

Contents

RESEARCHER/P.I. DOCUMENTATION.....	2
Getting Started.....	2
<i>System Basics.....</i>	<i>2</i>
<i>Principal Investigator Special Note.....</i>	<i>2</i>
<i>IRB Approval and Study Information.....</i>	<i>2</i>
<i>Logging In.....</i>	<i>2</i>
<i>Email Address Options.....</i>	<i>4</i>
Types of Studies.....	4
<i>Standard Study.....</i>	<i>5</i>
<i>Online Study.....</i>	<i>5</i>
<i>Multi-Part Standard Studies.....</i>	<i>6</i>
Manage Your Studies.....	6
<i>Adding a Study.....</i>	<i>6</i>
<i>Managing Timeslots (sessions).....</i>	<i>10</i>
<i>Manual Sign-Up and Cancellation.....</i>	<i>11</i>
<i>Viewing the Participant List.....</i>	<i>12</i>
<i>Prescreen Participation Restrictions.....</i>	<i>13</i>
<i>Inviting Qualified Participants to a Study.....</i>	<i>14</i>
<i>Granting or Revoking Credit.....</i>	<i>14</i>
<i>Batch Credit Granting.....</i>	<i>15</i>
<i>Emailing Participants.....</i>	<i>16</i>
<i>Viewing Uncredited Timeslots.....</i>	<i>17</i>
<i>Updating a Study.....</i>	<i>17</i>
<i>Deleting a Study.....</i>	<i>17</i>
<i>Advertising Your Study.....</i>	<i>18</i>
<i>Viewing Other Studies.....</i>	<i>18</i>
<i>Participant Study View.....</i>	<i>18</i>

RESEARCHER/P.I. DOCUMENTATION

Click the following link to watch a video tutorial:

<https://www.youtube.com/watch?v=ec8S3xfO-a8>

Getting Started

System Basics

You will create studies in the system. Each study may have a number of timeslots (sessions), which are the times you plan to run the study. Participants can sign up for the timeslots by viewing a list of studies and available timeslots. You can grant or revoke credit to participants after the session occurs.

Principal Investigator Special Note

This documentation applies to both researchers and principal investigators (P.I.s). A P.I. can perform all the same functions on a study as a researcher. This allows a P.I. to operate as an overseer and monitor the progress of their studies, as well as 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 noted otherwise. All studies must have a P.I. specified. The main difference between a P.I. account and a researcher account is that researchers have the option to receive routine emails from the system about their study, for example, receiving a notification any time a participant signs up or cancels, while the P.I. has no such option.

IRB Approval and Study Information

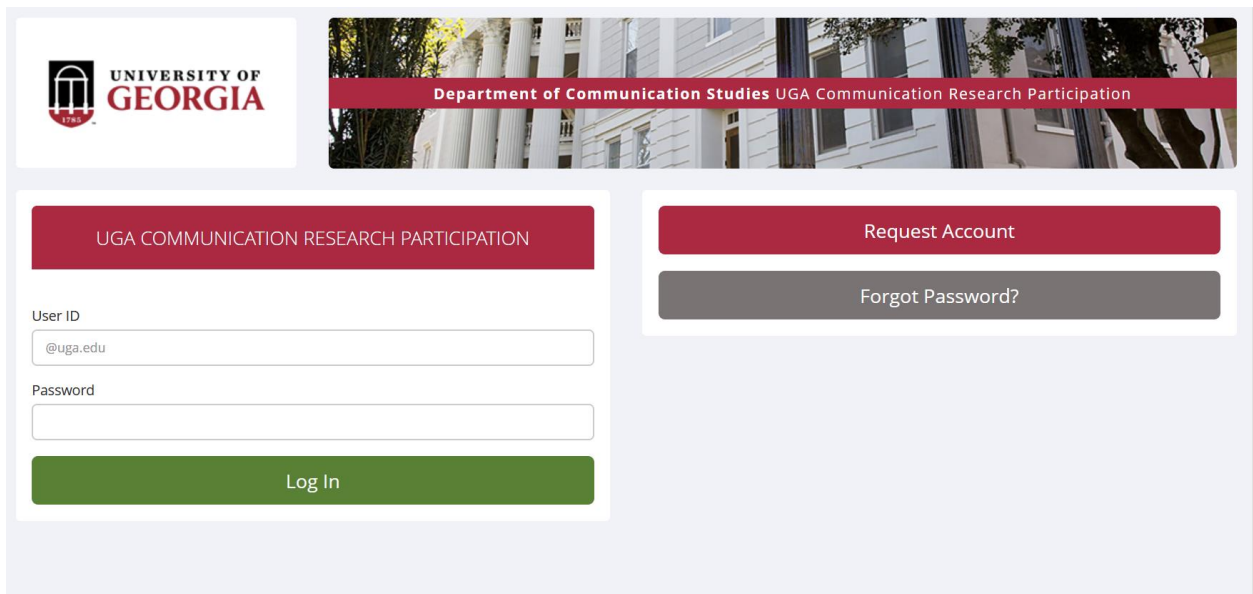
Before requesting an approval of your study, send your research pool director the following information: IRB approval, study type and credit(s) to be granted, number of participants you request (consistent with what is requested in your IRB application) and the study duration.

