



Sona Systems, Ltd.
Experiment Management System

Participant Information

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PARTICIPANT (STUDENT) INFORMATION

Introduction

The Experiment Management System provides an easy method for you to sign up for studies and tracks your progress throughout the term. Everything is done through the software’s web-based interface, so you can access the system at any time, from any computer, using a standard web browser.

It should be noted that this documentation covers all features in the system, but your organization may have chosen to disable certain features. Do not be alarmed if the documentation covers options and features that are not visible on the system that you are using.

Getting Started

We hope that your interaction with the system will be minimal and hopefully as painless as possible. After you log in to the system, you can view a list of available studies and any restrictions, sign up for studies you are interested in, and track your progress throughout the semester. The system will also track when you receive credits for a study, which can be viewed online.

The system works best on any popular web browser that is up to date, such as Microsoft Edge, Firefox, Safari, and Chrome. It may also work with other web browsers, and with some older versions of web browsers noted above, however the layout may not be as clean. No functionality will be lost when using an older web browser. Additionally, the software will work with a screen reader or other assistive tools for those with who require alternate systems. disabilities.

This documentation assumes you have a basic knowledge of how to use the web. While using this system, it is not necessary to use the Back button. You can use the toolbar on the top of every screen to navigate the site.

Requesting an Account

REG will create your Sona Participant account through the class lists provide by the registrar's office. If you have enrolled in a psychology or related course, then your account will remain the same throughout the terms. If you have not, or 2 years have passes then your account will need to be created, which is done automatically. .

Logging In

You log into SONA using your NEXUS ID and password (which consists of the main WatIAM email that you use to log into campus computers etc.) You will go to the log in page for SONA and enter your user id and password to log in. Click on the button that states WatIAM Log In and use your normal id and password to sign in.

The screenshot shows the main login page for the SONA system. At the top left is the University of Waterloo logo. To the right is a banner for the Department of Psychology Research Experiences Group. Below the logo is a white box containing two buttons: an orange one labeled 'RESEARCH EXPERIENCES GROUP' and a green one labeled 'WatIAM ID Log In'. On the right side of the page, there is a large announcement in green text: 'Fall 2022 Term' followed by 'Sona will reopen for Phase 1, Mass Testing and Pre Screen on Thursday September 8th, 2022'. Below this, it says 'Mass Testing is now closed for the term' and 'Announcements'.

