SONA System Manual

General Information about SONA

Policies & Resources

1. **Where can I find Department Policies about the SONA System?**
   ● Department Policies about the SONA system are provided on the Psychology [SONA webpage](). All SONA users are expected to abide by Department Policies when using the SONA system.

2. **Where can I find more information about the SONA System?**
   ● Resources about the SONA system can be found on the Psychology [SONA webpage]().
   ● Some general questions could be answered by the staff in the Psychology Office [psych@sfsu.edu]().
   ● There are a group of volunteers who help run the SONA system for SFSU. They are known as SONA Administration [sonaSFSU@gmail.com]().
   ● Technical questions can be answered by emailing SONA customer support [support@sona-systems.com]().

System & Accounts

3. **What is the SONA System?**
   ● The [SONA system]() is the research recruitment tool purchased by the Psychology Department at SFSU. It is used primarily by four groups of people:
     o *Participants are Psychology Department students who are completing research studies to earn SONA credits towards required credit or extra credit in their courses.*
     o *Instructors are Psychology Department course instructors who are using the SONA system for their course, having students earn required credit or extra credit by completing research studies for SONA credits.*
     o *Researchers are Psychology Department faculty and students who create and post research studies seeking human participants.*
     o *Principal Investigators (PIs) are Psychology Department Faculty who oversee a research project.*

4. **What can I do with a SONA account?**
   ● What you can do in the SONA system depends on your role:
     o *All Users: can create and maintain a user profile in the SONA system.*
     o *Participants: can select and change their enrolled courses for a particular semester, view and sign-up for research studies, participate in research studies to earn SONA credits, assign SONA credits to their enrolled courses.*
     o *Instructors: can request that their course be created in the SONA system, request their course be made active for a particular semester, view student Participants who have added their course to their user profile, review SONA credits for Participants as they assign SONA credits to their courses, run reports for their courses.*
     o *Researchers: can create and change a research study on the SONA system, make their studies active/inactive, request approval from SONA Administration [sonaSFSU@gmail.com]() for their studies, add time slots for their studies which Participants can sign-up for, record Participant attendance, assign Participants SONA credits, view anonymous Pre-Screen results, anonymously contact Participants based on their Pre-Screen responses, run reports for their research studies.*
     o *PI's: can do everything Researchers can do. A PI must be listed as the primary owner of a research study. A PI must be a Psychology Department faculty member.*

5. **Are there any prerequisites before making a SONA account?**
   ● All SONA users must be at least 18 years or older on the day they create their SONA account.
   ● If a student is required to earn SONA credits for their course and that student is under 18 years of age, the course Instructor must provide them with a research alternative.

6. **Can I be a <u>SONA Participant</u> if I am not a current SFSU student?**
   - No, only current SFSU students can have an account and use the SONA System as a Participant.

7. **Can I add my course to SONA as an <u>Instructor</u> if I am an SFSU Instructor outside the Psychology Department?**
   - Yes, as long as you are a current SFSU Instructor, you can add your course to the SONA System and get an instructor account for a course outside the Psychology Department.

8. **Can I put my research study in the SONA system as a <u>Researcher</u> if I am not an SFSU Psychology Department faculty member?**
   - Researchers outside the Psychology Department can only add their research studies to the SONA system if they are collaborating with a PI from the SFSU Psychology Department.
   - The SONA system is intended to support Psychological research at SFSU and will only be used for research studies where the PI or co-PI is a SFSU Psychology Department Faculty. The system will not support research outside the Department or University unless it is in collaboration with a current Psychology faculty member.

9. **How do I login to the SONA system?**
   - If you have a SONA account you can login by going to the [SONA system](#) and enter your SFSU ID and password using the single-sign-on (SSO) process. To ensure this process works, you must use your SFSU email address and SFSU ID number when creating your SONA account.
   - If you do not have a SONA account you will need to create one.

10. **How do I create an account in the SONA system?**
    - Login, go to the [SONA system](#).
    - Click "SFSU ID Log In"
    - *Complete the SFSU single-sign on (SSO) process.*
    - Fill in the requested information; First name, last name, SFSU ID, SFSU email address (note, you must use your SFSU ID and email address).
    - For Courses:
      - *<u>Participants</u> select the current Psychology "Course(s)" you are taking this semester, listed as course number and instructor name (e.g., 200 Sanchez). You can select multiple courses.*
      - *<u>Instructors, Researchers & PIs</u> select any course as it will be irrelevant which course you select once your account is converted to a new role.*
    - Check email
      - *You will receive an automated email with your login information.*
    - At this stage:
      - *<u>Participants</u> can begin using their SONA account.*
      - *<u>Instructors</u> need to email SONA Administration sonaSFSU@gmail.com requesting that their SONA account be converted to an Instructor account. In the email provide your full name, SFSU ID, SFSU email, and course numbers for the courses you plan to provide SONA credits in.*
      - *<u>Researchers & PIs</u> need to email SONA Administration sonaSFSU@gmail.com requesting that their SONA account be converted to either a Researcher account or a PI account (SFSU Psychology department faculty only). Provide your full name, SFSU ID, SFSU email, and Researcher need to state the name of the PI they will be working under.*

11. **Can I create a duplicate account in the SONA system?**
    - Do not attempt to create multiple accounts in the SONA system. This may result in having your account limited.

