

# SONA Researcher Manual

## Content

1. Who can request an researcher account .....	1
2. How to add studies? .....	1
3. What kind of information is needed for my study? .....	2
4. How do I set the timeslot?.....	3
5. How can I change study information? .....	3
6. Can I delete studies?.....	3
7. When can participants sign up? .....	4
8. Can I contact participants via SONA? .....	4
9. Can I sign up study participants myself? .....	4
10. How can I identify participants that did not appear to my study? .....	4
11. How to grant Credits? .....	4
12. What can I do if signed-up participants do not appear? .....	5
13. Can I recruit participants elsewhere? .....	5
14. Can I delete my researcher account?.....	5
15. Is there a mobile app for SONA? .....	5
16. Synchronization with google calender.....	5

## 1. Who can request a researcher account?

Solely members of the Institute of Psychology at Tübingen University (Ph. D. students, research assistants, Professors) can request a SONA researcher account. New researchers (incl. PhD students) are asked to write an e-mail to [sona@psycho.uni-tuebingen.de](mailto:sona@psycho.uni-tuebingen.de) in order to request a new account. You will then receive an email with access & password (best to change password). This may take 1-3 days. Students are not allowed to get a researcher account themselves – not even student assistants or students writing their B.Sc. or M.Sc. thesis. In these cases the supervisors are in charge of handling these studies, as students are in general not allowed to grant credits. The reason is, that students are not allowed to grant credits. The owners of the researcher accounts are responsible for the compliance with ethical guidelines within the advertised studies, the adequate calculation of credits, as well as the granting of credits.

## 2. How to add studies?

To add a study in SONA, log into your researcher account via <https://uni-tuebingen.sona-systems.com> and choose “Add New Study” in your navigation bar. On the appearing page, indicate which type of study you want to set up. For example,

**1. Standard Study** With this option, the participants should appear once for a laboratory study.

**2. Multi(up to 4)-Part-Standard-Study** With this option, the participants should appear in the laboratory at two different appointments.

**3. Online External Study** To avoid abuse it is best to include directly in your online experiment that an email is sent to you when the participant arrives at the end of your online experiment, preferably with her/his **SONA ID/Identity code**, so that you can give the credits right away.

**4. Online Internal Survey Study**

For each of these three options, you also specify whether you would like to compensate your participants through credits (Credit) or pay (Paid) them.

**If you want to give your participants the choice between credits and payment, select "Credit" and mention in the section "Brief Abstract" of your study description that it is possible to receive a certain amount of money as an alternative to credits. Pay the participants on the spot, grant them "0 Credits" in SONA, and leave a comment that the participant has been paid instead.**

Please make sure that participants do not receive both credits and payment. If you have a study with both options, it is best for your experimenter to have a list on which they can tick which participant (only identified through his/her **SONA ID/Identity code**) gets credits and which one gets paid.

### 3. What kind of information is needed for my study?

After having selected which type of study you would like to set up, enter the information about your study on the "Study Information" page as it should be visible in SONA. In any case, you should provide the following information:

#### **Basic Settings:**

**Study Name:** The name of the study. The studies are displayed to the participants in a random order. Therefore, please do not use unnecessary preceding characters (\* + # etc.) in the study name.

**Please specify in the title of your study whether it is an online or on-site study.**

**Brief Abstract:** A brief description of the study (approx. 1-2 sentences). The abstract appears together with the study title in the list of current studies and essentially determines whether potential participants take a closer look at the study.

**Detailed Description:** Here you can describe the course of the study in more detail. Please provide information about the type and duration of the procedure (possibly per sub-element). The Detailed Description does not appear in the list of current studies, only in the study description. You should also provide a contact address (e.g., email), to which participants can apply to.

**Eligibility Requirements:** Indicate whether certain requirements for participation must be fulfilled (e.g., only right-handed people, only women, no medication, etc.). If you have no requirements then leave "None" there.

**Duration:** The duration of your study. **Important:** According to the examination regulations (Prüfungsordnung), students must earn 30 credits (this corresponds to 30 hours). The duration of the study should therefore be measured as precisely as possible and exactly match the advertised credits. However, gradations should not be less than 0.25 credits. Thus, for a study with a duration of 10 minutes, of course 0.25 credits can be granted.

**Credits or Payment:** Specify how many credits are granted for study participation. Credits can be granted in 0.25 units and **must match the duration of the study as exactly as possible**. If you pay your participants exclusively, you can specify here how much money the participants get.

**Preparation:** Indicate whether the participants need to take anything into account before participating (e.g., not smoking 2 hours beforehand, not drinking coffee). Leave the field empty if no special preparation is required.

**Researcher/Principal Investigator** At this point, you must choose who conducts the study (researcher).

**Approved?** SONA does not require studies to be activated by an administration team. Researchers can independently mark their studies as approved here (in other words: click "yes").

