Introduction .................................................................................................................. 2
System Basics ................................................................................................................ 2
Getting Started .............................................................................................................. 2
Logging In ....................................................................................................................... 2
Logging Out ..................................................................................................................... 3
Study Approval ............................................................................................................... 3
Password Information ..................................................................................................... 4
Email Address Options ................................................................................................. 4
Retrieving a Lost Password ............................................................................................ 4
Working with Studies ..................................................................................................... 4
Two-Part Studies ............................................................................................................ 5
Adding a Study ................................................................................................................ 5
Updating a Study ........................................................................................................... 11
Deleting a Study ............................................................................................................ 12
Timeslot Usage Summary ............................................................................................. 12
Bulk Mail Summary ....................................................................................................... 12
Viewing Your Studies ................................................................................................... 13
Participant Study View ................................................................................................. 13
Viewing Other Studies ................................................................................................. 13
Working with Timeslots (Sessions) ............................................................................ 14
Timeslot Usage Restrictions ........................................................................................ 14
Timeslots Linked to Specific Researchers ................................................................... 14
Creating Timeslots ....................................................................................................... 15
Creating Multiple Timeslots ....................................................................................... 16
Modifying and Deleting Timeslots ........................................................................... 17
Timeslot Change Tracking ........................................................................................... 18
Deleting Multiple Timeslots ....................................................................................... 18
Manual Sign-Up ............................................................................................................ 19
Manual Cancellation ..................................................................................................... 20
Viewing the Participant List ........................................................................................ 20
Granting or Revoking Credit ....................................................................................... 21
Batch Credit Granting .................................................................................................. 22
Emailing Participants .................................................................................................... 23
Viewing Uncredited Timeslots ..................................................................................... 24
Frequently Asked Questions (FAQ) ............................................................................. 25
Regulatory Compliance Guidelines ............................................................................. 26
Introduction ................................................................................................................... 26
Data Handling and Security Guidelines ....................................................................... 26
Human Subjects/Privacy Policy Acknowledgment ................................................... 26
INTRODUCTION

Sona is used for the scheduling and management of the Psychology Department Human Subject Pool. As a researcher, you can set up your studies in the system, schedule sessions (timeslots) when participants may participate, and grant credit after the session. All of this is handled through a simple web-based interface that you can access at any time, from any web browser.

GETTING STARTED

The system works best if you use any popular web browser that is less than 2 years old, like Internet Explorer, Firefox, and Safari. It will work with other web browsers, and with older versions of popular web browsers, however the layout may not be as clean.

LOGGING IN

The site administrator will provide you with a username and password to login to the site, as well as the URL (web address) after being approved. When you go to the front page of the site (the login page), you may see a link to request an account. This form is only for participants.
Once you login, you will see the Main Menu. Your login (also known as a session) will expire after a certain period of inactivity (20 minutes). This is done for security purposes. If this happens, you can always log in again. When you are done using the system, it is better to explicitly log out, to prevent any problems that may arise if someone uses your computer before the session expires.

LOGGING OUT
When you are done using the system, choose Logout from the top toolbar to log out. You are now logged out. It is always a good security practice to close all your web browser windows as well, especially if you are using a computer that is shared by others.

STUDY APPROVAL
After submitting your Subject Pool Application to Dr. Ladan Shams and the System Administrator, you will be emailed a login and password once it is approved. You will need to login to the system and add your study information. Once you are ready to have your study viewed by participants contact the site administrator at subjectpool@psych.ucla.edu by sending an approval request. The administrator will make your study visible to participants. Please Note: Although you only need one login for ALL your experiments, each experiment will need to be approved individually. For each experiment please follow these steps:
1. Submit Subject Pool Application to Dr. Ladan Shams and the System Administrator (if you have never received a login, the System Administrator will send you one a few days after submitting your application). Note that **the title listed on the Subject Pool Application must exactly match the title of the IRB.**
2. Log into the system and post your experiment once you receive the approval email.
3. Send an Approval Request through SONA to make your experiment visible to participants.

CHANGING YOUR PASSWORD AND OTHER INFORMATION
If you would like to change your password or other information about yourself, choose My Profile from your Home page. If you would like to change your password, type your new password (twice, for confirmation) in the provided boxes. If you would not like to change your password, simply leave these boxes empty. If you change your password, please be sure to select a password you do not use on any other systems or websites. This is good computing practice, and especially important as in some cases, your password may be sent over email.

EMAIL ADDRESS OPTIONS
There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that a participant has signed up or cancelled their sign-up for your studies, but there are a few other cases where it may be used as well. The email address is also displayed to the participant when they view information about the study, in case they need to contact you with questions. When you update your personal information under My Profile, you will be asked to enter your email twice when changing the address, to ensure it is typed correctly.

RETRIEVING A LOST PASSWORD
If you have forgotten or do not have your password, then you will see an option on the main login page to have your password sent to you. Your password will be emailed after you submit the form, and should arrive in your email box in approximately 30 minutes or less.

