RESEARCHER/P.I. DOCUMENTATION

System Basics

In the system, you create <u>studies</u>. Each study may have a number of <u>timeslots</u>, which are the times when you plan to run the study. <u>Participants</u> <u>sign up</u> for the timeslots by viewing a list of studies and available timeslots. You grant or revoke credit to participants after the session occurs.

Questions:

Contact Jeanine Skorinko, skorinko@wpi.edu, or x5451.

Principal Investigator Special Note

This documentation applies to both researchers and principal investigators (P.I.s), when P.I. support is enabled by the administrator. A P.I. can perform all the same functions on a study as a researcher. This allows a P.I. to operate in an oversight role and monitor the progress of their studies, and step in on behalf of the researcher when necessary. Because the privileges are the same, throughout this documentation, the term "researcher" can be used interchangeably with "principal investigator" except where otherwise noted.

AT WPI: All faculty advisors will be given PI accounts, all undergraduate RA's and IQP and MQP students will be given Researcher accounts.

Logging In

Go to http://wpi.sona-systems.com

Graduate Students and Faculty: You are Principal Investigators (P.I.'s)
PI's usernames will be your WPI email id. You will be given a random password that you may change.

NOTE: You do NOT need to give your RA's your personal password in order for them to access and administer your projects. They are allowed to submit projects (though they must select a PI) and modify information for every study they are associated with.

Undergraduate Research Assistants and IQP/MQP Students: You are Experimenters.
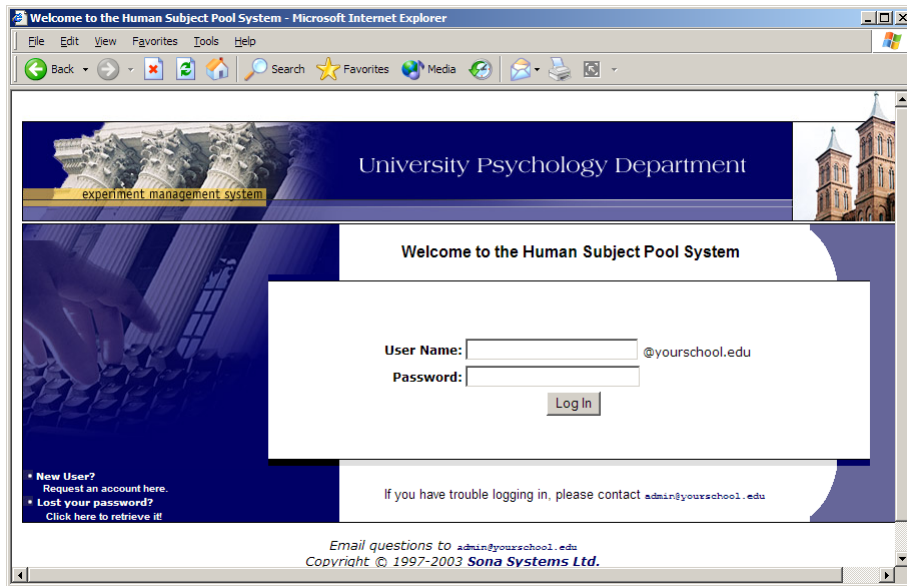Experimenter's usernames will be your WPI email id. You will be given a random password that you may change.

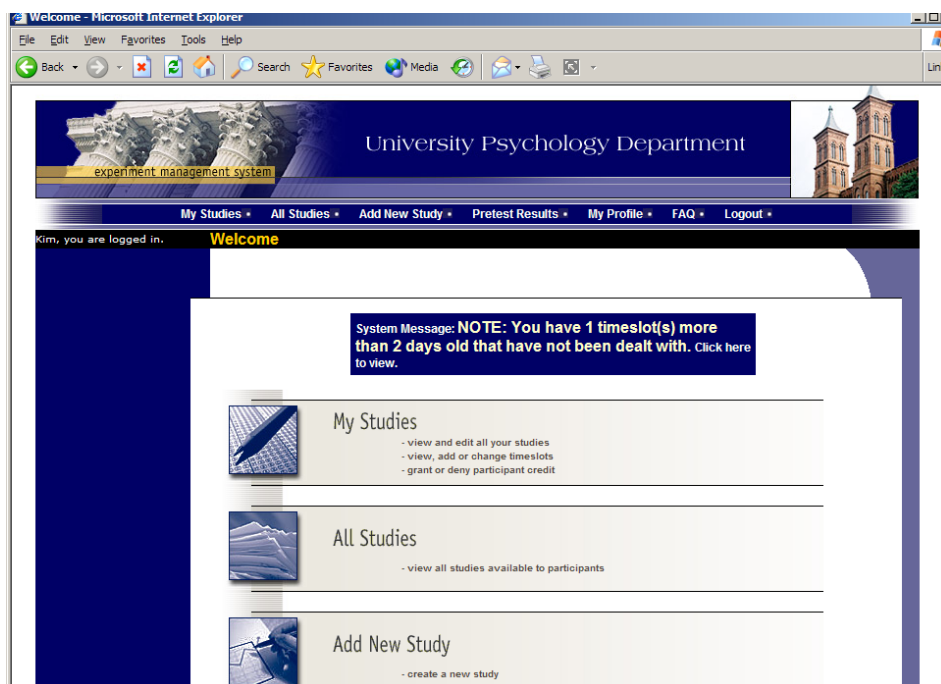**Figure 1 - Login Page**

Figure 2 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, usually 20-60 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.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. 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.

Figure 3 - Updating Your Profile

**You may also choose to receive a daily reminder (by email) with information about all of your study sessions scheduled for the following day.

