Adding an In Person (Standard) Study to Sona

Edited Jul 16, 2025

A. GET A RESEARCHER ACCOUNT

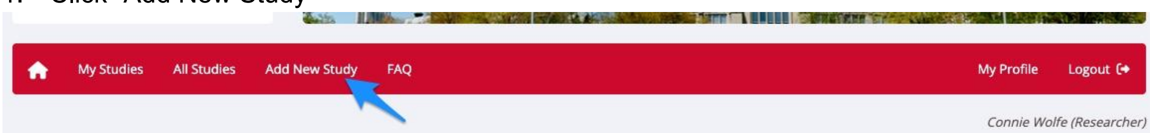
1. Email the current Sona faculty administrator to get a Researcher account. The administrator's name is listed at the bottom of every Sona page. You cannot use your Participant account. (For Advanced Research: One account per research group please. Pick a contact person.) Please allow 24-48 hours for a reply.

2. You will receive an email (at the address used to make your request) with instructions when the account is created. Read those instructions carefully. A link to this document will be included.

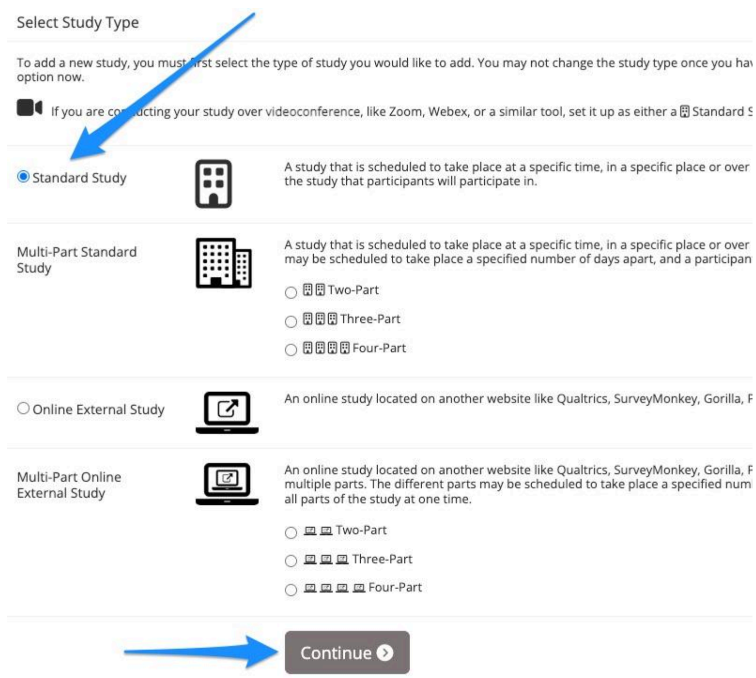
3. You will then login to SONA using your OneLogin credentials. If you also have a Participant account, you will be given the choice of which role to use when signing in.

B. ADD YOUR STUDY TO THE SYSTEM

1. Click "Add New Study"



2. Select study type: Standard



3. Study Name
   - Use the same title as the one on your Informed Consent Statement, as per the Ethics application section "Participant Recruitment"

4. Brief Abstract
    - Leave blank.

5. Detailed Description
    - **Required**. This is a brief description of the general types of tasks Participants will be doing. Please copy the language used in the "Participant Recruitment" section of your Ethics Application.

6. Eligibility Requirements
    - Enter restrictions on who can participate in your study, as specified on your Ethics Proposal.
    - Examples: "Only people who identify as women." "Students with seizure disorders should not participate." "Must have normal or corrected-to-normal vision."
    - If you wish to restrict your study to Participants who are/are not *currently* enrolled in a particular class, there is an option for that under Advanced Settings.

7. Duration
    - Estimate how long your study will take. If in doubt, estimate more rather than less time.
    - **You must enter at least 20 minutes**.
        - Entering less time may attract Participants to your study, but will unfairly disadvantage other studies.

8. Credits
    - Unless given explicit permission, leave the credit value at 1.

9. Preparation
    - Enter anything you want Participants to do or not do before they arrive. Example: "Do not drink caffeine for 8 hours prior to the study."
    - This is typically left blank.

10. Researcher
    - Your Researcher account should already be selected. Typically, a sign-up will list **one** researcher who acts as the Contact Person. If there are additional researchers (who have accounts), you can move them over to grant them access to the study. Typically this should **not** be used by Advanced Research project groups.