STUDIES WITH MULTIPLE PARTS
You may create a study with two parts or more in the system. Often, these are studies involving memory research, where the participant must return a specified number of days after the first session. When creating a study, you may specify the day range for the additional parts of the study (e.g. 7 to 10 days after the first part). Participants are required to sign up for all
sessions at the same time, to reduce the chance they will forget to sign up for the other parts. Each part of a multi-part study may have a different credit value and duration. Online studies may not be multi-part studies, and studies cannot be both online and in-person.

You may specify that the other parts of the study must be scheduled to take place at the exact same time as the first part (on a different date), or at any time on the dates that are the specified number of days after the first part.

You should ensure there are enough available timeslots for all parts of the study, or participants will be prevented from signing up for any part. Participants may cancel any part of their sign-up if necessary. For example, if they cancel the first part, the second part is automatically cancelled as well. If they cancel only the second part and the first part has already occurred, and they would like to participate in the second part later, you will need to manually sign them up for the second part (if you are allowed to do so), or ask the administrator to do so.

If you grant a no-show for the first part of a two-part study, the second part of that participant’s sign-up will not be cancelled automatically, but you will be reminded of the situation in case you would like to cancel the second part. The cancellation is not automatic as there are some situations where automatic cancellation is not desirable.

Subject Pool Applications for studies that are more than two parts will be reviewed on a case-by-case basis by the Subject Pool Chair. Although the SONA system is capable of creating a study consisting of up to four parts, the department does not encourage having a study that is more than two parts. Students are not required to complete all parts of a study, meaning that there may be a higher attrition rate for studies that have more than two parts.

Figure 4 - Adding a New Study

ADDING A STUDY

To add a study, choose the Add New Study option from the top toolbar (see above). You will need to pick from four possible types of studies. Please choose this carefully as you are not able to change this later.