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.

You have two choices for your email address. When you update your personal information, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Hotmail account, for instance), this is the address where any notifications will be sent, and this is also the address that will be displayed to other users (including participants in your studies).

If you do not supply an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain to the end of your user ID to form the address, so if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then it would derive your email address as "jsmith@yourschool.edu".

Working with Studies

Most of your time on the system will be spent, not surprisingly, using the study-related features of the system.

Web-Based (Online) Studies

You may setup studies that are web-based (online), and these studies may be set up internally in the system (as a survey) or outside the system.

There are a few things to note about web-based studies:

- Once you indicate to the system that the study is web-based, you may not be able to change it so it is no longer web-based (but you can disable or delete the study). So, make this choice carefully
- Web-based studies are typically setup so there is one timeslot, and that timeslot contains the maximum number of participants you would like to participate, and the *last* date and time when they can participate (often, this is the end of the term). It is not recommended that you set up multiple timeslots for a web-based studies (it confuses participants), though the system will support it.
- It is generally assumed that participants will participate in an online study shortly after they sign up. Because of this, the system will expect you to grant credit to them soon after they sign up. If you are creating an online survey within the system, credit will be granted automatically, immediately after the participant completes the survey.

Throughout the sign-up process, participants are notified that the study is web-based. If the study is not administered by the system, then participants are not given the URL for the website until they have signed up, to ensure they do complete a sign-up in the system for the study. This restriction applies only to participants, and only to web-based studies administered outside the system.

Studies for Pay

AT WPI: The system supports posting experiments for money. If you wish to make use of this feature, please contact the participant pool coordinators.

Two-Part Studies

You may create a two-part study 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 second part of the study (e.g. 7 to 10 days after the first part). Participants are required to sign up for both sessions at the same time, to reduce the chance they will forget to sign up for the second part. Each part of a two-part study may have a different credit value, but both are the same duration (in time).

You should ensure there are enough available timeslots for both parts of the study, or participants will be prevented from signing up for either part. Participants may cancel either part of their sign-up if necessary. 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 handle this.

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.

Adding a Study

Some researchers choose to setup their studies in the system before they have received the proper approvals (from the IRB & the Participant Pool Chair) to run the study. This is supported in the system. You can setup a study but specify that is it not visible to participants. That way, as soon as your approval is received, you can simply make the study visible and everything else is already prepared. You can also post a study and make it visible immediately, if that is appropriate.

Figure 4 - Adding a New Study

To add a study, choose the Add New Study option from the top toolbar. 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.

Field	Explanation
Study Name	**A brief study name that doesn't give away your hypothesis.**
Eligibility Requirements	**In most cases, you will leave this field as-is and set pretest participation restrictions, which you can do after you add the study. The restrictions listed here are not enforced, and clutter up the study listings.**
Pre-Requisites	**Most studies do not have Pre-requisites.** **If there are any studies a participant must participate in before participating in your study, choose them here.** **The participant must only be *scheduled* to participate in the pre-requisite studies (it is assumed they will go on to complete the pre-requisite studies). If a participant cancels a necessary pre-requisite for you study (they are warned of this situation), and you have configured your study so that the researcher will receive notifications of cancellations or sign-ups, then the researcher will receive notification of the pre-requisite problem and can contact the participant if necessary.**
Disqualifiers	**If there are any studies a participant must *not* have participated in, please select them here. You may select multiple studies, and on most systems, you hold down the Ctrl key and click the desired studies. The system will handle enforcements of the restriction, during the sign-up process.**
Duration	**For all single-session studies, the duration should match exactly with the time stated on the IRB-approved informed consent.** **If you are setting up a 2-part study, then this setting applies to the first part of the study.** **Note that this cannot be changed at the timeslot level.**
Preparation	**Most studies do not have Preparation.**
Sign-Up Password	**If you would like to have a special sign-up password for this study, enter it here. This is a password just for this study. Participants must know the password to sign up. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the password to the desired participants. If you do not need a sign-up password, leave this field blank.**
Is this a web-based study?	**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.**
Should survey participants be identified only	**This only applies to web-based studies administered by the system. If set to Yes, participants are only identified by a unique system-assigned ID code, to protect their privacy. Participants are also**

by a random, unique ID code?	notified of this when they start the survey. Once enabled, this setting cannot be changed after participants have taken the survey, as a matter of privacy protection.
Study URL	The URL (web address, usually starting with http://) for your study. This is only required for web-based studies administered outside the system.
Credits/Pay	Enter the number of credits or compensation for the study. A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning. If the study has a credit value, you may specify a fractional credit value up to one decimal point of accuracy (e.g. 0.5, 1.5, etc.). If you are setting up a 2-part study, this is the value for the first part of the study. **NOTE: At this time, all studies are worth 1 experiment credit. Should the pool become busier, this may be changed such that 30 minute studies are worth .5 credits and 1 hour studies are worth 1 credit.
Is this a 2-part study?	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.
Credits/Pay, Part 2	Enter the number of credits or compensation 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. Please see the Studies for Pay section of this documentation for more information on how to fill out this field in the case of for-pay studies. If the study has a credit value, you may specify a fractional credit value up to one decimal point of accuracy (e.g. 0.5, 1.5, etc.).
Part 2 Duration	The amount of time, in minutes, that part 2 of the study will take.
Part 2 Scheduling Range	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.
Researcher(s)	Select the researcher for this study. This is the researcher who will be in direct contact with the participants, in most cases the RA's. If you are a researcher, then you may not change who the researcher is (the P.I. for the study, as well as the administrator, can change the researcher). If you specify multiple researchers, each researcher has full control over the study. The pulldown box lists only users who are researchers.
Principal Investigator	Select the Principal Investigator for this study. The person you select will have full access to the study. You must select a P.I. This