Figure 1a. Main Log in

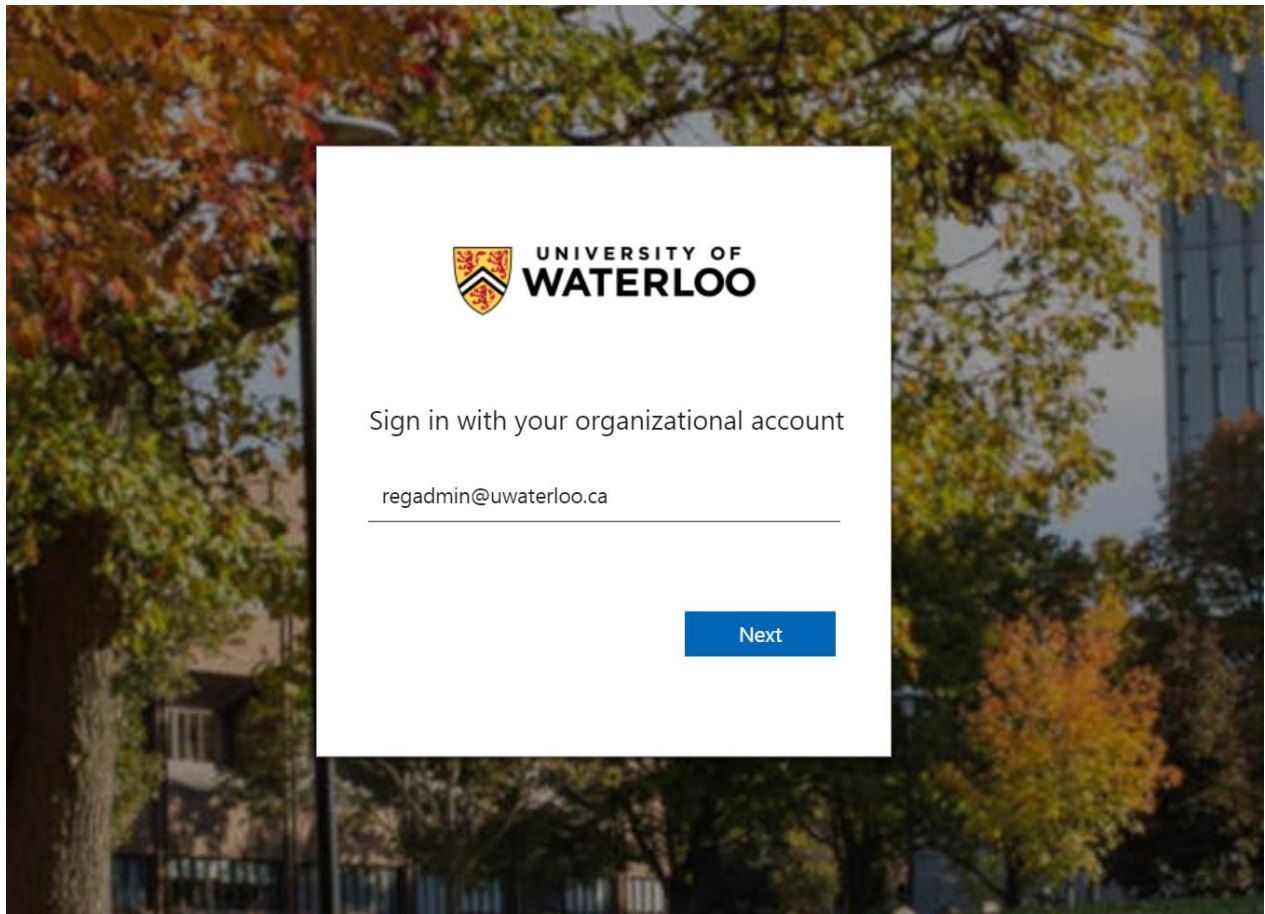


Figure 1b. WatIAM log in page

Figure 1 - Login Page

Once you log in, you will be asked to review and acknowledge the human subject and privacy policy for research. You will need to acknowledge this only once. You will also be asked to participate in a PreScreen Questionnaire. You may decline to participate, but a warning that declining to complete the PreScreen Questionnaire will result in not being eligible for the Mass Testing survey and may affect your eligibility to participate in other studies.

After you complete these tasks, you will see the Main Menu.