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, which are explained in the following table. All fields must be filled out unless otherwise noted.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study Name</td>
<td>A short name for the study. This is how the study is identified throughout the system. The system is configured so studies show in a random order to participants, so there is no advantage in choosing a study name that might put it at the top of an alphabetical list. Study names must be unique, and you will be prevented from adding a study if there is already another study in the system with the same name. A study name may be up to 100 characters in length.</td>
</tr>
<tr>
<td>Brief Abstract</td>
<td>This is a short one or two line description of the study. This short description will be displayed to participants when they view the entire list of studies, so you may want to list the most pertinent details here. This field can be up to 245 characters in length.</td>
</tr>
<tr>
<td>Eligibility Requirements</td>
<td>If there are any restrictions on who may participate (for instance, only those who are left-handed), list them here. Otherwise, leave the field as-is. If you list any restrictions, these 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.</td>
</tr>
<tr>
<td>Pre-Requisites (this feature might be disabled on your system)</td>
<td>If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies, and on most systems, you hold 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 system will handle enforcement of the pre-requisites in a strict fashion. In strict enforcement mode, the participant must have received credit for (participated in) the pre-requisite studies.</td>
</tr>
<tr>
<td>Disqualifiers</td>
<td>If there are any studies a participant must not have participated in, please select them here. You may select multiple studies. The system will handle enforcements of the restriction, during the sign-up process. If a study has some other study listed as a disqualifier, and a participant signs up for this study, then they will be prevented from signing up for the disqualifier study. Please note that this is set to lenient unlike Experimetrix which had strict enforcements.</td>
</tr>
<tr>
<td><strong>Course Restrictions</strong></td>
<td>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. You may choose No Restrictions if you would like to make the study available to participants in all courses. If there is a long list of courses for this setting, an Enlarge List button will appear. You can click this to make the list of courses larger and thus easier to click on. There is a limit to how many courses can be listed as course restrictions for a study, and the limit is somewhere between 60 and 80 courses. The limit is variable depending on a few factors, and the system will simply not save the course restrictions for any courses which would take it over the limit.</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Timeslot Usage Limit</strong></td>
<td>Under Study Information you will see the maximum number of study session hours available to this study. This value is set by the administrator, and only the administrator can adjust it. To determine the current session usage for a study, go to the Add A Timeslot page for the study, and the usage will be listed there.</td>
</tr>
<tr>
<td><strong>Preparation</strong></td>
<td>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 this field as-is.</td>
</tr>
<tr>
<td><strong>Invitation Code</strong></td>
<td>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. If you do not need an invitation code, leave this field blank.</td>
</tr>
<tr>
<td><strong>Is this a web-based study?</strong></td>
<td>If this is a web-based (online) study, choose the type of online study it is. If you have set up the study on another website, you should note the study is administered outside the system. If you want to set up an online survey study to be administered by the system, select the appropriate option.</td>
</tr>
<tr>
<td>Study URL</td>
<td>The URL (web address, usually starting with http://) for your study. This is only required for web-based studies administered outside the system. If you are setting up a web-based study outside the system, and would like the system to pass a unique identifier in the URL so you may easily identify participants, add the text %SURVEY_CODE% in the URL where you would like the identifier to be placed. This is discussed in further detail in the Web-Based (Online) Studies section of this documentation.</td>
</tr>
<tr>
<td>Credits</td>
<td>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. If the study has a credit value, you may specify a fractional credit value up to two decimal points of accuracy (e.g. 0.5, 1.25, etc.). If you are setting up a 2-part study, this is the value for the first part of the study. After a study has sign-ups, you may not change the credit value of the study. However, the administrator can change the credit value, in certain situations. A study may not be changed between a study for credit and for payment, after it has been created.</td>
</tr>
<tr>
<td>Is this a 2-part study?</td>
<td>Select Yes or No if this is a 2-part study. You can only decide this when creating a study (not when editing it), and this setting may not be changed after the study is created. See “Two-Part Studies” for more information.</td>
</tr>
<tr>
<td>Credits, Part 2</td>
<td>Enter the number of credits for part 2 of the study, if this is a two-part study (the value is ignored otherwise). 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. If the study has a credit value, you may specify a fractional credit value up to two decimal points of accuracy (e.g. 0.5, 1.25, etc.).</td>
</tr>
<tr>
<td>Part 2 Duration</td>
<td>The amount of time, in minutes, that part 2 of the study will take.</td>
</tr>
<tr>
<td>Part 2 Scheduling Range</td>
<td>Specify the number of days (as a range) after part 1 is scheduled, that part 2 should be scheduled. This setting only applies to two-part studies. The range may be the same value (e.g. “between 7 and 7 days”) if desired, but must be a whole number. See “Two-Part Studies” for more information.</td>
</tr>
<tr>
<td>Part 2 Scheduling Leniency</td>
<td>In some cases, you may want to ensure that the participant schedules the second part of the study to take place at exactly the same time (on a different date) as the first part. If so, choose Yes for this option. If there is some flexibility so they can sign up for any time within the Part 2 Scheduling range, choose No for this option.</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Researcher</td>
<td>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 (only the administrator, can change the researcher). The pull down box lists only users who are researchers.</td>
</tr>
<tr>
<td>IRB Approval Code</td>
<td>Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies.</td>
</tr>
<tr>
<td>IRB Approval Expiration Date</td>
<td>The date when IRB approval expires. This field may not appear if your system is not configured for it. If it does appear, you must provide a valid expiration date. The system will prevent you from adding new timeslots to take place after this date, and your study will become inactive (not approved and thus not visible to participants) after this date. You may not make a study active if the IRB approval has expired. Only the administrator can change the IRB approval expiration date, once it has been entered. You may specify a date up to 5 years in the future.</td>
</tr>
<tr>
<td>Approved?</td>
<td>The system is configured so that only the administrator can approve a study. You should contact the administrator when you are ready to make the study visible to participants – and a handy form is provided on the page to do so. As a researcher, you can always make an approved study invisible to participants (by making it not approved). In addition, if you change key items about the study, specifically the name or descriptions, the study will automatically be made invisible to participants, until the administrator reapproves it.</td>
</tr>
<tr>
<td>Email Approval Notice? (visible to administrators only)</td>
<td>This option will appear if the administrator is adding or updating the study, and it is not already approved. If they select Yes to Email Approval Notice and they approve the study (set Approved to Yes) at the same time, then an email will be sent to all researchers for the study, to notify them that their study was just approved.</td>
</tr>
<tr>
<td><strong>Active Study?</strong></td>
<td>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 pre-requisite 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 pre-requisites, where the inactive study is a pre-requisite for an active study.</td>
</tr>
<tr>
<td><strong>Email notification when a participant signs up or cancels?</strong></td>
<td>The researcher for this study will receive an email notification whenever a participant signs up, or cancels their sign-up, for the study. The email notification will be sent to an email address based on the information the researcher has provided. See the Email Address Options section of this documentation for more information on how the email address is determined. Emails will contain the first 50 characters of the study name as part of the subject line, to make it easy to sort the emails with an email program that supports filtering based on subject line. Emails are sent to all researchers specified for the study, unless a specific researcher is assigned to the timeslot that the email notification is being sent about. See Timeslots Linked to Specific Researchers for more information.</td>
</tr>
<tr>
<td><strong>Automatic Credit Granting</strong></td>
<td>If set to Yes, timeslots that are more than a specified number of hours 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.</td>
</tr>
</tbody>
</table>
Can a participant sign up for this study more than once?

If you would like to allow participant to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No. If No is chosen, participants may only sign up for the study more than once if they previously failed to show up for the study (a no-show).

Private Comments

This is an optional area where you may enter any comments or notes about the study, which are only visible to the researchers for this study, and not to participants.

Participant Sign-Up Deadline

Enter the deadline before the study is to occur that the participant may sign up, in whole hours.

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.

UPDATING A STUDY

You may update any of your studies at any time. To do so, choose My Studies from the top toolbar, and you will see a list of your studies. Click on the desired study, and choose the Change Study Information link.