	is typically the graduate student or faculty member who is overseeing the project. **The pulldown box lists only users who are principal investigators.**
IRB Approval Code	**Please use this field to list the faculty advisor for this study.**
Visible to Participants?	**Select Yes if this study should show up on the list of studies which participants may sign up for. Ensure you have received the necessary approvals to run the study before choosing Yes. A study must be Visible and Active to show up on the list of studies which participants may sign up for.** **If you select No, the study will not be visible to participants.**
Active Study?	**Select Yes if this study is in progress. You must select Yes and the study must be Visible if you want the study to show up to participants so they can sign up for it.** **If a study is Not Visible 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. 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.**
Should the Researcher receive an email notification when a participant signs up or cancels?	**If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up, or cancels their sign-up, for this study. The email notification will be sent to an email address based on the information the researcher has provided. See the Email Address Options section of this documentation for more information on how the email address is determined.** **If set to Yes, researchers will also receive a notification if the system is in lenient pre-requisite enforcement mode and a participant cancels a study that was a pre-requisite for the current study. Read the section on Pre-Requisites in this table for more information about this situation.** **Emails are sent to all researchers specified for the study.**
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.** **This is a good area to put the name of the study and, if there are multiple RA's running a project, to list their schedules.**
Participant Sign-Up Deadline	**Enter the deadline before the study is to occur that the participant may sign up, in whole hours.**
Participant	**Enter the deadline before the study is to occur that the participant**

Cancellation Deadline	**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, e.g., 1 hour prior to the study.**

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information. Your next step is likely to add timeslots (sessions). See the Working with Timeslots section of this documentation for more information.

If you need to update this study, see the following Updating a Study section of this documentation. If you would like to add participation restrictions based on pretest responses, you can do so when you update the study (see Pretest Participation Restrictions).

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 will be take effect immediately after they are saved.

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 will contact Sona Systems technical support and make this change for you.

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 with has sign-ups, so the option will not be presented.
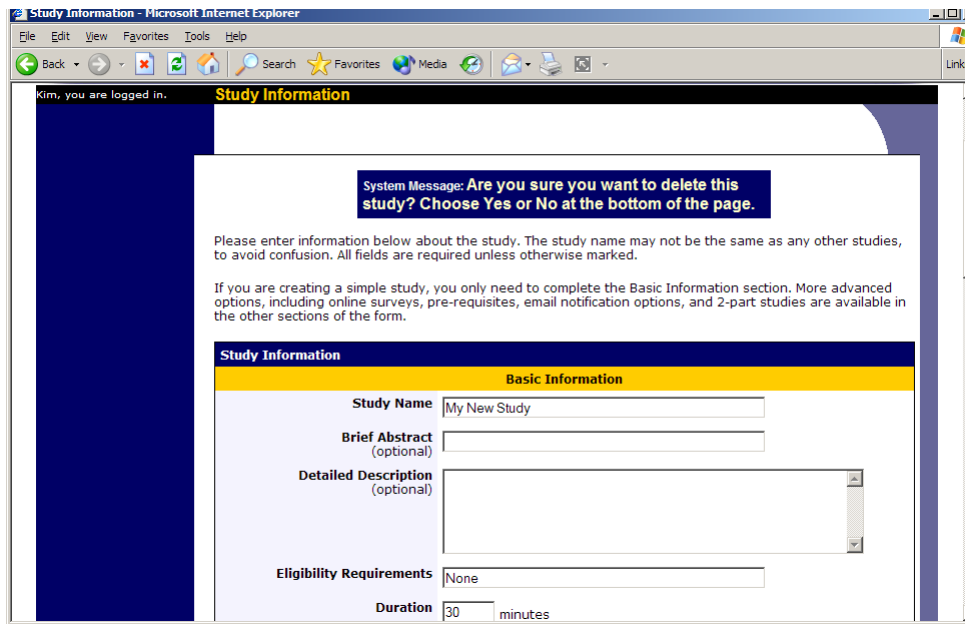
Figure 5- Deleting a Study

To delete a study, choose My Studies from top toolbar, click on the desired study, then choose the Delete Study option. 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 will also be deleted.

Pretest Participation Restrictions

> AT WPI: We are collecting demographic information (gender, race) from students through the Sona-systems "Pretesting" feature. Our typically Pretesting, in which students complete scales, will be collected outside this system and thus will not be available for automatic restrictions.

You may place participation restrictions on your study based on pretest responses. Participants are unaware that such restrictions are placed on the study. These restrictions are never listed to them. If they do not qualify to participate in a study because they do not meet the pretest participation restrictions, then the study will simply not be listed to them. This is important to note – participants never know why a study was or was not listed to them, because they are unaware of the pretest restrictions.