Logging In

Log in the system through the URL <https://uga-comm.sona-systems.com>. There are two ways to request an account:

1. E-mail your research pool director at commrp617@uga.edu to provide the following information: 1) your first and last name; 2) your UGA MyID (*note*: should be in the form of “jd12345@uga.edu”, not “john.doe@uga.edu”); and 3) your role(s) in the system. You can have multiple roles in the system, including researcher, principle investigator, and instructor. Once the research pool director creates an account for you, you will receive an e-mail notification.
2. When you are on the login page (Figure 1), click **MyID Log In** to authenticate your UGA MyID. If this is the first time you use the Sona system, you will be able to request an account on the next page. Please note that although the requesting account function is mainly designed for student participants to request an account, as a researcher, you can also click this link, and create an account as a “participant” first. The research pool director can later change your role to researcher or PI. You will be asked to provide some basic information and select “**For Instructor/Researcher**” from the course(s) selection window. An automatic e-mail will be sent to you. This indicates that you have already created an account in the system. You will then contact your research pool director at commrp617@uga.edu to

ask for reassignment of your role(s). Please indicate which roles you would like to have. As mentioned above, you can request multiple roles in the system.



The screenshot shows the login page for the UGA Communication Research Participation system. At the top left is the University of Georgia logo. To the right is a banner image of a building with a red overlay containing the text "Department of Communication Studies UGA Communication Research Participation". Below the logo is a white box with a red header "UGA COMMUNICATION RESEARCH PARTICIPATION". Inside this box are two input fields: "User ID" with the placeholder "@uga.edu" and "Password". Below these fields is a green "Log In" button. To the right of the login box is a white box containing two buttons: a red "Request Account" button and a grey "Forgot Password?" button.

Figure 1 - Login Page

Once you log in, you will come to the **Main Menu** page (Figure 2). If you would like to change any information about yourself, choose **My Profile** from the top toolbar. It is recommended that you provide your phone number and office location, as this information will be made available to research participants who sign up for your studies. If you are a researcher, this contact information will be displayed to participants when they view information about the study. If you are a principal investigator, this contact information will be displayed if a participant explicitly chooses to view it (since the researcher is the primary point of contact for a study). Researchers (but not PIs) may also choose to receive a daily reminder via email with information about all of their study sessions scheduled for the following day. If this is turned on, then a notification will also be sent about any uncredited timeslots that are awaiting action.