You will see a form remarkably similar to the one you used to add the study. A few options may no longer be changeable depending on the status of the study (e.g., if participants have already signed up for it). The fields shown are all the same as when you added the study. See the Adding a Study section of this documentation for an explanation of those fields.

The changes you make will be take effect immediately after they are saved. If administrator approval is required before a study is made visible to participants, and the name, description, or eligibility requirements of the study are changed, then the study will require re-approval by the administrator before it is again visible to participants. The reason is that many IRBs are quite strict about a study’s wording, so the administrator must look over any changes.

If you need to change the credit value for a study, and there is no option to do so, this means the study already has at least one participant signed up for it. You cannot change the credit value when a study is in this situation because there is no easy way to handle past credits for the same study (e.g. should old credit grants for the same study be adjusted to reflect the new credit value, or kept the same?). If the study is nearing the end of its run, and variable credit granting is enabled, then the easiest solution is to grant the new credit value to participants who sign up in the future. If you prefer that the credit value is changed for the entire study, contact the administrator, who can make the change for you under certain conditions (which depend on the credit status of existing sign-ups for the study).
DELETING A STUDY
You may delete a study only if participants have not signed up for it. If you need to delete a study which already has sign-ups, you should make it Inactive instead, if you do not want it to be visible to participants. You may not delete a study which has sign-ups, so the option will not be presented.

If you want to delete a study that has sign-ups, please contact the administrator. The administrator can delete a study with sign-ups, but only if the sign-ups are all without credit values (this usually occurs when study participation history from a previous semester was retained, but credits were zeroed out).

To delete a study, choose My Studies from top toolbar, click on the desired study, then choose the Delete Study option under the drop down Study Menu. You will see a confirmation page. Choose Yes (at the bottom of the page) to delete the study.

Once a study is deleted, it cannot be restored, so use this feature very carefully. If you delete an online survey study, the survey and all data collected will also be deleted.

TIMESLOT USAGE SUMMARY
The timeslot usage summary is available when viewing your study. This gives some basic information about timeslot utilization in the past and in the future, as well as some basic no-show information. It also gives information on timeslots for the study by location (if the study is not an online survey study or external web study), and by researcher (if the study is configured to allow researchers to be assigned to specific timeslots).

BULK MAIL SUMMARY
The system tracks whenever any type of bulk email is sent (by a user) related to the study. This includes inviting participants based on the study’s prescreen participation restriction analysis, or contacting those who have already signed up for the study. This information is kept for 6 months, and it is tracked to ensure that all users follow generally accepted Internet practices for responsible use of email. The administrator also has access to this information.
VIEWING YOUR STUDIES
To view your studies (and not the studies of others), choose the My Studies option on the top toolbar. The system will list your studies in alphabetical order by study name. There are two tabs, one is for your active studies, and one is for your inactive studies.

![Figure 6 - Your Studies](image)

PARTICIPANT STUDY VIEW
If you would like to see how your study appears when participants view it, find your study and choose the Participant Study View option. This will show exactly how the study appears to participants, with the exception that when a participant views a study, next to each pre-requisite and disqualifier study (for a study) is listed a status indicator about whether they have met that requirement. In Participant Study View, the pre-requisite and disqualifier studies are listed, but there is no status indicator next to each study in the list.

VIEWING OTHER STUDIES
To view all studies that are visible to participants, choose the All Studies option from the top toolbar.

You will see a list first of all Active studies. These studies will show up to participants on the list of available studies. The next group of studies (if there are any) is Inactive studies. These will not show up on the list of available studies (to participants), but participants can access information about these individual studies on links from the page with their progress (if they participated in the study) or if another study has the Inactive study listed as a pre-requisite or disqualifier.
WORKING WITH TIMESLOTS (SESSIONS)

Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study. If you are setting up timeslots for a web-based study, please read the section in this documentation on Web-Based (Online) Studies for some special information.

Timeslots allow you to specify a date, time, location, maximum number of participants, and researcher for a session.

TIMESLOT USAGE RESTRICTIONS

You will find there is a limit to the amount of time available for scheduling timeslots. This usage is computed by adding up all the past timeslots where credit was granted, and then adding all timeslots in the future, regardless of credit status. You may find that the usage goes down over time, as time progresses and timeslots that were in the future had no participants signing up for them. The usage and limit is listed whenever you add a timeslot, if usage restrictions apply. It may also be listed when you view your profile, depending on how your system is configured.

TIMESLOTS LINKED TO SPECIFIC RESEARCHERS

If your system is configured to allow multiple researchers per study, you will also have an option to link timeslots to a specific researcher. This is done primarily for organization purposes, and has no effect on who can view and modify the study, or any timeslots for that study.

This feature is useful when there are a number of researchers running a study, and researchers are responsible for running specific timeslots. If a timeslot has a specific researchers linked to it, then only that researcher will be listed as the contact point when a participant receives any emails related to their participation in that timeslot. Finally, only the researcher connected to that timeslot receives related notification emails, such as participant cancellation notification, and reminder emails (assuming such emails are enabled).