You may restrict a study on any question or questions on the pretest that allowed for a multiple-choice answer where only one choice could be selected. You may restrict to one choice or many choices for any question. If you restrict on multiple questions, it is the same as a logical "AND." For example, if you setup the pretest restrictions so that participants must have answered "Yes" to a "Do you wear glasses?" question and "Blue" or "Grey" to "What color are your eyes?", then they must meet *both* requirements to participate. In other words, only participants who wear glasses and have either blue or

grey eyes are eligible. There is no support for a logical "OR" restriction across multiple questions.
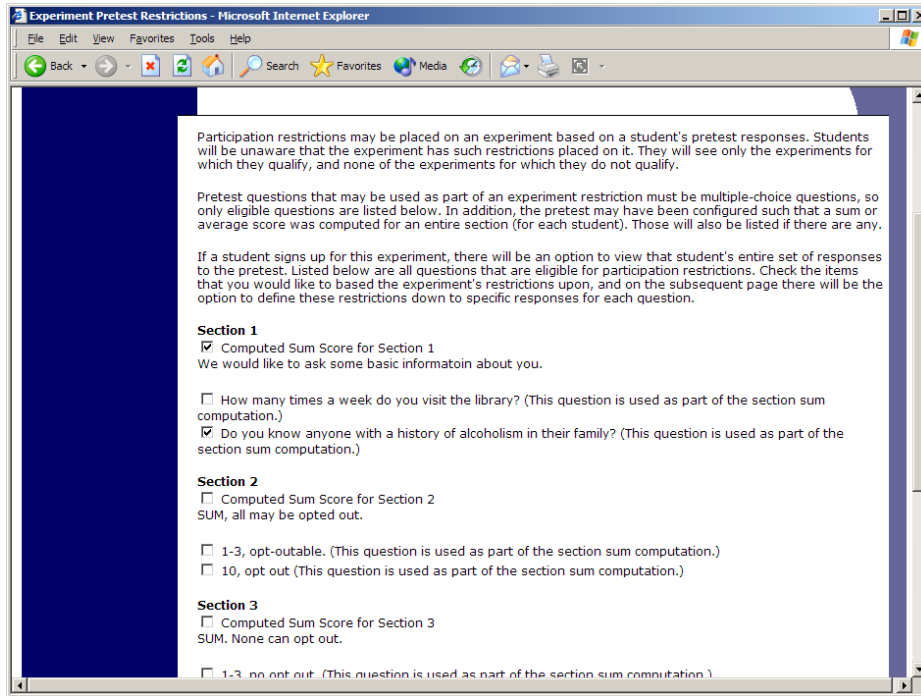

Figure 6 - Pretest Restrictions Question Selection

To set participation restrictions, view (do not choose edit) your study and choose View/Modify Restrictions. You will see a list of eligible questions which you may use for your restrictions. If the study already has some restrictions, those will be checked. Choose the questions you would like to restrict upon (and keep the existing checked restrictions checked, unless you want to remove that restriction), and click on the Set Restrictions button. On the subsequent page, you can select each value that is acceptable for each question you have chosen. Once you have selected all the acceptable values, save your changes and they will take effect immediately. It is important to note that if you change the restrictions, it will *not* remove the study sign-ups for participants who qualified under the previous set of restrictions. For this reason, you should probably decide on your restrictions before making the study available to participants.
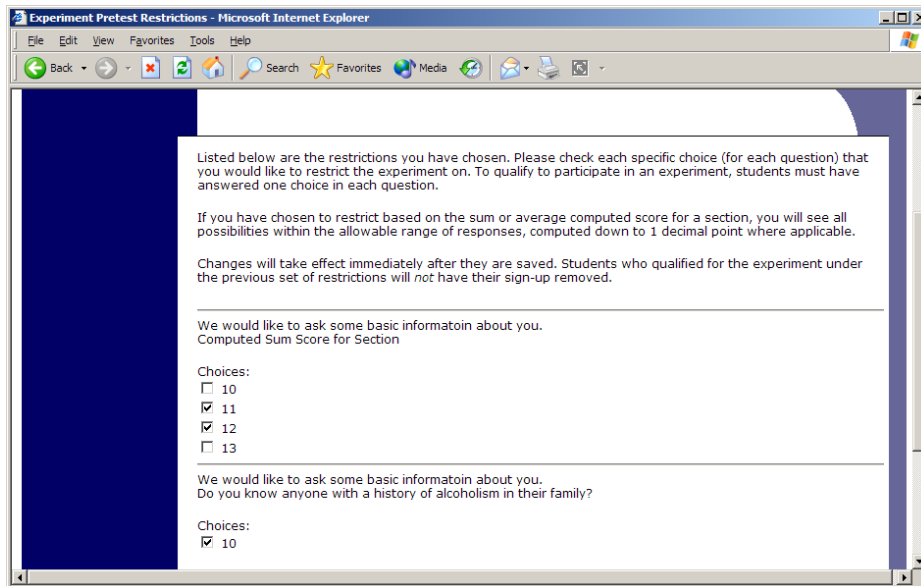
Figure 7 - Pretest Response Restrictions

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 all your studies in alphabetical order by study name, grouped by studies that are active, then inactive studies.

Figure 8 - Your Studies

Viewing Other Studies

To view all studies that are visible to participants, choose the All Studies option from 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.

Online Survey Studies

AT WPI: This system has a built in survey feature. I personally find this survey feature to be very complicated and not useful, but it does have a lot of features. I encourage people to use SurveyMonkey or some other way of presenting questionnaires, but you can request the instructions for this system from the ppool coordinators. If you can create your own HTML pages with form fields, ask the Participant Pool Chair for a script that may help you present the pages and record data.

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, and maximum number of participants for a session.

Creating Timeslots

To add a timeslot for a study, you must first choose the study that 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, and choose the Timeslots choice.

You will see a list of any existing timeslots, and the Add A Timeslot option at the bottom of the page. Click on Add A Timeslot.

Figure 9 - Adding a Timeslot

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

Field	Explanation
Date	**The date for the timeslot.**
Start Time	**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.**
End Time	**The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.**
# of Participants	**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.**
Location	**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. This field does not apply for web-based studies.**

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 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 are running a web-based (online study), you should create a single timeslot with a 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.

Creating Multiple Timeslots

If you would like to add multiple timeslots at once, choose the Multiple Timeslots link from the page where you add a single timeslot. 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, the form will be pre-filled using data about the last timeslot for the study (if such data exists), to make data entry easier. You may change any of it. 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? Column.

