



**Social Science Department  
WPI  
Participant Pool and Sona Systems Guidelines:  
For Researchers**

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### 1. Introduction

The following concerns use of the Participant Pool in the Department of Social Science & Policy Studies with an overview of the pool and instructions for submitting studies to the Participant Pool chair.

The purpose of the participant pool is: 1) to enhance the education of students in courses discussing social science methodology and human subjects research by providing them with hands-on experience as a participant in human subjects research, and 2) to enable researchers using human subjects to collect data more efficiently.

Social Science is unique among the sciences in its ability to engage students in active, cutting-edge research. Physics, Chemistry, and Biology types of classes do have laboratory components to their work, but it is rare that students in those courses experience novel research as it happens. Our participant pool provides an opportunity to show Social Science methodology in action, instill excitement about the discipline, provide an occasion to imagine life as a Social science major or professional, and teach something about current research and the practice of social science. As such, all studies submitted through the participant pool should clearly define how it is related to social science to ensure the studies meet the educational goals for the participants.

Sona Systems software is used to manage these participant pools. This is a web based system that can be accessed from most computers with internet access.

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### 2. Access to the pool

If you are a faculty member, graduate student, postdoctoral fellow, visiting researcher, visiting scholar, MQP student, or IQP student, you are eligible to put in a request to post studies in the Participant Pool.

Application documents to use the Participant Pool are *due to the Participant Pool Chair*. The application is available online from the Participant Pool Chair. Please request and submit documents via email to [skorinko@wpi.edu](mailto:skorinko@wpi.edu).

To be eligible to use the Participant Pool, the researchers must submit:

- A current application form
- A Protecting Human Subjects certificate for each researcher or RA
- a current IRB approval letter for each study
- a current IRB approved Consent Form for each study, if required by IRB
- a debriefing form/script for each proposed study for all studies, regardless of IRB
- If you are an undergraduate student, you must provide the name of your Faculty Advisor(s). Prior to creating an account, the Faculty Advisor will be emailed to confirm they are aware of and approve of the proposed study.

Note on Protecting Human Subjects Training:

All researchers and research assistants who have access to the pool *must complete the Protecting Human Subjects Training course supported through WPI's IRB*. The Human Subjects Training course can be accessed at: <https://about.citiprogram.org/en/homepage/>

This certificate of completion must be submitted to [skorinko@wpi.edu](mailto:skorinko@wpi.edu) before any Sona account can be approved, especially for any Research Assistants on a project.

Note on Using Sona Systems/Information relevant for application:

All studies posted in Sona *must* include the name and contact information of the Primary Investigator. For all students, this person will be your faculty advisor. Post-docs and Graduate Students may apply for Primary Investigator Status. Research assistants (e.g., undergraduate students assisting the Primary investigator) may request accounts to log in to Sona Systems but may not post their own studies (see below for information on how to add research assistants).

#### **a. Adding a Research Assistant (RA)**

When you submit your application you should include the names and email addresses of your RAs. If you do not know who your RAs will be for the term you may request a Sona account for them later. To add a research assistant after you have submitted your application send an email to [skorinko@wpi.edu](mailto:skorinko@wpi.edu) that includes:

- 1) your name
- 2) the name of your RA
- 3) your RA's email address that they want to make public (preferably a WPI email address)
- 4) a list of the studies they will be working on
- 5) and their Protecting Human Subjects Training course certificate.

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### **3. Ethical Guidelines, Educational Mission, and Debriefing**

Ethical Guidelines:

All research (non-pilot studies) listed in the Participant Pool must be approved by the IRB. In general, ethically unacceptable studies and questionnaires are those that put the subjects under stress. We must remember that participants in the Participant Pool are mainly comprised of students who are strongly encouraged to be research participants as part of their enrollment in a Social Science oriented course. Therefore, it is essential that only approved studies are used and that debriefings fit our educational mission.