12. **What does it mean to have a limited account?**
    - A limited account is one that can sign-on SONA and assign already earned SONA credits for the current semester to active courses but cannot sign up for a study timeslot or complete studies for the remainder of the semester. This is usually the result of attempting to create multiple accounts

or exceeding the no-show limit for the current semester. Limited accounts are reset at the end of each semester.

13. What happens the first time I login to the SONA System?
- You will be prompted to:
  - *Read and agree to the privacy policy and your rights as a research participant.*
  - *You must complete the Pre-Screen questionnaire.*

14. What is the Pre-Screen questionnaire
- All SONA users are required to complete a pre-screen questionnaire with the approved pre-screen questions. Researchers have access to the pre-screen questionnaire, can use it as a prerequisite to sort participants, or to anonymously contact participants based on their responses.
- The Prescreen Questionnaire currently includes the following scales:
  - *Gender at Birth, Sex, Sexual Orientation, Ethnicity, Marital Status, Employment status, Annual Income, Age (NOT current, but as of the day they signed up for SONA), Birthday, Class (e.g., Freshman), GPA, SAT or ACT scores, SONA Agreement, and Personality (Rammstedt & John, 2007)*
- Researchers can only access anonymized Prescreen Responses using the SONA ID numbers for Participants.

15. What if I am having trouble signing in to the SONA system?
- If you are having difficulty logging in to the SONA system, contact SONA Administration sonaSFSU@gmail.com.

16. What is my SONA ID and where can I find it?
- Your SONA ID or as some will call it your "anonymous ID" is the "Identity Code" listed in your SONA profile.
  - *All SONA users have a SONA ID or "Identity Code" to maintain their anonymity. This is usually a 5-digit or 6-digit number listed in the User Profile page of the SONA system.*
  - *To maintain your anonymity, write this code down.*
  - *Participants and Researchers are encouraged to only correspond using the Participant's anonymous SONA ID number.*

17. How do I update my SONA profile information?
- Login to SONA
- Click "My Profile" from your homepage and update as needed.

18. Can I deactivate / delete my account from the SONA system?
- You are not able to deactivate or delete your account from the SONA system. You can email SONA Administration sonaSFSU@gmail.com to request that your account be deactivated or deleted.
  - *Participants can delete their account after they have graduated.*
  - *Instructors, Researchers, and PIs can delete their account if they will no longer be participating with the SONA system in the foreseeable future.*

Schedule & Timing

19. Is the SONA system available every semester?
- The SONA system will be available every semester of the year (i.e., Fall, Winter, Spring, Summer). However, Instructors may ONLY offer SONA credits as extra credit during the Summer and Winter semesters due to variations in study availability.

20. When does the SONA system open for each semester?
- The SONA system will open no later than the first week of instruction in the Fall and Spring semesters and within the first 4 weeks of instruction for the Winter and Summer semesters

(depending on the timing of the system reset). The SONA system will close no sooner than the last day of instruction for all semesters.

21. Why does the SONA system have to close each semester?
- The SONA system must be reset at the end of each semester. Generally, the SONA system will remain open to Instructors, Researchers, and PIs with the exception of a 1-day closure for the system when all settings are reset for the upcoming semester. This reset will occur no earlier than the day after grades are due from Instructors. The system may remain closed longer for students but will open no later than the first day of instruction.

22. When is the deadline for completing research studies in the SONA system?
- The last day where timeslots for research studies can be scheduled is 5 pm (PST) the last day of instruction (i.e., the last weekday before final exams begin).
- Participants will not be able to sign-up and complete studies after this time. This ensures that there is time for all SONA credits to be granted by Researchers and assigned to courses by Participants. This must be done in time for Instructors to calculate their grades.

Student Participants in SONA

Adding Courses to SONA Profiles

23. Why do I need to add courses to my profile?
- Students must create an account in the SONA system and add their Psychology courses for the current semester to their profile before they can assign SONA credits to those courses.
- If a Student has only 1 course added to their SONA profile, then any SONA credit they earn will be automatically assigned by the SONA system to that course.
- Students can only earn course credit for their SONA credits if they assign their SONA credits to a course which has already been added to their SONA profile.

24. How do I add or change the courses in my SONA profile?
- You can add or change your courses any time by going to your profile.
- Login to SONA
- Select "My Profile" from your homepage
- Select "Change Courses"
- Locate & Select the course you want to add
- Click "Save Changes"
- Once completed you can assign credits to this course.

25. What if the course I am trying to add to my SONA profile is not listed?
- Some courses do not offer SONA credit and will not be listed. Check with your course instructor to see if SONA credits are available for their course this semester.

26. What happens to my courses next semester?
- Your courses will be automatically removed from your profile at the end of the semester after grades are due.
- In a new semester, the first time you login, you will have to "Change Courses" under your "My Profile" page in order to add credits to the courses you are currently taking in that new semester.