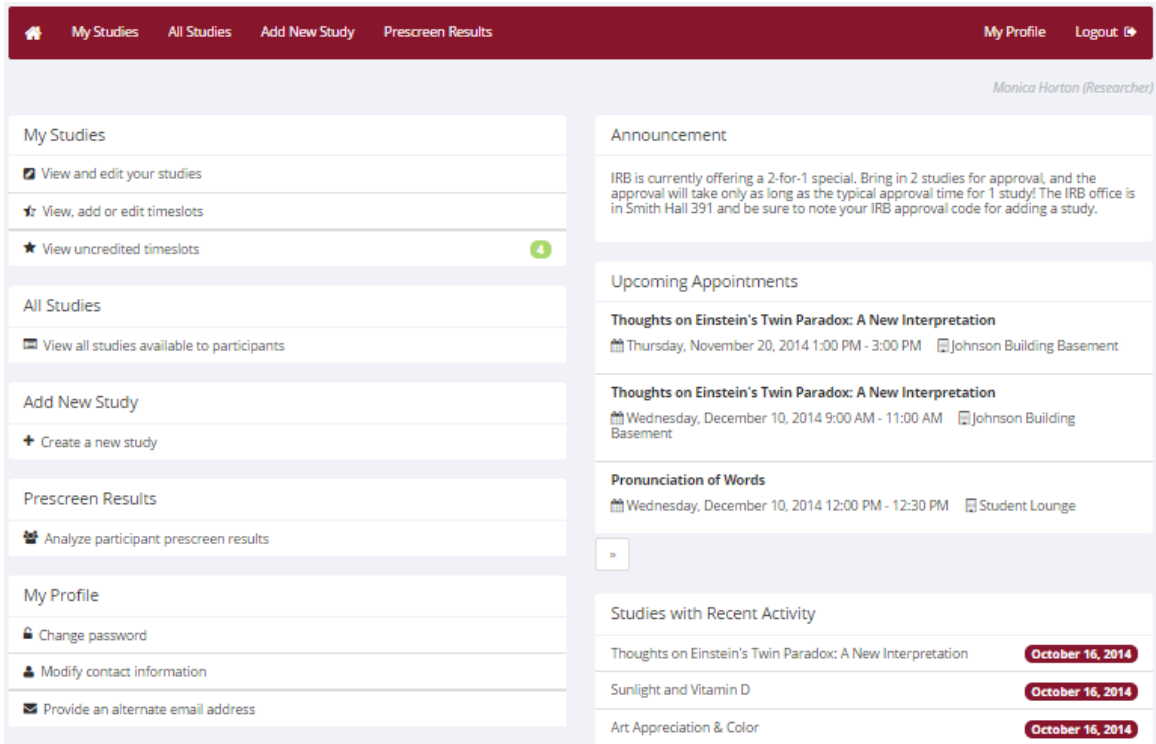


Figure 2 - Main Menu

Email Address Options

There are certain events in the system that 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. 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.

Your primary e-mail address must be your UGA MyID e-mail address. You can also provide an alternate email address (when you update your personal information). If you provide such an address (this could be a Gmail account, for instance), this is the address where all notifications will be sent and will also be displayed to other users (including participants in your studies).

Types of Studies

To create a new research opportunity, you can choose the **Add New Study** option from the top toolbar on the **Main Menu** page. You will then be asked to select the type of study you would like to add as well as the compensation type. You may not change the study type or the compensation type once you have added it, so please be sure to select the correct options.

In terms of the compensation types, for our research pool purpose, “credit” is the most likely choice. In cases where participants are compensated for their participation in the study, you may set it up as a paid study and specify the compensation amount.

Available study types are listed below:

Standard Study

Standard study refers to the type of study that is scheduled to take place at a specific location (i.e. not online), and where there is only one part to the study that participants will participate in. This would apply to the following research opportunities as specified in the COMM1110 and COMM1500 workbooks:

- Lab-based research study
- Attendance and reflection of a live debate
- Attendance and reflection of the Public Speaking Contest
- Attendance and reflection of a Communication Studies presentation

Online Study

Online study refers to the type of study that is web-based. This would apply to the following research opportunity as specified in the COMM1110 and COMM1500 workbooks:

- Online study

Online studies may be set up internally in the Sona system (**online internal survey study**) or outside the system (**online external study**, such as study created using Qualtrics). There are a few things to note about online studies:

- Once you indicate to the system that the study is online, you will not be able to change it to other study type. However, you can deactivate or delete the study, so be sure to make this choice carefully.
- Online studies are typically set up so that there is one timeslot (session). That timeslot contains the maximum number of participants you require, and the **last** date and time when they can participate. It is NOT recommended that you set up multiple timeslots for online studies. Though the system will support it, it confuses participants. It is acceptable to have multiple timeslots, where only one timeslot is active at a time. For example, if the data collection is going to be conducted for two semesters, one timeslot could have had a deadline date at the end of this semester, while the other timeslot starts at the beginning of the next semester and has a deadline date at the end of the next semester.
- It is generally presumed that participants will participate in an online study shortly after they sign up. In this case, the system will expect you to grant credit to them soon after they sign up. If you are creating an online internal survey study (survey administered by the system), credit will be granted automatically, immediately after the participant completes the survey.
- In the case of an online external study, if you are using a survey product like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, etc., you will need to check your survey data to obtain a list of participants that you will manually grant credits to. Advanced setup is possible to link automatic credit granting with your external survey platform: <https://www.sona-systems.com/help/qualtrics.aspx>.

