This is intended as a quick-reference guide to the on-line sign-up procedures. It is not an all-inclusive list of everything a researcher must do before running human participants.

1. There are two Sona sites. One site is dedicated to studies that will award course credit as compensation for participation; https://tufts.sona-systems.com. One site is dedicated to studies that will pay participants; https://tuftspaid.sona-systems.com. Some of the procedures for paid studies will be identical to those for credited studies. Some procedures will diverge.

2. PI accounts are allocated research hours for both sites. If you have not established a PI account before, you will need to do so for the credit Sona system. All PIs will need to request PI accounts for the pay Sona system. PIs are allocated hours that they can distribute to any study for which they serve as the PI. PI status on SONA is not necessarily the same as PI status on grants or even in labs. Often graduate students, postdocs, and even honor’s thesis students serve as PIs. PIs manage researcher accounts.

3. If you are a PI in need of an account, Email Psych_ResearchAdmin@tufts.edu to obtain a log-in and password. Please specify if you want an account on one or both Sona sites.

4. Log-in to the SONA site occurs on a per-researcher basis, not a per-study basis. PIs should email Psych_ResearchAdmin@tufts.edu a list of all affiliated researchers for whom accounts are needed this semester. After each semester, all Researcher accounts on SONA are deactivated by default. This means you will need to email a list of a) returning researchers whose accounts should be reactivated and b) new researchers who need accounts. In each case, please send along full names and tufts.edu email addresses to facilitate the process.

5. Go to the Sona Systems website and log-in (http://tufts.sona-systems.com/). Every 6 months you will be required to review and agree to our departmental Human Participants Research guidelines. Under “Edit Profile” you will be able to change your password and add a secondary email address if you use another account. You *must* add your contact information to your profile, including office and phone number. There are other options you can change here; for example, you can have the system send you an email reminder of all study sessions you have scheduled for the next calendar day.

FOR CREDIT STUDIES

1. Sona keeps track of allocation hours by PI, not by study. This means that if you are running a study under your own allocation, you must be listed as PI (i.e., you must have a Sona PI account). If the study is being run under someone else’s allocation, that other person must be listed as PI and you need to obtain a separate Researcher account on Sona that can be linked to the study in question.

2. “Add Study” to list a study on the site.
   - Choose the appropriate compensation option under “Study Type”
   - “Study Name” is the brief name visible to participants. Simply put a filler here and you will be randomly assigned a code name for your study when you submit it to the system administrator for approval.
   - You will see an option for a description of your study. Please leave this blank. “For credit” studies should not include a description.
   - “Eligibility Requirements” are made visible to participants as well; these do not include eligibility requirements determined based on pre-screening, which are specified after you have successfully added a study to the system.
- “Preparation” should be left blank unless you have specific, IRB-approved instructions for participants, such as “do not eat for 4 hours before study.”
- A PI and at least one researcher must be listed for each study.
- Near the bottom of the page, you may choose the cut-off point after which students may no longer sign up for your study; the default is 24 hours, and you should set it to no less than 1 hour.

FOR PAY STUDIES
1. To add a PAID study go to https://tuftspaid.sona-systems.com.
2. Choose the appropriate compensation.
3. PAID studies can have descriptive names.
4. PAID studies can have descriptions.
5. You can use prescreening data for PAID studies.
6. All other procedures listed above in the “for credit” section will apply for paid studies.

6. Under “Study Information,” click the link to “Send a Request” to make your study visible to participants. Each study must be approved by the system administrator before it can be made visible. If you plan to specify eligibility criteria based on the pre-screening questionnaire, you must use the comments field to explain what these proposed criteria will be and why they are necessary to the study.

7. Set up sessions of your study using “View/Administer Time Slots.” If you have multiple researchers for a project, you are encouraged to link them to their respective time slots for organizational purposes. Also, you may either type in your study location or select a location from the drop-down menu. If you would like to have study locations added to the drop-down menu to prevent double-booking, email Psych_ResearchAdmin@tufts.edu to that effect.

8. If you choose to (and have approval to do so), you may set eligibility criteria based on pre-screening by going to “My Studies.” Under “View,” choose “Study Info.” and then “Pre-Testing: View/Modify Restrictions.” Participants who are ineligible for your study will not see it listed as available for sign-up. Selecting multiple questionnaire items requires participants to meet each criterion in order to be eligible; after specifying the items on which you want to pre-test, you will be asked to specify the values that render a participant eligible. In order to do this, you may also conduct pre-test results analysis of any item from the questionnaire.

9. To check on sign-ups for a session, go to “My Studies.” Select the study and timeslot in question and then click “Modify.” Participants will only be identifiable through a randomly assigned ID# that they must bring with them to the session. You will need to know this number in order to properly assess credit/no-shows or to find a participant’s pre-screening responses after s/he has been in your study—this number is the only way in which your participants will be identifiable to you. If you need to contact participants before the study—for example, to cancel a session more than 24 hours ahead of time for good reason—you may make use of the “Email Participants” option.

10. Assign credits and no-shows as soon as possible after the session ends. You will have to also assign payment on the SONA system. Assignment of compensation within 24 hours of the study is the only way for the system administrators and students themselves to stay updated on the credit situation. This is done using the same “Modify” procedure described above. Accurate record keeping (and storage of consent forms) is essential as a backup. Please note that per OHRP guidelines, we do not assign penalties for no-shows. Instead, you should assign a “no-show (unexcused)” to students who fail to show up; students have been warned that if they accumulate two such no-shows, the system will lock them out. This means that if you have a student for whom you are going to “excuse” a no-show, you need to make sure to assign a “no-show (excused).”
11. Avoid researcher no-shows at all costs. If you fail to show up for a scheduled study, full credit should be assigned to each participant immediately; the same rule applies if you cancel a session less than 24 hours ahead of time (unless at the request of a participant). Multiple researcher no-shows may lead to loss of pool privileges.

12. For pay studies that are posted on the TuftsPaid site are not restricted to Tufts University students. The only restrictions for participants are those that are established by an individual study. As will credit studies, participants should be compensated for their time, even if they choose to stop the study before it is completed. Participants cannot be penalized for any reason, including no-shows. However, if participants continue to miss appointments, they will be locked out of the system.

13. The same prescreening questionnaire will be operational on both websites.