

Sona Systems Guide

The following steps describe how to create and manage a Sona Systems account for participant recruitment. Sona Systems allows researchers to post research studies. Interested participants (who are also enrolled in SONA) can participate by clicking a direct URL for online studies or selecting time slots for in-person or video interview studies.

Creating and Accessing Your SONA Account:

1. In order to use SONA, you must create an account: Principal Investigator or Researcher. The type of account you create depends on your role in the research and in the university. You will only need to complete this step the first time you use SONA.
 - If you are a faculty member or graduate student conducting your own study, you must create a **Principal Investigator** (P.I.) account.
 - If you are an undergraduate conducting your own study, you must have your faculty supervisor create a **Principal Investigator** (P.I.) account. You must then create a **Researcher** account and have your faculty supervisor add you to the study.
 - If you are a research assistant (undergraduate or graduate student), you must create a **Researcher** account. You must then have your faculty supervisor add you to the relevant studies. Please note that if you are a graduate student, you can be a Principal Investigator for your own study, as well as a Researcher for other studies.

To create a SONA account, please send an email to harpadmin@aucegypt.edu requesting to have a Sona Systems account. The email request should include your desired role (Principal Investigator, Researcher), Name, and AUC email address. You can always change your assigned password by selecting “Forgot Password” on the Home Page or “My Profile” once you have logged in.

2. Once the request is approved, you will receive an email from the HARP admin with your username and password.
3. To access the AUC Sona Systems Platform, go to <https://aucegypt.sona-systems.com/default.aspx>
4. Enter your username and password sent to you from the HARP Admin under “**AUC Psychology Research and Volunteer Sign Up.**”

Posting Studies:

Please note that you will need to complete the steps below each time you want to post a new study. Furthermore, only participants with SONA accounts will be able to see and sign-up for your study.

At the current time, anyone within or outside of AUC can create a SONA account and be a participant.

1. Click on “**Create a new study**” on the left under “Add New Study.”
2. Identify your study type, so you can fill out the relevant information in #3:
 - a. **Standard Study**: This option applies to an in-person or video interview study, with one session per participant.
 - b. **Multi-Part Standard Study**: This option applies to in-person or video interview studies, with up to 2-4 sessions per participant.
 - c. **Online External Study**: This option applies to an online study with an external URL, with one session per participant.
 - d. **Multi-Part Online External Study**: This option applies to online studies with an external URL, with up to 2-4 sessions per participant.
 - e. **Online Internal Study**: This option applies to an online survey that you have created within SONA, with one session per participant.
3. Indicate the compensation type for your study type:
 - a. **Paid** describes studies in which you will compensate people with a monetary prize (e.g., e-gift card) or something similar.
 - b. **Credit** describes studies in which you will compensate students with extra credit for a given course. This cannot be your own course as it may be a conflict of interest and students may feel pressured to participate in your research. Instead, this should be a course taught by a different instructor. You should have your own agreement with the instructor that they can receive extra credit for participating in your research. Typically, most universities award 0.5 credits for every 30 minutes of participation. However, the amount of credit you decide to give depends on the amount agreed upon with the IRB board and instructors.
 - c. Given that there is no volunteer option, you can select the **Credit** option. But be sure to indicate to participants that when you award them credit in the system, this simply means that they have completed the study.
 - d. Click on “**Continue**” at the bottom
4. Fill out the “**Basic Study Information**”:
 - a. **Study Name**: Indicate the name of the study that participants will see.
 - b. **Eligibility Requirements**: Indicate any eligibility requirements, if applicable.
 - c. **Duration**: Indicate how many minutes the study will take
 - d. **Credits OR Payment**: Indicate the amount of credits or payment that participants will receive

