

# Standard Study

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\*\*NOTE: For information on additional features, refer to the full Researcher/PI Documentation listed on the Principle Investigators webpage.

## A Standard Study - Study Type

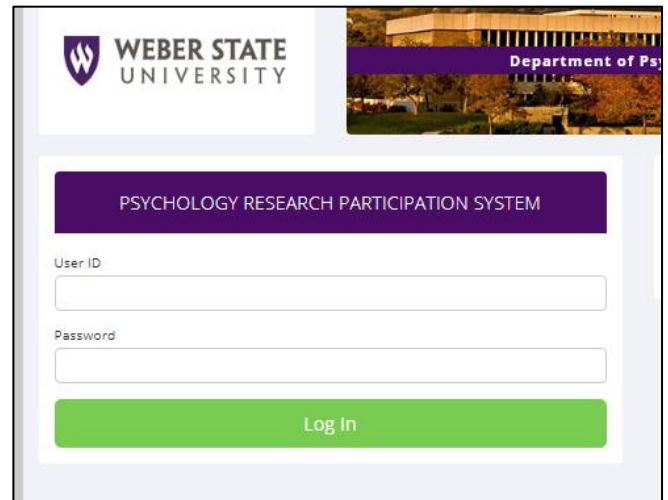
A Standard study is a study that is scheduled to take place at a specific location (*i.e. not online*), and where there is only one part (session) to the study that participants will participate in. To receive credit, Participants must sign up in Sona Systems (via time-slots) and attend a specific session.

Researchers grant credit to participants upon the completion of the session.

## Creating the Study

### *Log in to Your Sona Systems Account*

To get started, log in to your Sona Systems Researcher account at <https://weberstate.sona-systems.com>. (Your instructor will have requested researcher accounts for your class and login info should have been emailed to you. If you have not received an email and you know your instructor has requested accounts for your class, please contact the Lab Manager)

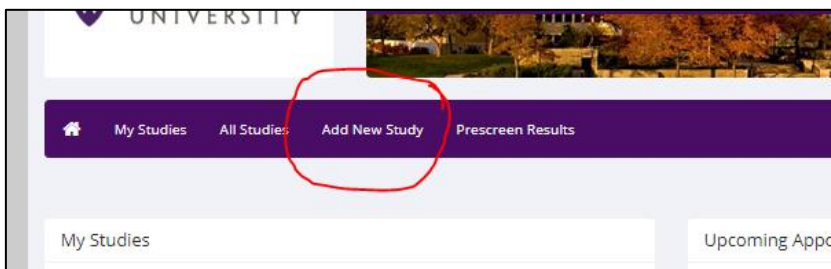


Once in, you'll see your homepage.

### *Adding a Study*

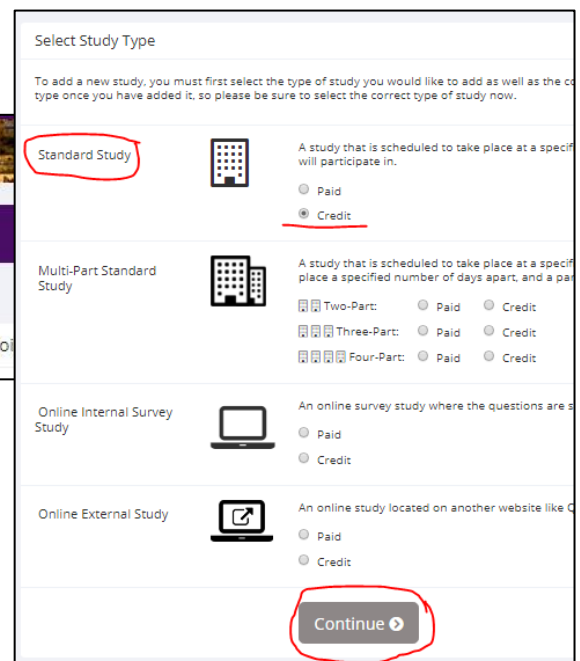
**Before** you continue, **make sure you have the following information:**

- Your IRB approval number
- The expiration date for your IRB approval number
- Duration of study
- The amount of credits your project is worth for the duration of your study (1 credit per 15 mins. For more info, refer to the credits link on the Primary Investigators webpage.).
- Name of Instructor
- Names of all researchers



From the homepage, select the tab titled *Add New Study*. The next page will ask you to select study type. Under *Standard Study*, select the credit option and then press continue.

