SONA Researcher Manual

Content

Who can request a researcher account?

Solely members of the Institute of Psychology and Education Science at Ulm University (Ph. D. students, research assistants, Professors) can request a SONA researcher account. New researchers are asked to write an e-mail to anna.greve-kramer@uni-ulm.de in order to request a new account.

Students are **not** allowed to get a researcher account themselves – not even student assistants or students writing their thesis. In these cases, supervisors are responsible for the handling of studies. The reason is, that students are not allowed to grant credits. The owners of the researcher accounts are responsible for the compliance with ethical guidelines within the advertised studies, the adequate calculation of credits, as well as the granting of credits.

How to add studies?

To add a study in SONA, log into your researcher account and choose „Add New Study" in your navigation bar. On the appearing page, indicate which type of study you want to set up.

1. Standard Study

With this option, the participants should appear once for a laboratory study.

2. Two-Part-Standard-Study

With this option, the participants should appear in the laboratory at two different appointments.

3. Online Survey Study

With this option, an online study can be programmed directly within SONA. However, the following option is rather recommended:

4. Online External Study

Select this option if you want to offer an online study in SONA that has been programmed externally (e.g. in Unipark). For participants who take part in a Unipark study, the credits can be granted directly. That means that you do not have to query the participants' SONA-IDs and do not have to grant the credits yourself. How the automatic credit grant works in Unipark studies is explained in detail at the end of this manual.

For each of these four options, you also specify whether you would like to compensate your participants through credits (Credit) or pay (Paid) them.

If you want to give your participants the choice between credits and payment, select "**Credit**" and mention in the study description that it is possible to receive a certain amount of money as an alternative to credits. Pay the participants on the spot, grant them "0 Credits" in SONA, and leave a comment that the participant has been paid instead.

Please make sure that participants **do not** receive both credits <u>and</u> payment. If you have a study with both options, it is best for your experimenter to have a list on which they can tick which subject (identified through SONA code) gets credits and which one gets paid.

What kind of information is needed for my study?

After having selected which type of study you would like to set up, enter the information about your study on the "Study Information" page as it should be visible in SONA. In any case, you should provide the following information:

Basic Settings:

Study Name:

The name of the study. The studies are displayed to the participants in a random order. Therefore, please do not use unnecessary preceding characters (* + # etc.) in the study name. Likewise, please do not use striking colours, large fonts, etc. Just stick with the default setting.

Brief Abstract:

A brief description of the study (approx. 1-2 sentences). The abstract appears together with the study title in the list of current studies and essentially determines whether potential participants take a closer look at the study.

Detailed Description:

Here you can describe the course of the study in more detail. Please provide information about the type and duration of the procedure (possibly per sub-element). The Detailed Description does not appear in the list of current studies, only in the study description. You should also provide a contact address (e.g. email), to which participants can apply to.

Eligibility Requirements:

Indicate whether certain requirements for participation must be fulfilled (e.g. only right-handed people, only women, no medication, etc.). Leave the field empty if there are no eligibility requirements.

Duration:

The duration of your study. **Important**: According to the examination regulations (Prüfungsordnung), students must earn 30 credits in order to prove their performance record "Versuchspersonenstunden". The duration of the study should therefore be measured as precisely as possible and exactly match the advertised credits. However, gradations should not be less than 0.25 credits. Thus, for a study with a duration of 10 minutes, of course 0.25 credits can be granted.

Credits or Payment:

Specify how many credits are granted for study participation. Credits can be granted in 0.25 units and must match the duration of the study as exactly as possible. If you pay your participants exclusively, you can specify here how much money the participants get.

Preparation:

Indicate whether the participants need to take anything into account before participating (e.g. not smoking 2 hours beforehand, not drinking coffee). Leave the field empty if no special preparation is required.

Researcher/Principal Investigator

At this point, you have to choose who conducts the study (researcher) and who is primarily responsible for the study (head of department).

Approved?

SONA does not require studies to be activated by an administration team. Researchers can independently mark their studies as approved here ("yes").

Active Study?

In order for your study to appear in the SONA study list and for participants to be able to sign up, your study must be set to "**active**". When you your study is over, do not forget to set it to inactive. To do so, click on "Change Study Information" and change the "Active Study"-setting to "No". Studies can be reactivated at any time.
Important: Please do **not delete** your studies, as the granted credits will disappear completely!

Advanced Settings:

In this area you will find several other options that you can set if necessary. For example, you can set whether you want to be informed by email about sign-ups and cancellations for your study or whether the participants must not have participated in another study or must have participated in another study so that they can register for your study.

If it is an online study, the link to the study must be inserted here under Study URL.

Under "Participant Sign-Up Deadline" and "Participant Cancellation Deadline" you can specify until when participants can sign-up or cancel their registration. The default setting is 24 hours and also applies on weekends (example: a participant would like to take part in your study on Monday at 10:00 a.m. and can therefore register until 10:00 a.m. on Sunday morning). You can also shorten the deadline to 12 hours before the study is to occur.