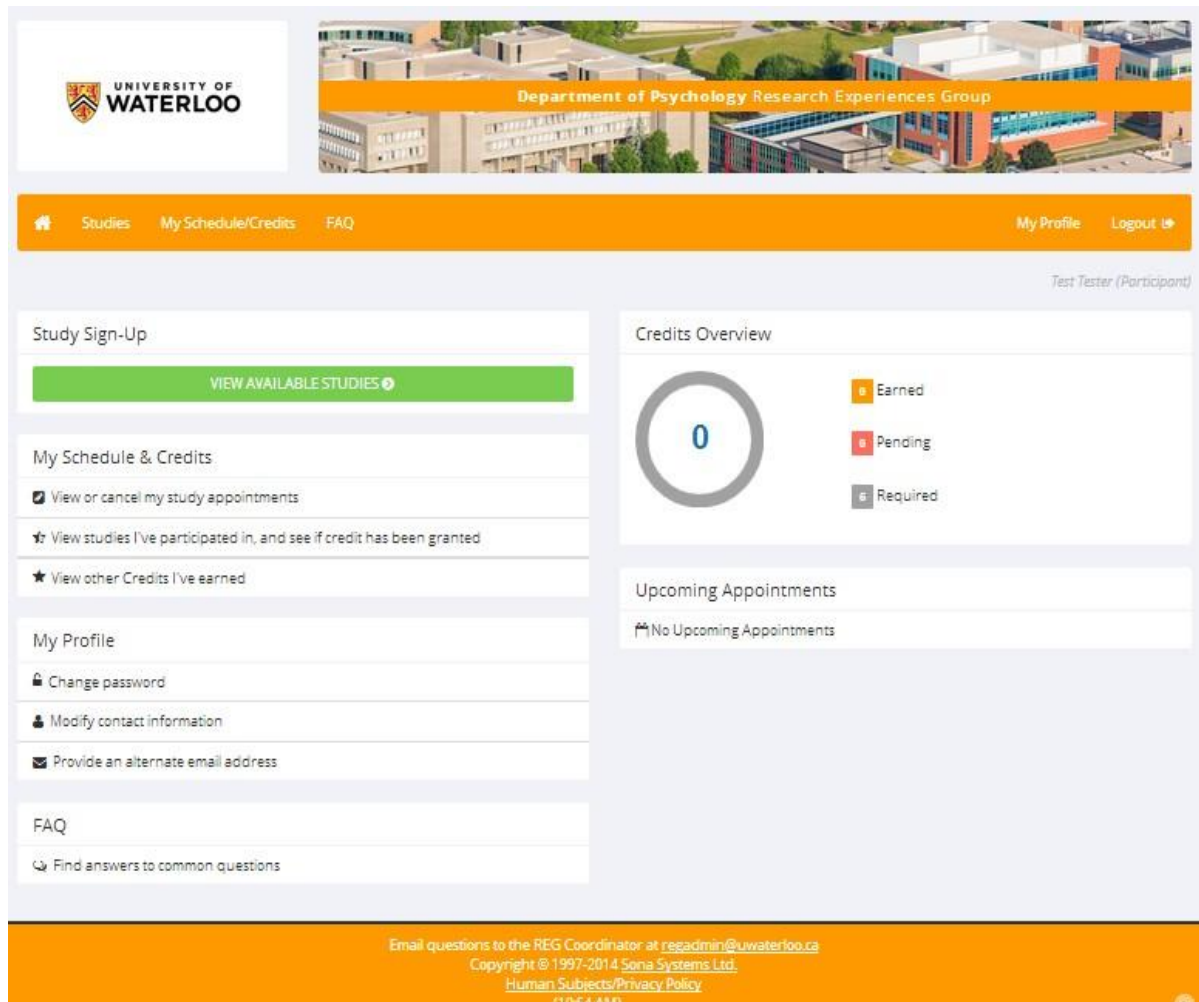


Figure 2 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, which is usually around 20 minutes. The system will warn you a few minutes before the expiration. This is done for security purposes. If this happens, you can always log in again. Once you are done using the system, it is better to fully log out, to prevent any problems that may arise if someone uses your computer before the session expires. This is especially important if you are using a public computer in a lab.

Logging Out

Once you are done using the system, choose Logout from the top toolbar on the right side to log out. You are now logged out. It is always a good security measure to close all of your browser windows, especially if you are using a computer that is shared by others.

Changing Courses

The system is configured so that the REG Coordinator will change any course information. This is done from the Class Lists from the Registrar's Office. New lists are uploaded every Friday for the first 5 weeks of the term. If you have enrolled in a course or changed courses, it may take some time (a week or so) before the Class Lists reflects this change. Once that has happened the change will appear on your Sona account. If you drop a course after the 6th week of the term your Sona account will not be updated until the last day of lectures. At this time, the REG Coordinator will upload new class lists in preparation for the Course Credit Reports.

You can go to My Schedule/Credits at any time to assign /reassigned / unassigned credits to a course. Please note, you will have to reassign any credits earned if you drop a course to another valid course as this will not happen automatically.

Unique ID Codes

The system will automatically assign a unique, numeric ID code to you, your Sona ID. The purpose of the Sona ID code is to identify you to Researchers in a way that does not reveal your identity or compromise your privacy. You will see this ID code when you go to view your profile, as well as, in email confirmations and reminders about your upcoming study sessions. You should ALWAYS bring this Sona ID code with you when you go to studies or when communicating with Researchers and/or the REG Coordinator. Researchers will be provided with your first name when you sign up for a study, but you should always have the Researcher confirm your Sona ID before starting any study. If the wrong participant (student) is in the wrong study your credit will not be assigned.

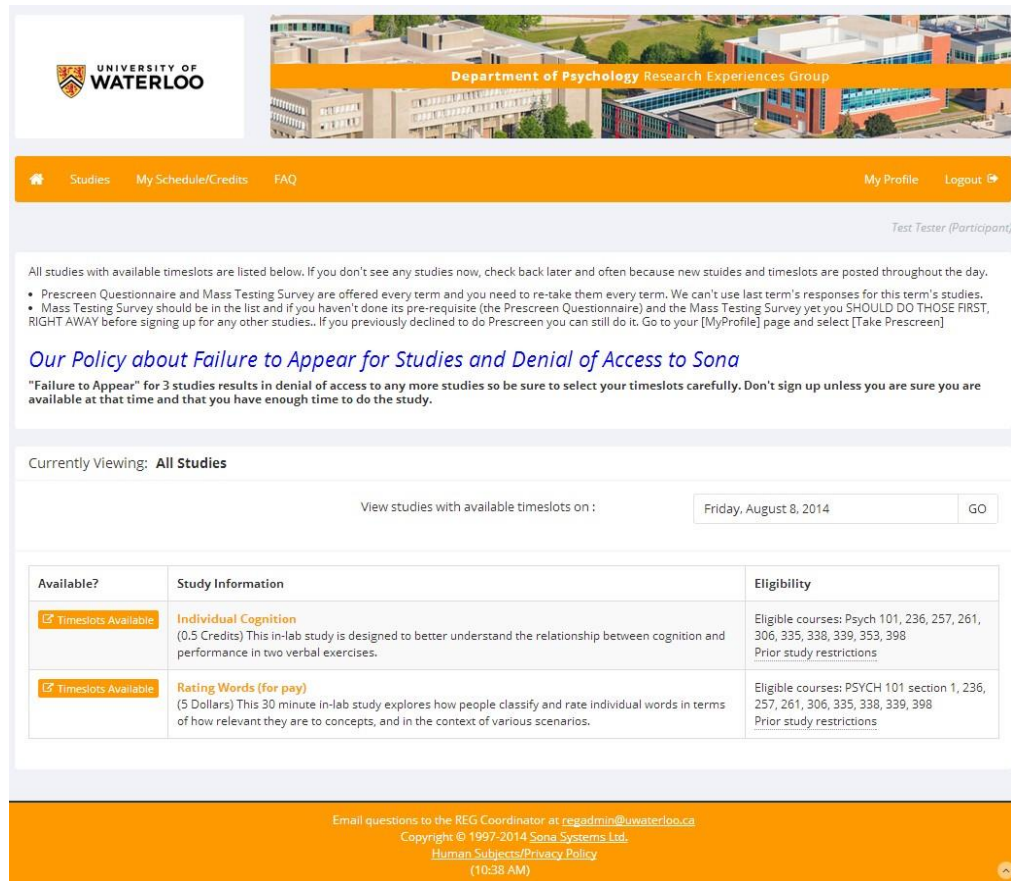
Studies

With the system, you may view studies, sign up for studies that are interesting to you, and be made aware of any special eligibility restrictions. You may also cancel your sign-up through the system

You may see that some studies are online studies. You should read the details of these studies closely, but generally, you may participate in them online, without having to go to a lab. It is presumed that you will participate in the study shortly after you sign up for it, though you have until the Participation Deadline Date to participate.