Figure 10 - Creating Multiple Timeslots

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 maximum number of participants to a lower number than it was before, the system will *not* cancel the sign-ups for any participants who are over the new limit of participants. Generally, researchers only update timeslots with sign-ups to update the location, if it was not available when the timeslot was originally created.

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 Timeslots. At the bottom 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.

Figure 11 - Delete Multiple Timeslots

Manual Sign-Up

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.

The participant will receive an email when you sign them up for a study. In that case, you are also given the option to enter comments to be included in this email that may better explain to the participant why they were signed up. You may only sign up participants for your own study.

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. 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.
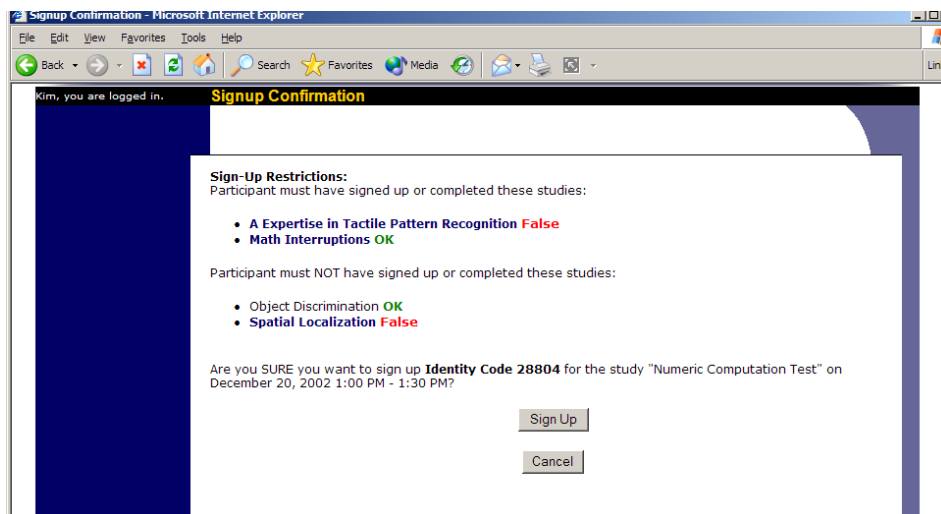

Figure 12 - Manual Sign-Up Confirmation

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.

Manual Cancellation

You can 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 then be cancelled.
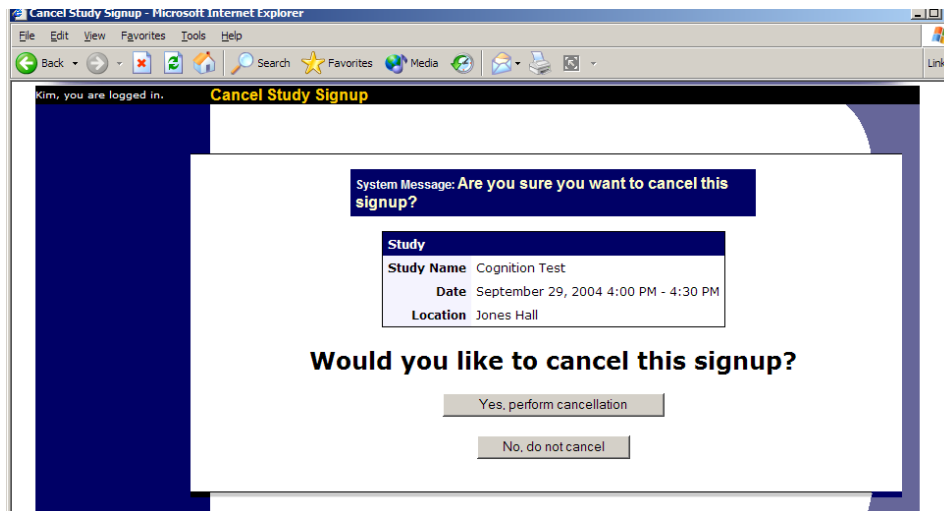
Figure 13 - Manual Cancellation

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.

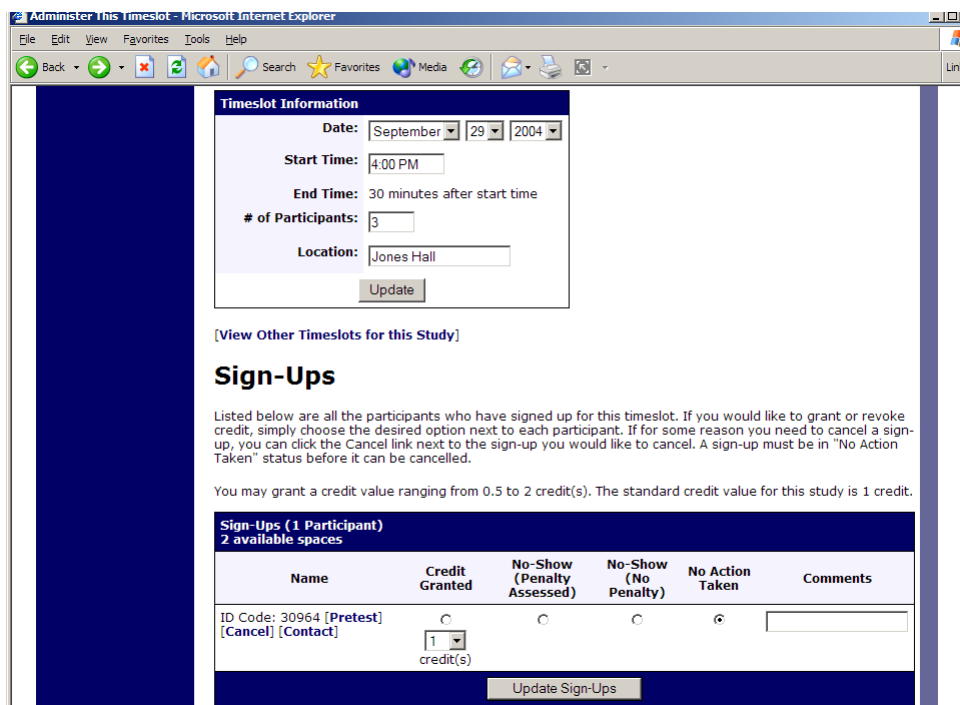The list of participants, along with their email addresses, will be listed.

