

## Researcher SONA Procedures

**Purpose:** The subject pool consists mainly of introductory psychology students and occasionally other psychology students. Students are required to complete 14 credits (7 hours) of research credit. 7 of those credits must be completed in-person. We use an online tool called “SONA” to help organize participants, researchers, and course instructors.

**Requesting a Researcher Account:** Email [tamusubjectpool@gmail.com](mailto:tamusubjectpool@gmail.com) Please include: your personal TAMU email, what you would like your user name to be, and what email you would like associated with your account. Some labs create a shared lab account. This helps research assistants be able to log-in to your account to view/grant credit. Once you email me this information, I will create an account for you.

**Requesting Study on SONA:** For your study to be on SONA for students to participate, you need to send an email request for a study number. To request a study number, you must include the pertinent documents for your study. You can find more information about what documents are needed on the Request Study Form below. *Every semester* a unique study number must be assigned to your study. This means you will email me *every semester* for a **new** study number with the documents needed for every study that you would like on SONA. The documents required will change whether it is a new or continuing study.

**New Study:** Cover Page (Request Study Form), PDF of: IRB approval letter, informed consent, written debriefing.

**Continuing Study:** Cover Page (Request Study Form)

**Prescreen:** In the fall and spring semesters, we conduct a prescreen. If you would like to participate in the pre-screening, please email your pre-screen questionnaire along with your IRB approval numbers for each questionnaire to [tamusubjectpool@gmail.com](mailto:tamusubjectpool@gmail.com). Please also submit the questionnaire as a WordPad (.rtf) file. To be part of the prescreen you must send your prescreen questions. Prescreen

The screenshot displays the SONA user interface with several sections:

- My Studies:** Includes options for "View and edit your studies", "View, add or edit timeslots" (highlighted with a red dashed border), and "View uncredited timeslots" (marked with a green '1' in a circle).
- All Studies:** Includes an option to "View all studies available to participants".
- Add New Study:** This section is circled in orange and contains the option "+ Create a new study".
- My Profile:** Includes options for "Change password", "Modify contact information", and "Provide an alternate email address".
- FAQ:** Includes an option to "Find answers to common questions".

collection occurs 4 weeks before classes begins and ends 2 weeks before classes ends. Emails will be sent with specific dates. The prescreen is not conducted in the summer semester.

**Creating Study on SONA:** Once you have an account and a study number, you may add your study to SONA. You may create a new study under “Add a New Study”

1. Click ‘+ “Create a New Study”
2. Select a Study Type (the most common are standard studies and online external study; e.g., Qualtrics)
3. Complete Study Information
  - a. Study Name is **ONLY** the study number assigned by the subject pool coordinator. (e.g., 22S16)
  - b. Credits: Students earn 1 credit for every 30 minutes participated in research
  - c. Active Study: select “YES” – *If this is not selected yes, it will not appear on the subject pool coordinator’s list to approve.*
  - d. There may be other pertinent fields on the study information based on your particular study.
4. Once the study information is filled out, you may send a request for approval.

Study Information	
Study Name	22Sum99
Study Type	 Standard (lab) study 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> Active study : Does not appear on list of available studies -- must also be approved
Duration	30 minutes
Credits	1 Credits

**View/Administer Timeslots:** You may view/administer time slots by scrolling down to “Study Menu”

- **An important note about online timeslots:** You may create one timeslot for online studies with up to 999 participants. Some participants will sign up for your timeslot and never participate in your study. You **must** delete these participants who did not complete the study at the end of the semester.

**Automatic SONA Credit Through Qualtrics:** A fellow grad student, Jessica Lowe, has provided a document explaining the process of automatically granting credit from Qualtrics through SONA, see below. This can be finicky! Apologies ahead of time.

