

SONA Research Participation System

Researcher Instructions and Guidelines

Overview

All faculty and advanced students who are conducting research with human participants using the [SONA](#) research participation system must abide by the guidelines outlined in this document.

Use the links below to jump to specific sections of this document as needed:

[SONA Rule Violations](#)

[Adding Time Slots to a Study in SONA](#)

[Study Approval](#)

[Assigning Credit to Participants in SONA](#)

[Consent Forms](#)

[Setting Up Auto-Credit Granting for Online SONA Studies Using Qualtrics](#)

[Becoming a Researcher in SONA](#)

[Data Collection Deadline](#)

[Adding a New Study in SONA](#)

SONA Rule Violations

Graduate assistants and the SONA coordinator, Dr. Skyler Sklenarik, will monitor the SONA system for rule violations throughout the semester. Please note the following:

1. The 1st time a researcher violates any SONA rule, they will receive a warning email from the SONA coordinator. A student-researcher's instructor will be copied on this email and any further correspondence.
2. The 2nd time a researcher violates any SONA rule, another warning email will be sent.
3. The 3rd time a researcher violates any SONA rule, the researcher's study will be removed from the SONA system. The researcher's faculty supervisor must contact the SONA coordinator to allow the study to continue. Faculty supervisors may require researchers to demonstrate their knowledge of SONA rules before allowing the study to continue.

Please be sure to read this entire document for a complete listing of rules. If you have any questions or concerns about SONA rules, please reach out to your research supervisor, course instructor, and/or the SONA coordinator (s.sklenarik@ccsu.edu).

The following is a brief summary of rule violations that will lead to warnings:

1. Any study description violation (see [below](#) for specific details).
2. Failing to show up OR showing up more than 10 minutes late to a scheduled study session.
3. Failing to [assign credit](#) to participants within 48 hours of their participation.

4. Canceling a study session less than 24 hours before the session is scheduled to take place.
 - a. If a researcher must cancel a study session less than 24 hours in advance, they **CANNOT** just delete the study slot and record of participants who were scheduled to participate. Instead, the researcher MUST (1) email all participants and inform them about the cancellation ASAP and (2) AWARD FULL CREDIT to all participants who had signed up for the cancelled study slot(s).
 - b. If a researcher must cancel a study session *more* than 24 hours in advance, the researcher can email participants to let them know the study session is canceled and that they are free to sign up for the study at another time. The researcher does not need to award credit in this case.

Study Approval

ALL research projects involving human subjects MUST first be reviewed and **APPROVED** by either:

- A. The faculty supervisor (e.g., a PSY 302 instructor). This option is for student projects NOT intended for publication or presentation outside of CCSU.
- B. The **CCSU Institutional Review Board** (IRB), which is a university committee that evaluates the ethical nature of each proposed study. If you seek approval from the CCSU IRB as a student researcher, you should work with your faculty supervisor to create the submission.

Failure to complete the study approval process will render you ineligible to utilize SONA, as dictated by University and Federal regulations.

Consent Forms

In your consent form, please state that participants (a) **must be 18 or older** OR (b) **must have submitted a completed underage participation form to their instructor in order to participate.**

- There is no need to restrict participation to students who are 18 or older, though you may choose to do so if that is your intent.
- Underage students may participate as long as they submit an underage participation form signed by a parent/guardian to their instructor (i.e., they have parental consent to participate in research).
- Please note that underage participants DO NOT need to show their signed parental consent form to experimenters. They submit their signed parental consent form to their course instructor, who passes it along to the SONA coordinator.
- Here is an example consent form statement: *“My signature indicates that I am either 18 years of age or older, or that I have filed a parental consent form with my instructor.”*

Please also include the following notice in all consent forms:

- A. If your project received ethical approval from your faculty supervisor: *“If you have questions about your rights as a research participant or if you have a research-related complaint, please contact Dr. Skyler Sklenarik at s.sklenarik@ccsu.edu or (860) 832-3101.”*

- B. If your project received ethical approval from the CCSU IRB: “If you have questions about your rights as a research participant or if you have a research-related complaint, please contact the IRB Administrator at irb@ccsu.edu.”

Becoming a Researcher in SONA

Once your study has received ethical approval, you may add your study to SONA. To post your study in SONA, you must first request to be added to the SONA system as a researcher by following these steps:

1. Request a researcher account.
 - If you are PSY 302 or PSY 597 student, your instructor will create your researcher account.
 - If you are not in one of the classes listed above, please contact me at s.sklenarik@ccsu.edu. I will create your researcher account if I can confirm you are being supervised by a faculty member in the PSY Department at CCSU.
2. Once you are added into the SONA system as a researcher, you will receive an email from SONA with your login information.
 - The email will be titled “Research Participation System Login Information” and come from an account called “Research Participation System [ccsu-admin@sona-systems.net].”
3. Once you receive your login info via email, return to <http://CCSU.sona-systems.com>, then enter your User ID and password.
 - Once you log in, you can change your password and edit other information under the *My Profile* tab if you’d like.
 - **NOTE:** The *My Profile* tab also has an option to receive reminders of your scheduled appointments, which you may find useful.