Viewing Studies

To view a list of studies, click on “Studies” tab from the top toolbar (see Figure 4 – next page). You will see a list of studies. A brief description of each study will be listed, as well as any special requirements that may restrict your eligibility to participate in the study.



The screenshot shows the website interface for the Department of Psychology Research Experiences Group at the University of Waterloo. The top navigation bar includes links for Home, Studies, My Schedule/Credits, FAQ, My Profile, and Logout. Below the navigation bar, there is a section titled "Test Tester (Participant)" with a message stating: "All studies with available timeslots are listed below. If you don't see any studies now, check back later and often because new studies and timeslots are posted throughout the day." This is followed by two bullet points regarding the Prescreen Questionnaire and Mass Testing Survey. A section titled "Our Policy about Failure to Appear for Studies and Denial of Access to Sona" provides information about the consequences of failing to appear for three studies. Below this, there is a filter section for "Currently Viewing: All Studies" and a date selector for "Friday, August 8, 2014". The main content area displays a table of available studies with columns for "Available?", "Study Information", and "Eligibility".

Available?	Study Information	Eligibility
Timeslots Available	Individual Cognition (0.5 Credits) This in-lab study is designed to better understand the relationship between cognition and performance in two verbal exercises.	Eligible courses: Psych 101, 236, 257, 261, 306, 335, 338, 339, 353, 398 Prior study restrictions
Timeslots Available	Rating Words (for pay) (5 Dollars) This 30 minute in-lab study explores how people classify and rate individual words in terms of how relevant they are to concepts, and in the context of various scenarios.	Eligible courses: PSYCH 101 section 1, 236, 257, 261, 306, 335, 338, 339, 398 Prior study restrictions

At the bottom of the page, there is a footer with contact information for the REG Coordinator at regadmin@uwaterloo.ca, copyright information for Sona Systems Ltd., and a link to the Human Subjects/Privacy Policy.

Figure 4 - Viewing Studies

Studies that currently have available participation times (timeslots) will have “TIMESLOTS AVAILABLE” listed next to the name of the study. If none of the studies has available timeslots or if the posted timeslots do not work with your schedule, you may want to contact the Researcher to see if another timeslot could be made available to you. You may also want to log on to the system a few days later to see if new timeslots have been added.

To view more information about a study, click on the name of the study.

Multiple-Part Studies

Some studies have multiple parts. Check to see if you need to sign up for all parts at once, and whether the different parts must be scheduled a certain number of days apart. These studies will be clearly marked, and the system will ensure you are only able to sign up for timeslots

within the appropriate amount of time between the first and subsequent parts. It is important to remember when signing up for multi-part studies, that completion of the subsequent sessions is very important to the research you are taking part in. Keep this in mind when deciding on whether to sign up for a multi-part study or not.

Online Survey Studies

Some studies may be online survey studies that are administered in the system.

