GUIDE FOR RESEARCHERS
USING THE RESEARCH PARTICIPATION SYSTEM

Since students can now sign-up and keep track of extra credit using our *Research Participation System* at utexascomm.sona-systems.com (Or via the CMS website: Undergrad Program > Extra Credit

NOTE: When you use this system, be sure to follow IRB protocols and procedures.

An Overview
of how to set up studies in the Research Participation System

1. Login to the Research Participation System
2. Add a New Study
3. Add Time Slots
4. Get the Study Approved (and therefore visible to Students)
5. Update Research Participation Credits as needed.

And if the time comes before the end of the semester, Close Study

Note: *What follows are pretty comprehensive details, but overall you'll find the process pretty simple.*

Key Things to Remember

- If you are an instructor and a researcher/PI you will have multiple logins. Your researcher (students) or PI (faculty) login will be your EID, since we expect you will use this more frequently. Your instructor login (which you will rarely, if ever use) will be `YourEID-instructor`. The accounts can have the same email address.

- *Studies become visible after approval by the Research Administrator*. Once you have IRB approval send/bring your IRB document (e.g., consent form and/or approval letter) to the research administrator and the administrator will confirm the approval number, and the compensation before activating the study.

- *You can enter studies before receiving IRB approval;* but they won't be visible until IRB approval is received and the Research Administrator approves the study in the Research Participation System. (That does mean you can set up the study while waiting for IRB). Note: You will need to enter PENDING as the IRB approval code and pick an estimated date for IRB approval which you can update once you receive official approval

- If you're not the PI (AKA you're a student), *make sure your PI is listed as one of the researchers on the study*. Only faculty can be PIs (consistent with current policies). However, multiple researchers can be assigned to a project and do all the work associated with setting up and managing the study.

- *All research studies become invisible after the final class day*. This allows the research administrator to run the necessary research participation reports for instructors.

- ***Enter all research participation credits in the system on or before the last class day.*** We encourage you to enter the credits within a week of students' participation to minimize emails from students wondering where their extra credit is.

- If you are doing an online study, provide students with some sort of confirmation of their participation that is consistent with IRB protocols (think of this as the paper ATM receipt you receive in case something goes wacko with the deposit. It instills confidence and creates a paper trail as needed.

Detailed Instructions
for Setting up Studies in the Research Participation System

1

Login to the system with the provided account.

By default your researcher account is your eid (e.g. `bb24746`). If you are an instructor, your account is your eid-instructor (e.g. `bb24746-instructor`), since the system requires us to keep different types of accounts unique.

- You will be asked to agree to IRB and FERPA guidelines regarding protecting students and faculty information.

- ***First time logging in?*** Request your password under the lost password link on the main page (https://utexascomm.sona-systems.com) Your login is your EID. Your email address is the one officially on file with UT. *If the system does not recognize your EID* as your login name, request a new researcher account on the main page.

- ***Forgot your password?*** Use the Forgot Password link on the bottom corner of the main page.
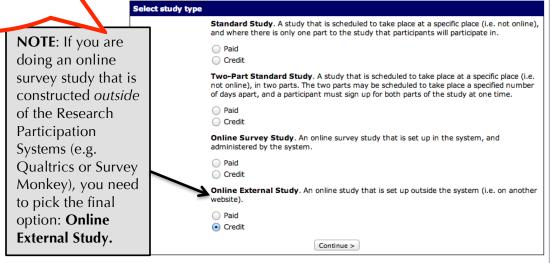
2

Add a Study

You can choose to set up your studies in the system before receiving IRB approvals to run the study. That way, as soon as your approval is received, you can simply contact the research administrator (cmsresarch@austin.utexas.edu) to make the study visible.

a. To add a study, choose the **Add New Study** option from the top toolbar.

WATCH OUT!
This section is being answered incorrectly on a regular basis. If you are doing your study online via an EXTERNAL website - make sure you choose the ONLINE EXTERNAL STUDY.

