers/disqualifiers. For example, if you are looking for left-handed participants, write “left-handed participants only.” Please note that these eligibility requirements are not enforced by the system, you should verify that the participants meet these requirements upon arrival.
- **Duration** – The maximum amount of time, in minutes, that each study session will take.
- **Credits** – Enter the number of credits earned for the study. ½ hr = 0.5 credit, 1 hr = 1 credit, etc.
**Preparation** – Enter any advance preparation a participant must do here (i.e. “Do not eat 2 hours before session”). If there’s no preparation requirements, leave this field empty.

**Researchers** – Select co-researchers for this study. Your name will automatically be selected.

**IRB approval code** – Enter in the IRB HS# (i.e. ####-####)

**IRB approval Expiration Date** – Enter in the date when the IRB expires. This can be found on the IRB approval letter.

**Approved?** – Request approval. Only the HS Lab Staff can approve a study.

**Activate Study**—Choose YES next to “Active Study” to make the study viewable to students.

REMINDER: The study must be approved (by the HS Lab) and active (by you selecting “yes” to the above question) in order for your study to be viewable to participants in Sona.

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### Advanced Setting

- **Pre-Requisites**: This allows you to choose studies a participant must have participated in before signing up for your study. You may select multiple studies and can specify that all or at least one of the studies need to be taken. Select from “My Studies” or “All Studies” list.

- **Disqualifiers**: This allows you to choose studies a participant must NOT have participated in before signing up. For example, if your study is extremely similar to another study, you can select the study title and prevent the participant from signing up for your study.

- **Course Restrictions**: If you would only like participants enrolled in a specific course, select the eligible courses here. If it doesn’t matter, leave blank.

- **Invitation Code**: If you would like to have a special sign-up password for a study, enter it here. This is known as an invitation code. Participants must know the code to sign up for the study. Leave blank if participants do not need a special password to sign up.

- **Is this a web-based study?** This will list if the study is an online study, and the type of online study. This setting cannot be changed after a study is added.

- **Study URL (optional)**: Enter in the URL (web address, usually starts with https://) for your online external study. This is only required for web-based studies administered outside the system.

  **Setup Automatic credit granting with Qualtrics**: See instructions.

- **Participant Sign-Up Deadline**: Enter the deadline before the study is to occur that the participant may sign up, in whole hours.

- **Should the Researcher receive an email notification when a participant signs up or cancels?** If set to Yes, the researcher will be notified.

- **Can a participant sign up for this study more than once?** If you would like to allow participants to sign up for your study more than once, choose Yes. Otherwise, choose No. If No is chosen, participants may only sign up for the study once even if they previously failed to show up for the study (a no-show).

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When you have finished, click “Add This Study”. You can edit these settings at any time in the “My studies” section under “Change Study Information.”

6. **Making your study viewable:**

- Your experiment will NOT be viewable immediately. The HS Lab Pool staff must review and approve your study in order for the experiment to be posted.

- Please feel free to contact us at: ssreslab@uci.edu with your study title and approved documents to request approval.
7. Creating appointment timeslots:

- After you create your study, under “My Studies,” select “View, add, or edit timeslots.”
- Select the title of the study you need to add timeslots.
- Select “View/Administer Time Slots” (if you have a 2-part experiment, it will give you the Part 1 and Part 2 option).

You will see a menu like this:

![Image of menu with options for adding timeslots]

8. Posting standard study timeslots:

**Note:** If you would like to use available space in the HS Lab Pool, located on the 4th floor of the Social Science Lab building, please make sure to reserve use of the space before posting timeslots on the Sona website. You can check for availability of space in person (SSL 488), by email (ssreslab@uci.edu), or by phone (949-824-5412).

- To add one timeslot, click “Add a Timeslot.”
- To add multiple timeslots, click “Add Multiple Timeslots.”
- *You CANNOT post timeslots after the Friday of week 10.*
- Set the number of timeslots, date and time for the first timeslot, then set the time between timeslots.
- Set the number of participants allowed at each timeslot and set the location.
To add one timeslot, click “Add a Timeslot”

To copy timeslots from one week to another, use the feature **ADD 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.

