"How-To": Sona Study Set Up for Researchers

This guide will provide step-by-step instructions on how to set up research studies within the WPUNJ Sona System.

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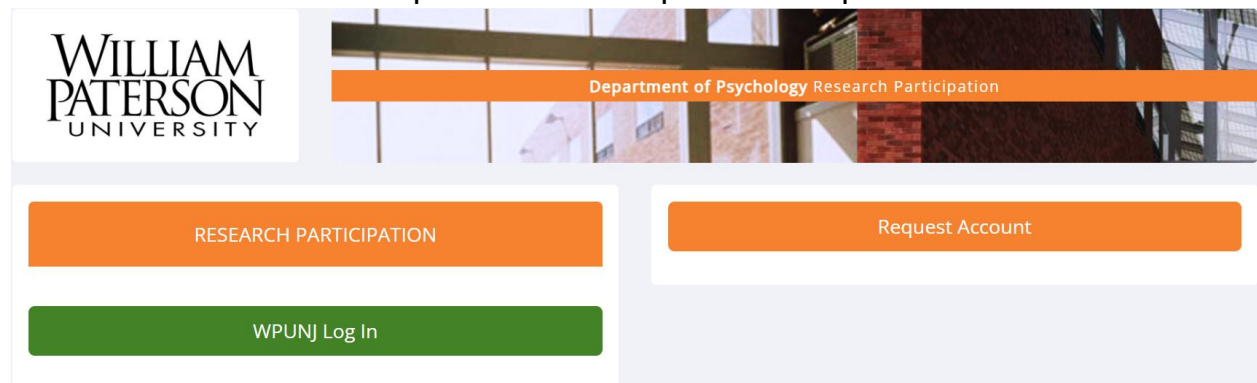
An Overview of how to set up studies in Sona

1. Login to the Sona system at https://wpunj.sona-systems.com/ using your WPUNJ provided username/email and password.
2. Select "Add a New Study"
3. Select "Add Time Slots"
4. Update Research Participation Credits as Needed

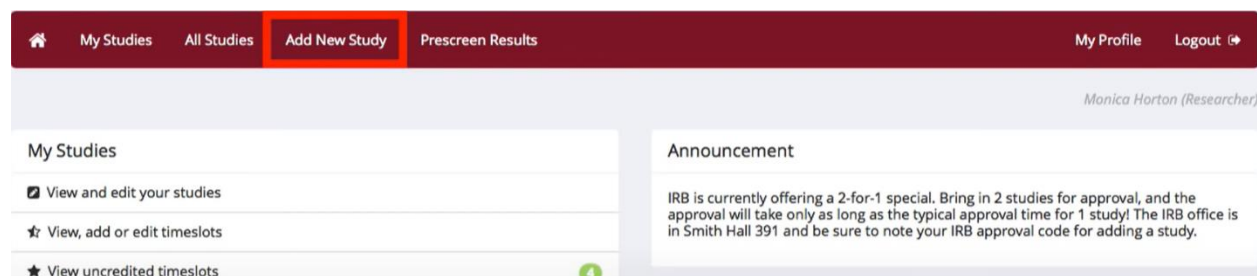**Detailed Instructions** for Setting up Studies in Sona

1 Login to the Sona System

- The Sona system can be located at https://wpunj.sona-systems.com/
- Your login is the same username and password used to log into WPConnect
- **Having trouble logging in?** Contact WPUNJ's IT Department at 973-720-4357 or Submit a Ticket at https://www.wpunj.edu/it/
- **First time logging in?** You will be asked to agree to the Human Subject and Privacy Policy Notice. Please read the information carefully and agree to the terms by clicking "yes" at the bottom of the page. Then, you will have to complete a series of pre-screen questions.

WILLIAM PATERSON UNIVERSITY

Department of Psychology Research Participation

RESEARCH PARTICIPATION

Request Account

WPUNJ Log In

2 Add a Study

- To add a study, select **"Add New Study"** from the top toolbar.

| 🏠 | My Studies | All Studies | Add New Study | Prescreen Results | | My Profile | Logout ➡ |

Monica Horton (Researcher)

My Studies

📝 View and edit your studies

⭐ View, add or edit timeslots

★ View uncredited timeslots   4

Announcement

IRB is currently offering a 2-for-1 special. Bring in 2 studies for approval, and the approval will take only as long as the typical approval time for 1 study! The IRB office is in Smith Hall 391 and be sure to note your IRB approval code for adding a study.

○ *Select Study Type:* You will be presented with five different options for types of studies. Choose carefully as you will not be able to change this later without recreating a new study. Most choose either the first option, "Standard Study" or the third option, "Online External Study." Be sure to also select what form of compensation the participants will receive (Paid or Credit).