In addition, all participants under the age of 18 are considered Minors. Students who are considered Minors must obtain Parental Consent and Assent prior to their participation in the Participant Pool. Please note that these participants must still give consent to participate in individual studies in the pool.

#### Educational Mission:

One of the main goals of the Participant Pool is to enhance the education of students in courses discussing social science methodology and human participants research by providing them with hands-on experience as a participant in human participants research, and teach them about the current research and practice of social scientists. As such, all studies submitted through the Participant Pool need to ensure the studies meet the educational goals for the participants. Because of the variability in methodologies and types of research, there are very few specific rules for how to exactly meet the educational mission. Instead, it is the responsibility of each research team to determine how best to provide educational value in their research protocol. The vast majority of studies will accomplish this during the process of debriefing.

#### Debriefing:

All participants must be debriefed who participant through the Participant Pool. This is the case even if the IRB does not require a debriefing. Participation in research should be an educational experience. Proper debriefing should fully inform the participant about the research and explain any deception used in the study. Failure to debrief participants adequately is grounds for losing your Participant Pool privileges. To use the pool, researchers must submit debriefing forms or scripts *before* they may run participants. These debriefing scripts should include your experimental question, your hypothesis, the way in which answers are evaluated, the broader issues addressed by your study, and how and participants can obtain copies of your findings (See Debriefing Guidelines at the end of this document for more details). You should also thank your participants for their time and ask them if they have any questions before they leave. Whenever possible debriefing should be done in person, immediately following participation. If your study includes deception and demands that you postpone debriefing you may do so as long as participants are notified when and how the debriefing will occur. Treat them like rats, and that is how they will feel. Take the time to educate them about your study and engage them in your research, and they might learn something and be glad that they did.

Note: Studies with Exempt IRB status typically do not need to provide informed consents for running their studies in the pool. However, they will still need a debriefing form for participants in the pool.

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#### 4. Pre-selection

Pre-selection is to be used to determine whether or not participants are eligible for your study. It is **not** to be used to collect experimental data or to include different conditions. Pre-selection surveys are ***not to be used for piloting***. The following demographic information has been approved by the IRB to be collected by every participant that opens an account on Sona Systems:

- Gender
- Age
- Ethnicity
- Whether the Participant is Enrolled in School
- What School Attending, if enrolled (e.g., WPI, Holy Cross, etc)
- Relationship Status (Single, In a Relationship, In a Long Distance Relationship, Married, etc.)
- Political Affiliation
- Facebook Usage
- Greek Life Membership (Yes/No)

Our approval to conduct Pre-selection with the Participant Pool is based on our agreement with the IRB that all survey items must be approved by the prior to administering the Pre-selection tool.

Surveys should take no longer than 2 minutes to complete and must be submitted to the Participant Pool Coordinator for review BEFORE the start of each term. Submitted questionnaires must include the researchers' name, IRB approval number and title, and the estimated time for completion. Questions in Pre-selection should not be stressful for participants to answer.

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## 5. Paying participants

You may not pay students in the Participant Pool if they are participating for credit, unless the payment is an unadvertised part of the study (such as a payoff for performance, which only some participants will win). It cannot be an inducement for Participant Pool participants to participate. Please be aware that new IRB guidelines stipulate that participants be offered the option between credit and payment if you are also running your study for payment. Individual participants can **either** be given credit or paid, but not both.

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## 6. Posting Studies

The studies that you post in the pools should be included on your application. You can include several studies on your application. You should not add studies to the pool that were **not** included on your original application without first contacting the Participant Pool Coordinator.

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### a. Study Information Pages

Study listings must include the name of the researcher who submitted the application for that study along with any research assistants who work on that project. The Participant Pool Coordinator will assign a name for the study on Sona Systems. You must use this name. If you need to include a description, it should include a very brief overview of what the participants will be doing (survey, computer task, watch videos, etc.). The "description" cannot be a lie, nor should it divulge the true purpose of your study. If you divulge your purpose and hypotheses, then you will be increasing the chances of bias into your sample.