It is also possible to have some timeslots where a specific researcher is linked to them, and others where all researchers (who are assigned to the study) are responsible for the timeslot. It is not possible to link more than one, but not all of the researchers (for the study), to a specific timeslot. The options are to either link one researcher to the timeslot, or all of them.

If a researcher is removed from a study, then any timeslots that were linked to them for that study will be changed so all researchers (for the study) are now responsible for those timeslots.

To use this feature, the system must be configured to allow multiple researchers per study. Then, the study itself must be configured to allow researchers to be linked to specific timeslots. Finally, the study must have more than one researcher connected to it.
CREATING TIMESLOTS

To add a timeslot for a study, you must first choose the study you would like to add a timeslot for. To view your studies, choose the My Studies option on the top toolbar. Click on the desired study, under the Study Menu, click on View/Administer Timeslots. You will see a list of any existing timeslots, and the Add A Timeslot option at the top, under Study Menu. Click on Add A Timeslot.

![Figure 7 - Adding a Timeslot](image)

The following table lists the information you may enter about a timeslot, along with an explanation. All fields are required.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date for the timeslot.</td>
</tr>
<tr>
<td>Start Time</td>
<td>The time for the timeslot. A sample time will be provided. If you want to change the time, please use the same format as the time you see presented. Note in particular how “a.m.” and “p.m.” are handled (if such a format is enabled on your system).</td>
</tr>
<tr>
<td>End Time</td>
<td>The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.</td>
</tr>
<tr>
<td># of Participants</td>
<td>The number of participants for this timeslot. This limit is not visible to participants. They will only see whether the timeslot is full or not. The maximum number is 999.</td>
</tr>
<tr>
<td>Location</td>
<td>The physical location where the study will take place, for this timeslot. It will be automatically filled with the location of the previous timeslot, when available, to ease in data entry.</td>
</tr>
</tbody>
</table>
Depending on how your system is configured, you may see a list of pre-configured locations. You may choose any of those locations and click on View Schedule to see the schedule for a location. The system will automatically prevent you from adding a timeslot using a location that is already in use at the time you try to schedule the timeslot. If you do not see the location in the list that you plan to use, you can simply type in the location in the text field below it.

The location field does not apply for web-based studies.

The researcher assigned to this specific timeslot. The list will contain a list of all researchers for the study. Choose ALL if all researchers (for the study) should be assigned to this timeslot.

To ease data entry, the system will automatically fill in the date, time, and location based on the ending time of the last timeslot for this study. If applicable, your current timeslot usage will be listed, and you will be prevented from adding a timeslot that would exceed your timeslot usage time limit. A convenient calendar is provided next to the form, and you can click on any date and that date will be transferred to the form.

If you add a timeslot such that there is another timeslot (for any study) that occurs in the same time, at the same location, you will receive a warning (but the addition will be allowed). If you add a timeslot that will take place outside of normal hours (for example, at 1:00am), the system will provide a warning but will allow it to be scheduled. You may not schedule a timeslot to occur after the IRB expiration date for your study, if Strict IRB mode is enabled by the administrator.

If you are running a web-based (online study), you should create a single timeslot with the participation deadline equal to the last day you would like to run the study. For number of participants, specify the maximum number of participants who may participate. If you are running a web-based study and you plan to collect data from more than 999 participants (999 is the maximum allowed in one timeslot), then once that timeslot is close to filling up, create a second timeslot as a slightly different time and/or date as the first timeslot.

**CREATING MULTIPLE TIMESLOTS**

If you would like to add multiple timeslots at once, choose the Add Multiple Timeslots link. You may choose to add a specified number of timeslots, or copy the timeslots from another week to a specified week. If you choose to copy, the system will copy the time, location, and number of participants for the specified week to the desired week, for each day of that week (starting with Monday).

If you choose to create a specified number of timeslots, you can choose the number of timeslots you would like to add, the start time and date, and the amount of time between each timeslot (to allow for breaks). You also may specify that timeslots that would occur outside normal business hours be shifted to the next business day. On the subsequent page, you may change any of it to deal with special cases. Timeslots that you attempt to add, that either have errors or would result in exceeding the timeslot time usage limit, will not be
added. This feature is not available for web-based (online) studies, as web-based studies rarely have more than one timeslot.

If you would do not want to add a specific timeslot that is listed, choose No in the Add This Timeslot?

![Figure 8 - Creating Multiple Timeslots](image)

**MODIFYING AND DELETING TIMESLOTS**

To modify or delete a timeslot for a study, you must first choose the study that you would like to deal with. To view your studies, choose the My Studies link from the top toolbar. Choose the Timeslots option in the timeslots column for the desired study. You will see a list of all recent timeslots. Recent timeslots in the past with no participants signed up will not be displayed. To work with timeslots more than a few days old and to see all timeslots, you will see a link to view all timeslots for the study. Select the timeslot you would like to deal with, and click the Modify button.