### Typical Dates

**Prescreen Collection:** 4 weeks before classes – 2 weeks before classes

**Prescreening Dates:** 1<sup>st</sup> Friday of semester at 5pm – 2<sup>nd</sup> Friday of semester at 5pm

**Subject Pool Opens:** 3<sup>rd</sup> Week of Class (Monday) at 9am.

**Subject Pool Closes:** Last day of classes at 5pm

# Automatic SONA Credit Through Qualtrics

## What is This Guide?

This guide will provide instructions on how to create (or modify) a study that will allow SONA Systems to automatically credit participants upon completion of an external study. To do this, researchers will need to modify their current study's configuration on both the SONA System and Qualtrics platform.

## First Steps

This guide assumes that you already have a study created on Qualtrics and a corresponding approved SONA study.

## Modifying Your Qualtrics Survey

1. Your Qualtrics study will need to read in your participants' unique identification number. To allow Qualtrics to do this, click on SURVEY FLOW.
2. While in SURVEY FLOW, add a new element to the beginning of your survey and select EMBEDDED DATA. In this open field, type in the phrase "id."
  - a. This should be at the very top, not under any blocks

The screenshot shows the Qualtrics Survey Flow interface. At the top, it says 'Survey flow' and 'Draft' with a toggle switch. Below this, there are two main blocks. The first block is 'Set Embedded Data:' and is highlighted with a blue border. It contains an 'id' field with the text 'Value will be set from Panel or URL.' and a link 'Set a Value Now'. Below the field is a link 'Add a New Field'. At the bottom right of the block are several action links: 'Add Below', 'Move', 'Duplicate', 'Add From Contacts', 'Options', and 'Delete'. The second block below is 'Show Block: Default Question Block (2 Questions)' with similar action links at the bottom right.

1. Go to your SONA Study and click on CHANGE STUDY INFORMATION.
2. Scroll down to where it says STUDY URL. This item lets you link your survey out to an external site – if you are currently using Qualtrics, you will already have a link in this box. If not, go to your Qualtrics survey and go to DISTRIBUTIONS. Next, click on WEB. Then, click on USE ANONYMOUS LINK. Finally, copy the link provided on this screen and paste it into the space for STUDY URL on SONA.
3. In order for them to be linked properly, add “?&id=%SURVEY\_CODE%” (with no quotation marks) to the end of the web address in the STUDY URL text box.

Study URL

[http://sfasu.qualtrics.com/jfe/form/SV\\_8J87SmTuyqCNC8l?&id=%SURVEY\\_CODE%](http://sfasu.qualtrics.com/jfe/form/SV_8J87SmTuyqCNC8l?&id=%SURVEY_CODE%)

If the text %SURVEY\_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study. You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add ?id=%SURVEY\_CODE% to the end of the URL to make use of this feature.

[Detailed Help](#)

4. Now, any time a student clicks on your study's link, SONA will populate the "SURVEY\_CODE" string with its own unique identifier.
5. When you save your changes, SONA will redirect you to your study's information. Now, you will see a new field for your COMPLETION URL. Copy this link (example below).

Website

[View Study Website](#)

[Sample Link with Embedded ID Code](#)

Qualtrics Redirect to a URL

[https://sfasu.sona-systems.com/webstudy\\_credit.aspx?e](https://sfasu.sona-systems.com/webstudy_credit.aspx?e)

## Integrating Qualtrics and SONA

1. Now, we need a way to let Qualtrics communicate with SONA the same ID number that was originally fed into the system. Go back to your Qualtrics survey and click on SURVEY FLOW. Add a new element to the end of your survey and select END OF SURVEY. Next, select CUSTOMIZE. Next, select OVERRIDE SURVEY OPTIONS and "Redirect to a URL..."
2. Paste the Completion URL you copied from SONA into the "Redirect to a URL..." field.

## Customize End Of Survey

Override Survey Options

Default end of survey message.

Custom end of survey message...

Redirect to a URL ...

3. Ensure there is only one <http://> at the beginning of the URL
4. Save your work. You are done!
5. Now, when students complete your survey, they will be guided to this URL that contains the integer that was saved as the "id" (earlier from the survey), and SONA will recognize this unique code and grant the student credit.