Completing Research Studies

27. How do I view and sign-up for research studies in the SONA system?
- Login to SONA
- Click "View Available Studies" from your homepage
  - *A list of current studies will appear*
- Select a study you are interested in and click "Time Slots Available"
- Click "View Time Slots for This Study"

- Locate a time slot you are available and click "Sign up"
- On the "Confirm Sign-up" page Click "Sign Up"
  - *You will receive an email confirmation*
  - *Make note of the date, time, location and special instructions*
- Check frequently for updated time slots from researchers
- You can always email the researcher of a particular study to ask when new time slots will be posted if no current time slots are available.

28. How do I participate in research studies in the SONA system?
- Each research study is unique so the requirements and number of SONA credits you can earn are specific to that study. You will need to read the information and description on the Study Information page (Click "View Available Studies" > select a study).
- If you have further questions about a study, contact the researcher of that particular study.

29. Who do I contact if I have questions about a particular research study?
- Contact the Researcher for that particular study. Their name and email can be found under the Study Information page (Click "View Available Studies" > select a study).

30. Can I get assistance completing my SONA credits?
- Participation in SONA studies must be completed by the student who owns the SONA account. The student cannot have another individual (or entity such as a program or AI) complete any part of a research study for them. Failure to meet this policy may result in a limited account.

Earning SONA Credits

31. Is there a maximum number of credits that I am allowed to earn/use each semester?
- Currently there is no limit to the number of credits allotted to each student.
- However, there is a maximum number of SONA credits individual to each course you are taking.
- See your course syllabus and discuss with your instructor the number of SONA credits you can apply for that course.
- Not all Psychology courses offer SONA credits so review your syllabus for each course to know what options you have in a semester for assigning your SONA credits.

32. How do I assign my SONA credits to a current course I am taking?
- Login to SONA
- Click "My Schedule/Credits" from your homepage
- Locate the credits you want to reassign and click "Assign"
- Find and select the course you want the credits to be assigned to
- Click "Assign Credit"
- We recommend waiting to assign your credits to a course until the end of the semester.

33. How do I track my SONA credits in the SONA system?
- Assign and track SONA Credits on the "My Schedule/Credits" page
- Login to SONA
- View current credits under "Credits Overview" on your homepage
- Click "My Schedule/Credits"
- Click "Credit Status" to view assigned credit for each specific study

34. What do I do if I haven't been granted SONA credits for participating in a research study?
- All SONA credits are assigned by the study researcher. Log on to SONA to see who the researcher is and contact them regarding specific questions on when you will receive credit for participating.

35. What happens to my SONA credits next semester?
- SONA credits are removed from their assigned courses at the end of the semester during the system reset. Although Participants can see the studies they have completed, the earned SONA credits from past semesters will read as 0 credits.

36. Do SONA credits carry over from one semester to the next semester and can I reuse SONA credits I earned in a previous semester towards my courses for this semester?
- No, Participants are not able to assign credits from a previous semester to courses for a current semester.
- SONA credits can only be assigned to courses during the same semester they were earned. Meaning SONA credits do not rollover from one semester to another even if the credits weren't assigned to a course.

37. If I have several courses in the SONA system, do SONA credits count for all of my classes (meaning I share the same SONA credits across different courses)?
- No, the SONA credit from each research study can only be assigned to one course. They cannot be shared (or "double dipped") for multiple courses.
- SONA credits can only be applied to one course and cannot be used to earn credit across multiple courses.

38. Can I split SONA credits from one research study between different courses?
- No, the SONA system does not allow SONA credits from a single research study to be split across courses.
- SONA credits cannot be split and used across different courses. The number of credits earned for a single research study must be applied to a single course. If a different research study is completed, those SONA credits can all be assigned together to a different course.

39. Can I reassign SONA credits to a different course after they have already been assigned to another course?
- Students cannot reassign their credits from one course to another course.
- It is recommended that you wait until the end of the semester to assign your SONA credits to your courses.

40. I heard there is a grace period when I can have my SONA credits "reset" so that they are no longer assigned to courses. Is that true?
- Yes, there is a 3-week grace period at the end of the semester (i.e., the week before finals through the week after finals) where all Students can make a 1-time request for their SONA credits to be reset.
- A credit reset must be requested via email to SONA Administration who will reset the SONA credits. This does not impact the number of credits the student has earned that semester.
- The reset allows the Student to assign the SONA credits for the current semester to different courses. Once the SONA credits are reset, the Student must go into their SONA profile and assign their credits to their courses so the Instructor can see them.
- There are no exceptions to this grace period.

