RESEARCHER QUICK-START GUIDE

This is a very basic guide to setting up and granting credit for studies using the PSYC 100 Sign-Up System (by Sona Systems). For more detailed information, please refer to the full Instructions for Researchers. You may contact psyc100@stfx.ca with any questions.

1. **Log in:** Make sure that you have your system username (usually your stfx username) and password. You should have received these via email from the administrator (Participant Pool Coordinator). If you did not, then check your junk mail folder, and then contact the Administrator if the email is not there.
2. Log in to the system. Once in the system, it is not necessary to use the Back button. You can always use the toolbar on the top to navigate to anywhere on the site.
3. If you have forgotten or do not have your password, then you may choose to have your password reset and then emailed to you. You will see an option ("Lost your password?") on the main login page. If you request that the system reset and email a password to you, and it has not arrived after 30 minutes, then check in your email program's junk mail folder in case the email was delivered there.
4. Once you log in, you will see the Main Menu. Your login (also known as a session) will expire after a certain period of inactivity, usually 20 minutes.
5. **Add your study:** To add a study, choose the Add New Study option from the top toolbar. You will need to pick from four possible types of studies. Please choose this carefully as you are not able to change this later. Most likely, your study will be a Standard Study (a one-part study that does not take place online).
6. After you choose the study type, you'll see a form asking for more information. You will need to fill out a number of fields. Fields must be filled out unless otherwise noted. Most studies will require that you fill in only the Basic Information; you may be able to ignore the Advanced Settings. Each field should be self-explanatory, but refer to the full Instructions for Researchers for more information. Leave "Research Alternative?" set to "No."
7. **Restrict participation (OPTIONAL):** If you are using Prescreening to select participants who meet a certain requirement(s), then you should set participation restrictions by viewing (do not choose "edit") your study and choosing View/Modify Restrictions. You will see a list of eligible questions which you may use for your restrictions. Choose the questions you would like to restrict upon, and click on the Set Restrictions button. On the subsequent page, you can select each value that is acceptable for each question you have chosen. Once you have selected all the acceptable values, save your changes and they will take effect immediately. It is important to note that if you change the restrictions, it will not remove the study sign-ups for participants who qualified under the previous set of restrictions. For this reason, you should probably decide on your restrictions before making the study available to participants.
8. **Invite participants (OPTIONAL):** Prospective participants will be able to view all studies for which they are eligible that have open timeslots. You may also wish to invite participants to participate in your 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 may craft an email to be sent to all qualified participants. You may choose to exclude those who have already signed up for or

participated in any studies you specify, and this disqualifier list will be pre-populated based on any disqualifiers already set for the study. 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. You cannot include attachments in the email, so if you have a document you would like to include, you should post it on some other website and provide a link to the document in the email you send.

9. **View your study(ies):** To view your studies (and not the studies of others), choose the My Studies option on the top toolbar. The system will list all your studies in alphabetical order by study name, grouped by studies that are active, then inactive studies.
10. 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 that when a participant views a study, next to each pre-requisite and disqualifier study (for a study) is listed 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.
11. **Set up your timeslots:** Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study. 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 View/ Administer Time Slots (under Study Menu). You will see a list of any existing timeslots, and the Add A Timeslot option toward the middle of the page. Click on Add A Timeslot. You will see some boxes for you to fill in. Click on the Date box to bring up a calendar for you to select a date for your study. Then, fill in the rest of the information (start time, number of participants, location).
12. 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, 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).
13. **View your participant sign-up 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. For privacy reasons, you will see only an ID code (no name or email address) for each participant, and the list will be sorted by ID code.
14. **Grant participant credit:** At the completion of a session, you should promptly deal with the participants, in the system, to ensure proper credit grants. To grant 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 by ID code. If the participant properly participated in the study, click the radio button next to his/her name in the Participated column.
15. If the participant did not appear for the timeslot, you may choose to mark his/her no-show as excused or unexcused. 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. Students will <u>not</u> be granted a no-show penalty, but the system will track no-shows for record-keeping purposes.

16. When you log in to the system, you will receive a warning if you have any timeslots that are more than 2 days old and haven't been dealt with. You may view a list of all timeslots that have not been dealt with by choosing the View Uncredited Timeslots option from the My Studies page. The 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.
17. If you would like to do a simple credit grant or no-show, you may do so directly from this page. Select the desired sign-ups/timeslots, and then choose the desired option.