Figure 14 - Modifying a Timeslot / Participant List

Viewing Pretest Responses

You are allowed to view an individual participant's pretest responses, so you will see a Pretest link next to each participant's name when you view the information for a timeslot. Click on that link to view the participant's pretest.
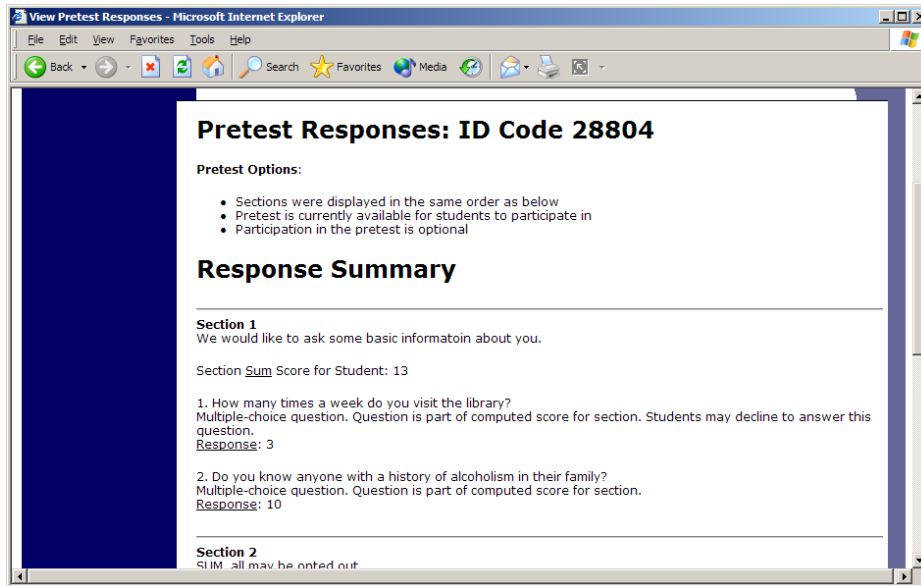

Figure 15 - Viewing a Pretest

Granting or Revoking 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. If the participant properly participated in the study, click the Credit Granted button next to their name. If the participant did not appear for the timeslot, choose the Participant No-Show? button. You will see two "No-Show" options. One option allows you to assess a penalty, and the other does not. You may choose not to assess a penalty if the participant had an acceptable reason for failing to attend the study.

> At WPI: Though you are *allowed* to penalize participants for either being late or missing the appointment entirely, most researchers penalize participants only when they do not show at all and do not contact you. If the participant is late or contacts you with a reasonable excuse, we recommend assigning them to the No

show without penalty (so they can't sign up again) or cancelling them and rescheduling their appointment.

You will see an option to grant a credit value that is different from the standard credit grant. Typically, this feature is not used at WPI. However, 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. 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, the participant will not be able to sign up for that study again.

If desired, enter any comments about the session in the Comments section (generally, this is used to indicate the reason for denying credit). Participants will see anything you enter in the Comments section for their sign-up.

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.

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.

NOTE: The system will **automatically** *grant credit to participants for timeslots that past a cutoff, and where the researcher has taken no action, but do not rely on this for credit granting. You can always change the automatic credit grant later if it was in error. The automatic credit grant takes place once a usually overnight. day,*

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.

Figure 16 - Batch Credit Grant

Emailing Participants

NOTE: Mass emailing participants or recruiting participants via the email feature can only be used if you have gotten an recruiting email approved by the IRB. If you do use this feature it is recommended that you only email a small percentage of the participant pool.

If you wish to contact participants in a particular timeslot for any reason, you may click on the Contact link that will appear next to each participant's name 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.

Participants receive a reminder about upcoming studies the day before they are scheduled to participate.
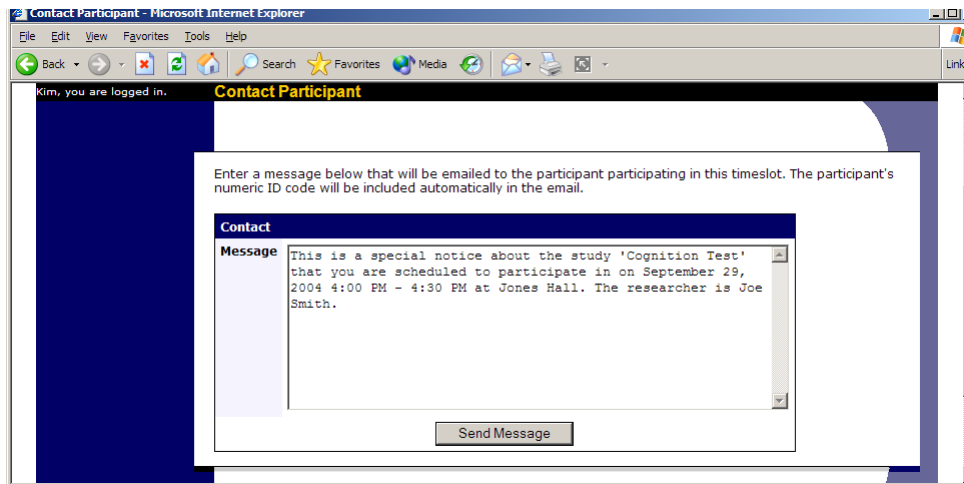
Figure 17 - Contacting Participants