Attendance

41. What if I need to cancel a scheduled research study appointment?
- You may cancel a research study appointment on SONA up to 24 hours (not including weekends) prior to when it is scheduled.
- Login to SONA
- Click "My Schedule/ My Credits" from your homepage
    - A list of your study sign-ups will appear
- Click "Cancel" beside the scheduled study appointment
- Click "Yes" to confirm
    - *After canceling you will receive an email confirmation.*

42. What if I need to cancel a scheduled study appointment, but the 24-hour deadline for canceling had already passed?
- Email the researcher as soon as possible (their email can be found under the study descriptions in SONA).
  - *o* *Provide your SONA ID, the date/time of your scheduled study appointment and justification for why you need to cancel.*
  - o *It is up to the researcher whether or not to cancel your session if the 24-hour deadline has already passed. They have the option to cancel, or mark your attendance as "excused" or "unexcused."*
  - o *All attendance decisions are up to the researcher of that particular study.*

43. What happens if I miss a scheduled study appointment?
- If you miss a scheduled study appointment or cancel after the 24-hour deadline, you may be assigned an Unexcused Absence or "No Show" for your attendance.
  - o *After 1 "No Show" you may receive a warning from the system*
  - o *After 2 "No Shows" you will have your account limited. This means you will be locked out of the system for the remainder of the semester.*

44. What if the researcher cancels a scheduled study appointment?
- Sometimes a researcher will need to cancel a study. If the researcher cancels LESS than 24 (weekends are included) hours in advance you *might* be able to receive credit for the study.
  - o *You must submit a request for this credit within 48 hours of the cancellation directly to the study researcher.*
  - o *All credit granting options are at the discretion of the researcher for that particular study.*

45. What if the researcher fails to show up for a scheduled study appointment?
- Double check the date and time of your appointment.
- Double check that you are at the correct location.
- Double check your email to make sure you followed all study instructions that were sent to you (check your spam folder).
- Email the researcher for that particular study.
- Wait at least 15 minutes past the appointment time at the listed location.
- If you were at the correct location and waited until 15 minutes past the appropriate appointment date and time, email the researcher to request credit.
  - o *You must submit a request for this credit within 48 hours of the cancellation directly to the study researcher.*
  - o *All credit granting options are at the discretion of the researcher for that particular study.*

46. What if SONA says my account is disabled or I can't log into my account?
- There may be an issue with the SONA system or with your account, first try emailing SONA Administration.
- Your account might be limited. This may happen for several different reasons such as earning 2+ "No shows" or violating one of the Department Policies.

Course Instructors in SONA

47. Am I required to make my course available to students in the system?
- It depends, most core classes (i.e., PSY 200, 303, 371, 400, & 690), are required to have students complete a minimum of three (3) research credits in the SONA system. Having your course in the SONA system is optional for all other Psychology courses.
- Other course instructors choose to offer SONA credit options, either as required course credit or as extra credit.

48. Can I require students in my Class to earn SONA credits?
- No, all research in the Psychology Department must be a voluntary option for all students. All instructors, including those teaching core classes that require SONA credits, must offer a research alternative.

49. How do I get my course in the SONA system?
- Instructors can request a new course be created or a recurring course be made active for a particular semester by emailing SONA Administration (sonaSFSU@gmail.com) include:
  - o   Your full name
  - o   Your course number (PSY200)
  - o   Your SONA credits 5 credits
  - o   Type of credit (Required or Extra credit)
  - o   *Note: You must first have a SONA account created so the course can be linked to your SONA account.*

50. How do I let my students know they can use SONA credits in my course?
- Provide students with a brief explanation of SONA in the course syllabus (example below).
  - o   *As part of this course, all students have the opportunity to participate as a research participant in the SONA system for up to number (**X**) **extra credit/required** points. To participate in this option, students will need to register in the SONA system. Please note, if you have registered in the system or obtained SONA credit for another course then you will need to use the same account for this course. This system can be used to sign up for research studies, earn SONA credits for participating in research, and assign those SONA credits to a course to earn course credit. Please see the Psychology SONA webpage for more resources about the SONA system and Department Policies about using the SONA system.*

51. How many SONA credits should I make available in my course?
- The number of SONA credits that can be assigned to a specific course is chosen by the course instructor.
- Most instructors choose to allow ~3 SONA credits to be applied to their course but anywhere between 1 and 6 is common.

52. Is there a maximum number of credits that I am allowed to use in my course per semester?
- Currently there is no limit to the number of credits allotted to each instructor. We recommend not offering over 6 SONA credits in a single course for a single semester.

53. How many course credits should I make a SONA credit worth?
- Instructors make all final decisions on how to apply SONA credits to their course grades.
- It is recommended that SONA credits be equivalent to approximately 1 SONA Credit = .5% - 1% of the final grade (meaning 1-2 SONA Credits = 1% of the final grade).
  - o   *For example, in a 600-point class, 1 SONA credit would be equivalent to an approximately 3-point to 6-point assignment using the class grading scale.*

54. Can I manually adjust the number of SONA credits a Participant has earned?
- Instructors can grant SONA credits to students who have added the instructor's course to their SONA profile.
- Instructors should only grant students credit under extenuating circumstances (e.g., a researcher has taken an emergency leave of absence and SONA is closing soon and the student hasn't been awarded their SONA credits).

55. How do I find out the number of SONA credits my students earned?
- To see how many credits students in your courses have earned, go to the "Credit Completion Report".
  - o   *From your SONA profile*
  - o   *Click "Course Reports" from the menu bar at the top of the main screen*

- o *If you teach multiple courses that allow SONA credit, locate the course you are pulling the report for*
- o *Click "All Participants (Students)" under the course you want the report for.*
- o *This screen lists all of the students who have indicated they are enrolled in that course.*
- o *The column "Credits Earned for Course" indicates how many SONA credits the student has allocated to your course.*
- o *At the bottom of the screen is the option to print or download the report to a .csv file as you see fit.*
- ● Note. Unlisted students haven't added your course to their SONA profile. Students may be enrolled in multiple courses that allow SONA credit, so their "Overall Credits Earned" may be higher than their "Credits Earned for Course" that you will use. If a student has a zero under "Credits Earned for Course" column, they have not allocated any research credits to your course and <u>should not receive any course credit for SONA participation in your course</u>.