11. IRB Approval Code
    - Please enter the approval code from the approved ethics document.

12. IRB Approval Expiration
    - Typically one year after original ethics approval.

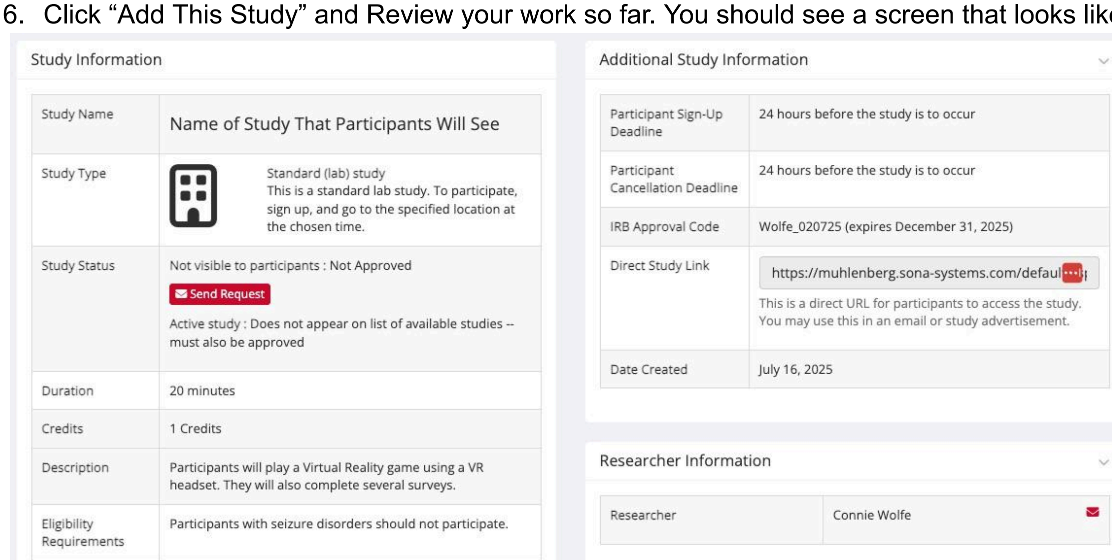
13. Approved?
    - This will say "Currently not approved. Approval is required." You will request that approval in Section D below.

14. Active Study
    - Click 'yes' if you are ready for Participants to sign up.
    - Click 'no' if you are not ready, or wish to suspend sign-ups. You will have to return to this setting and switch to 'yes' before Participants can see or sign up for your study.

STOP – Do not click "ADD THIS STUDY" until you have also reviewed the Advanced Settings.

15. Advanced Settings - Review the list of settings. Only a few will be commonly used. For example:
    - **Change the sign-up and cancellation deadlines**. The sign-up default setting prevents additional sign-ups starting at 24 hours before the start of the study. You probably want to change this to fewer hours depending on how often you plan to check SONA for Participant sign-ups. You can select any number of hours, but partial hours are not allowed. The cancellation default setting gives Participants an error message if they try to cancel their sign-up sooner than 24 hours before the start of the study. Again, you may wish to change this if you want to give Participants more flexibility.
    - **Researcher Email notifications:** You are strongly encouraged to leave this as "yes."
    - **Uncommon settings** - leave most other settings blank or at their default unless you are certain you know what you are doing. For example:
        - **Pre-requisites & Disqualifiers.** Use with care. If you have a two-part study you may wish to use a pre-requisite. If your study is a follow-up to a previous study and you only want new Participants, you may use a disqualifier. **Please note the SONA Participant data is deleted at the end of every semester.** If you need to refer to a study from a previous semester, try using the *Detailed Description (#5)* or *Eligibility Requirements (#6)*.
        - **Course Restrictions.** Use with care. Sometimes you want Participants who are or are not taking a particular class to be in your study. **Please note that the SONA Participant data is deleted at the end of every semester.** If you want to exclude/include Participants who have EVER taken a particular course, try using the *Detailed Description (#5)* or *Eligibility Requirements (#6)*. Also note: **all courses *ever* taught are included in the list. Thus, you must check which courses are being taught in the *current* semester very carefully before selecting.** If you move over a course not currently being taught, no one will be able to see or sign up for your study.
        - **Researchers at Timeslot-Level**. Uncommon. This option is mostly for faculty research. If you have multiple researchers for your study, you can change this option to "Yes" if you want to be able to set up timeslots for each specific researcher. For example, if you have a timeslot at 10:30am on January 1st, and you know that Jane Student will be the researcher at that time, you can add their name to that timeslot, while adding different researchers to other timeslots.

