

A Researcher’s Guide to the Psychology Sona System:
2024 – 2025 Academic Year

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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 (Gen Brook) 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 volunteer 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 opens 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* (i.e., word-for-word) the recruitment notice that Ethics has approved. For an example of a Sona recruitment notice, please see [Appendix A](#).

7. Types of Studies Available.

- **In-lab studies**
 - Completed in person (e.g., in the researcher's lab) with a researcher and/or other participant(s)
 - Completed at a mutually agreed upon scheduled meeting time between the researcher and the participant(s)
- **Online interactive studies**
 - Requires face-to-face interaction in a virtual setting with a researcher and/or other participant(s)
 - Conducted through video/web conferencing (e.g., Zoom)
 - Completed at a mutually agreed upon scheduled meeting time between the researcher and the participant(s)
- **Online non-interactive studies**
 - Completed individually by the participant
 - Completed through various survey websites or online experiment software programs
 - Completed during a timeslot chosen by the participant from the range of available timeslots provided by the researcher

8. Posting Your Study.

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

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

1) Standard Study

A study that is scheduled to take place at a specific time in person or over videoconference (e.g., Zoom), and where there is only one part to the study that participants will participate in. For standard studies, you may set up multiple time slots for participants to choose from. **Select this option if you are conducting a one-part in-lab study or a one-part online interactive study.**

2) Multi-Part Standard Study

A study that is scheduled to take place at a specific time over videoconference, in multiple parts. 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.

Select this option if you are conducting a multi-part in-lab study or a multi-part online interactive study.

3) Online External Study

An online study located on another website like Qualtrics, SurveyMonkey, or any other website. This option allows researchers to create their survey using their desired website and copy and paste the link into Sona. Participants will then click on the link and be taken directly to the survey website. It is recommended you set up one single timeslot with multiple spaces so that students can sign up for this timeslot and complete the survey whenever they choose before the timeslot ends. The timeslot can end no later than 5:00 pm on the last day of classes.

Select this option if you are conducting a one-part online non-interactive study.

4) Multi-Part Online External Study

An online study located on another website like Qualtrics, SurveyMonkey, or any other website, in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time. Set up one timeslot for each part of the study. The timeslot for the final part (e.g., part three of a three-part study) can end no later than 5:00 pm on the last day of classes.

Select this option if you are conducting a multi-part online non-interactive study.

5) Online Internal Survey Study

This 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. **Do not select this option.**

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* (i.e., word-for-word) 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.**”

9. Credit Value for In-lab, Online Interactive, and Online Non-Interactive Studies.

In-lab and Online Interactive Studies

For each block of 60 minutes that students spend participating in an in-lab/online interactive study, they will raise their grade by 1%:

- (up to) 30 min in-lab/interactive study = 0.5%
- 31-60 min in-lab/interactive study = 1.0%
- 61-90 min in-lab/interactive study = 1.5%
- 91-120 min in-lab/interactive study = 2% ... etc.

Online Non-Interactive Studies

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

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

10. Updating Timeslots.

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

Note: Researchers can no longer penalize students who fail to attend/complete studies.

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 the appropriate credit % 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.

11. 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](#).

If using an external website besides Qualtrics (e.g., SurveyMonkey), see this Sona help page for how to automatically grant credit: <https://www.sona-systems.com/help/>

12. What Happens When a Student Withdraws from a Study?

For in-lab, online interactive, and online non-interactive studies, 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.

13. 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.

14. 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).

15. 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).

16. 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.

17. 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.

18. 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 (Gen Brook) at sona@carleton.ca.

Updated August 2024

Appendix A: Example of Sona Recruitment Notice

Study Name: Juror Decision Making Study

Description: Participation in this study will require that you read a trial transcript and answer some questions about what you read.

Eligibility Requirements: Must be jury-eligible (i.e., 18-years-old or older and a Canadian citizen).