56. The students on my SONA course don't match my list of students on my attendance sheet. What can I do about this?
- ● That is only an issue if they attempt to assign credits to your course, meaning they won't get the credits in their actual course.
- ● It is best to contact the student, if they assign credits to your course and let them know they will not receive any credits from your course since they are not an enrolled student in your course.

57. The "Credit Completion Report" is inconsistent with what my student(s) say they participated in. Their credit has not been awarded to my class. What do I do?
- ● All attendance and credit granting decisions are made by researchers. Have the student email the researcher for that particular study.
- ● We ask researchers to award SONA credits within 48 hours of the timeslot listed in SONA.

Researchers & Principal Investigators (PIs) in SONA

58. What can I do with a SONA Researcher Account?
- ● Researchers create and change study pages, make studies active/inactive, request approval for studies, add time slots for studies, run Participants through studies, record Participant attendance, assign Participant SONA credits, view anonymous Pre-Screen results, anonymously contact students based on screening criteria, run reports for your studies.

59. How is a Principal Investigator (PI) account different from a Researcher account?
- ● PIs can do everything researchers can do in the SONA system. A PI must be listed as the primary owner of a research study. A PI must be a Psychology Department faculty member.
- ● In general, the PI is responsible for the study. For example, they must ensure everyone participating on the research side has a current CITI certificate. They must maintain current IRB approval for all studies they oversee. They are responsible for the ethical upkeep and boundaries of their studies.

60. What if I want to know a participant's name/contact information?
- ● All researchers must comply with their IRB approved study and not collect any information outside of what has been approved by IRB.
- ● Additionally, all SONA Researchers and PIs will make concerted efforts to maintain the anonymity of SONA Participants by using their unique SONA ID at all times and communicating with Participants through the SONA system whenever possible.

61. Why can't I see the names of participants who signed up?
- ● In order to preserve confidentiality, Participants are identified by an ID number and not by name.
- ● Please use and always verify ID numbers when communicating with a participant.

62. How can I use the SONA Prescreen questionnaire for my study?
- Researchers have access to the pre-screen questionnaire and can use the responses to the questionnaire as a prerequisite for their study, to sort participants, or to anonymously contact participants based on their responses.

SONA Credits & Payments

63. How do I know how many SONA credits to offer for my research study?
- SONA credits should be calculated Time Required + Session Bonus + Study Location. That is .25 credits for every 15 minutes of Participant time, .5 bonus credits for each additional session and 1 bonus credit if the study is in person.
    - Time Required (.25 SONA credits = 15 minutes)
        - 60-minute, 1 session, online study = 1 SONA credit *(1 hour no bonus)*
        - 70-minute, 1 session, online study = 1.25 SONA credits *(round up to 1.25 hours)*
    - Session Bonus (.5 bonus for additional sessions)
        - 60-minute, 3 sessions, online study = Session 1: 1 SONA credit *(1 hour no bonus)*, Session 2: 1.5 SONA Credits *(1 hour, multi-session bonus)*, Session 3: 1.5 SONA Credits *(1 hour, multi-session bonus)*
        - 15-minute then 45 minute, 2 sessions, online study = Session 1: .25 SONA credits *(15 minutes, no bonus)*, Session 2: 1.25 SONA credits *(45 minutes, multi-session bonus)*.
    - Study Location (1 bonus for in-person studies)
        - 60-minute, 1 session, in-person study = 2 SONA credits *(1 hour, in-person bonus)*
        - 30-minute, 2 sessions, first online then in-person study = Session 1: .5 SONA credits *(30 minutes no bonus)*, Session 2: 2 credits *(30 minutes, multi-session bonus, in-person bonus)*

64. Can studies offer Participants SONA credit for recruiting other people (friends or parents) to complete my study?
- Credit will only be awarded for time that the Participant personally spends completing research studies.

65. Can studies offer to pay Participants cash?
- Yes, studies can offer cash payments.
- Payment can be offered in addition to, or in place of, SONA credits.
- Researchers who are offering ONLY cash payment, must choose this option when posting the study.
- The SONA system does not allow a combination of SONA credit and cash payment. In this case, set up the study as "credit only" and include the cash compensation in the study description.

66. Is there a way to automatically grant SONA credits once a Qualtrics study is completed?
- Yes, online studies are encouraged to set up automatically granted credit. Instructions for setting this up can be found at http://www.sona-systems.com/help/qualtrics.aspx?p_experiment_id=517&p_credit_token=e819529b083f45658e7178b3194dbf55

67. Can I manually change the number of SONA credits a Participant has earned?
- Yes, researchers can grant between 0 to 2x the number of original SONA credits of the study, to participants who have signed up for their study.
- Adjusting the number of SONA credits earned, should not be a regular practice but instead applied in extenuating circumstances such as when the participant did additional research related activities that earned them SONA credits.