You will now enter in some basic study information. You will need to fill out a number of fields, which are explained in the following table. Some of the fields listed below may not appear depending on how your system is configured, and the **type of study** you selected (Standard). All fields in the Basic Study Information section must be filled out unless otherwise noted.



Study Type	Description	Paid	Credit
Standard Study	A study that is scheduled to take place at a specific location and a specific time.	<input type="radio"/>	<input checked="" type="radio"/>
Multi-Part Standard Study	A study that is scheduled to take place at a specific location a specified number of days apart, and a participant can complete multiple sessions.	<input type="radio"/>	<input type="radio"/>
Online Internal Survey Study	An online survey study where the questions are asked to participants within the Sona Systems environment.	<input type="radio"/>	<input type="radio"/>
Online External Study	An online study located on another website like Coursetime or Qualtrics.	<input type="radio"/>	<input type="radio"/>

TEST-Researcher TEST-ResearcherLast (Researcher)

**Study Information**

Please enter information below about the study. The study name may not be the same as any other studies, to avoid confusion. All fields are required unless otherwise marked. Only the administrator may approve a new study so that it is visible to participants.

All studies must have a IRB approval code and expiration date specified. No timeslots may be posted after the expiration date. Only the administrator may change the expiration date. If you are creating a simple study, you only need to complete the Basic Study Information section. More advanced options, including pre-requisites and email notification options are available in the other sections of the form.

**Basic Study Information**

Study Name   
(Participants see the list of studies in random order not alphabetical order.)

Brief Abstract   
(Up to 255 characters, optional)

Detailed Description   
(Up to 15,000 characters, optional)

Eligibility Requirements

Duration

Credits   
(Credits must be evenly dividible by 1)

(Refer to table below.)

<b>Basic Study Information-Table 1</b>	
<b>Field</b>	<b>Explanation</b>
Study Name	A short name for the study. This is how the study is identified throughout the system. Most systems are configured so studies show in a random order to participants (choose Your Studies on the toolbar and it will state at the bottom of the resulting page if they are displayed in random order), so there is no advantage in choosing a study name that might put it at the top of an alphabetical list. You should consult with your administrator if there is a naming convention to be followed when naming studies. 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.
Brief Abstract (this feature might be disabled on your system)	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 it may be beneficial to list the most pertinent details here. This field may be optional, and can be up to 255 characters in length.
Detailed Description (this feature might be disabled on your system)	This can be a more long-form description about the study, and it will show if a participants clicks on the study to get more information before they sign up. You may include basic HTML in this area (ask your IT department for help if you are unsure of how to do this). If you would like to add a carriage-return (paragraph break), simply