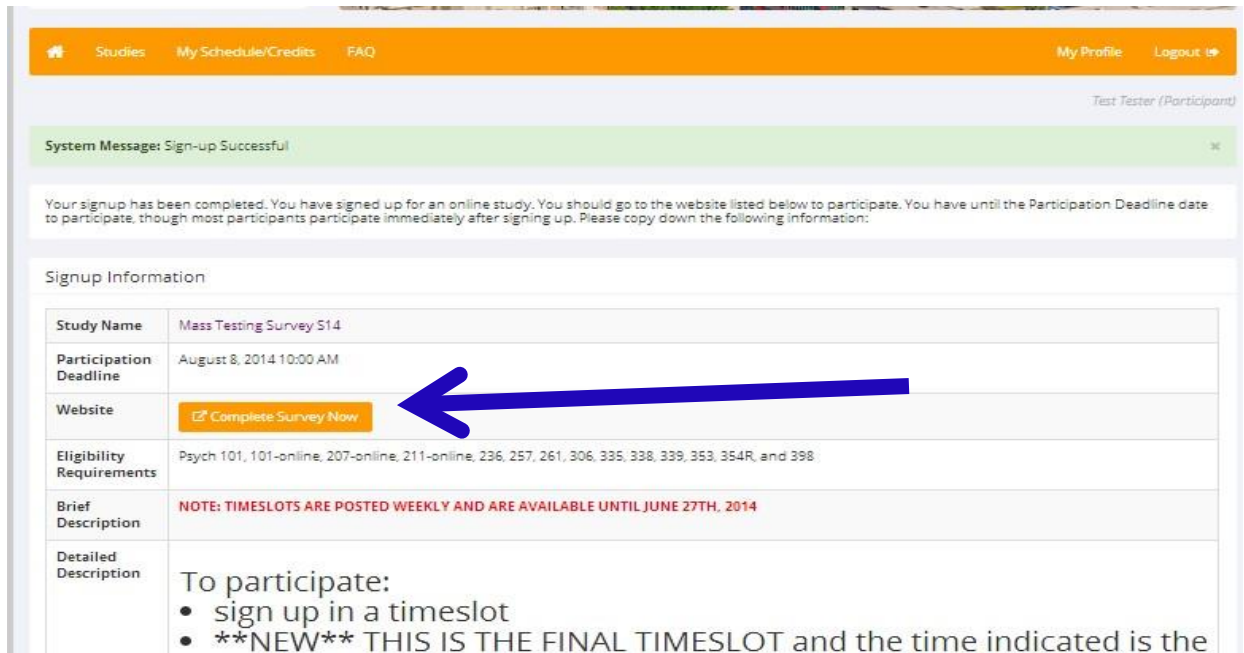


Figure 5 – Signing up for Online Survey Studies

Once you have signed up for an online study, you will be taken to a Signup Information page with a link (“Complete Survey Now” – see Figure 6 above). You can click that link and complete the study right away; **OR** you can sign up for the online survey, start and/or come back at another time to complete the study. Keep in mind that the timeslot date and time is the **DEADLINE** to complete the study. Ensure you provide yourself with sufficient time to complete the survey before the deadline occurs. As soon as you complete the survey, you will receive credit.

To return to the online survey, go to your “My Schedule/Credits” page and click on the study title. The Study Information page will be displayed, scroll to the bottom of the page and click the “View Study Website”. This will take you to the point of the survey where you left off. If you

have not started, it will take you to the beginning, if you had completed a portion of the study it will take you to that point. **NOTE: all this must be done before the timeslot deadline.**

You may withdraw from the survey at any time by following the instructions at the beginning of the survey on the withdrawal process.

Remote Access Studies

Some studies require that you attend at a specific time with the researcher over video-conferencing software like TEAMS or ZOOM. These studies count as the same as in-lab studies for the purpose of completing your required in-lab portion. You will need to ensure that you have the appropriate software installed. TEAMS is included as part of the Office 365 package that is provided to you by the University. There is information available on how to install the application located at <https://uwaterloo.ca/microsoft-365/>.

Signing Up For Studies

To sign up to participate in a study find the study you would like to participate in (see the section on Viewing Studies) and click on the study name for more information. The study information page will list any special restrictions or eligibility requirements, as well as a contact person if you have questions about the study. To contact the Student Researchers and/or the Principal Investigator, you can click the envelope icon next to their name to open an email message. In most cases, it is preferred that you contact the individual listed as the Researcher if you have specific questions.

Study Information



Study Name	Mass Testing Survey 514
Study Type	 Web Study This is an online study. To participate, sign up, then go to the website listed below to participate.
Credits	1 Credits
Duration	60 minutes
Abstract	NOTE: TIMESLOTS ARE POSTED WEEKLY AND ARE AVAILABLE UNTIL JUNE 27TH, 2014
Description	<p>To participate:</p> <ul style="list-style-type: none"> • sign up in a timeslot • **NEW** THIS IS THE FINAL TIMESLOT and the time indicated is the timeslot "DEADLINE" (this Friday, June 27th at 11 pm) • you must start and complete the survey BEFORE that deadline <p>In this online study you will be asked to complete a series of psychological measures/scales.</p> <p>You may have completed this survey before in a previous term, however, we ask that you complete it again this term. Firstly, we have added many new scales this term, and secondly, we need your current updated responses to our existing scales.</p> <p>Your responses and scores on this survey are used for participant selection or analysis of many studies so completing this online study may increase the number of studies available to you.</p> <p>All of your responses to these scales will be stored on a secure server in the PAS building to which only authorized researchers have access. However, this survey uses Qualtrics™ which is a United States of America company. Consequently, USA authorities under provisions of the Patriot Act may access this survey data. If you prefer not to submit your data through Qualtrics™ please do not sign up for this study. Confidentiality will be maintained. This survey data is confidential and will be stored indefinitely on a secure, password protected computer or server in a secure area in the Department of psychology to which only authorized people have access.</p> <p>This study has been reviewed and received ethical clearance through a UW Research Ethics Committee. However, the final decision about participation is yours.</p> <p>You may start the survey, take a break then come back to it later, if you wish, but be sure to complete the survey before the weekly deadline. If you can, try to complete the survey in one session. Please try to have private, uninterrupted time available with no distractions before starting the survey.</p> <p>Those participants who appear to have not completed the survey carefully (by completing the survey in a time far below the expected average time for completion) may be asked to retake the survey to retain their full participation credit. If you were unable to complete the survey before the weekly deadline you may receive a prorated credit (e.g. .25 credits for each one quarter portion of the survey completed) or may be asked to redo the survey so that they can be invited to participate in future studies.</p> <p>Please note that a study sign-up is a firm commitment to the researcher running the study so select timeslots carefully and if you cannot complete the online survey before the specified deadline, please cancel the Sign-Up or contact the researcher in advance. Failure to appear for too many studies without providing adequate prior notice to the researcher may result in denial of access to further studies. Details are provided on the FAQ page on your Sona account.</p>
Eligibility Requirements	Psych 101, 101-online, 207-online, 211-online, 236, 257, 261, 306, 335, 338, 339, 353, 354R, and 398
Website	You may not view the website until you sign up for this study.
Researcher	REG 1 Researcher 
Principal Investigator	REG 1 Principal Investigator
View Time Slots for This Study	