9. **Online Study - External**
- Online studies administered through Qualtrics or Survey Monkey can be conducted on SONA.
- These surveys can easily be set up so that participants are **automatically granted credit** for participating in your study, and it prevents participants from taking a survey more than once.
- To setup **automatic crediting**, please request instructions from the HS Lab staff.
### Study Information

<table>
<thead>
<tr>
<th>Study Name</th>
<th>ONLINE TEST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online External Study</strong></td>
<td>![Computer Icon]</td>
</tr>
</tbody>
</table>

This study is an online study located on another website. Participants are not given access to the Study URL until after they sign up for the study.

<table>
<thead>
<tr>
<th>Study Status</th>
<th><strong>Not visible to participants</strong>: Not Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inactive study</strong>: Does not appear on list of available studies</td>
<td>![Email Icon]</td>
</tr>
</tbody>
</table>

**Click to send approval request to the Administrator**

<table>
<thead>
<tr>
<th>Duration</th>
<th>30 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credits</td>
<td>0.5 Credits</td>
</tr>
</tbody>
</table>

**Website**

- ![View Study Website Icon]
- ![Instructions Icon]

You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add `&d=%SURVEY_CODEX` to the end of the URL to make use of this feature.

**Detailed Help**

Use the "How to give Automatic Credit on Sona when using Qualtrics" instructions
10. Posting timeslots for Online Study:
For web-based online studies, you still need to add a timeslot.

- Select “View/Administer Time Slots”
- Click on “+ Add a Timeslot”

It is not recommended that you set up multiple timeslots for a web-based study because it confuses participants.
- 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 the participants soon after they sign up.
- In the case of an “external online study,” like Qualtrics, you will need to setup credit granting so it occurs automatically. **Setup Automatic credit granting with Qualtrics.** See instructions.
- **Do not grant credit** until the end of the quarter. If the status is “awaiting credit” for your external online study, this means that participant hasn’t completed your online survey because you have the automatic crediting setup.
11. Delete Timeslots

- To delete timeslots click on the existing timeslot and select the timeslot and click delete.

![Timeslot Information](image)

12. Manual Sign-Up – Sign up participants that haven’t already signed up for the study

- 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.

![Manual Sign-Up](image)
13. **Grant/Give/Change Credit**

- SONA assigns all participants a random, anonymous 5 or 6-digit ID code. This ID code is the only way you will be able to identify any participant through SONA. You might want to ask participants for their ID codes during your study.
- Go to “My Studies” on the top menu bar
- Click on the study title
- Select the timeslot you want to issue credit for
- Choose “Modify”
- Select the correct option and enter any comments you want added to the e-mail that will go to the participant notifying them of their credit change.

![Select option](image)

To save any changes, click this button

14. **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.

![Manual Sign-Up](image)

**Select for Batch credit**

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 Batch Credit Grant.
**Batch credit continued...**

*Note: Batch credit must be listed by USER ID, which is a unique log-in name that the subject created.*

**Batch Credit Grant**

You may use this form to manually sign up and grant credit to a set of participants for this timeslot. You may only sign up [15 participants] because there are currently only 10 available spaces for this timeslot. Participants who are already signed up for this timeslot will not be signed up again for the same timeslot.

**Credit Comments**

(explain reason for the credit)

**Participant List**

Type in a list of User IDs, separated by spaces

(Example: jsmith jdoe bsmith)

(list UCInetID of participant names, separate by space)

**Go to Confirmation Page**

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15. **Contact Participants** - Emailing people who have already participated in your study

- Go to “My Studies” at the top of the page. Select the study you need to email the participants.
- Click “Contact Participants” at the bottom of the page
- Email Participants who were/are:
  1. granted credit
  2. no-show
  3. awaiting action
  4. signed up for the timeslot during a certain period
- Enter the message you want to send in the “message” box and click “send message”
16. All Studies List
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 other researchers.