	<p>type in "&lt;p&gt;" (without the quotes). This field may be optional, and can be up to 15,000 characters in length.</p>
Eligibility Requirements	<p>If there are any restrictions on who may or may not 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 <i>not</i> enforce these restrictions, but it is expected that a participant will only sign up for a study in which they are qualified, as they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions instead (those are enforced automatically), which you can do after you add the study. This field may be up to 245 characters in length.</p>
Duration	<p>The amount of time, in minutes, that each study session will take. If you are setting up a multi-part study, then there will be the option to specify the duration for each 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.</p>
Credits (applies to credit studies only)	<p>Enter the number of credits a participant will earn for the study. 1 credit per 15 mins of duration. Note for Multi-part studies: A value of 0 is acceptable and may be desired in cases where the study is <i>part of a set of studies, and only the final study is credit-earning</i>. The credit value specified must be evenly divisible by the credit increment specified. For example, If the increment is 0.5, then the study can have credit values like 1 and 1.5, but not 0.75. If you are setting up a multi-part study, there will be options to enter credit values for each part of the study. The system will compute the total credit value of the study automatically. After a study has sign-ups, you may not change the credit value of the study. However, the administrator can still change the credit value of a study with pending sign-ups. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. A study may not be changed between a study for credit and for payment, after it has been created.</p>
<p>Payment (**<u>applies to FACULTY paid studies ONLY</u>**)  All <u>student research studies</u> are for <u>CREDIT only</u> – <b><u>leave blank</u></b></p>	<p>Enter the compensation for the study. This is a text field, so any text may be entered like "Amazon Gift Card" or "Up to \$20" and so on. Please see the Studies for Pay section of this documentation for more information on how to fill out this field in the case of paid studies. If you are setting up a multi-part study, there will be options to enter compensation values for each part of the study, as well as a total compensation value. You can change the payment text at any time. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. This field may be up to 30 characters in length. A study may not be</p>

	changed between a study for credit and for payment, after it has been created.
Timeslot Usage Limit	Depending on how your system is configured, you may see an item that specifies the maximum number of study session hours available to this study. The administrator sets this value, and is the only one who can change it. To determine the current session usage for a study, go to the Add A Timeslot page for the study, or to the Timeslot Usage Summary.
Preparation	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 blank.
Researcher(s)	Select the researcher(s) for this study. Most likely, this is you (and members of your group), and your name will automatically be selected. If you are a researcher, you may not remove yourself as the researcher (the P.I. for the study, as well as the administrator can change the researcher). You will be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The selection box lists only users who are researchers.
Principal Investigator (Faculty member)	Select the Principal Investigator for this study. For student research, select your instructor. The person you select will have full access to the study. If you see this option, then you must select a P.I.  The selection box lists only users who are principal investigators.
IRB Approval Code	Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies. Depending on how your system is configured, this field may be required. If it is required, then only the administrator can change the IRB approval code once it has been entered.
IRB Approval Expiration Date	The date when the IRB approval expires. This field may <i>not</i> appear, depending on how your system is configured. If it <i>does</i> 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. This is the reason why it defaults to blank to force you to choose a date. You may specify a date up to 5 years in the future.
Approved?	For Weber State: Once you have submitted a Project Activation Request, the Lab Manager will review your activation request and approve your study. <hr/> General note:

	<p>You may see an option to select Yes or No. If you Select Yes, this study <u>will show up on the list of studies that participants might sign up for</u>. Ensure you have received the necessary approvals to run the study before choosing Yes. A study must be Approved and Active to show up on the list of studies that participants may sign up for.</p> <p>If you select No, the study will not be visible to participants.</p> <p>Some systems are configured in a way that only the administrator can approve a study. If that is the case, you should contact the administrator when you are ready to make the study visible to participants (a 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), but you may need the administrator to make it visible again. 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 (depending on how your system is configured). The reason for this is that many IRBs approve very specific language for study names and descriptions, so the administrator needs to ensure the study is in proper compliance.</p>
Email Approval Notice? (Visible to administrators only)	<p>This Yes/No option will appear if the administrator is adding or updating the study that is not already approved. If they select Yes to Email Approval Notice <i>and</i> they approve the study (set Approved to Yes) at the same time, then an email will be sent to all researchers for the study, notifying them that their study was just approved.</p>
Active Study?	<p>For Weber State:  Select Yes. Until your study has been approved by the Lab Manager, it will NOT be visible to participants.</p> <hr/> <p>General info:  Select Yes if this study is in progress. You must select Yes and the study must be Approved if you want the study to be available for participants to sign up for.</p> <p><u>If a study is Not Approved but is Active, then it does not show up to participants on the listing of studies</u>, but it is accessible through other links if the participant has participated in it before and 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) where it is listed as a pre-requisite or disqualifier for a study.</p> <p>The reason to select No is if the study is being kept for historical purposes, but should not show up on the list of studies participants can sign up for. Often, this is done so</p>

the system can enforce prerequisites where the inactive study is a prerequisite for an active study.