- **Select Study Type.** Select from four possible types of studies. Choose carefully as you will not be able to change this later without recreating a new study. NOTE: Most will choose either the first option (standard study) or last option (online external study).

NOTE: If you are doing an online survey study that is constructed *outside* of the Research Participation Systems (e.g. Qualtrics or Survey Monkey), you need to pick the final option: **Online External Study.**

Select study type

Standard Study. A study that is scheduled to take place at a specific place (i.e. not online), and where there is only one part to the study that participants will participate in.

○ Paid
○ Credit

Two-Part Standard Study. A study that is scheduled to take place at a specific place (i.e. not online), in two parts. The two parts may be scheduled to take place a specified number of days apart, and a participant must sign up for both parts of the study at one time.

○ Paid
○ Credit

Online Survey Study. An online survey study that is set up in the system, and administered by the system.

○ Paid
○ Credit

Online External Study. An online study that is set up outside the system (i.e. on another website).

○ Paid
◉ Credit

[Continue >]

b. **Enter Study Information.** After you choose the study type, you'll see a form asking for more information. You will need to fill out a number of fields, the most common of which are explained below. Some of the fields listed below may not appear, depending on how your system is configured and the type of study you selected. All fields must be filled out unless otherwise noted.

Most of the information is self-explanatory, but we've included details in the table on the following page.

Field Explanation: A short name for the study. This is how the study is identified throughout the system. Out of fairness to all researchers, the system is configured so studies show in random order to participants. Study names need to be unique and may be up to 100 characters in lengths.

Brief Abstract. A short one or two line description that will be displayed to participants when they view the entire list of studies. Include key pertinent details here of length and eligibility here. This field can be up to 255 characters in length.

Detailed Description (optional). This can be a rather lengthy description about the study, and it will show if a participant clicks on the study to get more information, before they sign up. The maximum length of this field is 15000 characters.

Eligibility Requirements If there are any restrictions on who may participate (e.g., only those who are left-handed), list them here. Otherwise, leave the field as-is. These restrictions will be displayed on the list of studies when participants view a list of all available studies. Note the system does not enforce these restrictions, but it is expected a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions, which you can do after you add the study. This field may be up to 245 characters in length.

Pre-requisites. If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies, and on most systems, you hold down the Ctrl key and click the desired studies. You may specify that participants must have participated in all of the studies you specify, or at least one of the studies specified. The participant must have received credit for the pre-requisite studies to be eligible.

Course Restrictions. If you would only like participants enrolled in certain courses to participate in your study, select the eligible courses here. Participants who are not in at least one of the courses you selected will not see the study when they go to view the list of available studies. Choose *No Restrictions* if you would like to make the study available to participants in all courses.

Duration. The amount of time, in minutes, that each study session will take. If you are setting up a 2-part study, then this setting applies to the first part of the study. For online studies, this should be an estimate of how long participants can expect the study to take,

so that they can plan accordingly. This should be the same number as included in your IRB guidelines.

Preparation. Enter any advanced preparation a participant must do here (e.g. "do not eat 2 hours before session"). If there are no preparation requirements, leave this field as-is.

Invitation Code. If you would like to have a special sign-up password for this study, enter it here. This is known as an invitation code and applies just for this study. Participants must know the invitation code to sign up for this study. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants. Invitation codes are not case sensitive. If you do not need an invitation code, leave this field blank.

Is this a web-based study? If this is a web-based (online) study, choose the type of online study it is. If you have set up the study on another website, you should note the study is administered outside the system. If you want to set up an online survey study to be administered by the system, select the appropriate option.

Should survey participants be identified only by a random, unique ID code? This only applies to web-based studies administered by the system, and only if participant anonymous ID codes are not already turned on system-wide. If set to Yes, participants are only identified by a unique system-assigned ID code to protect their privacy. Participants are also notified of this when they start the survey. Once enabled, this setting cannot be changed after participants have taken the survey, as a matter of privacy protection.

