Welcome to the online research participant sign-up and credit tracking software

I WANT TO USE THE SONA-SYSTEM TO RECRUIT PARTICIPANTS OR NON-RESEARCH VOLUNTEERS FOR TRAINING PURPOSES. HOW DO I RECEIVE A LOG-IN AND PASSWORD FOR THE SYSTEM?

• There are four distinct roles in SONA: participant, instructor, researcher, and principal investigator. Because of the differences in each role, distinct USER IDs (incorporating the user name from your CWU email account) are required. For ease, if you have multiple roles, consider modifying your passwords in your profile to all be the same – then only your user ID changes.
  o Participant: For students, the default role is participant. Students can register themselves as participants in the system.
  o Researcher roles have USER IDs consisting of their CWU email account user name with “_re” at the end (for instance, smithj_re).
  o Instructor roles have USER IDs consisting of their CWU email account user name with “_in” at the end (for instance, smithj_in).
  o Principle Investigator: For faculty members only. The USER ID will be their email account user name with “_pi” at the end (for instance, smithj_pi).
  o The SONA user interface automatically adds “@cwu.edu” to the end of the user name for each of the distinct roles. Your actual CWU email address will be associated with all your SONA account(s).

• ALL NONPARTICIPANT ACCOUNTS MUST BE CREATED BY THE SYSTEM ADMINISTRATOR. PARTICIPANT ACCOUNTS ARE SELF-CREATED BY THE USER.
  o Please contact the system administrator and indicate which type of account you would like. The SONA administrator can be reached via email at researchadministrator@cwu.edu. If you are an undergraduate student, you MUST have a faculty member contact the researchadministrator@cwu.edu email and request a researcher account for you.
  o Your USER ID and password will be sent to you directly from SONA – please don’t ever disregard emails from SONA.
I AM A STUDENT (EITHER UNDERGRADUATE OR GRADUATE) INTERESTED IN POSTING THEIR STUDY FOR RECRUITMENT ONLINE. WHAT SHOULD I DO?

• Student researchers must be registered in the system by the SONA administrator after a request by their faculty mentor, who will be noted on the study as the Principal Investigator. Please have your faculty mentor contact the SONA administrator via email at researchadministrator@cwu.edu with the students’ names and email addresses.

• Student researchers must be listed on the HSRC approved project as a co-investigator

• In order to post a new study with available days/times for participant sign-up, you must have an HSRC approval number. You must have the wording of your study description that will be posted on SONA approved by HSRC.

• Sign-on with your principal investigator (faculty only) or researcher (student) account, and under “Add New Study”, click on “create a new study”. You may add a:

  1. Standard one-part study (credit or paid; most studies are credit only).
  2. A two-part standard study
  3. An online survey using sona to administer the survey – DO NOT SELECT THIS OPTION IF YOU PLAN TO USE SURVEYMONKEY OR QUALTRICS
  4. An online external study – USING QUALTRICS OR SURVEYMONKEY OR ANOTHER HSRC-APPROVED SYSTEM

You must request that the study be approved by the system administrator BEFORE YOU CAN BEGIN TO COLLECT PARTICIPANTS.
HOW DO I ADD TIME-SLOTS FOR STUDENT PARTICIPANTS TO SIGN-UP?

• At the top of your SONA screen, click on “My Studies.”

- In your study list, click on the desired study name to access the study information page.

• Under the heading “Study menu”, click on “View/Administer Time Slots”.
• You can add individual timeslots or multiple timeslots. Click on “Add a Timeslot” or “Add Multiple Timeslots”

• Based on your study specifics, the system will set-up timeslots per your requested start times and free time between timeslots using the duration of the study as already set. You cannot alter the length of the study timeslots on this page. Add an appropriate location for the participant to find the researcher for the study session and select your name from the list of researchers. The researcher who is selected will be sent email confirmations of sign-ups or cancellations.

• Once you have times set-up for one week, you can copy that week into subsequent weeks.
WHAT IF I DON’T WANT TO CREATE OPEN ENROLLMENT TIMESLOTS BECAUSE I ALREADY KNOW THE NAME OF THE PERSON I WANT TO SIGN-UP?

• Sign into SONA using your USER ID that ends in “_re”. If you have lost your password, you can request it be resent by clicking on “Lost your password? Click here to retrieve it”

• At the top of your SONA screen, click on “My Studies.”

In your study list, click on the desired study name to access the study information page.

• At the bottom of the study information page, click on “View/Administer Time Slots”.
• You can add individual timeslots or multiple timeslots. Click on “Add a Timeslot”

• Based on your study specifics, the system will set-up timeslots per your requested start times using the duration of the study as already set. **You cannot alter the length of the study timeslots on this page.** Add an appropriate location for the participant to find the researcher for the study session and select your name from the list of researchers. The researcher who is selected will be sent email confirmations of sign-ups or cancellations.

• After you have filled in the form, click “Add this Timeslot”
• The next screen will say “Timeslot added” and show you the Future Timeslot information in grey. You have created a blank timeslot. IF YOUR STUDY IS LIVE, ANYONE WHO IS ONLINE AT THAT MOMENT, COULD SIGN UP FOR THAT TIMESLOT SO YOU MUST ACT FAST. You must now add the name of the student. In that grey box, click the “Modify” button on the right-hand side.

![Image of the interface showing timeslot details]

- The timeslot information will appear again. Scroll to the bottom of the screen to “Manual Sign-Up”. Enter their information under “Manual Sign-Up” for either their Username or Last Name and click “Sign-Up”. ***You can only do this if the student has already registered in the SONA system. It is essential to get them to enroll as a participant when you schedule their appointment and BEFORE you set up their timeslot***

![Image of the Manual Sign-Up interface]
• Once you enter their information under “Manual Sign-Up” and click “Sign-Up” from the previous screen, the following confirmation screen will appear. Click “Sign Up” if the information is correct.

• The system should provide you with confirmation that the sign-up was successful.
WHAT IF I WANT TO AWARD VARIABLE CREDITS TO A STUDENT WHO HAS PARTICIPATED?

• Sign into SONA using your USER ID that ends in “_re”. If you have lost your password, you can request it be resent by clicking on “Lost your password? Click here to retrieve it”

• At the top of your SONA screen, click on “My Studies.”

• In your study list, click on the desired study name to access the study information page.
• At the bottom of the study information page, click on “View/Administer Time Slots”.

![Image of study information page]

• You should see a list of timeslots with “Awaiting Action” on them. This will occur whether the student has self-enrolled in a timeslot or if you, as a researcher, enrolled them manually. For the timeslots that you wish to adjust, click “Modify”.

![Image of timeslots page]
To award the pre-set number of credits for the study, click on “Participated” under the Sign-Ups. If you would like to adjust the number of credits the participant should be awarded, click the arrow next to the number of credits and select the appropriate number of credits to award based on a formula of \( \frac{1}{2} \) credit for every 10 min of participation. Make certain to click “Participated” and then “Update Sign-Ups” to award the credits earned.

An e-mail notification will be automatically sent to the participant. You should manually update your participant sign-ups (with Participated, Unexcused No-Show, or Excused No-Show) within 48 hours of the scheduled appointment.