Figure 6 - Study Information

Some restrictions are automatically enforced by the system. If the study has certain prerequisites or disqualifiers (studies you must *not* have participated in to participate in this study), those may be listed, as well as a note about whether you meet those eligibility requirements. If you have signed up for a study with another study listed as a disqualifier study, then you will be prevented from signing up for the disqualifier study.

The study may have restrictions and/or criteria to be eligible to participate. These will be listed under “Eligibility Requirements” if applicable to the study. An example of criteria is “Lefthanded

people only.” If listed in the “Eligibility Requirements” field, the system does *not* enforce this restriction.

However, you should only sign up for the study if you qualify under the restrictions and criteria. If you sign up for the study and you do not meet these requirements, you will not receive credit for the study.

The study may have preparations, such as consumption of caffeine prior to the study timeslot, which are necessary for participation in the study. If listed, you must follow the preparations as set out in the Study Information to be eligible for participation in the study. If you do NOT follow these preparations, you will most likely not be eligible to be run in your scheduled timeslot and will NOT receive your credit. It will be up to the Researcher to decide if another signup can be arranged.

Method of access to future studies. Details are provided on the FAQ page of your JONAS account.






Preparation	Must not consume caffeine (e.g., coffee, tea, pop, chocolate) 12 hours prior to participating in the study.
Eligibility Requirements	Eligible Courses: Psych 101; 101R; 218; 226R; 230; 231; 253; 257; 261; 291; 307; 312R; 318; 336; 338; 342; 354, 391; 395 Sec.2; 397
Researchers	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 80%;"> <p>Karam Ghandour 📞 6478226688</p> <hr/> <p>Alexander Moore 📞 613-240-4535</p> <hr/> <p>Harrison Oakes 📞 226-792-0213</p> <hr/> <p>Garrett Shay</p> <hr/> <p>Alexandra White</p> </div> <div style="width: 10%; text-align: center;">      </div> </div>
Principal Investigator	Igor Grossman
Deadlines	Sign-Up: 12 hour(s) before the appointment Cancellation: 9:00 PM the day before the appointment

Figure 7 – Preparation, Eligibility Requirements, Researcher Information, and Deadlines

For in-lab studies, the sign-up deadlines for the study will be listed. Those deadlines are based on the date and time of each timeslot. The cancellation deadline will also be listed for the study (see Figure 7).

If you are viewing a study that you have signed up for in the past and have already participated, then you will not see the list of timeslots for the study.

You may sign up for a timeslot only until a certain time before that timeslot is scheduled to occur (until the sign-up deadline).

The system will not show a Sign Up button for timeslots that are too late for sign up. If you sign up for a timeslot and already have another sign-up in the system that conflicts with that appointment time, the system will warn you of the scheduling conflict (though it will not prevent the sign-up).

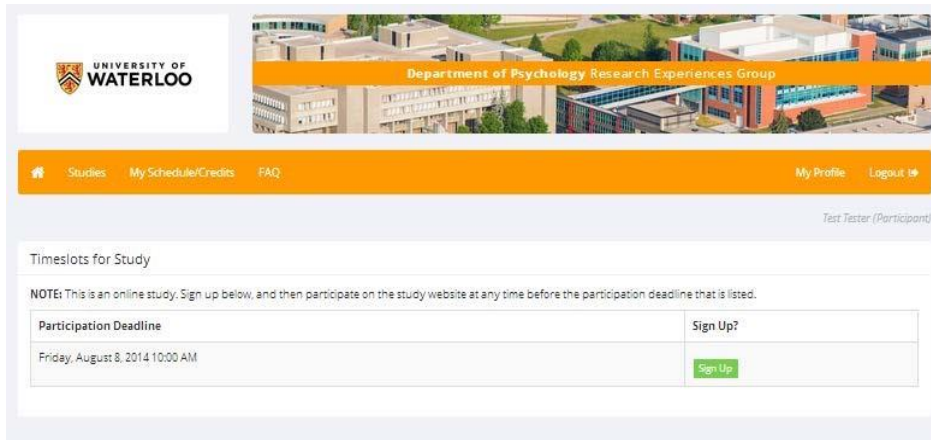


Figure 8 - Study Timeslots

Once you have determined you meet all the requirements, click on View Timeslots for This Study at the bottom of the Study Information page and you will see a list of available timeslots. Choose a timeslot that is convenient for you, and click Sign Up.

