



THE UNIVERSITY OF WINNIPEG

Department of Psychology

SONA Participant Management System Guide for Researchers and Principal Investigators

This documentation applies to both researchers and principal investigators (P.I.s). P.I.s can perform all the same functions on a study as a researcher, which allows the him/her to operate in an oversight role and monitor the progress of their studies, or step in on behalf of the researcher when necessary. Because the privileges are the same, throughout this documentation, the term “researcher” may be used interchangeably with “principal investigator” except where otherwise noted.

System Basics

The SONA Experiment Management System is a highly configurable web-based interface for scheduling and managing research participants in studies using human subjects. Researchers create their studies in the SONA program, schedule and deliver the data collection sessions, and grant or revoke participation credits following the session.

In-person or on-line studies are created and have either single or multiple session timeslots for data collection. By viewing a list of active studies with their available timeslots eligible subjects will sign-up to participate. Researchers will grant or revoke credit to participants after the session occurs, and on-line studies can be configured to automatically grant credit.

Your SONA Researcher account

DO NOT use the Request Account button, this is only for participants and participant accounts have an entirely different set of privileges, which are not appropriate for a researcher.

Once your study receives full ethics approval, an email containing your SONA User ID, a temporary password, and link to SONA will be sent to the email address that you used to submit your ethics proposal.

Using this initial temporary password, you can login to SONA at any time, however it's probably best to log in as soon as you receive the temporary password and create your own password.

For security purposes, logged on sessions expire after a certain period of inactivity, usually 20 minutes. If this happens, just log in again. When you're done using the system it's better to log off to prevent any problems that may arise if someone uses your computer before the session expires.

SONA WEBSITE: <http://uwinnipeg.sona-systems.com>

Contact: Karen Barkhouse, Research Coordinator k.barkhouse@uwinnipeg.ca, 4L41A, 204-786-9744

Retrieving a Lost Password

If you forgot your password, click the Forgot Password button on the main login page and another one will be emailed to you momentarily. If you provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address taken from your account profile. If the requested password has not arrived after 30 minutes, then check in your email program's junk mail folder in case the email was delivered there.

Changing Your Password and Other Information

To change your password or other information, choose My Profile. It is recommended you provide a phone number and office location, as most human subject committees require that this information be made available to research participants. 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).

Email Options

Certain events in the system will cause an email notification to be sent to you, such as notifications that a participant has signed up or cancelled their sign-up for your study. In addition, your email address is displayed to the participant when they view information about the study, in case they need to contact you with questions. If you do not specify an alternate email address in your SONA researcher profile (i.e. hotmail or gmail), the default email address is your UW webmail address.

Logging Out

When you are done using the system, choose Logout. You are logged out when the main log in page is displayed. It is always a good security practice to close all your web browser windows as well, especially if you are using a computer that is shared by others.

Creating Your Study

Before you begin creating your study, review the SONA Manual for Researchers posted on thesis website. A summarized checklist indicates only the main tasks involved in running your subject participation. Refer to the manual for in-depth explanation. Remember, once you have prepared your study, prepared your timeslots and pre-booked your classroom, your study must be approved by the SONA administrator. There is a step to request the approval.

Interpersonal Communication in Human Research Participation

It is important to understand that your role as a research agent of the department requires assured professionalism and dignity while interacting with your participants. You should not express nor endure any form of harassment. Please report any mistreatment or concerns to your advisor, the thesis class instructor, or the research administrator. Participants have the same right and obligation to report to the Psychology Department any perceived threat, unprofessionalism, or apprehension of their own.

Checklist for Researchers

Step		<u>Study Status</u>	<u>Participant View</u>
1	Receive Ethics Approval and SONA user id.		
	You will receive an e-mail from the Research Coordinator notifying you of ethics approval and soon thereafter your SONA user account will be <u>created for you</u> and a temporary password will be e-mailed to you.		
2	Log in to SONA		
	Initiate your account and create your own password.		
3	ADD your New Study	Inactive	Study is not viewable.
	Create your study using the title, descriptions, and recruiting information that you submitted with your ethics. Enter any characteristics, prerequisites, etc. Continue to scroll down to the lower part of the screen to complete the study set up, or to change study information of an existing study. If necessary, refer to the researcher manual on the thesis class website for Adding A Study and Working with Timeslots.		
4	Prepare your timeslot(s).	Inactive	Study is not viewable and timeslots are NOT yet available for sign-up.
	Define the dates and timeslots and secure room locations: To request campus space, you must use the on-line form http://uwinnipeg.ca/academic-scheduling/academic-scheduling-booking-request.html providing all detail especially including your reason: i.e for Thesis data collection under the supervision of “supervisor name”. For Psychology departmental space, contact the Department main office or c.smallwood@uwinnipeg.ca .		
5	Request approval of your study.	Inactive	Cannot yet be viewed by students until Active.
	After timeslots are created, you must request approval via Change Study Information screen . (Only when timeslots are set up can the administrator approve your study.)		
6	Turn on your study to make it available for sign-up.	Active	Your study can be viewed and timeslots are available for sign-up.
	Once approved and you are ready for sign-ups the RESEARCHER must change study status to ACTIVE using the change study information screen. Rem: UPDATE the screen.		
7	Carry out Sessions & Take Attendance	Active	Participants can sign up as long as timeslot space is available.
	Monitor your sign-ups, prepare your study materials; photocopy consents, feedback and tests (in advance); Post directional signs to obscure locations, and door signs. Take Attendance using your sign-up roster.		
8	Grant Credits	Active	
	After each session, promptly go to your study and Modify the Timeslot to record attendance and grant credit to each participant or report an absence, and update timeslot to actually post the credits.		
9	End Study	Inactive	Cannot be viewed by students.
	When you have completed your data collection, please change the study status back to Inactive		