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 Study Info. next to 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 30 to avoid overloading email servers.
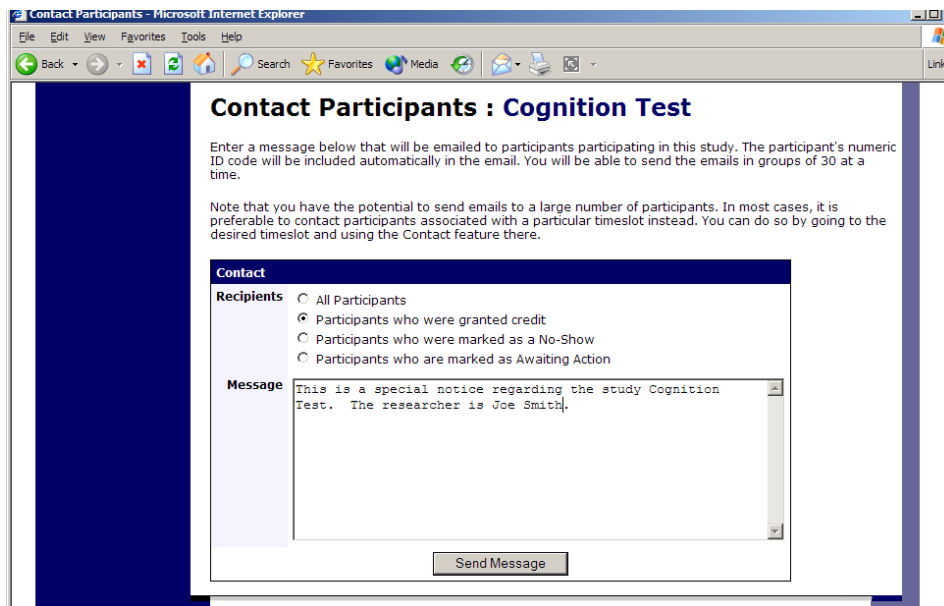

Figure 18 - Contact Participants

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 do a special credit grant, you can easily click on the timeslot's date and time, and go directly to that timeslot.
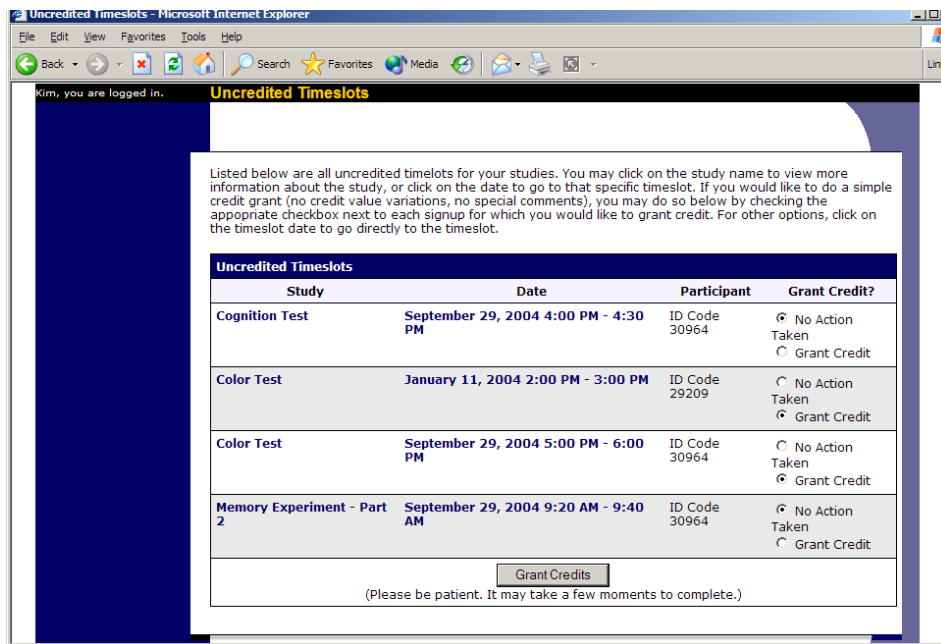

Figure 19 - Uncredited Timeslots

Pretest Qualification Analysis

If you would like to get an idea of how many participants meet a set of requirements (for help in setting pretest restrictions on your study), use the Pretest Qualification Analysis link from the Pretest Responses page. Using this feature, you can select multiple questions (only questions that qualify for study participation restriction are listed), and then the desired responses for those questions, and you will see how many participants meet that criteria.

You may also contact participants and invite them to participate in any of your studies. Be sure to include information about how to sign up for the study in your communication to them, as a direct link to the study is not provided in the email. The email is sent in a fashion that protects the participants' identities from the researcher. The participant pool administrators will receive a copy of this email, for review purposes.

NOTE: Mass emailing participants or recruiting participants via the email feature can only be used if you have gotten an recruiting email approved by the IRB. If you do use this feature it is recommended that you only email a small percentage of the participant pool

Frequently Asked Questions (FAQ)

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?

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, the principal investigator (if applicable) and the creator of the study are the only people who can see who has signed up, and modify the study.

What do the participants see?