After you click Sign Up, you will see information displayed confirming the time and location of the study in which you plan to participate. You will receive an email confirmation of the study sign-up once you have clicked “Sign-Up”.

Canceling a Sign-Up

If you need to cancel a timeslot you have signed up for, you can do this from the “My Schedule and

Credits” page. Choose the “My Schedule/Credits” tab from the top toolbar.

You will see all the studies you have signed up for, as well as those you have completed.

Studies that you have signed up for and that you are allowed to cancel will have a Cancel button next to them. The cancellation time limit for in-lab studies is 24 hours prior to the time slot. If there is less than 24 hours and you need to cancel, please contact the researcher to let them know that you are unable to attend the appointment. You may receive an “excused no show” or the Researcher may initiate a cancellation.

For online studies, you may cancel a sign up until the scheduled timeslot deadline.

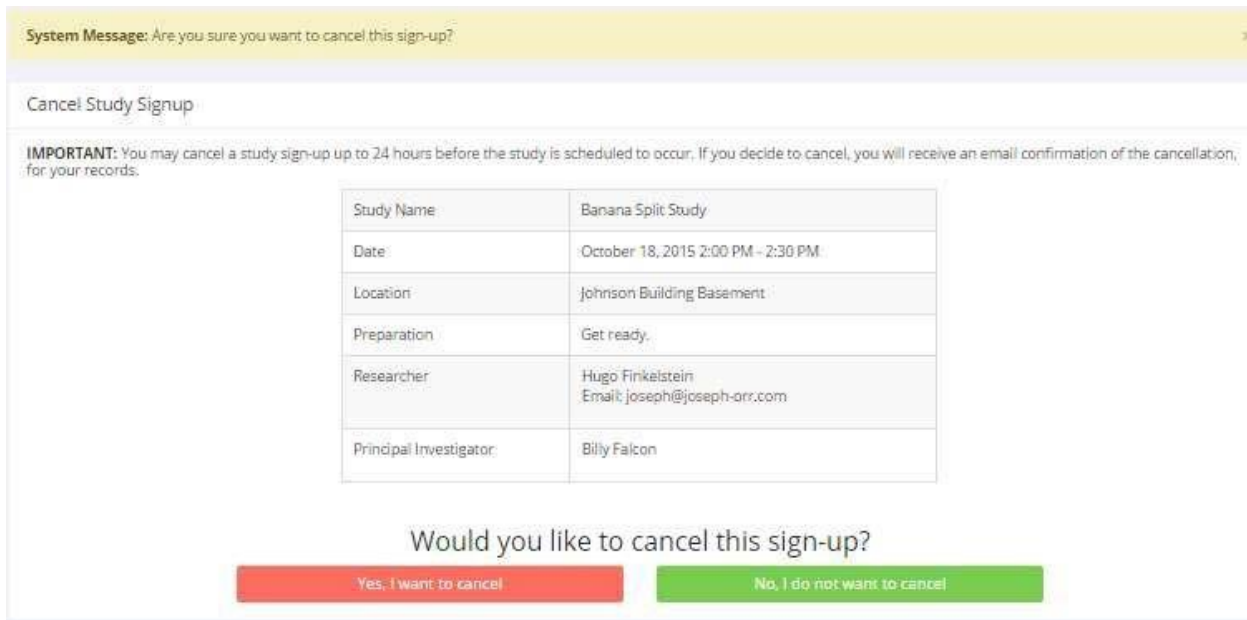


Figure 9 - Sign-Up Cancellation

Once you click “Cancel”, you will see a confirmation page. You will also be warned if your cancellation might affect your ability to participate in other studies that you have signed up for, due to pre-requisites and restrictions. If the cancellation affects your ability to participate in another study you are signed up for, it is **your** responsibility to deal with this issue (usually by canceling the dependent study as well and/or contacting the Researcher). The system will warn you but will not block the cancellation.

Click “Yes, I want to cancel” to cancel your sign-up, and the sign-up will be cancelled immediately.

If you cancel the first part of a two-part study, the second part will also be cancelled. If you cancel the second part of a two-part study, the first part will *not* be cancelled, but you will need to ask the Researcher to sign you up for the second part again if you would like to participate in it at a later date.

Tracking Your Progress

You may track your progress at any time by choosing the “My Schedule/Credits” tab from the top toolbar.

When you view this page, at the top, you will see the number of credits you are expected to earn in addition to how many you have already earned thus far. You may also have an option to view how many credits you have earned for each course. Below that, if you have signed up for any studies, those also will be listed. In the list of studies, you will also see information about your credit status.

Overall Credits Earned: 9 Overall Credits Pending: 9 Overall Credits Requirements: 1802

Remember you have until May 20 to reassign your credits between courses.