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### b. Visible/Active Studies

Studies can only be made visible if you have a current IRB approval to begin your study on file with the Participant Pool Coordinator and your study information page meets the guidelines outlined in this document. Studies automatically become *invisible* to participants when at the end of a term.

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### c. Scheduling and Study length

Studies should be posted in half hour increments in the Participant Pool as credit is given in half credit (or half hour) increments. If your study is *less* than a half hour, inform the Participant Pool Chair so another short study can be paired with yours. If your study takes between 35-45 minutes, also inform the Participant Pool Chair to see if a short study can be paired with yours.

You **may not** advertise that your study is shorter than the amount of credit given.

Keep in mind that some students also prefer to participate in hour-long studies because it could reduce the number of studies they have to participate in.

At this point in time, .5 experiment credit = up to 30 minute long study. Note: This is subject to change, per discretion by the Participant Pool Chair. Any changes will be communicated to the Participant Pool Researchers, Instructors, and Participants.

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## 7. Emailing Participants

On a limited basis, you can email people in the pools to help your recruitment. The text in these emails *must* be approved by the IRB just like any other recruiting material. The Participant Pool Chair receives all emails sent through the system and does quality control on them.

Do *not* email participants too often. **Unless special circumstances apply (e.g., needing a special underrepresented population) you may send no more than 2 recruitment emails a term per study to 50% of the participant pool population that needs to fulfill their requirement.** (In Sona, you can select the percentage of eligible participants who should receive the email, the system will randomly select that percentage of the pool it sends the email to).

Why these limits? Remember the Participant Pool is something that we are lucky enough to have and we need to respect our participants time—including their email. Participants will get annoyed with excessive emails.

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## 8. Credit Granting/No shows

Students in the Participant Pool should be issued credit for their participation at the rate of .5 credits per half an hour. Participants must be given credit for the study even if they decide to stop early. You cannot penalize participants for stopping their participation. Credit should be granted immediately after a student has participated so students have an accurate record of how many experiments they have completed. Sona does not always automatically issue credit. You must update credit manually.

*NOTE:* If you are conducting a web survey that is not managed by Sona Systems make sure you have a plan to identify your participants in Sona to give them credit. If you use Qualtrics, there is a way to set up automatic crediting. If you use another system, you'll have to figure out a way to get their information without it being linked to their data.

Students may stop participating at any time without penalty. You must issue them the full amount of credit if they show up for the study on time.

In the Participant Pool, participants can be issued a penalty if they fail to show up or are late to a study and you cannot run them in the time remaining. Select "Unexcused No Show". This penalty adds on the overall number of experiments they must complete for the term. **At this time, participants will be docked 1 experiment credit per study they miss (regardless of the original credit of the study).**

You do not have to issue a penalty for a no show, instead select the "Excused No Show" in Sona.

If a researcher does not show up for a study or cancels with less than 12 hours notice the participants must be given credit for participation and the researcher should deduct those credits from their allocation.

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## 9. Cancellations

Please notify participants at least 12 hours in advance if you have to cancel a time slot. If you cancel a time slot in the Participant Pool without at least 12 hours notice you will be required to issue that participant credit for the study. Participants are expected to notify you at least 12 hours in advance of a cancellation as well. If they cancel with less than 12 hours notice you can give them a "no-show" with a penalty or a "no-show" without a penalty. You do not have to issue a penalty and you can reschedule that participant with their permission. To have a participant sign back up for your study use the "cancel" function rather than giving the participant a "no-show" as Sona will **not** allow a participant to sign up twice for a study even if they did not attend their first time slot.

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## 10. Demographic Data

Demographic reports for all participants in the pool can be requested from the Participant Pool Coordinator at anytime. For your own studies, you need to ask the demographic questions you are interested in.

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## 11. Problematic Participants

If you have a participant with repeated no shows, or who shows up and doesn't appear to be giving truthful or accurate data, please contact the Participant Pool Coordinator after the participant has left the lab. Habitually problematic participants in the pool may be sent a warning and can lose the privilege of using the participant pool.

