

A Researcher's Guide to the Psychology SONA System

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1. What is SONA?

SONA is an online platform where researchers can recruit undergraduate psychology students to participate in their studies.

Note: There are different SONA systems for different departments in the university. Psychology faculty and their student researchers must use the Psychology SONA system: <https://carleton.sona-systems.com>

2. Are There Any Restrictions to Using SONA?

A study may be posted in SONA if the principal investigator OR primary supervisor is a full-time faculty/instructor member in the Department of Psychology at Carleton University. Full-time faculty/instructor member refers to a person with a 50% cross-appointment or higher to the Department of Psychology.

A study may also be posted in SONA if the principal investigator is a psychology graduate or undergraduate student AND the study is part of their psychology course work (including thesis work or a formal independent study). A faculty supervisor of the posted study can include faculty members outside the Department of Psychology and faculty members with less than 50% cross-appointment to the Department of Psychology.

3. How Do Researchers Get Access to SONA?

SONA requires that every researcher has their own account. If you do not have a researcher account, please email the SONA TA (Lauren Thompson) at sona@carleton.ca to request one. Please include your full name, Carleton email address, the name of your supervisor, and department in your request.

4. Who Can Sign Up for My Study?

Students registered in introductory psychology courses (PSYC 1001, 1002, 2001, and 2002) can earn up to 4% either as bonus marks (in PSYC 2001 and PSYC 2002) or as part of their final grade (in PSYC 1001 and PSYC 1002). Each semester, there are also a few students who are not registered in any of these courses, but choose to participate for monetary compensation, gift cards, or the experience of participating in psychological research.

5. SONA Opening and Closing Dates.

The SONA system opens to researchers slightly before the beginning of each new term and to students during the first full week of classes each term. You will be notified by e-mail when SONA open to researchers and when it opens to students.

SONA closes to students at 5:00 pm on the last day of classes for each term. This means that all studies must be completed by then. Researchers have 24 hours after SONA closes to students to ensure that all timeslots are credited appropriately (e.g., credit granted, excused no-show, etc.) and to download their participant lists. **Do not post timeslots after 5:00 pm on the last day of classes for the given term.**

6. Ethics Approval.

In order to collect data using the SONA system, your study must have been approved by the Ethics Committee (CUREB-B). You will need to provide your ethics clearance number and study expiry date.

You must receive ethics clearance for all the researchers you list as assisting with the data collection for your study. If a researcher is listed in the SONA system, but not on your ethics application, you will need to submit an addendum before your study can be approved.

Please also ensure that your study description in SONA matches *exactly* the recruitment notice that Ethics has approved. For an example of a SONA recruitment notice, please see [Appendix A](#).

7. Posting Your Study.

To log into the SONA system, go to <http://carleton.sona-systems.com>.

Researchers have four options to choose from when setting up their study:

1) Standard Study

The ‘standard study’ option refers to in-lab studies that require students to show up to a specific location and participate in-person. For standard studies, you may set up multiple time slots for participants to choose from.

2) Multi-Part Standard Study

The ‘multi-part standard study’ option refers to in-lab studies that also require students to show up and participate in at least one follow-up session. Multi-part standard studies can have up to four study sessions (i.e., one initial session and up to three follow-up sessions). For multi-part standard studies, you may set up multiple time slots for each part of the study separately for participants to choose from.

3) Online Survey Study

The ‘online survey study’ option refers to online studies that are set up and administered directly within the SONA system. This option requires that researchers create their survey and store data directly in the SONA system. **This option is not recommended for researchers.**

4) Online External Study

The ‘online external study’ option refers to online studies that are set up and hosted by an external survey platform (i.e., Qualtrics). This option allows researchers to create their survey in Qualtrics and copy and paste the link into SONA. Participants will then click on the link and be taken directly to the survey website. For online external studies, you may set up one single time slot that ends on the last day of classes at 5:00 pm (or earlier). **Please use this option for all online surveys.**

Note: All professors in the Psychology Department have a Qualtrics account that their student researchers can use.