Study Signups

Study	Time	Location	Credit Status	Course	Comments	Cancel?
Climate effects on happiness Credits: 1 Credits	June 4, 2014 11:00 AM - 11:30 AM	Greeves Hall 399	Failure to-appear - unexcused (1 Credits penalty).	Astrology 101 Reassign		
External Survey Monkey Study Type: Online Study Credits: 4 Credits	October 30, 2014 9:00 AM	Online	4 Credits granted on September 9, 2014.	Astrology 101 Reassign		
The Psychic Canine Comparison	November 4, 2014 11:05 AM - 11:35 AM	Greeves Hall 399	Awaiting action from researcher.	Astrology 101		

Figure 10 - Viewing Your Progress

If you failed to appear for a study, you will be awarded an “unexcused no show”. That will be displayed in your progress. Next to each signup, you can also see any comments the researcher has left regarding the study and your credit for it. In cases where the study was set up for monetary compensation and not credits, your participation will be noted as “participated.” This is done to ensure your eligibility for any studies where the study you just completed is a prerequisite study.

Non-study credit is also listed, when applicable. Non-study credit is usually granted for writing a paper, completing the PreScreen, or some other special situation.

It is possible that older records of your participation are in the system, but not displayed. If that is the case, you will see an option to view your older sign-ups.

Reassigning Credits

If you are enrolled to multiple courses participating in Sona, you may reassign a credit from one course to another. To do this, simply use the Reassign link that appears when you view your progress. The link appears under the course entry for each item in your progress listing. You may not split a credit between two courses. For example, assigning two credits of a 3-credit study to one course and one credit from that study to a different course.

PreScreen Questionnaire

Usually when you first log in to your Sona account for the term, you will be asked to complete the PreScreen Questionnaire. You have the option to opt out of the PreScreen Questionnaire.

However, you should realize that declining to participate in the PreScreen Questionnaire might affect your eligibility for some studies, in particular the Mass Testing Survey.

The PreScreen Questionnaire consists of multiple sections of questions. All questions are either multiple-choice or fill-in (free entry) answer. Many Researchers to pre-select eligible participants for their studies use these questions. For example, a study may only want participants that are left-handed. If you indicated you are left-handed in the PreScreen Questionnaire this study will be listed on your list of available studies. If there are any other qualifiers for this study (eg. completion of the Mass Testing survey), they will be listed along with an indication if you meet the criteria or not. You will also need to pay attention to additional qualifications that you may need to have in order to participate and these will be listed. At the end of the PreScreen, you may have a chance to review and change any of your responses. After you save all your responses, you may not participate in the Prescreen Questionnaire again during that term unless the REG Coordinator has allowed this or deleted your existing responses (at your request), so answer all questions carefully and check your responses before saving your information. Please note that if you skip the prescreen at the beginning, you can go back to it by either selecting to take part in your SONA account or by contacting the REG coordinator at regadmin@uwaterloo.ca.

Personal Information

This website requires you to select a button for every item. If you prefer not to answer a question just select the box beside "Check this box if you do not want to provide an answer to this question". If a question does not apply to you please select the "Does not apply to me" option or enter "n/a" in the response box.

What is your biological sex?

Female

Male

Intersex

I prefer not to answer

Check this box if you do not want to provide an answer for this question

With which gender do you identify?

Woman / Transwoman

Man / Transman

Gender queer / Gender non-conforming / Gender non-binary

Two-Spirited

I prefer to self-define (please specify below)

I prefer not to answer

Check this box if you do not want to provide an answer for this question

If you answered "I prefer to self-define" above, please specify (short answer no punctuation please):

Figure 11 – example of PreScreen Questions

Frequently Asked Questions

Immediately after I login and click on any menu option, I am taken back to the login page, and I see a message that my authentication has expired. What does this mean?

Your web browser is not properly configured to accept cookies. You should turn on cookies in your web browser, try to use a different web browser (for example, switch to Firefox if you are currently using

Internet Explorer) or try to use a different computer. Detailed instructions can be found if you go to the site and enter the URL “cookie_help.aspx” in place of “default.aspx” in the address bar of the browser when you are on the front page of the site.

You can also try to use another computer. Usually, the computers in university computer labs are configured correctly.

I participated in a study, but I have yet to receive credit. How do I receive credit?

The Researcher must grant you credit. This is usually done shortly after your participation in the study.

If it has been some time and you have still not received credit, contact the Researcher and/or the REG Coordinator.

Who can see the information about my sign-ups? I do not want everyone to know which studies I signed up for.

Only the Researcher, Principal Investigator of the study, and REG Coordinator may see that you have signed up for a study. No other users, including other Researchers or your Instructor can see this information.

How do I change the email address where email notifications from the system are sent?

Provide an Alternate Email address and notifications will be sent there.

I wrote a paper instead of participating in studies. How do I know I have completed my requirements?

If you have completed an Article Review then you must contact the Course Instructor and/or Course Teaching Assistant (TA).

I attempted to sign up for a study, and I was prevented from doing so because the study I was trying to sign up for is a disqualifier for another study I am scheduled to participate in. Why is this?

If you have signed up for a study that has disqualifiers (studies you must **not** have participated in to participate in that study), you may not sign up for the studies that are listed as the disqualifier studies.