If the study is not administered by the system (online external study), then participants are not given the URL for the study website until they have signed up. This is to ensure they complete a sign-up in the system for the study. Participants can see the URL after sign-up, while the timeslot they signed up for is still in the future. Once the timeslot they have signed up for is in the past, they will no longer have access to the study URL. There is also an option when setting up the study where the URL will no longer be available as soon as the participant is marked as having participated in the study (regardless of the timeslot date). This restriction

regarding viewing the study URL applies only to participants and to web-based studies administered outside the system.

Multi-Part Standard Studies

You may create a multi-part lab study in the system, up to 4 parts. When creating a study, you may specify the day range for each part of the study (e.g. 7 to 10 days after the previous part). Participants are required to sign up for all parts at the same time, to reduce the chance of forgetting to sign up for all parts. Each part of a multi-part study may have a different credit or payment value, and duration, but each part must be the same compensation type. You should ensure that there are enough available timeslots for all parts of the study or participants will be prevented from signing up for the study.

This study type is not applicable to multi-part *online* studies. If at least one part of a two-parts study is an online study (e.g., online + lab, or online + online), create two separate studies (one for each part) and set the first study as a pre-requisite for the second study.

Manage Your Studies

Adding a Study

Some researchers choose to set up their studies in the system before they have received the IRB approval to run the study. This is supported in the system. You can set up a study but specify that it is not visible to participants. That way, as soon as your IRB approval is received, you can send it to your research pool director, and request your study to be approved and made visible.

To add a study, choose the **Add New Study** option from the top toolbar. After you choose the study type, you will see a form asking for more information (See Figure 3). You will need to fill out several fields, which are explained in the table that follows.

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

Brief Abstract
(Up to 255 characters, optional)

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

Eligibility Requirements

Duration

Credits
(Credits must be evenly divisible by 0.5)

Timeslot Usage Limit
20000(only the administrator may change this value)

Restrictions

Figure 31 - Adding a New Study

Basic Study Information	
Field	Explanation
Study Name	A short name for the study. This is how the study is identified throughout the system. Study names must be unique. 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. Please follow the naming convention, and add [Online], [Lab], [Debate], [Speaking Contest], or [Colloquium] before your study name.
Brief Abstract	This is a short, 1-2 line description of the study. This short description will be displayed to participants when they view the entire list of studies.
Detailed Description	This can be a more long-form description about the study, and it will show if a participant clicks on the study to get more information before they sign up.
Eligibility Requirements	If there are any restrictions on who may or may not participate, list them here. Otherwise, leave the field as-is. This field may be up to 245 characters in length. 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. You can also

	set prescreen participation restrictions (those are enforced automatically), which you can do after you add the study.
Duration	The amount of time, in minutes, that each study session (timeslot) will take.
Credits (applies to credit studies only)	Enter the number of credits a participant will earn for the study. A value of 0 is acceptable in cases where the study is part of a set of studies, and only the final study is credit-earning.
Payment (applies to paid studies only)	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.
Timeslot Usage Limit	The research pool director 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”). Otherwise, leave this field blank.
Researcher(s)	Select the researcher for this study. Most likely, this is you, 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, and the research pool director can change the researcher). If you specify multiple researchers, each researcher has full control over the study.
Principal Investigator	Select the Principal Investigator for this study. The person you select will have full access to the study. If you see this option, then you must select a P.I.
IRB Approval Code	Enter the IRB approval code here (i.e., IRB ID). This field is displayed to the research pool director to help them keep track of studies.
Approved?	<p>Select Yes if this study should show up on the list of studies that participants might sign up for. Ensure you have received the necessary approvals from the research pool director 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>As a researcher, you can always make an approved study invisible to participants, but you may need the research pool director to make it visible again. <u>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 research pool director reapproves it.</u></p>
Active Study?	Select Yes if this study is in progress. <u>You must select Yes and the study must be Approved if you want the study to be available for participants to sign up for.</u>