How do I set the timeslot?
Under "My Studies" you find lists of all your studies ("All"), those that are already active ("Active") and those that are still inactive ("Inactive"). For each study, you can set the times for your study under "Timeslots" on the right. You can also delete existing timeslots here.

The fastest way to create timeslots is to enter the number of slots for each day under "Add Multiple Timeslots" (one slot is as long as the specified duration of the study) and how many participants can participate per slot (Example: If a one-hour study runs from 9 a.m. to 5 p.m., there are eight slots). One week's timeslots can be copied into the following weeks ("Copy Timeslots from a Specific Week").

Due to transparency and registration procedures, timeslots should always be created, even if it does not really matter when exactly the participants appear for the study. If desired you can add an explanation like the following to your description: "Register at any time you like - you are free to appear at any time between 9 a.m. and 5 p.m."

For online studies, you must enter the end date of the study to make it visible in SONA. Under "Add a Time Slot", enter the date up to which participation is possible ("Final Participation Time") and the maximum number of participants ("Max. Number of Participants").

How can I change study information?

If you go to the "Study Menu" on the study page, you can change the survey period under "View / Administer Timeslots" and change the information about the study under "Change Study Information". If you would like to change the number of credits, please also contact anna.greve-kramer@uni-ulm.de.

When can participants sign up?

For participants to be able to sign up, two requirements must be met:

1. The study must have been set to "**approved**" and "**active**".
2. You must have set up at **least one timeslot in the future**. If you only have timeslots in the past, the study will automatically become invisible (but not inactive) to participants.

How can I contact selected participants via SONA?

You can invite students to your studies via SONA, but please note: Students who need credits or want to earn money from participating in studies regularly check SONA to see what studies are currently available. To ensure that students won't be flooded with recruitment emails, we would ask you to only write to the pool if recruitment otherwise turns out to be very difficult. The system is also set up so that a maximum of 200 students receive an invitation email.

If you want to invite students, select "View / Modify Restrictions" under "Prescreen Restrictions" on the top right of the study page. Here you can first select the participants for whom your study should be made visible (regardless of whether you invite them by email or not). For example, if you only need male participants, under "Gender" → "Set Restrictions" you can select "only male", so that only men will get your study listed.

To be able to invite participants by email, you have to set restrictions. If there are no restrictions for your study, simply select all options. If you have saved the restrictions ("Save Changes") and now go to "View / Modify Restrictions" on the study page, you can now write to students who you're your specified restrictions: "Invite qualified participants ".

Participants who have already signed up for your study can be contacted in the "Study Menu" of this study under "Contact Participants".

Can I sign up study participants myself?

You can also sign up participants for your study yourself if they have agreed and if you know their Uni Ulm email addresses. To do so, go to the timeslots and click on "Modify" on the corresponding timeslot. Select "Manual Sign-up" at the bottom of the page. There you can sign up participants with their email address for your study under "Username Manual Sign-Up".

How can I identify participants that did not appear to my study?

For anonymity reasons, the timeslots for your study only show the codes of the participants who are registered for the study. Participants are instructed to always have their codes on hand when they take part in a study - you can use the code to check who appeared vs. not appeared. If participants have forgotten the code, they can look it up in the system via the Internet (e.g. smartphone). If this is not possible, write down the participant's name and request their code at anna.greve-kramer@uni-ulm.de.

How to grant Credits?

When you log in, you will be automatically informed when people have participated in your laboratory study and have not yet received any remuneration (credits / money) (system message). Select "Click here to View" and you see a list of all participants who have not yet been paid. For all participants you have the choice between the following alternatives:

No Action Taken: e.g. if the appointment has been postponed or has been cancelled by the investigator, etc.

Grant Credit: The person participated. Grant the credits according to their participation.

Unexcused No-Show: Select this option if the person did not show up for the appointment without excuse or did not take part in an online study by the specified end time!

Excused No-Show: The person did not appear, but with valid excuse.

If a person has appeared but received alternative payment (i.e. not with credits), first click on "Grant Credit" and then select "View / Administer Time Slots" → "Modify" within your study. Here you can make changes. Please change the credits here to "0 credits" and write "paid" in the comment.

Can I compensate participants through special incentives (e.g. a lottery) in addition to their credits?

The earning of credits is a study achievement and therefore may not be remunerated in addition to the proof of the completed credits. Students that do not receive any credits can, of course, alternatively be remunerated. In other words, a participant may be remunerated either by credits or by other incentives, but not by both. The only exceptions to this rule are studies in which incentives are given as part of the experiment (e.g. economic games). However, such studies may not advertise with additional incentives in or outside SONA to recruit participants.

What can I do if signed-up participants do not appear?

If someone does not show up for the appointment without having cancelled it in advance, please mark the person as "Unexcused No-Show". The person is automatically informed by email that they have been marked as "Unexcused No-Show" for the appointment.

Can I recruit participants elsewhere?