16. Click "Add This Study" and Review your work so far. You should see a screen that looks like this:



Study Information

Study Name	Name of Study That Participants Will See
Study Type	Standard (lab) study This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Study Status	Not visible to participants : Not Approved Send Request Active study : Does not appear on list of available studies -- must also be approved
Duration	20 minutes
Credits	1 Credits
Description	Participants will play a Virtual Reality game using a VR headset. They will also complete several surveys.
Eligibility Requirements	Participants with seizure disorders should not participate.

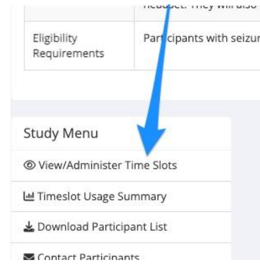
Additional Study Information

Participant Sign-Up Deadline	24 hours before the study is to occur
Participant Cancellation Deadline	24 hours before the study is to occur
IRB Approval Code	Wolfe_020725 (expires December 31, 2025)
Direct Study Link	https://muhlenberg.sona-systems.com/defaul This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	July 16, 2025

Researcher Information

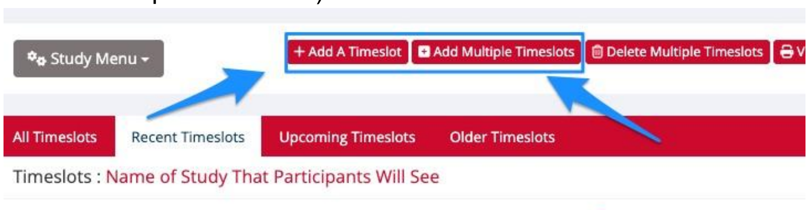
Researcher	Connie Wolfe

C. ADD TIMESLOTS



1. Go to "Study Menu" and select "View/Administer Timeslots."

2. On the menu bar click "Add a timeslot." (See below for how to use Multiple Timeslots.)



Enter the information as indicated.

- For "number of Participants," indicate how many people can sign-up for the same timeslot.
- Examples: If you can run 5 Participants at a time, enter 5 . If you can run 1 Participant at a time, leave it at 1.
- You must add a location for the study so participants know where to go for their slot. You MUST have CONFIRMATION of your reserved location before making your sign up sheet Active (see Step B.14.) Mrs. Gonzalez can help you reserve one of the rooms in Moyer basement.

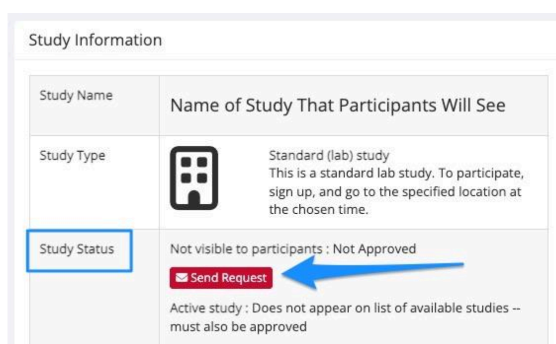
3. Repeat as needed.

4. Alternatively, you can use the "**Add Multiple Timeslots**" option. Essentially, this feature allows you to easily create multiple timeslots which are either back-to-back OR are in a row, but have some free time between them.
   - For example, if you wanted to set up 4 back-to-back 30 minute timeslots starting at 2pm, you would select "4" under "Number of Timeslots" and then enter the start time as 2:00pm. In the "Free time between spots" section, you would put "0."
   - Or, if you wanted to post 4 timeslots, each 30 minutes in duration, but with 15 minutes between each time (so you could reset the lab, or in case of delays), you would complete the same steps as above, but now enter "15" in the "Free time between slots" option.
   - Once you click "Add" you will see a screen displaying the details of each timeslot which you must check for accuracy.

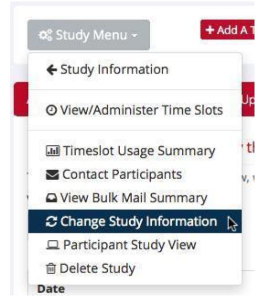
5. The system will automatically send Participants a receipt when they sign up, and a reminder at 5pm (EST) the day before the study.

D. REQUEST APPROVAL FOR SONA SETTINGS

You must request approval for your SONA settings before your study will be seen and eligible for sign ups. To do this, look at the study overview and click on the Send Request button next to Study Status. Please give the SONA administrator 24-48 hours to review. Your study will either be approved and immediately available for sign up, or you will have to make corrections.