If the timeslot has no participants signed up for it, you will see a Delete button. You may not delete a timeslot that has participants signed up for it. If you would like to delete the timeslot, click the Delete button, and you will see a confirmation page. Choose Delete again to delete the timeslot.

If you would like to modify the timeslot, modify the desired information and click the Update button just below the timeslot information. It should be noted that participants will not be notified (by email) of any changes you make to the timeslot, so you should contact them if information needs to be passed on to them (a link is provided on the same page to do so). If you change the date or time of the timeslot, you will be warned that this was changed in case the change was unintended. You may not update the size of the timeslot (number of participants) to a value lower than the current number of participants signed up for the timeslot. Generally, researchers only update timeslots with sign-ups to update the location, if it was not available when the timeslot was originally created.

If the study (or researcher) is subject to timeslot time usage restrictions, the system will enforce them and prevent you from increasing the number of participants in a timeslot if that would result in exceeding the timeslot usage limit.
TIMESLOT CHANGE TRACKING
The system automatically tracks certain changes that occur with a timeslot, including any time key information about the timeslot (date, time, etc.) is changed, as well as any time a manual sign-up or cancellation is performed (i.e., not a sign-up or cancellation done by the participant). This information is tracked for the last 3 months of changes for each timeslot.
To view this information, choose the View Timeslot Modification Log when viewing a timeslot, and you will see this information.

DELETING MULTIPLE TIMESLOTS
If you would like to delete multiple timeslots at once, you may do that as well. Such a feature is only available for timeslots which have no participants signed up. To do so, select the desired experiment and choose View/Administer Timeslots. At the top of the Timeslots page, you will see a Delete Multiple Timeslots option. The option may not appear in certain cases where such an option is not available because of a lack of available timeslots to delete.
After going to that page, you will see a list of timeslots eligible for deletion. Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to proceed. If you would like to delete all empty timeslots, there is a Select All option at the bottom of this page that will automatically select all timeslots listed on the page for deletion. Click the Reset button to revert the effect of choosing the Select All option.
The system routinely deletes all empty timeslots more than 3 months old to preserve database space.

Figure 9 - Delete Multiple Timeslots
**MANUAL SIGN-UP**

If enabled on your system, you may manually sign up participants for your study. There are a number of situations where this is desirable. If the participant happens to show up for a timeslot they were not signed up for, and you elect to let them participate, you can sign them up on the spot for the timeslot. The participant in many cases cannot sign up on their own in this situation, because the sign-up deadline has passed. You may also sign up a participant for a study that has already occurred, if necessary.

Also, a manual sign-up overrides any restrictions you have placed on the study (e.g. prerequisites), though you will be warned if you are overriding any restrictions. You may not sign up a participant for the same timeslot that they are already signed up for. You are allowed to sign them up for a study even if they are already signed up for a different timeslot for that same study, though you will receive a warning in this case. You may not sign up a participant for a study if it would cause them to exceed their maximum credit limit. If it is necessary to do so, please ask the administrator to do this, as they are allowed to do a manual sign-up even when it will violate maximum credit earning limits.

To sign up a participant for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on Timeslots for the desired study, then select the timeslot you would like to deal with, and click the Modify button.

At the bottom of the page, you will see a Manual Sign-Up option, if it is enabled. Type in the participant’s User ID (you may have to ask them for this) and click Sign Up. If enabled, you may also choose to sign up a participant using their unique ID code. You may also have the choice to enter their last name and choose from a list of participants. In all cases, after submitting the form, you will see a confirmation page that also lists any restrictions on the study. Choose Sign Up to complete the sign-up.
If you are subject to timeslot time usage restrictions, the system will enforce them and prevent you from signing up a participant in the timeslot if that would result in exceeding your timeslot usage limit.

If you are doing a manual sign-up for a two-part study, you must do a manual sign-up for each part separately. The system will overlook the scheduling range restrictions as well.

You cannot use the manual sign-up feature for online survey studies, because the sign-up for the study is integrated with the administration of the survey.

The manual sign-up feature will not appear for a researcher if the study requires approval by the administrator and it has not yet been approved. This is to ensure sign-ups cannot occur for a study that has not yet been approved, since research should not take place prior to approval.

MANUAL CANCELLATION

If enabled on your system, you may have the opportunity to cancel a participant’s sign-up. You may only cancel sign-ups that are in a No Action Taken state. To cancel a sign-up, find the desired timeslot and participant, and click Cancel next to their name. The participant will be emailed an email about the cancellation, along with a confirmation code, and their sign-up will be immediately cancelled. The administrator may also receive a copy of this cancellation email, depending on how the system is configured.

VIEWING THE PARTICIPANT LIST

To view the list of participants who have signed up for your study, you must first select the study and timeslot you wish to see. To view your studies, choose the My Studies option from the top toolbar. Click on the Edit link in the timeslots column for the desired study, then select the timeslot you would like to see, and click the Modify button.
The list of participants, along with their email addresses, will be listed. If ID codes are enabled, you will only see an ID code and no name or email address for each participant, and the list will be sorted by ID code.