When you post your study in the SONA system, you will need to place your ethics clearance number in the spot that says **IRB Approval Code** and indicate the expiry date of your study in the spot that says **IRB Approval Expiration**. You will also need to ensure that your study description in SONA matches *exactly* your recruitment notice that was cleared by Ethics. Please ensure that this information is correct in order to avoid delays.

Once your study is posted, you need to send a request through the SONA system to make your study visible to students (click on the words “**Send a Request**”).

Once your study is approved, you need to set up time slots so that students may sign up and participate in your study. To do so, click on your study title and select “**View/Administer Time Slots**” in the study menu. There will then be an option to “**Add a Timeslot.**”

8. Credit Value for Experiments and Online Surveys.

Experiments (conducted in a lab)

For each block of 60 minutes that students spend participating in an experiment, they will raise their grade by 1%:

- (up to) 30 min experiment = 0.5%
- 31-60 min experiment = 1.0%
- 61-90 min experiment = 1.5%
- 91-120 min experiment = 2% ... etc.

Online surveys

For each block of 60 minutes that students spend participating in an online survey, they will raise their grade by 0.5%:

- (up to) 30 min survey = 0.25%
- 31-60 min survey = 0.5%
- 61-90 min survey = 0.75%
- 91-120 min survey = 1% ... etc.

9. Updating Timeslots.

****Researchers must update timeslots for online studies within one week of participation, and for in-lab/standard studies within 24 hours of participation.****

Note: Researchers can no longer penalize students who fail to attend an experiment or complete an online survey.

Researchers have three options when updating timeslots:

1) Participated

If a participant attends your study, grant them a credit (i.e., indicate that they "**participated**").

If you are paying your participants, indicate that the student "**participated**," but change the credit value to 0% and include a note in the comments section that the participant was given money instead of a credit. Once you have done so, click "Update Signs-Ups."

2) Excused no-show

If a participant fails to attend your study, grant them an "**excused no-show**."

Note: You should not assign participants an "**unexcused no-show**," as they will not be penalized even if you select this option. Please see [Section 13](#) regarding multiple rescheduled no-shows.

3) Variable credit grant (to assign partial or additional credit)

If a participant (legitimately) takes longer to finish your study than anticipated, you can use the variable credit granting option to make sure they receive 0.5% for every half an hour they attended your experiment. To use the variable credit granting, click on "View/Administer Time Slots" in your Study Menu. You will notice a red box labelled "Modify" to the right of each time slot. Click this and then select the appropriate new credit value from the drop-down menu. When you are finished, click "Update Sign-Ups" at the bottom of the page.

This option can also be used to grant partial credit for online external studies with multiple time points (i.e., online longitudinal studies). If a participant only completes the initial survey, you can grant them partial credit. As participants complete additional time points, you can update the credit value granted. Be sure to click "Update Sign-Ups" at the bottom of the page after making any changes to credit values granted.

10. How Do I Know Who Participated in my Online External Study?

Many times, students sign up for online surveys and do not actually participate in them. For this reason, please use the external credit granting feature. SONA can assign randomized ID codes to participants

that become embedded in the Qualtrics survey. Researchers can then compare the list of ID codes in their Qualtrics data file to the list of ID codes in their participant sign-up list in SONA. If a participant's ID code is listed in both SONA and Qualtrics, then they have completed your study and should be granted credit.

For detailed instructions on how to integrate randomized ID codes from SONA into your Qualtrics survey, please see [Appendix B](#).

11. What Happens When a Student Withdraws From a Study?

For both experiments and online surveys, when a student withdraws after consenting to participate in a study, they are entitled to their credit. However, if a study involves multiple sessions over different days, the student should only receive credit for the time completed provided that you have clearly indicated the credit value for each session in your study description.

12. When Participants Fail to Show Up.

Participants can cancel an appointment through their SONA account. However, if you have specified a cancellation deadline and it has passed (e.g., you stated that students cannot cancel 12 hours before your study begins), then students will have to contact you in order to cancel their appointment. **If a participant fails to appear for a study, they must be assigned an "excused no-show."**

Note: You should not assign participants an "unexcused no-show," as they will not be penalized for not showing up even if you select this option.