68. If I don't want to use the automated credit granting option, how do I otherwise grant credit for participation?
- To grant credit manually, you will need to have the participant's SONA ID number. This is not automatically collected or stored by the system, so you will need to request this information in your survey. It is typically a 5 or 6 digit number. Note, that some students mistype this number thus it can be helpful to have students enter their SONA ID number both at the beginning and at the end of the survey to compare responses in case they make a typo.

Administering Studies in SONA

69. How do I set up a study in the SONA system?
- Login to SONA
- Click on "Add new study" from your homepage
- Fill-in your study information
- Type of study
- Number of SONA credits/payment
- In person (one or multiple sessions) or Online
- Study name
  - *EX: Examining the Work Environment in the Bay Area*
- Study description
  - *EX: This study examines the work environments in the Bay Area by gathering data from nearby organizations. This data will be used to compile a list of the best places to work in the Bay Area.*
  - *Participation in this study will include: (a) watching a short in person presentation about Bay Area organizations (approximately 10-15 minutes), and (b) completing a survey on your perceptions about the depicted organizations (approximately 10-15 minutes). If you participate in this study, your total time commitment will be between 20-30 minutes. This study will take place in person in EP301.*
  - *Please arrive 5 minutes early to sign-in for the study. Participants arriving more than 5 minutes late may be turned away from participating in this study.*
- Describe eligibility requirements
  - *EX: Must be 18 years of age or older to participate.*
- Assign SONA credits (see explanation)
- IRB approval number & expiration date
- IRB approval form must be emailed to the SONA Administrator for review or your study will not be made active (sonaSFSU@gmail.com)
- Select "Active"
- All "Advanced Settings" are optional
- Click "Add this Study"
- Click "Send an Approval Request" from the study description page

70. How to make a study active / inactive?
- This option is available under "Change Study Information". This changes whether your study description is visible to student participants or not.

71. Is there a maximum number of credits that I am allowed to use per semester?
- Currently there is no limit to the number of credits allotted to each researcher.

72. Can a study be set up to include both in person and online sessions?
- The SONA system does not allow a combination of in-person and online sessions.
- In this case, set up your study as an "in-person" study and include the online component in the study description.

IRB Requirements

73. Do I need IRB approval before I create my study?
- All studies in the SONA system need IRB approval (i.e., Exempt or Full Review)
- You can create a study in the SONA system anytime even if the IRB has not yet approved the study.
- However, the study cannot be approved and made active until documentation of the IRB approval has been sent to the SONA Administrator (sonaSFSU@gmail.com) for review.

74. Do I have to have IRB approval for my study to collect data in SONA?
- Yes, the SONA system will only be used for studies that have been reviewed and approved through the SFSU IRB process. Evidence of IRB approval must be provided at the time of requesting approval for the SONA study.

75. My study was designated as 'exempt' by the IRB and does not have an expiration date. What should I list as the expiration date?
- As a rule of thumb, list a date that is three years after the IRB approval date.
- If this study is for a student project, list the student's anticipated graduation date from SFSU.

76. Do I need IRB approval before I use the Prescreen responses for my study?
- Yes, IRB approval is required before you access the prescreen responses for your study.
- If researchers want to use any of the Prescreen Responses, they must say as part of their IRB protocol that they want to use the Prescreen Responses in the SONA system.
- It is recommended that researchers not rely on the Prescreen Responses for their study data.

Schedules & Timeslots

77. Why can't a Participant sign up to participate in my study?
- Most reasons why a Participant can't sign up for a study has to do with the "criteria" set up in the "study info" page. Go there to review the requirements set there.
- A few common things to double check include the following:
  - *Has the Participant already completed your study?*
  - *Has the Participant done any of the "disqualifying" studies preceding your study?*
  - *Has the Participant met all the eligibility requirements for your study? (e.g., are they 18 years or older if your study requires that)*
  - *Are there any other criteria that qualifies or disqualifies a Participant from participating that may be occurring?*
  - *Do you have open time slots for your students that participants can sign-up for?*

78. How do I list timeslots for my online study?
- You can add time slots from your study description page. Participants can't sign up for your study until there is at least 1 time slot for them to sign up for.
- Note: It is recommended that you schedule time slots at varying times, particularly timeslots late in the day and in the evening so that your study is available at a variety of times to meet Participant's scheduling needs.

79. I just have an online study, how do I list "timeslots" for this when it doesn't matter when participants take it?
- For online-only studies, most Researchers choose to list a single time slot for many participants (e.g., a time slot at 9 AM on a Tuesday morning that is available for 50 Participants).
- Most choose the last day of instruction in the current semester.
- Ensure the number of Participants who are able to sign up does not exceed the number approved by the IRB.
- Be sure to log attendance within 48 hours of that date or the system will automatically log all Participants as "participated."
- It is recommended that you have several time slots throughout the semester to encourage students to complete the study instead of waiting, and to allow waves of credit granting to participants.