## Advanced Settings

### Field

### Explanation

Pre-Requisites (this feature might be disabled on your system)

If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies.

You may specify that participants must have participated in *at least one*, if not *all* of the studies specified.

The system will handle enforcement of the prerequisites in a strict or lenient fashion, depending on how your system is configured. In strict enforcement mode, the participant must have *received credit for* (participated in) the prerequisite studies. In lenient enforcement mode, the participant must only be *scheduled* to participate in the pre-requisite studies (it is presumed that they will go on to complete the pre-requisite studies). You can ask your administrator how this is configured, if it is of concern. If your system is in lenient enforcement mode and a participant cancels a necessary pre-requisite for your study (they are warned of this), and your study is configured so that the researcher will receive notifications of cancellations or sign-ups, then the researcher will receive notification of the prerequisite problem and can contact the participant if necessary.

Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as pre-requisites when they view your study.

Disqualifiers (this feature might be disabled on your system)

If there are any studies that 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 participant has signed up for, or participated in, at least one of the studies specified as a disqualifier, then they will not be eligible to sign up for your study.

Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as disqualifiers when they view your study.

Course Restrictions

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 view the list of available studies. You may choose No

	<p>Restrictions if you would like to make the study available to participants in any course.</p> <p>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 varied depending on a few factors, in addition to the system will simply not save the course restrictions for any courses that would take it over the limit.</p> <p>Note that course restrictions do not function as a disqualifier but rather a qualifier. For example, if a participant is in both Course A and Course B, and the study is restricted to only those in Course A, the participant is eligible because they are in Course A, despite the fact Course B is not listed as a course restriction. In addition, using the same example above, the participant may assign the credit from the study to any of their courses, including those courses not listed in the course restriction (Course B in this example). Course Restrictions function solely to qualify participants for a study, and not to restrict their ability to assign credits to courses.</p>
<p>Invitation Code (this feature might be disabled on your system)</p>	<p>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. Invitation codes are <i>not</i> case sensitive, and are in no way connected to any passwords users use to log in to the system.</p> <p>If you do not need an invitation code, leave this field blank.</p>
<p>Is this a web-based study? (This feature might be disabled on your system)</p>	<p>This will list if the study is an online study, and the type of online study. This setting cannot be changed after a study is added.</p>
<p>Should participants be identified only by a unique, random ID code?</p>	<p>If enabled, then researchers will not see participant names, but instead an ID code to identify them. This setting only applies for online studies, and only if ID codes aren't already enabled system-wide by the administrator. For external web studies, this setting is useful primarily in conjunction with placing %SURVEY_CODE% in the Study URL. Once this setting is enabled (to show ID codes), it cannot be changed back to showing names again.</p>
<p>Study URL</p>	<p>The URL (web address, usually starting with https://) for your study. This is only required for web-based studies administered outside the system.</p>



	<p>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 that you may easily identify participants and even have the system grant credit automatically, add the text %SURVEY_CODE% in the URL where you would like the identifier to be placed. This feature is most commonly used with online survey products like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, and similar products. This is discussed in further detail in the Web-Based (Online) Studies section of this documentation.</p>
Study URL Display (external web studies only)	<p>If set to Yes, then participants may still access the Study URL even after they have been marked as having participated in the study. If set to No, the URL will not be available to them.</p> <p>In all cases for external web studies, the URL will not be displayed until they have signed up for the study. Regardless of this setting, the URL will not be displayed after the timeslot is in the past.</p>
Participant Sign-Up Deadline (this feature might be disabled on your system)	<p>Enter the deadline date (before the study is scheduled to occur) that is the last possible date a participant may be allowed to sign up, in whole hours.</p>
Should the Researcher receive an email notification when a participant signs up or cancels?	<p>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. Emails will contain the first 50 characters of the study name as part of the subject line in order to make it easier to sort the emails within an email program.</p> <p>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, 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.</p>
Researchers at Timeslot-Level	<p>If set to Yes, it will be possible (but not required) to assign a specific researcher from the list of researchers for the study to a specific timeslot. If set to No, then it is presumed that all researchers assigned to the study are responsible for all timeslots. See Timeslots Linked to a Specific Researcher for more information. This option only appears if the system is configured to allow multiple researchers per study.</p>