Study URL. The URL (web address, usually starting with http://) for your study. This is only required for web-based studies administered outside the system. If you are setting up a web-based study outside the system and would like the system to pass a unique identifier in the URL so you may easily identify participants, add the text **%SURVEY_CODE%** in the URL where you would like the identifier to be placed. There are more details available by request.

Credits/Pay. Enter the number of credits or compensation for the study. A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies where only the final study is credit-earning.

As per our agreement with IRB, research participation credits are based on time for every 60 minutes students receive 1 research participation credit, rounded to the nearest quarter hour. (Therefore, if your study takes 15 minutes, the study is worth 0.25 credits. If your study takes 1 hour and 5 minutes that is 1 credit. If your study takes 45 minutes, credit is 0.75 and so forth). After a study has sign-ups, you may not change the credit value of the study. However, the administrator can still change the credit value of a study with pending sign-ups. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically.

Is this a 2-part study? Select Yes or No if this is a 2-part study. You can only decide this when creating a study (not when editing it), and this setting may not be changed after the study is created. See "Two-Part Studies" for more information.

Credits/Pay, Part 2. Enter the number of credits or compensation for part 2 of the study, if this is a two-part study (the value is ignored otherwise). A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies where only the final study is credit-earning.

Part 2 Duration, Part 2 Scheduling and so forth all apply to the second part of two-part studies but otherwise follow the details above.

Researcher(s). Select the researcher for this study. Most likely, this is you, and your name will automatically be selected. If you are a researcher, then you may not change who the researcher is (the P.I. for the study, as well as the administrator, can change the researcher). You may be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The pull-down box lists only users who are researchers.

Principal Investigator. Select the Principal Investigator for this study. The person you select will have full access to the study. If you see this option, then you must select a P.I. The pull-down box lists only users who are principal investigators.

IRB Approval Code. Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies. This field is required before your study will be made visible by the administrator.

IRB Approval Expiration Date. The date when IRB approval expires. You must provide a valid expiration date. The system will prevent you from adding new timeslots to take place after this date, and your study will become inactive (not approved and thus not visible to participants) after this date. Only the administrator can change the IRB approval expiration date, once it has been entered. You may specify a date up to 5 years in the future. **NOTE: *If you don't have an IRB approval code or expiration date yet, enter pending in both sections.***

Approved? Our system is configured such that only the administrator can approve a study. Once your study is ready and you have received IRB approval, contact the administrator to make the study visible. As a researcher, you can always make a approved study invisible to participants (by making it not approved), but you may need the administrator to make it visible again, if so desired. In addition, if you change key items about the study, specifically the name or descriptions, the study will automatically be made invisible to participants, until the administrator reapproves it. This is because IRBs often approve very specific language for study names and descriptions, so the administrator needs to ensure the study is in proper compliance.

Active Study? Select Yes if this study is in progress. You must select Yes and the study must be Approved if you want the study to show up to participants so they can sign up for it. If a study is Not Approved but is Active, then it does not show up (to participants) on the listing of studies, but it is accessible through other links if the participant has participated in it before and they are viewing their participation history (in case the participant has follow-up questions about the study). It will also show up on the study information page (for an individual study) when it is listed as a prerequisite or disqualifier for a study. The reason to select No is if the study is being kept for historical purposes, but should not show up to participants on the list of studies they may sign up for. Often, this is done so the system can enforce prerequisites, where the inactive study is a prerequisite for an active study.

Should the Researcher receive an email notification when a participant signs up or cancels? If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up, or cancels their sign-up, for this study. The email notification will be sent to an email address based on the information the researcher has provided in his/her profile.

Researchers at Timeslot-Level. If set to Yes, it will be possible (but not required) to assign a specific researcher (from the list of researchers for the study) to a timeslot. If set to No, then it is assumed that all researchers (assigned to the study) are responsible for all timeslots.