80. Why can't I create time slots for my study?
- Researchers must request a review and approval of their studies before they can post time slots for Participants to sign-up. Researchers only need approval for initial review and will not need further approval for study changes. All changes in SONA credits should continue to align with the SFSU SONA Instruction Manual for calculating SONA credits.

81. How often should I "Administer Time Slots" and assign credits to Participants for participation, excused absences and unexcused absences?
- For in-person studies, credits should be assigned within 48 hours.
- For online studies, credit should be assigned within 1 week of completion.
- For multi-session studies you may wait to assign all credits until the participant has completed the final study session unless this is longer than 30 days, then grant credits within 1 week.
- Following these deadlines will prevent emails from Participants who are waiting to see their credits appear on SONA.

82. How do I schedule a multi-session SONA study with more than 4 sessions?
- The SONA system only supports scheduling studies with up to 4 separate parts or sessions. If you need to have more than 4 sessions, I recommend creating multiple studies. For example, for a 6-session study you would have the first study with 4 parts and the second study with 2 parts. Next, using the study prerequisites option, make the first 4-part study a prerequisite to the second 2-part study.

83. Should I use the "time in between option" in my multi-part study in SONA?
- In a multi-part study option, you control the time slots you schedule for students to sign-up and complete your study. Students can only access your study when they sign up for a timeslot.
- You don't have to use the "time in between option" in the SONA system. This will only PREVENT students from signing up for the next time slots if they are OVER or UNDER the range you provided. This can become more complicated if you have students completing part 1 of your study over a period of time. Meaning, students can sign up for part 1 of your study. If you say study 2 can be taking 7-31 days later then they can see Study 2 when posted but CAN'T sign up for the study 2 timeslot unless they are within that 7-31 days range you set from when THEY took part 1. This takes a lot of energy tracking so most researchers find it easier to not use the "time in between option".

Attendance

84. Who grants credit to participants for completing research studies.
- All credit granting decisions are made at the discretion of the SONA Researcher. Researchers are encouraged to grant credit equal to the time the Participant spent in the study (i.e., .25 credits = 15 minutes); granting a minimum of the number of credits listed in the study description.

85. Who makes the final decision on attendance issues with Participants?
- All attendance decisions are to be made at the discretion of the SONA Researcher. Researchers are encouraged to record *excused absences* for students who provide 24-hour notice of their absence and otherwise record an *unexcused absence* (i.e., no show) with rare exceptions under extreme circumstances.

86. Does the system automatically give participants credit?
- Participants are automatically granted credit for participating in a study 48 hours after the scheduled time slot unless the Researcher or PI enters something different in the attendance record.

87. When should I log a Participant as an excused absence versus an unexcused absence "No Show"?
- Researchers are responsible for logging participation. The study researcher will have the final say in all attendance decisions (i.e., participants can be logged as *participated*, *excused absence,* or *unexcused absence* which is also called a "No Show").
- As a rule of thumb here are the following guidelines:
  - *Participant will be logged as participated if they:*
    - were on time for the study
    - completed all study requirements
    - met all expectations of the study
  - *Participant will be logged as excused absence if they were:*
    - not on time to the study and not able to participate but did show up
    - not able to complete the study or all study requirements
    - not able to meet all expectations of the study
    - contacted the researcher after the study with a legitimate excuse or reasonable explanation that the researcher finds fit for excusing the absence □ this is not common
    - voluntarily withdrew consent or chose to not finish the study
  - *Participant will be logged as unexcused absence "No Show" if they:*
    - did not attend a study with no warning ahead of time
    - did not cancel their appointment within the 24-hour period prior to the study
    - contacted the researcher after missing the study but did not provide justification that the researcher finds legitimate for excusing the absence (students who "no show" one study tend to do so repeatedly)
- Do not use the 'comments' feature for assigning participation / absences or as a data log when assigning participation / absences. This space is visible to Participants and is not an appropriate place to track study information. Use only IRB approved databases (e.g., Qualtrics) for storing study and participant information.

88. What if I need to cancel an appointment?
- If you are canceling 24 hours (weekends included) or more in advance, you should do so within the SONA system.
  - Go to the study sign-in page
  - Click "Cancel"
- If you are canceling less than 24-hour (weekends included) before the study timeslot, the Participant is entitled to receive SONA credit for that session.
  - Award this credit on SONA and email the Participant to notify them of the cancellation.
  - If you do not hear confirmation from the Participant, it would also be courteous to leave a note at the study location on the day of the appointment.
- Know that the Participant will not be able to complete your study at a later date because the SONA system will recognize them as having previously participated. If this is a multi-session study, credit only needs to be awarded for the first session and not subsequent sessions.

Researcher Walkthrough – Manually Assigning SONA Credits

89. **How can I, as a researcher, manually assign SONA credits to students or manually add additional SONA credits for a student participant?**
    - Select your study.
    - In the bottom left corner select "View/Administer Time Slots".