Automatic Credit Granting	<p>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.</p> <p>For online external web studies, the credit grant will take place (the specified number of hours) after the timeslot (participation deadline) has occurred (as opposed to being based on when the participant signed up. This feature is generally not useful in this situation. The option will not appear for online survey studies (within the system) because credit granting generally occurs Automatically, immediately after the participant completes the survey.</p>
Can a participant sign up for this study more than once? (This feature might be disabled on your system)	<p>If you would like to allow participants to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No.</p> <p>If No is chosen, participants may only sign up for the study more than once if they had previously failed to show up for the study (a no-show).</p>
Shared Comments	This is an optional area where you may enter any comments or notes about the study. These are visible to any researchers and PIs in the system, but not to participants. This field is useful if you want to make the technique used in the study visible to other researchers, so they can set your study as a disqualifier if necessary. This field can be up to 1,000 characters in length.
Private Comments	This is an optional area where you may enter any comments or notes about the study. These are only visible to the researchers (and PI) for this study. These are not visible to participants or to other researchers or PIs in the system. This field can be up to 1,000 characters in length.
Research Alternative?	If set to Yes, then this study is considered a research alternative study. For various reasons, some participants may be restricted to participate in regular studies (typically, for accruing too many unexcused no-shows or being unable to consent), meaning that they can only sign up for research alternative studies. Only an administrator may change this value (the default is No).
<b>Multi-part Settings</b> (only applies if you select Multi-Part Standard Study on the Select Study Type page)	
<b>Field</b>	<b>Explanation</b>
Total Payment ( <b>paid FACULTY studies only</b> ) All <u>student research</u> studies are for <b>CREDIT only</b> .	Enter the amount of total compensation for the study, typically the sum of the payment values for each part. The system cannot compute this automatically since it is

	possible to enter nonnumeric values (e.g., “Amazon Gift Card”) in the other payment fields.
Part X Scheduling Range	Specify the number of days (as a range) after the previous part is scheduled, that this part should be scheduled. The range may be the same value (e.g. “between 7 and 7 days”) if desired, but must be a whole number. See “Multi-Part Studies” for more information.
Part X Scheduling Leniency	In some cases, you may want to ensure that the participant schedules the next part of the study to take place at exactly the same time (on a different date) as the previous part. If so, choose Yes for this option. If there is some flexibility to sign up any time within the Part X Scheduling range, choose No for this option.

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information. If you would like to add participation restrictions based on prescreen responses, you can do so when you update the study (see Prescreen Participation Restrictions in full documentation). Otherwise, your next step is to add timeslots (sessions).

## 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 additional information.

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

### *Timeslots Linked to Specific Researchers*

Because our 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, as well as 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 researcher linked to it, then only that researcher will be listed as the point of contact when a participant receives any emails related to their participation in that timeslot. Only the researcher connected to that timeslot receives related notification emails, such as participant cancellation notifications, 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 were removed from a study, then any timeslots that were linked to them for that study would be changed. In this case, 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. 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 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 on the top of the page. Click on [Add A Timeslot](#).