13. When Participants Fail to Show Up to Multiple Rescheduled Time Slots.

If a student fails to show up to a scheduled time slot, they may reschedule. However, once a student fails to show up to three rescheduled time slots, you are permitted to prevent them from signing up for your study again. However, this must all be communicated directly through email with the student as SONA does not allow students to be blocked from signing up for studies. In any event, ensure that the student clearly understands this policy in all email correspondence regarding rescheduling. If you are unable to resolve an issue with a participant, please inform the SONA TA (sona@carleton.ca).

14. If You (the Researcher) Fail to Show Up.

Please contact the participant(s) in your time slot as soon as you know you are unable to keep the appointment. Once they have acknowledged that their time slot has been cancelled, you should try to reschedule as soon as possible so that the student is able to make up their lost credit. If the student is not able to reschedule (e.g., the time slot was scheduled during the last week of classes), the participant is entitled to full credit.

If you are unable to contact the participant prior to the scheduled time slot (i.e., you sent the participant an email but have not received a reply email), the participant is entitled to full credit.

In both cases, keep records of your attempts to contact the participant and ask the participant to indicate that they received the message. If you are unable to resolve an issue with a participant, please inform the SONA TA (sona@carleton.ca).

15. Recording Participation Outside of SONA.

When recruiting students outside of the SONA system, it can be very difficult to assign credits to participants. **If you record the student's first and last name, student number, Carleton e-mail address and the class section they are registered in**, it will be easier for you to assign credits. If for any reason you are having difficulty assigning credits to certain students, contact the SONA TA (sona@carleton.ca) with the information provided above as soon as possible.

16. Expiry Dates on SONA.

If you would like to continue collecting data after the approval period on your ethics certificate expires, you must renew your study by submitting an online renewal form to the Ethics Committee. Once your study has been approved, log onto SONA and click on your study's name. Then click on "**Change Study Information.**" There will be text on that page beside the IRB Approval Expiration that reads "**Send a Request.**" Click on the text and write the new expiry date in the text box before submitting the request. The system will include all other relevant information to update your study. **Do not e-mail the SONA TA directly.** You will not be able to post timeslots on SONA if your ethics approval has expired. The expiry date for your study is listed below the IRB number.

17. What Can I Do to Ensure Better Quality Data?

There are some measures researchers can take to ensure better quality data. Some examples of methods are listed below:

- **Attention Check Items:** Some researchers use attention check items (i.e., "Please leave this item blank") to determine whether participants are paying attention when filling out surveys. If participants fail up to a certain number of these attention checks, their data can be excluded from the analysis.
- **Accuracy and Honesty Items:** Some researchers include items at the end of their survey to ask participants whether they provided accurate and honest responses to all questions. Be sure to let participants know that their responses to these items do not determine whether or not they receive credit for their participation – instead, you can explain the importance of good quality data.

- **Study Completion Time:** Some researchers who use online survey platforms (e.g., Qualtrics) can time how long participants take to complete their study. If a participant completes the entire study in a time frame that seems unrealistic, they may not have provided good quality data.

While these measures are not exhaustive, they provide a few examples of what can be done to prevent poor quality data. It is best to use a combination of methods and see what works best for your lab and the research you are conducting.

For any additional questions or concerns, please contact the SONA TA (Lauren Thompson) at sona@carleton.ca.

Updated June 2020

Appendix A: Example of SONA Recruitment Notice

Study Name: Reading and Writing Experiment

Description: This study asks monolingual native Canadian English speakers to read sentences presented on a computer monitor. Participants will also be asked to fill out a brief personal questionnaire about their exposure to any other languages as well as a questionnaire evaluating a list of English sentences.

Eligibility Requirements: We are looking for monolingual native Canadian English speakers with good or corrected vision (with soft contact lenses).