Adding a New Study in SONA

To add a new study in SONA, click *Add New Study*. First, fill out the info under *Select Study Type*. There are several types of studies, but the most common are:

1. **Standard Study** – Choose this option if you are doing an **in-person study** that will take place at a specific time and location.
 - a. If you are planning to conduct an in-person study, please review the **SONA Instructions for Conducting In-Person Research** document for further instructions. Your instructor should have access to this document, or you can email me at s.sklenarik@ccsu.edu for a copy.
2. **Online External Study** – Choose this option if you will collect data online using a survey platform that is external to (or outside of) SONA, such as **Qualtrics**.
 - a. As a CCSU student, you have full access to an online survey platform called Qualtrics that you can use to collect data. There is no need to create an account – you already have one! To access Qualtrics:
 - i. Navigate to <https://ccsu.qualtrics.com>

- ii. Select *CCSU Single Sign-On*. You may need to login using your Microsoft 365 credentials (i.e., CCSU student email address and password). These should be the same credentials you use to login to campus computers.
- b. For more information and resources for using Qualtrics, please see the following links:
 - i. [CCSU IT Knowledgebase: Qualtrics Online Survey Platform](#)
 - ii. [Qualtrics Basics Tutorial Video \(Presented by Dr. Bragg to PSY 302 Students\)](#)
 - iii. [Qualtrics Faculty Workshop \(Presented by Dr. Bragg\)](#)
- c. **NOTE:** If you are using Qualtrics to create an online external study, you will need to create your survey in Qualtrics **BEFORE** you post your study in SONA. Once you create your survey in Qualtrics, you can generate an external URL to the survey. Then, in SONA, (1) scroll down to *Advanced Study Information*, (2) find *Study URL*, and (3) enter the external URL to your Qualtrics survey.

Once you select your *Study Type*, select how many *Parts* your study will have. The majority of studies will involve 1 part (i.e., 1 study session). You also have the option to create multi-part studies that involve participation on more than one occasion. This option is rarely used, but if you think it might be appropriate for your study, please consult your faculty supervisor. Lastly, choose how you'll reward participants under *Compensation*. The majority of studies will compensate participants with credit. When ready, click *Continue*.

Under *Basic Study Information*, enter:

1. **Study Name**
2. **Study Description** – Your study description must follow these guidelines:
 - Provide a brief rationale for the study. Do not give too much detail – just describe the gist of the study. (ex: *"You are being asked to participate in a study about Internet use among college students."*)
 - Briefly describe what participants will do in the study. Limit your description to actual tasks. (ex: *"Participants will complete a survey regarding Internet use. They will also provide information on their age and gender."*)
 - Indicate how long the study should take. Be honest and DO NOT use phrases meant to make your study more attractive, like "Get credits fast!" or "5-minute study!" Simply state the estimated time. (ex: *"The survey is expected to take about 15 minutes to complete, but some participants may require more time."*)
 - Include your contact information.
 - Do not mention incentives like "free candy!"
 - Note that when studies are shown to participants in SONA, they are listed in random order.
3. **Eligibility Requirements** – Most studies will not have any eligibility requirements, but some studies may. For example, if you are restricting your study to participants who are 18 or older, enter that information here.
4. **Duration** – Indicate how long your study will take in minutes.
5. **Credits** – Determine how many credits participants should be awarded based on the study duration and type.

- 1 SONA credit is awarded for every 30-minute increment of *expected* research participation (ex: 1 – 30 minute study = 1 SONA credit; 31 – 60 minute study = 2 SONA credits; 61 – 90 minute study = 3 SONA credits).
 - **Standard (in-person) studies** are allowed to award an additional SONA credit on top of the duration-based credit award to help with recruitment efforts (ex: 15-minute **online study** = 1 SONA credit vs. 15-minute **in-person study** = 2 SONA credits).
6. **Principal Investigator** – Find your course instructor/research supervisor.
 7. **IRB Approval Code** – You MUST enter a valid approval code for the study. The approval code should come from either your faculty supervisor or the IRB (see more details [above](#)). You will NOT be able to post your study without one.
 8. **IRB Approval Expiration** – You MUST enter an approval expiration date. Unless you have a reason to do otherwise, this date should be one year from the date of the approval.
 9. **Active Study** – Be sure to select Yes here. Studies MUST be both approved and active in order for participants to sign up.

Under *Advanced Study Information*:

1. **Standard (in-person) studies:** Find *Participant Sign-Up Deadline* and *Participant Cancellation Deadline*. The default is 24 hours for each of these, but you may specify your own deadlines here. You may also find it helpful to select Yes next to *Should the Researcher receive email notifications for participant sign-ups and cancellations?*
2. **Online external studies using Qualtrics:** Be sure to enter the external URL to your Qualtrics survey next to **Study URL**.

Once you have entered all the required information described above, click *Add This Study*. Next, you will see a summary window indicating that your study has been added. Please be sure to review your study information to make sure it is correct. If any information needs to be changed or edited, scroll down and select *Change Study Information*.