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

(See table below)

**Study Information**

Study Name	TEST-STUDY
Study Type	<b>Standard (lab) study</b> This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Study Status	Not visible to participants : Not Approved <a href="#">Send Request</a> <b>Active study</b> : Does not appear on list of available studies -- must also be approved
Duration	30 minutes
Credits	2 Credits
Abstract	test
Description	test

**Restrictions**

Prescreen Restrictions	No Restrictions <a href="#">View/Modify Restrictions</a>
Course Restrictions	Participants must be in at least one of these courses: <ul style="list-style-type: none"><li>TEST COURSE LISTING</li></ul>

**Additional Study Information**

Participant Sign-Up Deadline	24 hours before the study is to occur
Participant Cancellation Deadline	24 hours before the study is to occur
IRB Approval Code	TEST (expires January 31, 2018)
Direct Study Link	<a href="https://weberstate.sona-systems.com/default.aspx?">https://weberstate.sona-systems.com/default.aspx?</a> This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	January 25, 2018

**Researcher Information**

Researcher	TEST-Researcher TEST-ResearcherLast	
Principal Investigator	TEST-Principle TEST-Investigator	

**Study Menu**

- [View/Administer Time Slots](#)
- [Timeslot Usage Summary](#)
- [Download Participant List](#)
- [Contact Participants](#)
- [View Bulk Mail Summary](#)
- [Download Prescreen Responses](#)
- [Change Study Information](#)
- [Participant Study View](#)
- [Delete Study](#)

**Study Menu** [+ Add A Timeslot](#) [+ Add Multiple Timeslots](#) [Delete Multiple Timeslots](#) [View Printer-Friendly List of Signups](#) [Print](#)

**All Timeslots** Recent Timeslots Upcoming Timeslots Older Timeslots

Timeslots : TEST-STUDY

Timeslots for this study are listed below, with any sign-ups listed below the timeslot.

Search for available timeslots on :  [GO](#)

There are no recent timeslots for this study.

**Add Timeslots : TEST-STUDY**

Use this page to add a single timeslot for your study. You may also add multiple timeslots at once using the Add Multiple Timeslots option.

NOTE: You are adding timeslots to a study that is **unapproved**, so participants will not be able to sign up for the study.

Date

Start Time

End Time 30 minutes after start time

Number of Participants

Location

[Add This Timeslot](#)

Field	Explanation
Date	The date for the timeslot.
Start Time	The time when the timeslot will start. 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).
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.
Number of Participants	The number of participants for this timeslot. This number is <i>not</i> visible to participants. They will only see whether the timeslot is full or not. The maximum number is 999.
Location	<p>For Weber State: Enter the previously scheduled location: Building and room number</p> <hr/> <p>General Info: 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 assist in data entry.</p> <p>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, simply type in the location in the text field below it.</p> <p>The location field does not apply for web-based studies.</p>
Researcher	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. See Timeslots Linked to Specific Researchers for more information.

To assist in 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 and there is another timeslot, for any study, which occurs at the same time and location, you will receive a warning. The addition will be allowed, unless the location was chosen from the pulldown list of locations, in which case the addition will be blocked. If you add a timeslot that will take place outside of normal hours (for example, at 1:00 am), 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. The system allows

adding timeslots to a study that is not available to participants, meaning not active or not approved. However, it will give a warning because participants are not able to sign up for the 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 timeslots, 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 timeslots that would occur outside normal business hours be shifted to the next business day, and specify when business hours occur. The system considers Monday-Friday to be business days.

**Add Timeslots : TEST-STUDY**

There are 2 options for adding multiple timeslots at once. You may add a specified number of timeslots, or you may duplicate the timeslot configuration from a specific week. If you duplicate the timeslot configuration from a specific week, the number of participants, locations, and times will be copied over.

NOTE: You are adding timeslots to a study that is **unapproved**, so participants will not be able to sign up for the study. With either option, you will have an option to review the information before the timeslot addition is performed. Please choose one of the 2 options below:

Number of Timeslots:

Date:

Start Time:

Free time between slots:  Minutes

Move timeslots to business hours?  Yes  No  
Timeslots that fall outside normal business hours will be shifted to the next business day.

Business Hours Start:

Business Hours End:

Number of Participants (Per timeslot):

Location:

**Copy Timeslots from a Specific Week**

From the week of:

To:

**Add Timeslots : TEST-STUDY**

Use this page to add multiple timeslots at once.