Automatic Credit Granting. If set to Yes, timeslots that are more than a specified number of hours old and still in the Awaiting Action state will be changed to a credit grant. The check for timeslots in this situation is made only once per day. If an automatic credit grant is done, you may still change it later if necessary. ***For online external web studies***, the credit grant will take place the specified number of hours after the timeslot (participation deadline) has occurred, so this feature is generally not useful in this situation. This option will not appear for online survey studies (within the system) because credit granting generally occurs automatically, immediately after the participant completes the survey.

Can a participant sign up for this study more than once? If you would like to allow participant to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No. If No is chosen, participants may only sign up for the study more than once if they previously failed to show up for the study (a no-show).

Shared Comments (optional). This is an *optional* area where you may enter any comments or notes about the study, which are visible to any researchers and PIs in the system, but not to participants. This field is useful if you want to make the technique used in the study visible to other researchers, so they can set your study as a disqualifier if necessary. The maximum length of this field is 1,000 characters.

Private Comments (optional). This is an *optional* area where you may enter any comments or notes about the study, which are only visible to the researchers (and PI) for this study, and not to participants. The maximum length of this field is 3,000 characters.

Research Alternative? For now leave at the default no.

Participant Sign-Up Deadline. Enter the deadline before the study is to occur that the participant may sign up, in whole hours.

Participant Cancellation Deadline. Enter the deadline before the study is to occur that the participant may cancel their existing sign-up, in whole hours. Generally the cancellation deadline should be shorter than the sign-up deadline, so participants can easily cancel an accidental sign-up.

TIP for online studies.

Consider making the sign-up deadline 0 (zero) hours—most students will want to sign-up and take your study right away.

Now you add Timeslots

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This applies to online and face-to-face studies. Once you have filled out the appropriate information, save it and the system will be updated immediately with the information. Your next step is to add timeslots (sessions).

a. Select **View/Administer Timeslots**

b. *If you are giving an online or web-based study* (whether internal or external to the system):
    a. Select **Add a Timeslot.**
    b. Then enter the last date and time students can sign-up for and

**Watch Out!
If you have an online study, you MUST create at least ONE timeslot**

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complete the online survey. Remember, studies need to close on the last class day of the semester.

If you are giving an in-person (standard) study:

a. Select **Add a Timeslot** or **Add Multiple Timeslots**

b. Follow the prompts to enter relevant information for your timeslot(s). Start date, start time, length, free time between slots, business hours only, number of participants, locations, and which researcher is assigned to which slot (if you choose the option when setting up the study).

Changing Your Study (Optional)

If you need to update your study (e.g., change timeslots or end participation):

a. Login
b. Go to My Studies
c. Select your Study
d. Select Change Study information

NOTE: The changes you make will be will be take effect immediately after they are saved. These changes may require administrator re-approval.

When changes are made, if administrator re-approval is required before a study is made visible to participants, then you should contact the administrator to request re-approval once you have made all your changes. Changing the following fields may require a re-approval: study name, brief abstract, detailed description, eligibility requirements (the text field, not specific restrictions like prescreen restrictions, study pre-requisites/disqualifiers, or course restrictions), duration, preparation, credit value (for credit studies only). There will be a notice on the Change Study Information to warn if re-approval may be required, and the system will also notify you, after making changes, if the study is now in need of re-approval.

Make your study visible: Request approval from our research participation system administrator.

a. Login to the system with your researcher account (EID is your login)
b. Select My Studies
c. Select Study Info for the appropriate study
d. Scroll down and select **Change Study Information** at the bottom of the screen.
e. If you have not already done so, enter the **IRB approval code**
f. If you have not already done so, enter the **IRB approval expiration date**

g. Then click on **Approved?** Send approval request. In the text box, provide information on how you will demonstrate that the posted study matches what was approved by IRB (e.g., emailing consent form and study information separately to cmsresearch@austin.utexas.edu or bringing the study forms in person to the administrator's office.