	<p>If a study is Not Approved but <i>is</i> 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 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 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 the system can enforce pre-requisites where the inactive study is a pre-requisite for an active study.</p>
Advanced Settings	
Field	Explanation
Pre-Requisites	If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies.
Disqualifiers	If there are any studies that a participant must <i>not</i> have participated in, please select them here. You may select multiple studies.
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 Restrictions if you would like to make the study available to participants in any course.
Age Restrictions	If you would like to limit to participants within a certain age range, you can specify it here, and participants who do not qualify will not see the study at all.
Invitation Code	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. If you do not need an invitation code, leave this field blank.
Is this a web-based study?	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.
Study URL (external online studies only)	The URL (web address, usually starting with https://) for your study. This is required for online external studies, such as those created using Qualtrics.

Study URL Display (external online studies only)	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.
Participant Sign-Up Deadline	Enter the last possible date (before the study is scheduled to occur) a participant is allowed to sign up, in whole hours.
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.
Researchers at Timeslot-Level	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.
Shared Comments	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.
Private Comments	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.
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 research pool director may change this value (the default is No).

Managing Timeslots (sessions)

To create or add a timeslot (session) 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**.

Add Timeslots : Art Appreciation

Use this page to add a single timeslot for your study. You may also add multiple timeslots at once.

Date:

Start Time:

End Time: 30 minutes after start time

Number of Participants:

Location:

Select a location from the list, or type in your own, but do not do both.

Already Used Hours	1
Scheduled Hours	3.5
Total Hours	4.5 (9 timeslots)
Usage Limit (Hours)	200
Available Time (Hours)	195.5

Figure 4 - Adding a Timeslot

If you are running an online study, you should create a single timeslot with the participation deadline equal to the last day you would like to run the study. For number of participants, specify the maximum number of participants who may participate.

If you 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 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). 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.

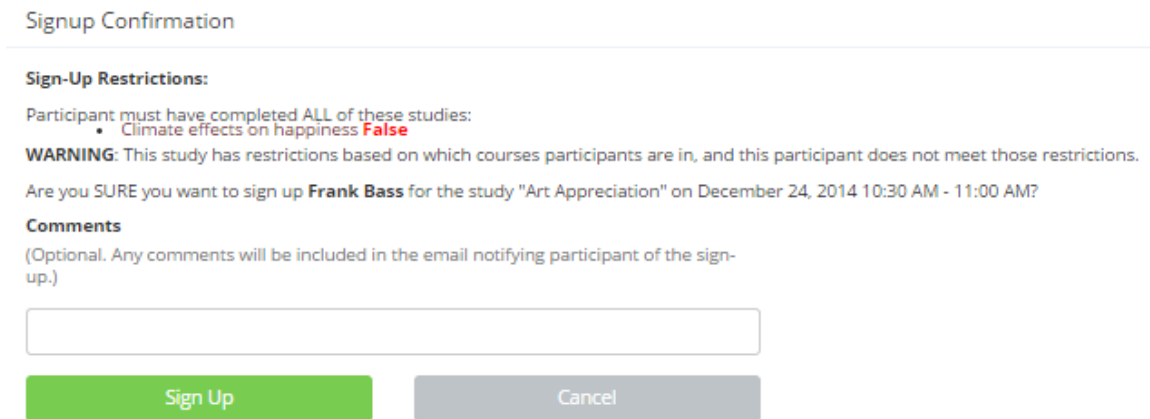
To modify or delete a timeslot for a study, you must first choose the study that you would like to deal with. Choose the **Timeslots** option in the **View** column for the desired study. You will see a list of all recent timeslots. Select the timeslot you would like to deal with, and click the **Modify** 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.

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.

Manual Sign-Up and Cancellation

If needed, you may manually sign up participants for your study on their behalf. 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. Type in the participant's UGA MyID (you may have to ask them for this) and click **Sign Up**. After proceeding, you will see a confirmation page that also lists any restrictions on the study. Choose **Sign Up** to complete the sign-up. You cannot use the manual sign-up feature for online survey studies.