Standard Study	A study that is scheduled to take place at a specific time, in a specific place or over videoconference, and where there is only one part to the study that participants will participate in. ○ Paid ◉ Credit
Multi-Part Standard Study	A study that is scheduled to take place at a specific time, in a specific place or over videoconference, in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time. Two-Part: ○ Paid ○ Credit Three-Part: ○ Paid ○ Credit Four-Part: ○ Paid ○ Credit
Online External Study	An online study located on another website like Qualtrics, SurveyMonkey, Gorilla, PsychoPy (Pavlovia), REDCap, or any other website. ○ Paid ○ Credit
Multi-Part Online External Study	An online study located on another website like Qualtrics, SurveyMonkey, Gorilla, PsychoPy (Pavlovia), REDCap, or any other website, in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time. Two-Part: ○ Paid ○ Credit Three-Part: ○ Paid ○ Credit Four-Part: ○ Paid ○ Credit
Online Internal Survey Study	An online survey study where the questions are set up in the system. ○ Paid ○ Credit

- *Enter Study Information:* After you choose the study type, you'll see a form asking for more information. You will need to fill out a number of fields. Some of the fields listed below may not appear, depending on the type of study you selected. All fields must be filled out unless otherwise noted.

Study Name. A short name for the study. This is how the study is identified throughout the system. Out of fairness to all researchers, the system is configured so studies show in random order to participants. Study names need to be unique and may be up to 100 characters in lengths
Brief Abstract. A short one- or two-line description that will be displayed to participants when they view the entire list of studies. Include key pertinent details here of length and eligibility here. This field

can be up to 255 characters in length. Although the system states this as optional, you must upload an abstract.
Detailed Description (optional). This can be a rather lengthy description about the study, and it will show if a participant clicks on the study to get more information, before they sign up. The maximum length of this field is 15000 characters.
Eligibility Requirements. If there are any restrictions on who may participate (e.g., only those who are left-handed), list them here. Otherwise, leave the field as is. These restrictions will be displayed on the list of studies when participants view a list of all available studies. Note the system does not enforce these restrictions, but it is expected a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions, which you can do after you add the study. This field may be up to 245 characters in length.
Duration. The amount of time, in minutes, that each study session will take. If you are setting up a 2-part study, then this setting applies to the first part of the study. For online studies, this should be an estimate of how long participants can expect the study to take, so that they can plan accordingly. This should be the same number as included in your IRB guidelines.
Credits/Pay. Enter the number of credits or compensation for the study. A value of 0 is acceptable and may be desired in cases where the study is part of a set of studies where only the final study is credit-earning. After a study has sign-ups, you may not change the credit value of the study. However, the administrator can still change the credit value of a study with pending sign-ups. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically.
Preparation. Enter any advanced preparation a participant must do here (e.g., "do not eat 2 hours before session"). If there are no preparation requirements, leave field as-is.
Researcher(s). Select the researcher for this study. Most likely, this is you, and your name will automatically be selected. If you are a researcher, then you may not change who the researcher is (the P.I. for the study, as well as the administrator, can change the researcher). You may be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The pull-down box lists only users who are researchers.
IRB Approval Code. Enter the IRB approval code here. This is usually the year followed by a 3-digit number. Although the system states this as optional, you must upload your code.
Approved? Select if your research has been approved by the IRB. If you are filling this form out, you must have already been approved. If you have a code, that means you're approved.
Active Study? Select Yes if this study is in progress. You must select Yes and the study must be Approved if you want the study to show up to participants so they can sign up for it. If a study is Not Approved but is Active, then it does not show up (to participants) on the listing of studies, but it is accessible through other links if the participant has participated in it before and they are viewing their participation history (in case the participant has follow-up questions about the study). It will also show up on the study information page (for an individual study) when it is listed as a prerequisite or disqualifier for a study. The reason to select "No" is if the study is being kept for historical purposes but should not show up to participants on the list of studies they may sign up for. Often, this is done so the system can enforce prerequisites, where the inactive study is a prerequisite for an active study.
Pre-requisites. If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies by holding down the Ctrl key and click the desired studies. You may specify that participants must have participated in all of the studies you specify, or at least one of the studies specified. The participant must have received credit for the pre-requisite studies to be eligible.