NOTE: To avoid delays send/bring your consent form and/or IRB approval letter that show your IRB approval number and the approved details of your study to our research participation systems administrator as soon as possible. S/he will double-check the credit amounts, the IRB number, use of the subject pool before making your study visible since these are difficult (and problematic) to change after the study is made visible.

Grant research participation credits as data is collected.

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For each participant, you will need to grant study credit as they complete the study; however, the system keeps track of who signed up, so aside from absences or non-completes, you can choose the "select all" option and quickly update participants.

For in-person studies and web-based studies outside the system, you will need to grant credit in the system based on participants' names *unless you follow separately available instructions* for external study granting whereby you link your external survey administration system to the research participation system. (It's a bit finicky, but it does work.)

At the completion of a session, you should promptly deal with the participants, in the system, to ensure proper credit grants. The reason for the prompt handling of this situation is in the event your study is a pre-requisite for another study and a few other situations. You do not want to hold up other studies that are waiting on your response to the study you just ran. Please grant research participation credits to participants as soon as they are completed, or within one week. **Remember**: **All research participation credits must be added by the last class day.**

To grant (or revoke credit) for a timeslot:
a. Choose the **My Studies** option
b. Click on the **Edit** link in the timeslots column for the desired study
c. Select the timeslot you would like to see
d. Click the **Modify** button
e. You will see a list of participants identified by name. If they properly participated in the study (based on IRB-approved guidelines, click the **credit granted** option (or participated if you are doing the study for money).
f. If student was no-show, you can choose to mark as excused or

unexcused. For most schools (unless there as an extenuating circumstance (e.g., a car accident), no-shows are unexcused.
   g. Enter comments as needed. Usually entered when revoking credits for some reason.
   h. Click **Update Sign-Ups** button at bottom to save changes.

NOTE: For some studies there is an option at the bottom of the page for "Mark all credit granted.

Note: There is an option for batch credit-granting if a study was administered on an ad-hoc basis (i.e. students didn't sign-up for timeslots). Have the administrator provide you with the details from p. 83 of the master research participation system manual.

For web-based studies administered from within the research participation system (likely to only be used for simple studies), credit will be automatically granted.

ONLINE STUDIES
Setting up External Online Studies to Automatically Grant Credit

The Research Participation System now can automatically grant credit in the system as soon as they finish and online external study (e.g., in Qualtrics, Survey Monkey, SurveyGizmo, LimeSurvey, and Inquisit). This is accomplished by having the external study notify the system that the participant has completed the study and thus deserves credit.

The notification to the system is done by accessing the **Completion URL** for the study. If this complete URL is loaded by the external system (e.g., Qualtrics), the participant will receive credit. Typically, this URL would be loaded by the participant clicking on a link in their browser or the participant being redirected to this link after completing the study. This is the most common method used for commercial survey products like SurveyMonkey and Qualtrics.

NOTE: IRB typically requires that all questions are optional in a survey such that students do not have to answer all questions to receive credit. **Remember, that as the researcher you are responsible to ensure that you follow all IRB guidelines for your particular study.**

Instructions for Qualtrics and Survey Monkey are available through the research participation systems administrator.

Frequently Asked Questions

- **How soon should I enter the research participation credit?**
  To keep down the emails from anxious students, we recommend entering the research participation credits within one week of participation. Remember, this usually involves logging in and clicking "grant all" unless you have some no-shows or non-completes.

  Remember, *all research participation credits need to be entered by the **last class day***. For web-based studies within the system, these are automatically calculated. For web-based studies using an outside tool, you will need to enter these credits unless you follow the configuration options list above.

- **Want to see how participants view your study?**
  Go to the participant study view (available under the specific study information) or set up a "fake" student account.