A Quick Guide to Using Sona Systems

For more information see the Sona Researcher Instructions

1. Request an Account in Sona Systems

- Submit an application, IRB approval letter, informed consents, debriefing forms, and the Protecting Human Subjects Training Certificates to the Participant Pool Chair at skorinko@wpi.edu, AK 121
- If you will have several R.A.'s working in your lab on different studies you probably want to enable the feature that allows Researchers to assign their names to the timeslots you post, and then have your RAs do so when they sign up for timeslots.
    - This feature must be activated: Sona ==> The Study You Want This Done For==> "Change study information" ==> "Researchers at Time-slot Level" ==> Select: Yes
- If you need additional accounts, email the Participant Pool Chair at skorinko@wpi.edu

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2. Set up an experiment

- Go to wpi.sona-systems.com
- Log in
- Go to "Add new study" at the top of the page
- Select the type of study you want to post
- Enter the relevant information in each of the fields; be sure to review the Advanced Settings at the bottom of the page (see below for more specifics).
- Click "Add This Study"

- Specifics for Different Fields for the Study Information Set-up
- Study Name: TYPE IN [APPROVED STUDYNAME]
- If you have multiple study names, use only one study name at a time. And create new studies for each.

- Eligibility Req: LEAVE "None" unless absolutely necessary. (Researchers are encouraged to use Pretest restrictions instead, see below)
- Duration: TYPE IN the time that the study takes in 30 minute increments (e.g, 30 Minutes, 60 Minutes, etc.)
- Credits/Pay: TYPE IN [CREDITS for the study]. (1 credit = 1 experiment. If you have a study longer than 1 hour, contact the Participant Pool Chair)
- Preparation: LEAVE "None"
- Researcher: SELECT people who are allowed to add timeslots or modify the study. You must select aresearcher that students can contact
- prior to scheduling appointments. If an appropriate contact does not appear, email the name and email address of the person to skorinko@wpi.edu
- Principal Invest.: SELECT the DIRECT overseer of the study, if available (usually a grad student,otherwise faculty)
- HSC Approval Code: TYPE in your IRB approval number (e.g., 2008-001)
- HSC Approval Expiration: SELECT the last day of the term
- This is the last day appointments **are allowed to be made (i.e. last day of the term).**
- Visible to Stud.: CHOOSE “Yes”
- Active Experiment: CHOOSE "Yes"
- Please look at your sign-up and cancellation settings; change them if they are too conservative or too generous. For sign ups, this means that if a timeslot is for 10am, and the lead time is set for 2 hours, then at 8am that timeslot will disappear and no participants will be able to sign up any longer. This enables your researchers to have ample “lead time” to know when their have to run participants.
    a. You are in charge of the amount of lead time you allow for sign-ups and cancellations. You can find your current settings by clicking on "Change Study Information." Many people have the lead time set for "24 hours." This is MUCH more time than most studies need (usually my RAs like to know 2 hours be).

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3. Set up sessions

- Go to “My Studies” at the top of the page
- Click on “Timeslots” in the entry for the study you want to add timeslots to
- To add one timeslot click “Add a Timeslot” fill in the relevant fields and click “Add This Timeslot”
- To add multiple timeslots click “Add Multiple Timeslots” fill in the relevant fields and click “Add.” Confirm your times then click “Add Selected Timeslots”

- Additional Comments/Features:
- Make sure that the duration is equal to the amount of credit being offered (except in the case of multi-session or diary studies). A 1 credit study should not be listed as less than 30 min, etc.

- Select the location from the drop-down menu if at all possible. This enables the system to ensure that a given room is not double-booked, and lets other researchers see the schedule for that room.
- Students receive an email both when they sign up and the day before their appointment. This email has the contact information for the listed researcher(s) as well as a reminder of the cancellation deadline.
- When signing up, the research assistants can identify which slots are theirs. This will enable the system to send only them emails that someone has signed up, cancelled, and study reminders. If no specific person is selected, all researchers will be emailed all notices and reminders.
    - This feature must be activated: Sona ==> The Study You Want This Done For==> “Change study information” ==> “Researchers at Time-slot Level” ==> Select: Yes.
- Each RA must be given a "researcher" account. Then they must be manually "assigned" to the studies they will work on before they can begin to add appointments on their own. Only the Principal Investigator (PI)--usually the grad student/Faculty in charge of the study--can "assign" the RAs (i.e., they cannot assign themselves). It is done on the Signups Site via the "Change Study Information" link.
    - Please note: You add researchers by finding their names on a scroll-down list and doing a "ctrl/click" to highlight their name. Before logging off, be sure to check that all researchers you added remained highlighted. If they are NOT highlighted, they will not be entered.
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4. Delete sessions

- To delete sessions click on “Delete Multiple Timeslots” then select the timeslots you want to delete and click “Delete Selected Timeslots”

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5. Email Participants through Sona for recruitment

**Remember that mass emails will be monitored by the administrator. You should not be emailing the pool too frequently and you should be only emailing 50% of the population!

- Go to the top tab labeled “Prescreen results”
- Click on the blue link labeled “Prescreen Qualification Analysis”
- Select your criterion. To send to all participants in the system select “Gender” then click both “male” and “female”.
- Write text in the text box provided
- Send email by clicking “Send Messages” at the bottom of the screen

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6. Email people who have already participated in your study

- Go to “My Studies” at the top of the page
- Click on the study your email is regarding
- Click “Contact Participants” at the bottom of the page
- Enter the message you want to send in the “Message” box and click “Send Messages”

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7. Give/change credit for a participant

- Go to “My Studies”
- Click on the study of interest
- Click on the timeslot you want to issue credit for
- Click “Modify”
- Select the correct option and enter any comments you want added to the email that will go to the participant notifying them of their credit change
- If you do not issue credit manually Sona will automatically issue credit in 24 hours. If you need to issue a “no show” be sure to do so within 24 hours.

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8. Report a problem

- Send an email to the Participant Pool Chair at skorinko@wpi.edu
- Be sure to give a detailed description of the problem
- Also, feel free to contact the Participant Pool Chair if you have a problem with a participant.

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