GRANTING OR REVKOKING CREDIT

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.

To grant or revoke credit for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on the Edit link in the timeslots column for the desired study, then select the timeslot you would like to see, and click the Modify button.

You will see a list of participants, identified either by name or ID code. If the participant properly participated in the study, click the Credit Granted button next to their name (this text may appear as Participated if the study is set up for payment). If the participant did not appear for the timeslot, choose the Participant No-Show? button. Depending on how your system is configured, you may see two “No-Show” options. One option allows you to assess a penalty, and the other does not. Studies that are for pay only will always have only one type of No-Show option. You may choose not to assess a penalty if the participant had an acceptable reason for failing to attend the study.

Depending on how your system is configured, you may see an option to grant a credit value that is different from the standard credit grant. This is useful when you want to grant a participant a lower credit value because they left the study early (if they deserve a lower credit grant), or a higher credit value if the study ran longer than expected. The default value that is selected is the study’s standard credit value. If this is enabled, then you may also grant 0 credits. This is useful if you do not want to grant credits to the participant, but you also want to prevent them from participating in the study again. If a participant is granted 0 credits, and the study is set to prevent duplicate sign-ups, then the participant will not be able to sign up for that study again.

Click on the Update Sign-Ups button at the bottom of the list of sign-ups to save your changes. Credit will be granted or a penalty assessed as necessary. The participant(s) will be
emailed about this if the system is configured in such a manner.

It is not recommended to leave any sign-up for a timeslot that has occurred in the “No Action Taken” stage. This is a credit “limbo” and the system will warn you upon your next login about the offending timeslot that has not been dealt with properly. Note that if Manual Cancellation is enabled and you would like to cancel a participant’s sign-up, the sign-up must be in No Action Taken state.

Depending on how your system is configured, the system may automatically grant credit to participants for timeslots that are more than an administrator-specified number of hours old, and where the researcher has taken no action. You can always change the automatic credit grant later if it was in error. The automatic credit grant takes place once a day, usually overnight. Your administrator can let you know if such a feature is enabled on your system.

If you need to do a simple credit grant across many timeslots, see the Uncredited Timeslots section which offers such a feature.

**BATCH CREDIT GRANTING**

In some cases, you may wish to automatically sign up and immediately credit a group of participants. This is often useful if you administered a study on an ad-hoc basis, and you want to credit participants after the fact.

To do so, go to the appropriate timeslot (you may want to create a timeslot specifically for this purpose), and click on Modify Timeslot. In the Manual Sign-Up section (if enabled), you will see a Batch Credit Grant link. Click that and you can provide the list of User IDs of users you would like to sign up and credit. Users will be signed up and credited immediately. This feature overrides any sign-up restrictions on the study, just as a normal manual sign-up does.

The batch credit grant feature will not appear for a researcher if the study requires approval by the administrator and it has not yet been approved. This is to ensure sign-ups cannot occur for a study that has not yet been approved.
EMAILING PARTICIPANTS

If you wish to contact participants in a particular timeslot for any reason, you may click on the Contact link that will appear under each participant’s name (or ID code) to contact an individual participant. To email the group of participants for a particular timeslot, click the Contact All Participants choice at the bottom of the Modify Timeslot page for that timeslot. You will be taken to a page where you can fill out a message that the system will send to the selected participants. The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to. You may remove this information if desired. You may choose to receive a copy of the email that you send.

In some cases, you may find it useful to contact all participants for the study, across all timeslots. This feature may be particularly useful if you are sending debriefing information when a study has concluded. To do so, go to My Studies, click on the desired study. Under the Study Menu of the desired study, and choose the Contact Participants option. You will then be able to select which group of participants to send to, and a message to send. Messages will be sent in groups of 300 (or less) to avoid overloading email servers. You may not include attachments in the email, so if you have a document you would like to include, you should post it on a university webserver and provide a link to the document in the email you send.
The From (sender) address on the email will be the administrator email address, which is done to prevent the email from being blocked by junk email filters. The “Reply To” address of the email will be that of the user who is actually sending the email, so when a user chooses to reply to the email, the reply will be sent to that (the reply to) address.

Finally, there is an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of day (e.g., during the evenings) when the email will be sent. The emails are generated at the time you use the emailing facility, but are stored on the server until the specified sending time. They cannot be removed from the queue once this emailing facility is used.

In most cases, summary information about the email you sent, and in particular to how many recipients it was sent to, will be logged and made available to the administrator. This is done to ensure there is no abuse of the email facility in the system, in compliance with generally accepted Internet practices for sending emails.

VIEWING UNCREDITED TIMESLOTS

When you login to the system, you will receive a warning if you have any timeslots that are more than 2 days old and haven’t been dealt with. You may view a list of all timeslots that have not been dealt with by choosing the View Uncredited Timeslots option from the My Studies page. The timeslots for online studies, including those in the future, are always considered in need of a response. See the Web-Based (Online) Studies section of this documentation for more information.