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## 12. Safety and Security

If you feel threatened in any way during a study you can contact the WPI Campus Police (508-831-5555).

If you have a participant that makes you uncomfortable you should contact Jeanine Skorinko at [skorinko@wpi.edu](mailto:skorinko@wpi.edu) after the participant has left the lab. Please include the name of the study and time slot and any relevant details.

For your safety and for the security of the building we would like to encourage you to only invite research participants into the building during normal business hours (8 am to 7 pm). And remember, after hours, some doors to the main buildings are locked and not all participants may have access into the building.

Be sure to lock all doors when rooms are unoccupied and put away any equipment that is not in use while participants are in your lab.

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## 13. Contact Information

**Participant Pool Chair: Jeanine Skorinko, Ph.D**

[skorinko@wpi.edu](mailto:skorinko@wpi.edu)

SL 317 D

x5451

**Internal Review Board (IRB) Chair: Kent Rissmiller, Ph.D, [kjr@wpi.edu](mailto:kjr@wpi.edu)**

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## Appendix A Debriefing Guidelines

Debriefing is an essential part of the educational experience of participating in research and is mandatory if you use the Participant Pool. Debriefing provides more information about the study, gives participants the opportunity to ask questions, and can provide valuable feedback to you about your study. Whenever possible the debriefing should occur immediately after the study. Be sure to give enough time after the study to adequately debrief your participants. Failure to adequately debrief your participants is grounds for losing subject pool privileges.

**You are required to submit a debriefing form before you can run any participants from the pool.**

Debriefing forms should include the following:

- Study name
- Researcher's name
- Researcher's contact information for questions about the research
- The study aim, hypothesis, or purpose
- The way in which answers are evaluated
- Explain any deception
- The broader issues addressed by your study

- The study methods, conditions, and/or manipulations
- Anticipated or observed results so far

You should also:

- Thank the participant
- Provide references for further reading on the topic
- Offer to send them the results of the study
- Relate your research to something they may have learned in class (methods or theory)
- Ask them questions (e.g., Was there a part of the study that was difficult? Would you change anything in the study?)

**[SAMPLE]**

Debriefing:

Perceptions and Cognitive Processing

Thank you for participating in this study!

Much research has shown that mood can influence the way we process information. People in happy moods tend to see “the forest”—they focus on the big picture, and notice more (and often unusual) relationships between things. People in sad moods, however, tend to process information in the opposite way: they see “the trees,” and their focus becomes more detail-oriented and concrete. In this study, we hypothesized that we could produce this difference in global/local processing with two different positive mindsets: amusement and profundity.

In the current study, we presented a series of photos or sentences that typically put people in a positive mood. We then asked you to rate the items in terms of how funny or how profound they seemed. You then completed one or more tasks to assess your style of thinking. The research on positive mood discussed above suggests that these positive feelings should make people focus globally (on the forest). What we wanted to know was whether the type of ratings people made would influence their style of thinking. Specifically, we predict that participants who rated the items for humor will have more of a local, detail-oriented, “only the trees” type of focus. If the results support our hypothesis, future research will ask *why* this was the case. One possibility is that humor often involves an attempt to make “big,” complicated, or abstract phenomena seem smaller, more obvious, and more concrete.

Thanks again for participating. Please do not divulge the purpose of this experiment to other people in the Participant Pool as this is an on-going experiment!

If you have further questions or concerns regarding this experiment, please contact XX @wpi.edu –

In addition, if you have any concerns about any aspect of the study, you may contact the Chair of the WPI Institutional Review Board: Prof. Kent Rissmiller, Tel. 508-831-5019, Email: kjr@wpi.edu

References For Your Information and Further Exploration:

Gaspar, K., & Clore, G. L. (2000). Do you have to pay attention to your feelings in order to be influenced by them? *Personality and Social Psychology Bulletin*, 26, 698 - 711.