The three screenshots below represent what participants see when they view your studies. Unlike these pictures, though, your study will not have a description and WILL show the number of credits. In other words, under study information, it will look something like:
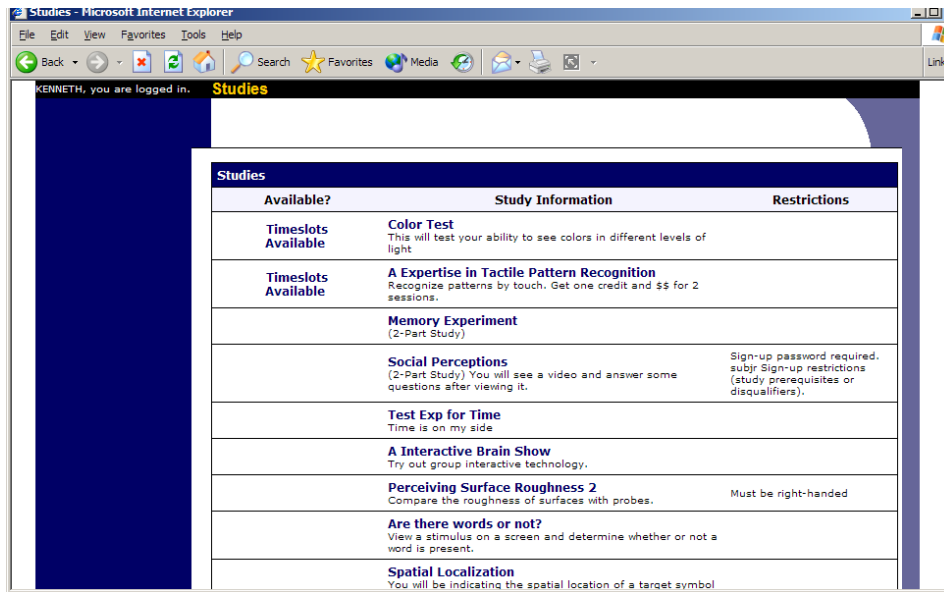
B4 *(1 credit)*

Figure 20 - Viewing Studies

When clicking on any link from the above screen, participants are shown the study information. Again, they will not see an abstract or description field. Note that they do see all available information about the Researcher, but only the name (or, at UVA, the initials) of the PI.
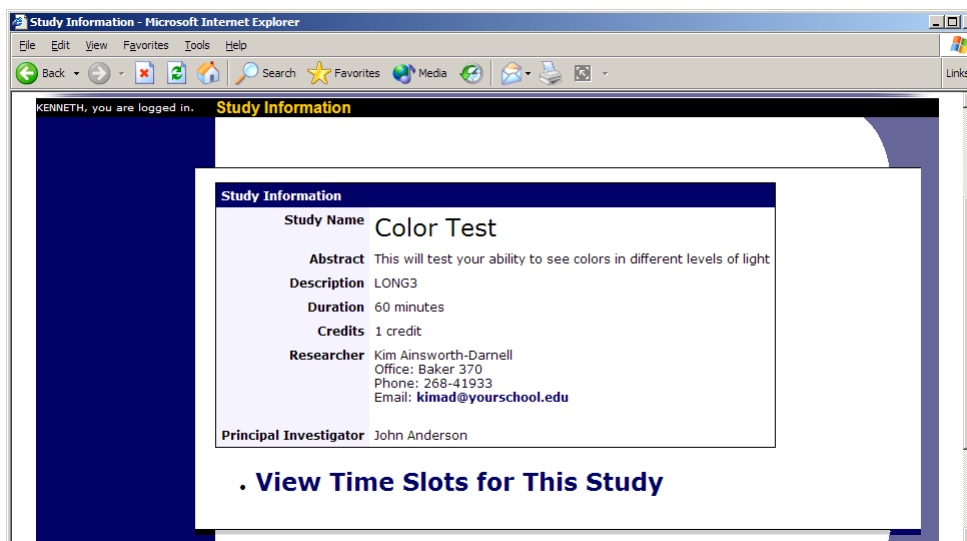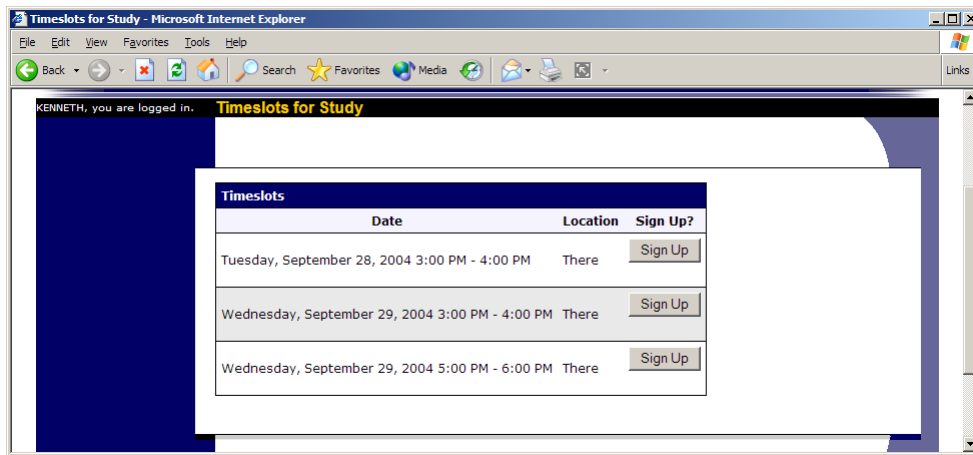

Figure 21 - Study Information

Figure 22 - Study Timeslots