- e. **Preparation:** Indicate whether there is anything that participants should or should NOT do before coming to the study. Examples may include not eating or drinking before a study if collecting biological samples.
 - f. **Researcher:** Choose members of your Researchers team and Principal Investigator, if applicable. You will only be able to select members who have accounts on Sona Systems.
 - g. **Active Study:** Mark the study as “**Active**”. Do not click “Add this Study” yet.
5. Scroll down to the “**Advanced Settings**”.
- a. **Prerequisites:** Indicate whether participants must have participated in specific pre-existing studies in SONA in order to be able to participate.
 - b. **Disqualifiers:** Indicate whether participants must have NOT participated in specific pre-existing studies in SONA in order to be able to participate.
 - c. **Course Restrictions:** Indicate whether participants must be enrolled in specific courses in order to be able to participate.
 - d. **Age Limit:** Indicate whether there are any age restrictions for participants
 - e. **Invitation Code:** Indicate whether there is a specific code that participants must have to sign-up
 - f. **Study URL:** Provide the study’s URL if it is a web-based study
 - g. **Participant Sign-Up Deadline:** Indicate how many hours participants have to sign up before a given time-slot, if applicable
 - h. **Participant Cancellation Deadline:** Indicate how many hours participants have to cancel before a given time-slot, if applicable
 - i. Indicate whether you would like researchers to receive email notifications for participant sign-ups and cancellations
 - j. **Researchers at Timeslot-Level:** Indicate whether you want the researchers on your team to be assigned to specific time-slots. This option is only relevant to in-person or video interview studies that also have multiple researchers. It is useful for assigning research assistants different shifts to run participants.
 - k. **Automatic Credit Granting:** Indicate whether you want credit to automatically be awarded to participants once a day, or whether you want researchers to do it manually. This is only relevant for studies awarding credit.
 - l. **Shared Comments:** Indicate any notes you would like to make available to all researchers and PI in the SONA system, even if they are not part of your study team.
 - m. **Private Comments:** Indicate any notes you would like to make available to the researchers and PI in the SONA system who are part of your study team.
6. If doing a multi-part study, scroll down to the “**Part 2**” “Part 3”, “Part 4” Study Settings. For each part,
- a. **Credits:** Indicate the amount of credits that participants will receive for this study part
 - b. **Duration:** Indicate how many minutes this part of the study will take

- c. **Scheduling Range:** Indicate the range of days between the current study part and the previous study part. Make sure to set an adequate range between each part of the study time slots
 - d. **Scheduling Leniency:** Indicate whether the study part must happen at the same time (but on a different day) as the previous part.
7. Scroll down and click on **“Add This Study.”**
8. Email the HARP coordinator via email the study’s IRB approval letter. Although you may have activated a study, it won’t be approved to be visible among participants without this document.
9. If you would like to change study information, click on **“My Studies”** at the top bar. On the right of your study, click “Study Info” under the tab that says “View.” You can also click on the study name and then click on **“Study Menu”**. A drop menu will be visible, click on **“Change Study Information.”** Please make sure that any changes you make to a study have been IRB approved.

Creating and Managing Time Slots:

The steps below apply to studies where you want participants to participate at specific times, in-person or through a video conference.

1. At the top bar, click on **“My Studies”**
2. On the right of your study, click “Timeslots” under the tab that says “View.” You can also click on the study name and then click on **“Study Menu”**. A drop menu will be visible, click on **“View/Administer Time slots”**
3. To add an individual time slot, click **“Add A Timeslot”** on the top right corner. To add multiple time slots, click **“Add Multiple Timeslots.”**
4. For each Timeslot:
 - a. **Date:** Indicate the date of the time slot
 - b. **Start Time:** Indicate the time of the time slot
 - c. **End Time:** The end time is already predetermined based on the study duration you indicated when posting the study
 - d. **Number of participants:** adjust the **number of participants needed for the time slot.** For example, you may want two people to complete the study separately but at the same time. Alternatively, you may want two people to come at the same time to interact with one another.
 - e. **Location:** Indicate the location or videoconferencing URL of the study where the participant must go to participate.

5. Click on “**Add This Timeslot.**” This will post your study in the “Available Studies” for all participants who fulfill the criteria.
6. If you would like to change or delete time slots, return to #2. You can select the “Modify” button for a given timeslot. You can also select “Delete Multiple Timeslots” at the top to remove multiple timeslots.

Compensating Participants

1. Once participants **sign-up** and complete the study, you can reward them with either credit or payment. Crediting or paying the participant should be done after ensuring that the participant who signed up for the study either filled in a survey or showed up for the experiment. You will keep receiving frequent emails from Sona notifying you that there are uncredited timeslots if there are any. So, it is highly recommended to credit participants after they finish the survey.
2. To reward the participants, go to the **Home** page.
3. Click on “**View Uncredited Time slots**” in the upper half (on the left).
4. Choose the adequate action and click on “**Process Changes.**”

Note:

If you need any assistance with using SONA, please contact the HARP coordinator.