**Active Study?** In order for your study to appear in the SONA study list and for participants to be able to sign up, your study must be set to "active". When your study is over, do not forget to set it to "inactive". To do so, click on "Change Study Information" and change the "Active Study"-setting to "No". Studies can be reactivated at any time.

Note, that studies are only visible for students when you have specified timeslots (this is also the case for online studies).

**Advanced Settings:** In this area you will find several other options that you can set if necessary. For example, you can set whether **you want to be informed by email about sign-ups and cancellations** for your study or whether the participants must not have **participated in another study** or must have participated in another study so that they can register for your study. If you provide credits, you can list information about the **study program** ("Course Restrictions") as well (i.e., credits for Psychology students, for Cognitive Science Students or for both). If you leave the field in the Advanced Settings blank then students from both courses can participate. If it is an **external online study**, the link to the study must be inserted here under Study URL.

If you have any questions regarding this issue, please do not hesitate to write an email to [sona@psycho.uni-tuebingen.de](mailto:sona@psycho.uni-tuebingen.de).

Under "Participant Sign-Up Deadline" and "Participant Cancellation Deadline" you can specify until when participants can sign-up or cancel their registration. The default setting is 24 hours and also applies on weekends (example: a participant would like to take part in your study on Monday at 10:00 a.m. and can therefore register until 10:00 a.m. on Sunday morning). You can also modify/shorten the deadline: For example, to 12 hour for the "Participant Sign-Up Deadline" and to 0 hours for "Participant Cancellation Deadline".

#### 4. How do I set the timeslot?

Under "My Studies" you find lists of all your studies ("All"), those that are already active ("Active") and those that are still inactive ("Inactive"). For each study, you can set the times for your study under "Timeslots" on the right. You can also delete existing timeslots here.

The fastest way to create timeslots is to enter the number of slots for each day under "Add Multiple Timeslots" (one slot is as long as the specified duration of the study) and how many participants can participate per slot (Example: If a one-hour study runs from 9 a.m. to 5 p.m., there are eight slots). One week's timeslots can be copied into the following weeks ("Copy Timeslots from a Specific Week").

Due to transparency and registration procedures, timeslots should always be created, even if it does not really matter when exactly the participants appear for the study. If desired, you can add an explanation like the following to your description: "Register at any time you like - you are free to appear at any time between 9 a.m. and 5 p.m." **For online studies**, you must enter the end date of the study to make it visible in SONA. Under "Add a Time Slot", enter the date up to which participation is possible ("Final Participation Time") and the maximum number of participants ("Max. number of Participants").

Note, that studies are only visible for students when you have specified timeslots (this is also the case for online studies, see also point 7).

#### 5. How can I change study information?

If you go to the "Study Menu" on the study page, you can change the survey period under "View / Administer Timeslots" and change the information about the study under "Change Study Information".

#### 6. Can I delete studies?

To delete a study, choose "My Studies" 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.

**Please note**, you may delete a study **only if participants have not signed up or got already credit** for it. If you need to delete a study which already has sign-ups, you should make it Inactive instead, if you do not want it to be visible to participants. You may not delete a study which has sign-ups (the “Delete Study” option will not be presented).

If you want to delete a study that has sign-ups, please contact the administrator. The administrator can delete a study with sign-ups, but only if the sign-ups are all without credit values. If the study has sign-ups where the sign-ups have (non-zero) credit values linked to them, then the administrator cannot delete the study until all those credit grants are updated/changed to a 0 value (normally you don’t want that!) or the participants for the sign-ups are deleted. The reason for this restriction is to ensure that the credit count for participants where they have earned credits is accurate, which means that the studies which contributed to their credit earnings must be kept intact.

## 7. When can participants sign up?

For participants to be able to sign up, two requirements must be met:

**1. The study must have been set to “approved” and “active”.**

**2. You must have set up at least one timeslot in the future.** If you only have timeslots in the past, the study will automatically become invisible (but not inactive) to participants.

## 8. Can I contact participants via SONA?

You cannot invite students to your studies via SONA, but please note: Students who need credits or want to earn money from participating in studies regularly check SONA to see what studies are currently available. You can contact the participants who have already signed up for your study or have already participated in the “Study Menu” of your study under “Contact Participants”.

## 9. Can I sign up study participants myself?

You can also sign up participants for your study yourself if they have agreed. To do so, go to the timeslots and click on "Modify" on the corresponding timeslot. Within “All Sign-Ups” at the bottom of the page you can sign up participants with their Username or ID Code for your selected timeslot.

## 10. How can I identify participants that did not appear to my study?

For anonymity reasons, the timeslots for your study only show the codes of the participants who are registered for the study. Participants are instructed to always have their codes on hand when they take part in a study - you can use the code to check who appeared vs. not appeared. If participants have forgotten the code, they can look it up in the SONA system.