Gaspar, K., & Clore, G. L. (2002). Attending to the big picture: Mood and global versus local processing of visual information. *Psychological Science*, 13, 33-39.

**If deception is used please use your debriefing script you had approved by the IRB. Students in the pool will expect to be debriefed after the study. If you cannot debrief them immediately after the study you should tell participants when and how they will be debriefed as covered by your IRB approved research protocol (e.g., you will receive more information about the study via email when the study has ended).**

**If you are conducting your study online, make sure that you include the debriefing at the end of your study on the online platform.**

# Application for Access to the Social Science Participant Pool

To apply to have access to the Social Science Participant Pool, please complete this application and include:

- **copy of IRB certificate of protocol approval** (must submit a copy with each study and renewals)
- **copy of Informed Consent** (unless exempt status from IRB)
- **a short debriefing statement** (Debriefing statements will be made available for the participants after they've completed their experiment requirement. You need to debrief your participants at the end of each session—even if your IRB is exempt.)

**Return this form TYPED to the Participant Pool Coordinator, Jeanine Skorinko, SL 317D**  
You may email any questions and the application to Skorinko@wpi.edu

**Term/Year Using Pool:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Standing:** ○ UG ○ G ○ Post-Doc ○ Faculty ○ Visiting Scholar ○ Other \_\_\_\_\_

**Faculty Sponsor/ Principle Investigator:** \_\_\_\_\_

**Protocol Title & # (can be found on IRB approval):**

\_\_\_\_\_

**Protocol Expiration Date:** \_\_\_\_\_

**Length of Study (How long it actually takes to complete in minutes or hours):** \_\_\_\_\_

Less than 30 minutes:                      ○YES   ○NO

Between 35-60 minutes:                      ○YES   ○NO

Between 65-90 minutes:                      ○YES   ○NO

**Is the study being conducted:**

**In a Lab:**                                      ○YES   ○NO

**Online:**                                        ○YES   ○NO

**If online what is the URL?** \_\_\_\_\_

**If online do you have a way to know who participated to award credit without linking their name to their data??**

**Using Qualtrics Automatic Credit System:**                                      ○YES   ○NO

**Created a new database to collect name and will enter manually:**                                      ○YES   ○NO

We have to set a Sign Up Deadline (time at which no more people can set up for a particular timeslots). We do this in hours (1-24 hours). This means if a session is at 9am, the timeslot will stop allowing for signups however many hours earlier that you set (e.g., 2 hour deadline means at 7am the slot closes for signups). Two hours is often a good choice if you will be in class and need to make sure no one signs up while you are in class. Twenty-four hours will limit who will sign up. What would you like to set for this deadline?

Signup Deadline: \_\_\_\_\_(in hours)

We have to set a Cancellation Deadline (time at which a participant can no longer cancel their session). We do this in hours (1-24 hours). This means if a session is at 9am, the participant will no longer be able to log in and cancel their session however many hours it is set for (e.g., 1 hour deadline means at 8am the participant cannot log in to cancel their session). One hour is often a good choice if you don't want to manually cancel participants, but it depends on your schedule. What would you like to set for this deadline?

Cancellation Deadline: \_\_\_\_\_ (in hours)

Is there a study participants need to complete PRIOR to this study?

Provide name of study: \_\_\_\_\_

Are there studies that participants can NOT have participated in to be eligible for this study?

Provide the name(s) of the study/studies: \_\_\_\_\_

Research Assistant(s): \_\_\_\_\_

Research Assistant(s) email addresses: \_\_\_\_\_

Experiment Location(s): \_\_\_\_\_

Do You Need to Participate in Pre-Selection: YES NO

If yes, what are you selecting for? \_\_\_\_\_  
(Please check the demographics form to see if it can be covered there instead.)

If yes, a copy of your questionnaire must be attached to this form. (You must include your protocol #, length of time to take your questionnaire (under two minutes for two sides).