Signup Confirmation

Sign-Up Restrictions:
Participant must have completed ALL of these studies:
• Climate effects on happiness **False**

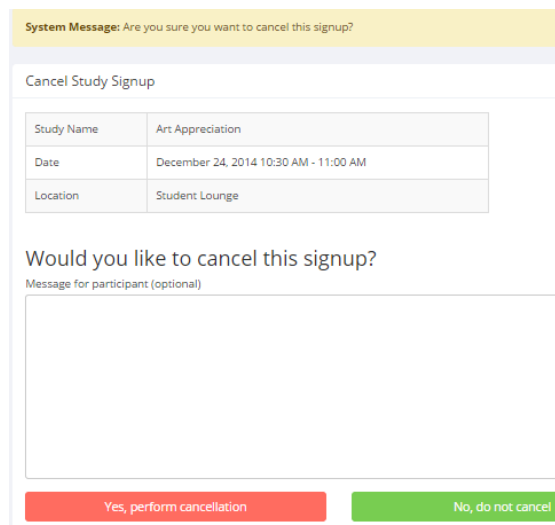
WARNING: This study has restrictions based on which courses participants are in, and this participant does not meet those restrictions.

Are you SURE you want to sign up **Frank Bass** for the study "Art Appreciation" on December 24, 2014 10:30 AM - 11:00 AM?

Comments
(Optional. Any comments will be included in the email notifying participant of the sign-up.)

Figure 5 - Manual Sign-Up Confirmation

To cancel a sign-up, find the desired timeslot and participant. Click **Cancel** next to their name. The participant will be sent an email about the cancellation, and who performed it, along with a confirmation code. Their sign-up will be immediately cancelled.



System Message: Are you sure you want to cancel this signup?

Cancel Study Signup

Study Name	Art Appreciation
Date	December 24, 2014 10:30 AM - 11:00 AM
Location	Student Lounge

Would you like to cancel this signup?

Message for participant (optional)

Figure 6 - Manual Cancellation

Viewing the Participant List

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.

Timeslot Information : Art Appreciation
[Other Timeslots for this Study](#)
[Timeslot Modification Log](#)
[Printer-Friendly Lis](#)

Date: Number of Participants:

Start Time: Location:

End Time: 30 minutes after start time [View Schedule](#)

All Sign-Ups Uncredited Sign-Ups

Listed below are all the participants who have signed up for this timeslot. If you would like to grant or revoke credit, simply choose the desired option next to each participant. If for some reason you need to cancel a sign-up, you can click the Cancel link next to the sign-up you would like to cancel. A sign-up must be in "No Action Taken" status before it can be cancelled.

You may grant Credits ranging from 0 to 2 Credits. The standard value in Credits for this study is 1 Credits

(4 Participants) 3 available spaces

Name	Participated	No-Show	No Action Taken	Comments
Gerry Brunswicker (gerryb@yourschool.edu) View Prescreen Cancel	<input type="radio"/> <input type="text" value="1"/>	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input type="radio"/>	<input type="text"/>

Figure 7 - Modifying a Timeslot / Participant List

Prescreen Participation Restrictions

If desired, you may place participation restrictions on your study based on prescreen responses. This is important to note – participants never know why a study was or was not shown to them, because they are unaware of the prescreen restrictions.

You may restrict a study on any question or questions on the prescreen that allowed for a multiple-choice answer where only one choice could be selected. You may also restrict a study based on a computed section sum or average score for a participant. If you restrict on multiple questions, it is the same as a logical “AND.” For example, if you setup the prescreen restrictions so that participants must have answered “Yes” to the question “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.

To set participation restrictions, view (do not choose edit) your study and choose **View/Modify Restrictions**. You will see a list of eligible questions that you may use for your restrictions. If the study already has some restrictions, those will be checked. You will see how many participants currently meet the restrictions. 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.

If you have restriction requirements where you would like to restrict participation to a percentage of the population (e.g. the responses that were chosen by the top 25% of people), but you are unsure which

responses meet this requirement, you can use the **Prescreen Response Analysis** feature to determine the valid responses.