## 11. How to grant Credits?

Please award the credits as soon as possible. You will also receive an email if there are pending (uncredited) timeslots more than 2 days old. **Note, that you will need the SONA Identity Code of the individual participant in order to grant credits (Participants are requested to bring their Identity Codes to the experiment). You cannot identify participants by name.**

**Please also write in the Comment field whether the participant participated in an online or onsite-study (see below\*).**

When you log in, you will be automatically informed (system message) when people have participated in your laboratory study and have not yet received any remuneration (credits / money). There are two ways of granting credits:

1. Select "My Studies"-> "View Your Uncredited Timeslots" and you see a list of all participants who have not yet been grant credit. For all participants you have the choice between the following alternatives:

**No Action Taken:** e.g., if the appointment has been postponed or has been cancelled by the investigator, etc.

**Grant Credit:** The person participated. Grant the credits described in your study description.

**2. (RECOMMENDED):**

Select "My Studies"-> Choose "Timeslots" of the study were you want to grant the credits -> Select "Modify" -> Grant credits for the respective participant.

- a) If a person has appeared but **received alternative payment** (i.e., not with credits), please change the credits here to "0 credits" and write "paid" in the comment.
- b) The credit **can also be adjusted here**. If, for example, the credit for the study is 1, but the participant took longer (e.g., 1.5 hours), the credit can be adjusted here (take care to choose the correct ID code of the participant).
- c) You can also **update credits**, if you accidentally gave 1 Credit, but you wanted to give 2 Credits you can update/change it from, e.g., 1 to 2 Credits (proceed as in 2. and update)

Remember if a participant started a study and then dropped out, the participant should receive the number of Vpn hours/credits equal to the duration of his/her participation until he/she dropped out.

**\*FROM WINTER SEMESTER 23/24 ON**

NOTE that, from the winter semester 23/24 on, all newly enrolled Psychology and Cognitive Science students (i.e., all Psychology and Cognitive Science students who take up their studies in the winter semester 23/24) are only allowed to collect a maximum of 50% of their Versuchspersonenstunden/required credits in online studies; the other (minimally) 50% of their Versuchspersonenstunden must be collected in the labs on site. To control for that, please write in your **study title** whether your study is an online or on-site study. Further, when you assign credits write in the **Comments field** (see below) whether the participant participated in an **Onlinestudy (put "Online" in the Comment) or an onsite-Study (put "Labor" in the Comments).**

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. Comments will be visible to participants.

You may grant Credits ranging from 0 to 3.0 Credits. The standard value in Credits for this study is 1.5 Credits

(1 Participant) 0 available spaces

Name	Credit Granted	No-Show	No Action Taken	Comments
ID Code: 7444 <div style="background-color: #333; color: white; padding: 2px; display: inline-block; font-size: x-small;">Contact</div>	<input checked="" type="radio"/> <div style="border: 1px solid #ccc; width: 40px; text-align: center; padding: 2px;">1.5</div> <div style="font-size: x-small;">Credits</div>	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input type="radio"/>	<div style="border: 1px solid #ccc; padding: 2px;">Labor</div>

**12. What can I do if signed-up participants do not appear?**

If someone does not show up for the appointment without having cancelled it in advance, please leave it at "No Action taken" and, especially, **DO NOT** mark the person as "No-Show". Alternatively, you may "Cancel" the appointment. The reason for this is that we do not collect this type of information and that this type of information should not appear, for example, in the student's transcription of records, which would be the case if you select this option.

### 13. Can I recruit participants elsewhere?

Yes, you can advertise your study outside of SONA (e.g., through flyers and notices). **Important:** Of course, the study information you provide outside of SONA must match the information in SONA. If, for example, your study is set up in SONA with a duration of 30 minutes, you should not advertise that the study lasts a maximum of 20 minutes.

### 14. Can I delete my researcher account?

You can ask the administrator to delete your account. However, this is only possible if you no longer have any studies in SONA in which participants have taken timeslots or received credits. An alternative is to include other researchers in your SONA-studies, who will then take responsibility for these studies. If you do not have any studies on your own, where participants have taken timeslots or received credits your account can be deleted by the administrator.

### 15. Is there a mobile app for SONA?

Yes, there is:

For Android Phones and Tablets:

[https://play.google.com/store/apps/details?id=com.sona\\_systems.mobile](https://play.google.com/store/apps/details?id=com.sona_systems.mobile)

For iPhones and iPads:

<http://appfinder.lisisoft.com/app/sona-mobile.html>

### 16. Synchronization with google calendar?

You can sync Sona with google calendar, but apparently only in one direction: Sona-> google calendar. See: <https://github.com/MetaD/SONA2Calendar> or <https://github.com/ndiquattro/sonacalendar>

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If you have any questions or uncertainties that should be answered or clarified in this guide, please write an e-mail to [sona@psycho.uni-tuebingen.de](mailto:sona@psycho.uni-tuebingen.de).

(Text in Anlehnung an: <https://www.uni-ulm.de/in/fakultaet/studium/studium-psychologie/versuchsverwaltung/>)

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