Risks: There will be no more physical risk than is consistent with sitting in front of a computer for a one hour period. Participants may take breaks if they wish.

Duration and Locale: 1 hour at Your Lab (Room and building)

Compensation: You will receive either 1% towards your course (PSYC 1001, 1002, 2001, or 2002) or \$10 for your time.

Researchers: xx (Principal Investigator); xx (Faculty Sponsor)

Phone: 613-520-2600 ext. xxxx

Email: username@carleton.ca

This study has received clearance by the Carleton University Research Ethics Board (A or B) (Clearance #xx-xxx, insert your ethics clearance number once obtained).

[Choose the appropriate board:]

CUREB-A:

If you have any ethical concerns with the study, please contact Dr. Bernadette Campbell, Chair, Carleton University Research Ethics Board-A (by phone at 613-520-2600 ext. 2517 or via email at ethics@carleton.ca).

CUREB-B:

If you have any ethical concerns with the study, please contact Dr. Bernadette Campbell, Chair, Carleton University Research Ethics Board-B (by phone at 613-520-2600 ext. 4085 or via email at ethics@carleton.ca).

Appendix B: Guidelines for External Study Credit Granting with Qualtrics in SONA

INSTRUCTIONS: The following steps allow researchers to program Qualtrics to record the unique, anonymous ID code – which is generated for each participant in SONA – into the data file. Then, this code can be compared in both SONA and the data file to verify participants who have accessed the survey URL and those who have not. Compensation can be assigned accordingly.

1. Open your study in SONA and go to “Change Study Information”. Enter the survey URL from Qualtrics (i.e., Anonymous Survey Link) into the “Study URL” box.
2. Add ?id=%SURVEY_CODE% to the end of the survey URL.

For example, if your Qualtrics Survey Link is:
https://carletonpsych.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE

You will change it to:

https://carletonpsych.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE?id=%SURVEY_CODE%

Note: “id” must be in lower-case.

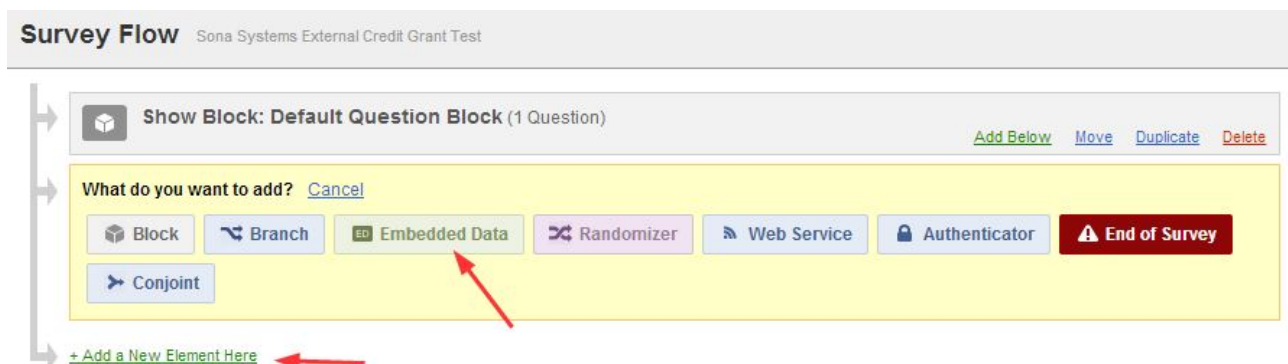
Note: If your Qualtrics URL was generated before the Qualtrics systems update (March 2017), it will have “/SE/” in it. For example:

https://carletonpsych.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE

In this case, you can either regenerate the URL for an Anonymous Link, or add &id=%SURVEY_CODE% (change the ? to &) to the end of your survey URL.

After completing these steps, the Study Information on SONA now displays the updated survey URL labelled “Qualtrics Redirect to a URL”.

3. Next, open your survey in Qualtrics. Go to Survey Flow, click on “Add a New Element”, and then select “Embedded Data”. Rename this embedded variable “id” (again all lower-case). Click Save Flow to save your changes.