Inviting Qualified Participants to a Study

While viewing the list of prescreen restrictions currently set for a study and the number of participants who meet those restrictions, you may see the option to **Invite Qualified Participants**. Using this option, you are able to craft an email to be sent to all qualified participants. The system will automatically exclude all participants who have participated or are signed up for the current study (no-shows are not excluded though, since they may sign up again). The system will pre-fill the email text with useful information like the name of the study and how many timeslots are currently open. 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. Note this text must be in upper case and surrounded by % symbols.

Figure 2 - Contacting Qualified Participants

Granting or Revoking Credit

At the completion of a session, you should promptly mark the attendance status of 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, as well as for updating the instructors and student participants about their successful participation as early as possible. It is recommended that you grant research credits at least on a weekly basis.

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.

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. 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. Our research participation pool policy currently does NOT impose any overall penalty on now-shows, but individual instructors can make their own decisions. Therefore, please still mark no-shows for record purpose.

The default value that is selected is the study's standard credit value (i.e., 1 credit or 2 credits based on the study type). 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, 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.

Click on the **Update Sign-Ups** button at the bottom of the list of sign-ups to save your changes. Credit will be granted, and the participant(s) will be emailed about this.

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.

Batch Credit Granting

In some cases, you may wish to automatically sign up and immediately credit a group of participants. To do so, go to the appropriate timeslot, or 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 link 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.

Batch Credit Grant

You may use this form to manually sign up and grant credit to a set of participants for this timeslot. You may only sign up 3 participant(s), because there are currently only 3 available spaces for this timeslot. Participants who are already signed up for this timeslot will not be signed up again for the same timeslot.

Credit Comments (optional)

Participant List
Type in a list of User IDs, separated by spaces
(Example: jsmith bdoe bsmith)

jsmith bdoe sglmore

Go to Confirmation Page

Figure 9 - Batch Credit Grant

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. 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.

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. The participant's numeric ID code will be included automatically in the email. 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

Date Range

- All Dates
- Specified Dates

Tuesday, 2019-01-01 - Tuesday, 2019-12-31

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 Svetlana Ivanov.

Design HTML

If you write the text `%FIRST_NAME% %LAST_NAME%` or `%USERNAME%`, the system will place the recipient's information in place of that text when it generates the email.

Send a copy to yourself? Yes No

This is a study invitation email. Exclude those who have opted out? Yes No

Emailing Delay: Send now

(the email(s), including the copy to yourself, will be delivered after the chosen number of hours)

[Preview Messages...](#)

Figure 10 - Contact Participants

Viewing Uncredited Timeslots

When you log in to the system, you will receive a warning if you have any timeslots that are more than two days old that have not 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 default view will show in-person studies with timeslots in the past, as well as all uncredited timeslots for online studies. Timeslots for online studies, including those in the future, are always considered in need of a response.

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.

The changes you make will take effect immediately after they are saved. When changes are made, if research pool director re-approval is required before a study is made visible to participants, you should contact the research pool director 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 pre-requisites/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.

Deleting a Study

You may delete a study only if there are no pending sign-ups (awaiting action) or active (non-zero) credits linked to it. If you need to delete a study that already has pending sign-ups or active credit grants, a better option may be to make it Inactive if you do not want it to be visible to participants. If you want to delete a study that has sign-ups and are unable to do so, please contact the research pool director. The research pool director can delete a study with sign-ups, but only if the sign-ups are all without credit values (this usually occurs when study participation history from a previous semester was retained, but credits were zeroed out). If the study has sign-ups where the sign-ups have (non-zero) credit values linked to them, then the research pool director cannot delete the study until all those credit grants are changed to a 0 value (or the participants for the sign-ups are deleted).

To delete a study, choose **My Studies** from the top toolbar and 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 and all data collected will also be deleted.

Advertising Your Study

If you need to promote your study by e-mailing the instructors, go to **Study Information** and copy the **Direct Study Link URL**. Participants who go to that link will be taken directly to your study after they log in, assuming they are qualified for the study. If they are not qualified, they will be taken to the participant dashboard as usual.

Viewing Other Studies

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

You will first see a list 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 are able to access information about these individual studies on links from the page that tracks their progress (if they have participated in the study) or if another study has the Inactive study listed as a pre-requisite or disqualifier.

Participant Study View

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