- Create a time slot using the "Add A Timeslot" button in the top right corner.
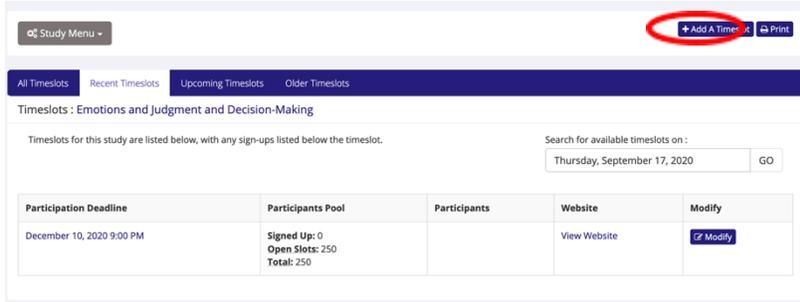
- Create a time slot for the number of participants you need to give credit to. It may help to use an unusual date and time (e.g., Saturday morning at 1 am) to prevent other participants from signing up for the study while you perform this task. The system may give you a notice warning you that your time slot is "unusual".
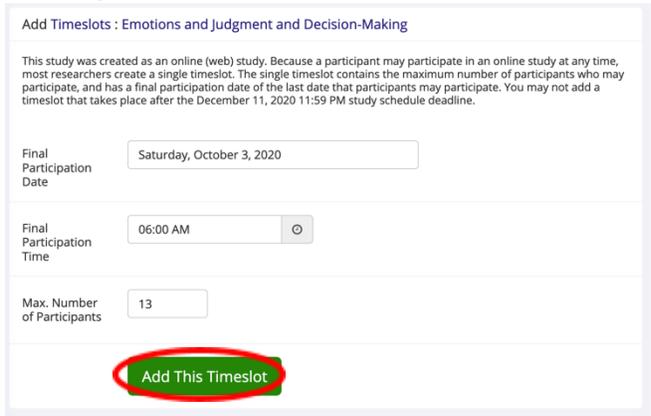
- Return to the time slot you just created by selecting the "Modify" button.

- Scroll down and under "Manual Sign-Up" you can add a single user to give credit to (either by Username or by "ID Code" which is the SONA ID number) or you can do "Batch Credit Grant" with the blue button on the right side which will give you more options for granting credit to large groups of participants.

- If the participant already got credit for this study, the system will give you a warning, since having a participant complete the same study twice is unusual. The system will warn you with the following message. Add a short comment / phrase to explain the situation.

- As a best practice, it is easiest if the added timeslot to grant additional/split credit is the same day and time as the original study. This places it right next to the other time slot so it is easy to see a summary of credits granted to this participant.
- Sometimes when a participant has more than 1 time slot the Sign-up automatically changes all time slots for that participant to "Unexcused". Double check that the correct credits have been assigned to the participant.

Researcher Walkthrough - Accessing Pre-Screen Responses

90. How can I access participants Prescreen responses?
- There are three ways to access the pre-screen responses.
- OPTION 1: Login to SONA > Click "Prescreen Results" from the top bar
  - *Choose "On-screen" (aggregated into totals by response) or "CSV Format" (organized by SONA ID, complete list of all responses)*
- OPTION 2: Log in to SONA > Click "My Studies" > Click name of study > Click "View/Administer Time Slots" > Click "All Time Slots"
  - *Locate the Participant you want to see the Prescreen results for*
  - *Click "View Prescreen" (full responses populate on next page)*
  - *This method only allows one participant's responses at a time to be viewed.*
- OPTION 3: Select your study.
  - *In the bottom left corner select "Download Prescreen Responses".*
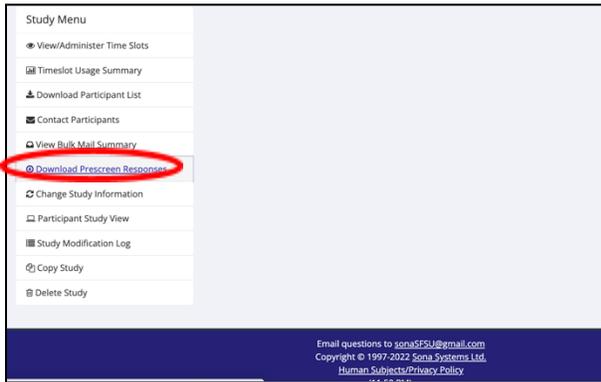
  - *At the bottom of this page you can download the "Question Key" under Step 1.*

  - *This is what the "Question Key" will look like. This is just a key of all the questions that are asked in the Pre-Screen Questionnaire.*

o *From the "Download Prescreen Responses" page, you can also download or view the "Prescreen Data" in Step 2.*

o *The data will look something like this and is always anonymized by SONA ID number.*

Researcher Walkthrough – Contacting Individual Participants

91. **How do I contact individual Participants through the SONA system?**
    - Select your study in the SONA system.
    - Scroll down to the Study Menu and select View/Administer Time Slots

Study Menu

👁 View/Administer Time Slots

- Click on your participation deadline (this will take you to the list of all participants who have signed up for the study)

Participation Deadline

May 8, 2020 5:00 PM

- This list of participants will allow you to individually assign credit to them and contact them.

Name

ID Code: 84202
☰ View Prescreen ✉ Contact

ID Code: 84322
☰ View Prescreen ✉ Contact

ID Code: 84469
☰ View Prescreen ✉ Contact

- Avoid requesting identifying or contact information for participants (e.g., name, SFSU ID number, email address.