If you would like to do a simple credit grant (standard credit grant, no comments), you may do so directly from this page. Select the desired sign-ups/timeslots, and then choose Grant Credits. The action may take a short time to complete, so please be patient while the credit grants are processed.

If you need to do something more complex, like mark a no-show, add comments, or perform a special credit grant with a non-standard credit amount, you can easily click on the timeslot’s date and time, and go directly to that timeslot.

In cases where a study has timeslots linked to specific researchers, you will see the warning only for timeslots that are specifically linked to you, or to everyone in the study (i.e., not timeslots linked to someone else in the study). However, when you view uncredited timeslots, you will see all uncredited timeslots for your studies, even if someone else is linked to one of the timeslots for your study. This is done to make it easier to give your fellow researchers (for your studies) assistance in dealing with uncredited timeslots.
FREQUENTLY ASKED QUESTIONS (FAQ)

Why do I have to acknowledge the Human Subjects Policy?
Certain regulations and research guidelines either require or recommend it. You only need to do it once every 6 months, so it should not be too intrusive. You will not be asked to acknowledge the policy if this feature is disabled by your administrator.

I want to set up a study so that participants can choose to receive credit. How do I set this up?
Set it up as a study for credit, and note in the study description that participants may opt to receive payment instead, and they should notify the researcher of this when they come to their appointment.

I want a participant to participate in an upcoming session, but the system says it is too late for them to sign up. What do I do?
If enabled, you can perform a manual sign-up. See the Manual Sign-Up section of this documentation. If not enabled, your administrator can still perform a manual sign-up.

Where are email notifications to me sent?
Email notifications (e.g. sign-up notices) are sent to either an address derived from your user ID or your alternate email address. See the Email Address Options section of this documentation for more information.

How do I deal with dyads?
A dyad is a study which requires a pair of people to participate, but often the second participant is not a “real” participant, but rather a colleague of the researcher who is “colluding” with the researcher as part of the study itself.
You do not need to deal with dyads in the system itself. Participants cannot see how many people have signed up for a timeslot, nor how many spaces are available for a timeslot. So, your “fake” participant can just act like a real participant and the real participant will be unaware of this.

I have finished running my study. What should I do?
So it does not clutter the list of studies for participants, you should make the study Inactive. See the Updating a Study section of this documentation for more information.

Who has access to my studies?
All users can see the information about your studies and the available timeslots. Administrators and the researchers for the study are the only people who can see who has signed up, and modify the study.

REGULATORY COMPLIANCE GUIDELINES
Introduction
This software complies with all major regulations governing human subject research and privacy of data stored online. The system complies with both HIPAA and Common Rule for customers in the United States. For customers in Canada, it complies with the Personal Information Protection and Electronic Documents Act as well as the Tri-Council Statement. For
customers in the European Union or in countries that follow OECD rules, it complies with OECD privacy rules and the European Union Directive of Data Protection. Your organization may or may not need to comply with the relevant regulations. Your subject pool administrator can advise you on this situation.

Even if you are not required to comply, compliance is still a good idea, as protecting sensitive data is always a good thing. Compliance in the context of this system is as simple as reading the remaining paragraphs of this section (that apply to your organization) and following the guidelines contained therein. The remaining compliance issues involving software, privacy and electronic data storage are all handled automatically by the software. You should still consult with your IRB or organization to learn about additional compliance rules you must follow outside of use of this software (the handling of the data you collect during your study would be one example).

Some regulations (particularly the US HIPAA regulations) are focused primarily on health data. You may think the system does not store confidential health data (in HIPAA terms, it is called PHI --Protected Health Information), but depending on how your organization uses the software, there may very well be confidential data in the system. Consider the case of a study that requires that a participant come from a family that has a history of mental illness. Merely knowing who signed up for that study can be considered confidential because that type of information should not be revealed to the public. It may turn out that your studies are not of such a nature, but even more benign situations, like a study that requires that participants be regular contact lens wearers, can be construed as confidential information. Organizations typically err on the side of caution given the criminal and civil penalties for violation of these types of regulations.

DATA HANDLING AND SECURITY GUIDELINES

In your role, you have access to your studies and you can see who has signed up for those studies. You may also have access to prescreen responses. Because of these privileges, you should follow these simple guidelines:

. • Secure Your Account. Use a password that is difficult to guess. The most secure passwords contain a combination of letters and numbers, do not spell a real word, and are at least 8 characters long. Your university IT department can provide you with assistance on choosing a secure password.
. • Secure Your Work Area. If you are logged into the system and you leave your computer, you should logout of the system or use a password lock on your computer. Ask your network administrator for help with setting up a password lock.
. • Handle Paper Documents Carefully. Any printouts from the system should be kept reasonably secure. Store them in desk drawer out of the public view. Documents you decide to discard should be shredded if possible.

Human Subjects/Privacy Policy Acknowledgment

Upon your first login to the system, you may be required to acknowledge your organization’s policy on these matters, and this acknowledgement will be logged. Ask your subject pool administrator if you have any questions.