Yes, you can advertise your study outside of SONA (e.g., through flyers and notices). **Important:** Of course, the study information you provide outside of SONA must match the information in SONA. If, for example, your study is set up in SONA with a duration of 30 minutes, you should not advertise that the study lasts a maximum of 20 minutes.

Is there a mobile app for SONA?

Yes, there is:

For **Android** Phones and Tablets:

https://play.google.com/store/apps/details?id=com.sona_systems.mobile

For **IPhones** and **IPads**:

http://appfinder.lisisoft.com/app/sona-mobile.html

External study credit granting with Unipark

1. On the SONA page, the study URL must first be adjusted. To do this, add this appendix to the end of the URL ?a =% SURVEY_CODE%
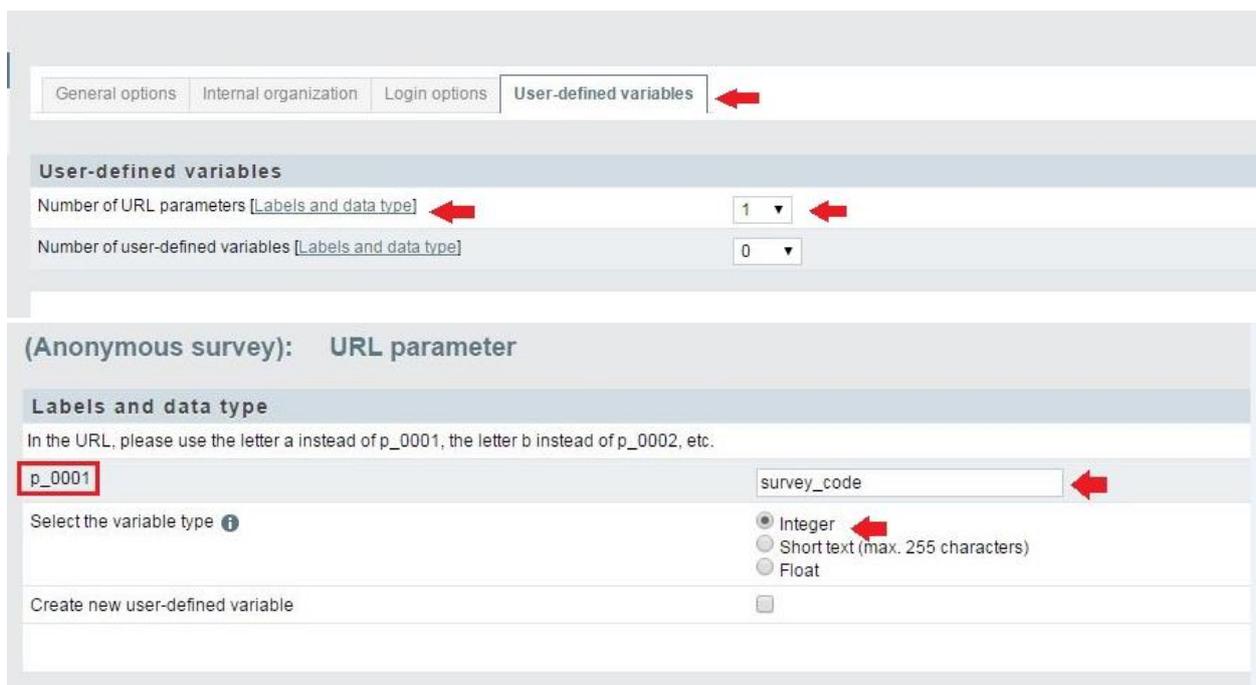
   Example:
   http://www.unipark.de/us/university/a5a1
   becomes
   http://www.unipark.de/us/university/a5a1**?a=%SURVEY_CODE%**

2. SONA then displays a "Unipark Destination URL" link. In Unipark we create a new variable (a URL parameter) with the settings Integer and the name "survey_code" under Project Properties →
   Survey Settings → User-defined variables.
   It is important that Unipark calls the variable "p_0001" and that you pay attention to upper and lower case!

3. In Unipark, go to the end page in the questionnaire editor and click on "Properties" in the navigation menu on the left. Under "Redirect to Survey" (destination URL external survey) we add the "Unipark Destination URL" from SONA. Then remove the two ticks from "Automatically add ospe.php3 to URL" and "Add return ticket".

As soon as the participants get to the actual end page, they are forwarded directly to SONA, i.e. that the content of the end page is no longer available to the participants and the contact details for queries should appear one page earlier.

Additional information on studies with lotteries

If the students have to decide between participating in a lottery and the credits, you can use a filter.

You need a simple page where the subject can choose between both options. After that, create a filter that looks something like this: "Variable (v_3 lottery or credits) equal to 1 (lottery)" and a second end page.

Move the second end page (for those who want to participate in the lottery) into the filter. In the properties of this end page, insert the link to the external survey with the lottery and remove the two ticks. Done!

Legende: 🌐 Leitet weiter auf externe URL ❗ Pflichtfrage oder DAC ⱴ Variablen

(Text based on: https://www.psy.uni-hamburg.de/service/versuchspersonenstunden/sona-forscher.html)

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