Duration: 45 minutes

Locale: Online, via Qualtrics

Compensation: You will receive either 0.5% towards your course (PSYC 1001, 1002, 2001, or 2002) or \$5 for your time.

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

Phone: 613-520-2600 ext. xxxx

Email: username@mail.carleton.ca

This study has received clearance by the Carleton University Research Ethics Board (A or B) (Clearance #xxx-xxx).

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

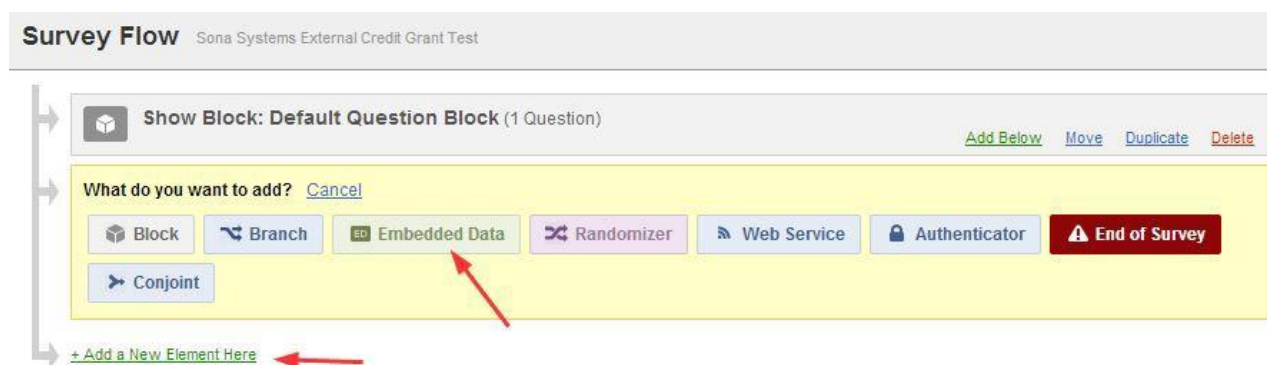
You will change it to:

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

Note: “id” must be in lower-case.

After completing these steps, and pressing “Save Changes”, you will be re-directed back to your studies home page, under the Study Information section, you will see an **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 Apply to save your changes.



Survey Flow Sona Systems External Credit Grant Test

Show Block: Default Question Block (1 Question)

Set Embedded Data:

id Value will be set from Panel or URL. [Set a Value Now](#)

[Add a New Field](#)


[Add Below](#)

[+ Add a New Element Here](#)

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, select the Builder icon to return to the Survey Builder:  **Builder**
5. Scroll to the bottom of the Survey Builder and click the End of Survey
6. On the **left** under Messaging, open the dropdown menu and select the "Redirect to URL" option:

Edit end of survey

▼ **Messaging**

End of survey message

Redirect to URL ^

Default

Custom

Redirect to URL

Include response summary

7. Enter the “Qualtrics Redirect to a URL” value from the **Study Information** page on your Sona Systems site (you may simply copy and paste the unaltered value from Sona into Qualtrics):

Website	<p>View Study Website</p> <p>Sample Link with Embedded ID Code</p> <p>Qualtrics Redirect to a URL</p> <p>https://carleton.sona-systems.com/webstudy_credit.aspx</p>
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↓

▼ **Messaging**

End of survey message

Redirect to URL v

Website URL

<https://carleton.sona-systems.com/w>

For example, you would enter:

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

Note. If you have multiple End of Survey elements set up in your Survey Flow, you will need to add the updated URL there also. To do this, go to Survey Flow, for each End of Survey element, you will need to click on “Customize”. In the Customize End of Survey pop-up window, click the option labelled “Redirect to a Full URL” and enter the updated survey URL from Sona in the box provided.

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 August 2022

The “**Testing External Study Credit Granting Integration**” 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/survey-platform/survey-module/survey-flow/standard-elements/passing-information-through-query-strings/>