Survey Flow Sona Systems External Credit Grant Test

The screenshot shows a 'Survey Flow' interface for 'Sona Systems External Credit Grant Test'. It displays a sequence of steps: 'Show Block: Default Question Block (1 Question)' and 'Set Embedded Data:'. The 'Set Embedded Data' step is highlighted with a green background and contains a field labeled 'id'. A red arrow points to the 'id' field, which has the text 'Value will be set from Panel or URL. [Set a Value Now](#)'. Below the field is a link 'Add a New Field' and at the bottom right is 'Add Below'. On the left side, there is a vertical arrow and a '+ Add a New Element Here' link.

STOP HERE if you wish to manually grant credit to participants, or if this is the first survey in a series of longitudinal surveys.

These steps will program an embedded variable (“id”) into the survey for each participant. This embedded “id” variable will appear at the end of the exported data file. This id code generated is a unique 5-digit id code, and can be found next to the student’s name in SONA. If you are manually granting credit, you can compare the id codes in SONA to the id codes in your Qualtrics file to determine who has participated in your study.

CONTINUE if you wish to use the automatic credit granting feature (students will be re-directed back to SONA upon reaching the end of the survey where they will receive credit automatically).

4. In Qualtrics, then go to Survey Options and click the option labelled “Redirect to a Full URL” in the Survey Termination section. Enter the updated survey URL from SONA in the box provided (you can copy and paste this link from SONA).

For example, you would enter:

[https://carleton.sona-systems.com/webstudy_credit.aspx?experiment_id=2096&credit_token=4783df60c24e4b71a0c7de1983c3fd57&survey_code=\\${fe://Field/id}](https://carleton.sona-systems.com/webstudy_credit.aspx?experiment_id=2096&credit_token=4783df60c24e4b71a0c7de1983c3fd57&survey_code=${fe://Field/id})

Note: If you have an End of Survey element set up in Survey Flow, you will need to add the updated URL there also. To do this, go to Survey Flow, select “End of Survey” and click on “Customize”. You will then enter the updated survey URL from SONA into the “Redirect to a URL” field in Qualtrics.

The image shows two screenshots. The top screenshot is from the Sona Systems interface, featuring a green button labeled 'View Study Website' and another labeled 'Sample Link with Embedded ID Code'. Below these is a section titled 'Qualtrics Redirect to a URL' with a red-bordered text box containing the URL: `https://yourschool.sona-systems.com/webstudy_credit.a`. The bottom screenshot is from the Qualtrics 'Survey Termination' settings. It shows several radio button options: 'Default end of survey message.', 'Redirect to single response report.', 'End of survey message from a library...', 'Redirect to a URL full URL, ex. "http://www.qualtrics.com"', 'Send additional thank you email from a library... When distributed via the Survey Mailer.', and 'Anonymize Response. Do NOT record any personal information and remove panel association (not recommended)'. The 'Redirect to a URL' option is selected. A red arrow points from the URL in the Sona Systems screenshot to the 'Redirect to a URL' option in the Qualtrics settings. The text input field for the URL in Qualtrics contains: `1f5a4dd88fccc19b5a3db14&survey_code=${e://Field/id}`.

IMPORTANT NOTE. Following these steps should result in automatic credit granting to participants who complete your study. However, some participants may withdraw from your study before reaching the end of the survey. These participants will still receive an “id” in Qualtrics, but may not have been granted automatic credit.

It is important to download your data (**including the “responses in progress” .csv file**) to check that all students who participated in your study are receiving their credit. Researchers can sort the “id” variable in the data file and search using the Ctrl-F function on the SONA participant record to verify whether a participant who signed up for a timeslot accessed the survey link. If there is a match, the credit can be assigned manually in SONA.

Instructions updated June 2020

The Integration Testing Instructions can be found [here](#)

These features are described on Qualtrics’ site at the following URL:

("Passing Information Through Query Strings")

<https://www.qualtrics.com/support/integrations/api-integration/passing-information-through-query-strings/>