Timeslots which conflict with an existing scheduled timeslot in the same location are indicated below. Timeslots with conflicts will not be added. Timeslots which are scheduled to occur after the IRB approval expiration date (April 28, 2018) will not be added.

**Timeslots**

Date	Start Time	Num. Participants	Location	Add This Timeslot?
<input type="text" value="Friday, February 9, 2018"/>	<input type="text" value="9:30 AM"/>	<input type="text" value="1"/>	<input type="text" value="Research Lab"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="Friday, February 9, 2018"/>	<input type="text" value="10:03 AM"/>	<input type="text" value="1"/>	<input type="text" value="Research Lab"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="Friday, February 9, 2018"/>	<input type="text" value="10:36 AM"/>	<input type="text" value="1"/>	<input type="text" value="Research Lab"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="Friday, February 9, 2018"/>	<input type="text" value="11:09 AM"/>	<input type="text" value="1"/>	<input type="text" value="Research Lab"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No

On the subsequent page, you may change any of this information 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 do not want to add a specific timeslot that is listed, choose No in the *Add This Timeslot?* column.

### 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 View column for the

desired study. You will see a list of all recent timeslots. Timeslots that are 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. You would need to first cancel all existing signups for the timeslot. 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 is important to note that participants will *not* be notified of any changes you make to the timeslot. You should contact them via email, if information needs to be passed onto 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 the event the change was unintended. You may not update the size of the timeslot, meaning the 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. This prevents you from making changes that would result in exceeding the timeslot usage limit, for example by increasing the number of participants.

### *Timeslot Change Tracking*

The system automatically tracks certain changes that occur with a timeslot. This includes information about any time the timeslot's key information (date, time, etc.) is changed, as well as any time a manual sign-up or cancellation is performed, but 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 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, select the desired study and choose 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 due to a lack of available timeslots to delete.

Delete Timeslots : TEST-STUDY

Listed below are all timeslots for this study eligible for deletion, including timeslots with sign-ups, as long as the sign-ups are not pending and do not have credits linked to them.

All Timeslots **Empty Timeslots**

Date	Location	Signed Up	Delete
Friday, February 9, 2018 9:00 AM - 9:30 AM	Research Lab	0	<input type="checkbox"/>
Friday, February 9, 2018 9:30 AM - 10:00 AM	Research Lab	0	<input type="checkbox"/>
Friday, February 9, 2018 10:03 AM - 10:33 AM	Research Lab	0	<input type="checkbox"/>
Friday, February 9, 2018 10:36 AM - 11:06 AM	Research Lab	0	<input type="checkbox"/>

Delete Selected Timeslots  Check all  Uncheck all

After going to that page, you will see a list of timeslots eligible for deletion. You can choose to view only empty timeslots (timeslots with no sign-ups), or all timeslots including those with sign-ups. If a timeslot has sign-ups, it will only be listed if there are no pending (Awaiting Action) sign-ups, no (nonzero) credit grants, and no unexcused no-shows.

Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to continue. If you would like to delete all empty timeslots, there is a Check All option at the bottom of this page that will automatically select all timeslots listed on the page for deletion. Click the Uncheck All button to revert the effect of choosing the Check All option.

The system routinely deletes all empty timeslots more than 3 months old to preserve database space.

### *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 timeslots link in the View 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. In this case the list will be sorted by ID code.

### Granting or Revoking Credit

Researchers grant credit to participants upon the completion of a session.

**At the completion of a session, you should promptly mark the attendance status of participants in the system to ensure proper credit grants.**

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 Timeslots link in the View 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 radio button next to their name in the Participated column. If the participant did not appear for the timeslot, you may choose to mark their no-show as excused or unexcused. Depending on how your system is configured, an unexcused no-show may result in a penalty being assessed for the participant (the system will compute this automatically), or their privileges to use the system may be restricted. You should ask your administrator for guidelines about when to grant an excused no-show or an unexcused no-show. Generally, excused no-shows are granted for extenuating circumstances, like if the participant was involved in a car accident on their way to the appointment. An unexcused no-show is generally used when the participant did not show up and had no reasonable excuse. For most schools, many of the no-shows are unexcused and are due to carelessness on the part of participants.