17. Prescreen – Demographic data for entire subject pool

- Participants are required to fill out a short questionnaire when they log-in for the first time.
- The information collected is as follows:
  - Gender, Age, Highest Level of Education, Marital Status, Religious Affiliation, Race, UCI student, Left-Handed or Right-Handed, Smoker, Corrected Vision, fluent English speaker, Major, etc.
  - Specific Question:
    - Are you male or female?
    - What is your age?
    - What is the highest level of education you have completed?
    - What is your current marital status?
    - What is your religious affiliation?
    - Please indicate your race or ethnicity:
    - How long have you been enrolled at UCI?
    - Are you left-handed or right-handed?
    - Do you smoke?
    - Do you have corrected vision? (Wear glasses/contacts)
    - What language are you most fluent in?
    - What is your major area of study (by school)?
    - What country/province are you a citizen of?
    - How long have you lived in the USA?
    - Do you have children (i.e. responsible for raising a dependent)?
    - Do you smoke?
    - Can you speak more than one language?
    - How many hours per week do you USUALLY work at your job?
    - What is your current employment status?
    - Political orientation
    - What country were you born in?

- Researchers have access to the prescreen responses of all participants who partake in their studies.
- Researchers can also set it so participants must have given certain answers in order to sign up for their study.
- The prescreen is also reset every summer, and questions are added and taken out.
- If you would like to see any specific question added, please contact the Lab Administrator.
- You can view the results of this data collection for the entire subject pool, or by your individual experiments.
- Select “Download Prescreen Responses” to Download/view Question Key or Download/View Data.
  To set a restriction using the prescreening test.
18. Set Restriction through Prescreen

- Select your Study.
- Click on the “View/Modify Restrictions” under Restrictions.
  On the bottom, select “Download Pretest Responses.”

Current Prescreen Restrictions: None   Status will say “Active” if you’ve set the restriction

Participation restrictions may be placed on a study based on a participant’s prescreen responses. Participants will be unaware that the study has such restrictions placed on it. They will see only the studies for which they qualify, and none of the studies for which they do not qualify.

If you would like to determine how many participants meet a set of criteria, you may want to run a prescreen qualification analysis.

Prescreen questions that may be used as part of a study participation restriction must be multiple-choice questions (where only one choice may be selected), so only eligible questions are listed below. In addition, the prescreen may have been configured such that a sum or average score was computed for an entire section (for each participant). Those will also be listed if there are any.

If a participant signs up for this study, there will be an option to view that participant’s entire set of responses to the prescreen. Listed below are all questions that are eligible for participation restrictions. Check the items that you would like to base the study’s restrictions upon, and on the subsequent page there will be the option to define these restrictions down to specific responses for each question.

Section 1

Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.

- Gender
  - Are you male or female?
- Age
  - What is your age?
- Level of Education
  - What is the highest level of education you have completed?
- Relationship
  - What is your current marital status?
- Religion
  - What is your religious affiliation?

Listed below are the restrictions you have chosen. Check the options that your desired participant must have chosen. To qualify to participate in a study, participants must have chosen one of your selected choices for each question.

If you have chosen to restrict based on the sum or average computed score for a section, you will see all possibilities within the allowable range of responses, computed down to 1 decimal point where applicable.

Changes will take effect immediately after they are saved. Participants who qualified for the study under the previous set of restrictions will not have their sign-up removed.

Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.

Age
What is your age?

Choices:
- 17 and under
- 18-21
- 22-25
- 26-30
- 31-40
- 41-50
- 51 and over

Save Changes
19. **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 hr notice, the participant should receive **CREDIT**. Contact the Lab Administrator for the participant to receive credit through “**Experimenter No-Show**.”

20. **Participant *No-Show* Policy**

- If a participant reaches **two no-shows** during the quarter, their account is automatically **DEACTIVATED** and they are no longer able to sign up for studies for that quarter.
- All no-shows are cleared at the beginning of each quarter and deactivated account reactivated.

21. **Contact Information:**

If you have any questions or concerns about the use of the Human Subjects Lab Pool, please contact us at: ssreslab@uci.edu.