E. TO CHANGE…



1. **Study Information**
   - Click on the study (if not already selected) and then click on the gray "Study Menu" button.
   - Choose "Change Study Information."

2. **Timeslots**
   - Select View/Administer Time Slots, click on the "Modify" button.

Date	Participants Pool	Participants	Location	Modify
Friday, September 5, 2014 2:00 PM - 2:30 PM	**Signed Up:** 0 **Open Slots:** 4 **Total:** 4		Moyer 006	Modify

   - Note: **You may not delete a timeslot if Participants are signed up.** The system may logistically let you do so, but Departmental policy (based on ethical principles) is that if you offer a timeslot, you need to fulfill that commitment. If there is an emergency: message the Participants through SONA immediately, and/or find a friend to go and collect the names of the people who show up, and/or put a sign on the door saying the study is cancelled. You should later contact Participants individually with an apology and an opportunity to participate in the study again. **Not showing up for a study you've scheduled is a serious mistake.**
   - If you decide you are done collecting data, you do not have to include additional Participants' data in your dataset, but you do have to run them through your study and give them LOC credit.

F. TO VIEW…

1. **Participants who have signed up**
   - Click on the study title to get to the gray Study Menu.
   - Select "View/Administer Timeslots."
   - If anyone has signed up, the "Participants" column will have names in it.
   - "Status: awaiting action" means you have not yet given the Participant credit for participation.

2. **What the Participant will see about your study**
   - Select "Participant Study View" from the gray drop-down Study Menu.

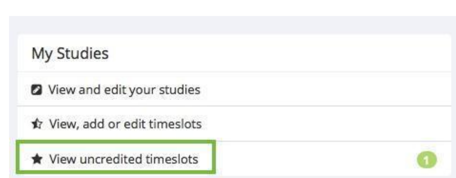
G. YOU MUST MANUALLY GRANT LOC CREDIT

1. You **must do this within 48 hours** after the timeslot.

2. Your actions here are immediately emailed to the Participant, so double-check before clicking "Update."

3. Contact the System Administrator if you have a problem (see bottom of any screen).

4. From your home page, click on "View uncredited timeslots."



5. Grant credit to each Participant individually, or look to the bottom of the page to grant credit to all.
   - If you didn't check Participant names before running your study and need to find their names to grant credit after the fact, you can get names from the signed Informed Consent documents as long as you continue to carefully follow ethical protocol for confidentiality or anonymity regarding their study data.
   - *What if the Participant didn't show up?* Click "***unexcused*** **no show**" if you didn't get any communication from the Participant (*double check your email before doing this; Participants will automatically be sent a sternly worded email if you choose this option*). Click "***excused*** **no show**" if the Participant didn't show up but did communicate with you. Participants who do not show up will automatically be able to sign-up for a new timeslot. No action is required on your part.

H. TO CONTACT YOUR PARTICIPANTS

1. If you wish to contact *all* of your Participants for any other reason, choose "Contact Participants" from the Study Menu.
2. In most cases, it is preferable to contact Participants associated with a particular timeslot instead. You can do so by going to the desired timeslot, select "Modify" and using the Contact feature there.

FAQ

1. *Potential subjects have told me the system says it is too late to sign up for a study.*

   - Change the default settings for sign-up and cancellation deadlines in Study Information.

2. *Participants have told me the system says it is too late to cancel a study.*

   - Participants are instructed to contact the researcher directly after the cancellation deadline established in Study Information. You can change that time.

3. *Why are Participants emailing me?*

   - Your email address is provided to Participants. They can email you at any point. They are <u>instructed</u> to email you if they try to cancel their sign-up after the deadline or if they need another copy of the debrief information. Sometimes Participants will email researchers with questions unrelated to your study. Do not ignore their emails. Rather, reply with a suggestion about what person could better answer their question.

4. *How do I add more sign-up times?*

   - Add more timeslots.

5. *How do I take away sign-up times if I have decided to end my study, our research team's schedule has changed and we can't cover a timeslot, or I do not want more Participants?*

   - Modify timeslots > Delete.
   - **You may not delete a timeslot if Participants are signed up.** The system may logistically let you do so, but Departmental policy (based on ethical principles) is that if you offer a timeslot, you need to fulfill that commitment. If there is an emergency: message the Participants through SONA immediately, and/or find a friend to go and collect the names of the people who show up, and/or put a sign on the door saying the study is cancelled. You

should later contact Participants individually with an apology and an opportunity to participate in the study again. Not showing up for a study you've scheduled is a serious offense.