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, 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 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.

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, and these comments will be included in the email sent to participants when a credit grant/revocation occurs, if notification emails are enabled on your system.

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, depending on how your system is configured.

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 that the timeslot 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 or no-show across many timeslots, see the Uncredited Timeslots section, which offers such a feature.

## 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 next to 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. If you include the text %FIRST\_NAME%, %LAST\_NAME%, or %USERNAME% in the email text, the system will substitute it with the recipient's first name, last name, or username.

Contact Participants: Art Appreciation

Enter a message below that will be emailed to all participants participating in this timeslot. Emails will only be sent to participants who are allowed to login to the system. You may choose to receive a copy of the email by choosing the appropriate option below. Please be aware that the system automatically sends participants a reminder email the day before the study.

Message

You are scheduled to participate in the study 'Art Appreciation' on Wednesday, December 24, 2014 10:30 AM - 11:00 AM at Student Lounge. The researcher is Monica Horton.

Send me a copy

Yes

No

Emailing Delay

Send now

Send Message

Note this text must be in upper case and surrounded by % symbols.

You may choose to receive a copy of the email that you send.

Depending on how your system is configured, participants may already be receiving a reminder about upcoming studies the day before they are scheduled to participate. Ask your administrator for more information.

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 (in the Study Menu). You will then be able to select which group of participants to send to, and a message to send. Messages will be sent in batches of 3,000 at a time, to avoid overloading email servers. You cannot include attachments in the email, so if you have a document you would like to include, you should post it on another website and provide a link to the document in the email you send.

Contact Participants : Art Appreciation

Enter a message below that will be emailed to participants participating in this study. Emails will only be sent to users who are allowed to login to the system. You will be able to send the emails in groups of 3000 at a time. You may choose to receive a copy of the email by choosing the appropriate option below.

Note that you have the potential to send emails to a large number of participants. In most cases, it is preferable to contact participants associated with a particular timeslot instead. You can do so by going to the desired timeslot and using the Contact feature there.

Recipients

All participants

Participants who were granted credit

Participants who were marked as a No-Show

Participants who are marked as Awaiting Action

Participants who are signed up in timeslots from

From

Wednesday, January 1, 2014 -- Wednesday, December 31, 2014

Message

You have received this email because you are signed up for the study 'Art Appreciation' (either in the past or the future). The researcher is Monica Horton.

Send a copy to yourself?

Yes

No

Emailing Delay

Send now

The 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. When a user chooses to reply to the email, the reply will be sent to that “Reply To” address.

There is also the option to restrict the emails so that they only go to participants who signed up for timeslots in a specified date range. The date range is based on the date of the timeslot, not when the participant signed up for, completed, or received credit for the study.

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 feature, but are stored on the email server queue until the specified sending time. These emails cannot be revoked once this emailing feature is used.

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

## 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 similar to the one you used to add the study. A few options may no longer be editable 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 take effect immediately after they are saved. When changes are made, if administrator re-approval is required before a study is made visible to participants, then you should contact the administrator to request re-approval once you have made all your changes. Changing the following fields may require a re-approval: study name, brief abstract, detailed description, eligibility requirements (the text field, not specific restrictions like prescreen restrictions, study prerequisites/ disqualifiers, or course restrictions), duration, preparation and credit value (for credit studies only). There will be a notice on the Change Study Information to warn if re-approval may be required. The system will also notify you after making changes if the study is now in need of re-approval. If re-approval is required and you are ready to request such approval, you may use the option to send such a request via the system, which is the same function you would have used to request initial study approval.

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 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 be 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 be changed for the entire study, contact the administrator who can make that change for you. Note that if the study’s credit value is changed while there are pending sign-ups, those participants are *not* notified of this change. You will need to notify those participants of the change in credit value if necessary.