Adding Time Slots to a Study in SONA

Once your study has been approved in SONA, you can add time slot(s) by following these directions:

1. Login to SONA and go to *My Studies*.
2. In the *My Studies* window, click on *Study Menu*, then click *View/Administer Timeslots*.
3. Click *Add a Timeslot*.
 - a. **Standard (in-person) studies:** For each in-person data collection session you plan to hold, you will need to reserve a room at least 7 days in advance. You must secure a room reservation **BEFORE** you add time slot(s) for your study. Please review the **SONA Instructions for Conducting In-Person Research** document for instructions on how to reserve a room. Your instructor should have access to this document, or you can email me at s.sklenarik@ccsu.edu for a copy.
 - i. Once you have secured a room reservation, add 1 time slot in SONA for each study session you intend to hold.

- ii. For each study session, specify the date, time, and maximum number of participants for the session.
 - iii. Under *Location*, use the drop-down menu to select the room that you reserved.
- b. **Online external studies using Qualtrics:** Add a SINGLE time slot.
 - i. Enter a *Final Participation Date* and *Final Participation Time*. The date should be the last day you want participants to be able to take your online study.
 - ii. Enter the maximum number of participants that can complete your online study.
NOTE: If you do not fill in this value, your study will NOT be visible to participants in SONA.
 - iii. **NOTE:** For online studies, you are limited to a maximum of 100 participants per study condition until April 10th. After April 10th, you may collect up to 200 participants per condition. There are NO limits for in-person studies.

Assigning Credit to Participants in SONA

Once you post time slot(s) in SONA, participants can sign up to participate in your study. Regardless of the type of study you are conducting, **you must award credit within 48 hours of each scheduled time slot.**

1. **Standard (in-person studies):** You are responsible for keeping track of who attends your in-person study sessions. Please follow these instructions to assign credit for each study session:
 - a. Login to SONA and go to *My Studies*.
 - b. Click on your study, then click *View/Administer Time Slots*.
 - c. Click *Modify*.
 - d. Under *Sign-Ups*, you can (1) grant the participant credit, (2) assign an *Unexcused No-Show*, or (3) assigned an *Excused No-Show*, as appropriate.
 - i. If a participant signs up for a study session but does not attend, you should assign them an *Unexcused No-Show*. If they accumulate enough of these, they will be barred from further participation.
 - ii. If a participant contacts you in advance to inform you that they cannot attend a study session they signed up for, you may choose to assign the participant an *Excused No-Show at the discretion of your faculty supervisor*.
 - iii. After each study session, you **MUST** award credit (or an excused/unexcused no-show) to participants immediately. **Failure to assign credit within 48 hours is a violation of SONA rules.** If you do not assign credit within 2 days of a time slot, you will receive the following message via email: “*This email is to notify you that you have 1 study timeslot(s) more than 2 days old that await your response. More information can be found by logging onto the site: <http://ccsu.sona-systems.com>.*” The SONA coordinator will also receive the message and will forward it to your faculty supervisor (please see more [above](#)).
 - e. Click *Update Sign-Ups*. Once you do this, you should see an updated list of participants with their status (e.g., *Credit Granted*) beside their participant IDs.

- i. Make sure the number of credits you assign is correct. If you make a mistake you can easily change it by repeating this process. Note that it would be unethical to take away credit that has already been awarded and posted.
 - ii. See [above](#) for more info about how many credits participants should be awarded.
2. **Online external studies using Qualtrics:** Qualtrics can be set up to automatically report to SONA when a participant has completed your study. This allows SONA to automatically grant that participant credit. You must [set up auto-credit granting in SONA](#) for each study you conduct using Qualtrics. If you are using Qualtrics, you MUST set up the auto-credit granting feature **BEFORE** your study is granted approval (please see [below](#) for instructions).
 - a. **NOTE:** If you are using an external survey site *other* than Qualtrics (e.g., SelectSurvey, SoSciSurvey, Survey Monkey), you cannot set up auto-credit granting in SONA. You must consistently monitor the external site for survey completion and manually assign credit to participants in SONA. Please consult with your faculty supervisor for more guidance.

Setting Up Auto-Credit Granting for Online SONA Studies Using Qualtrics

Please click [here](#) for written and video instructions on how to set up auto-credit granting in SONA for Qualtrics studies. I suggest following the written instructions, which are relatively simple:

- a. Follow the instructions in Step 1 – Step 3 closely.
- b. Step 4 will ask you to test that you set up auto-credit granting correctly. Using [this link](#), be sure to complete the Check Stage, then the 3-Step Test. If your 3-step test fails, then review the Troubleshooting section or feel free to reach out for additional support.
- c. Be sure to test and confirm that auto-credit granting is set up correctly for your study **BEFORE** requesting study approval. As noted above, your study will not be approved until auto-credit granting is set up appropriately.

Data Collection Deadline

ALL study sessions must be completed and ALL credits/no shows must be submitted **NO LATER than Friday, May 8th at 5:00 pm**. It is imperative that all credits/no shows be assigned in SONA by this deadline.