Disqualifiers. If there are studies a participant could not have previously completed or be signed-up for in order to participate in your study, choose them here. You may select multiple studies by holding down the Ctrl key and click the desired studies.
Course Restrictions. If you would only like participants enrolled in certain courses to participate in your study, select the eligible courses here. Participants who are not in at least one of the courses you selected will not see the study when they go to view the list of available studies. Choose *All Courses* if you would like to make the study available to participants in all courses
Age Restriction. Unless approved by the IRB, the age restriction must be at least 18 years and older. If you would like to only allow a certain age group, specify it here.
Invitation Code. If you would like to have a special sign-up password for this study, enter it here. This is known as an invitation code and applies just for this study. Participants must know the invitation code to sign up for this study. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants. Invitation codes are not case sensitive. If you do not need an invitation code, leave this field blank.
Is this a web-based study? This should already be filled out for you. If it is not, choose the correct option. This is also a good time to ensure you selected the right type of study at the beginning of this process.
Study URL. The URL (web address, usually starting with http://) for your study. This is only required for web-based studies administered outside the system (i.e., Qualtrics, Survey Monkey, etc.) **FOR QUALTRICS BASED SURVEYS, PLEASE VISIT https://www.sona-systems.com/help/qualtrics/ AND FOLLOW THE DIRECTIONS TO MAKE YOUR PARTICIPANTS ANONYMOUS THROUGH AUTOMATIC CREDIT GRANTING.**
Participant Sign-Up Deadline. Enter the deadline before the study is to occur that the participant may sign up, in whole hours. For online studies, you'll want this to be 0.
Participant Cancellation Deadline. Enter the deadline before the study is to occur that the participant may cancel their existing sign-up, in whole hours. Generally, the cancellation deadline should be shorter than the sign-up deadline, so participants can easily cancel an accidental sign-up.
Should the Researcher receive an email notification when a participant signs up or cancels? If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up, or cancels their sign-up, for this study. The email notification will be sent to an email address based on the information the researcher has provided in his/her profile.
Researchers at Timeslot-Level. If set to Yes, it will be possible (but not required) to assign a specific researcher (from the list of researchers for the study) to a timeslot. If set to No, then it is assumed that all researchers (assigned to the study) are responsible for all timeslots
Automatic Credit Granting. If set to Yes, timeslots that are more than an hour old and still in the Awaiting Action state will be changed to a credit grant. The check for timeslots in this situation is made only once per day. If an automatic credit grant is done, you may still change it later if necessary. For online external web studies, the credit grant will take place the specified number of hours after the timeslot (participation deadline) has occurred, so this feature is generally not useful in this situation. This option will not appear for online survey studies (within the system) because credit granting generally occurs automatically, immediately after the participant completes the survey.
Shared Comments (optional). This is an optional area where you may enter any comments or notes about the study, which are visible to any researchers and PIs in the entire WPUNJ Sona System, but not to participants. This field is useful if you want to make the technique used in the study visible to other

researchers, so they can set your study as a disqualifier if necessary. The maximum length of this field is 1,000 characters.

Private Comments (optional). This is an optional area where you may enter any comments or notes about the study, which are only visible to the researchers (and PI) for this study, and not to participants. The maximum length of this field is 3,000 characters.

Research Alternative? For now, leave at the default no.

3 Add Your Timeslots

a. Select ***View/Administer Timeslots***

b. **If you are giving an online or web-based study** (whether internal or external to the system):
   1. Select Add a Timeslot.
   2. Insert the maximum amount of participants.
   3. Then enter the last date and time students can sign-up for and complete the online survey. (Typically this is the last day of the semester at 5pm)

c. **If you are giving an in-person (standard) study**:
   1. Select ***Add Timeslot*** or ***Add Multiple Timeslots***
   2. Follow the prompts to enter relevant information for your timeslot(s). Start date, start time, length, free time between slots, business hours only, number of participants, locations, and which researcher is assigned to which slot (if you choose the option when setting up the study).

4 Changing Your Study (Optional, as needed)

If you need to update your study (e.g., change timeslots, etc.):

1) Login
2) Go to My Studies
3) Select your Study
4) Select Change Study Information

Grant Research Participation

- For each participant, you will need to grant study credit as they complete the study; however, the system keeps track of who signed up, so aside from absences or non-completes, you can choose the "select all" option and quickly update participants. If you are using Qualtrics, you should have set up the automatic anonymous credit granting mechanism.

- At the completion of a session, you should promptly deal with the participants in the system, to ensure proper credit grants. The reason for the prompt handling of this situation is in the event your study is a pre-requisite for another study and a few other situations. You do not want to hold up other studies that are waiting on your response to the study you just ran. **Please grant research participation credits to participants as soon as they are completed**.

- To grant (or revoke) credit for a timeslot:
    1. Choose the *My Studies* option
    2. Click on the **Edit** link in the timeslots column for the desired study
    3. Select the timeslot you would like to see
    4. Click the *Modify* button
    5. You will see a list of participants identified by name. If they properly participated in the study click the *Credit Granted* option
    6. If student was no-show, you can choose to mark as excused or unexcused.
    7. Enter comments as needed. Usually entered when revoking credits for some reason.
    8. Click *Update Sign-Ups* button at bottom to save changes.

Online Studies

Setting up External Online Studies to Automatically Grant Credit

- The Research Participation System now can automatically grant credit in the system as soon as they finish an online external study (Qualtrics) This is accomplished by having the external study notify the system that the participant has completed the study and thus deserves credit. To automatically grant credit, please visit https://www.sona-systems.com/help/qualtrics/ and follow the directions.

NOTE: IRB typically requires that all questions are optional in a survey such that students do not have to answer all questions to receive credit. **Remember, that as the researcher you are responsible for ensuring that you follow all IRB guidelines for your particular study.**

ANY QUESTIONS, COMMENTS, OR CONCERNS?

Email Dr. Makarec at makareck@wpunj.edu OR

[Watch this video](#) for a general overview of Sona Systems.