

## Frequently Asked Questions about Conducting Research Using the Psychology Course Credit Participant Pool

### 1) Who can use the Psychology Course Credit Participant Pool?

Psychology faculty/postdocs, currently enrolled Psychology graduate students, and undergraduate students in the Psychology Honors Program are eligible to use the Psychology Department's **Course Credit** Participant Pool. Special faculty with zero-time appointment in the Department of Psychology may use the Credit Pool if they are collaborating with a Psychology graduate student/faculty. Non-psychology faculty with affiliate appointments and PSYC290/Capstone undergraduates are not eligible to use the Credit Pool. Thesis/Dissertation projects of students from a different department are not eligible. Research projects of faculty/postdocs from a different department are not eligible.

### 2) What is the difference between the IRB and the HSC?

The IRB is the Institutional Review Board. It is run by the University and all research must initially be approved by the IRB. Forms for IRB review are available at their website. IRB review may take several weeks, so be sure to plan ahead. The HSC is the Human Subjects Committee run by the Psychology department. After your research is approved by the IRB, it must go through a second review by the HSC. See the HSC Guidelines for more information.

### 3) What is a "researcher hour" and/or "SONA credit"?

The easiest way to think about researcher hours is as credits. 1 SONA credit granted to a participant = 1 researcher hour used. Depending on the length of your study and the number of sessions in your study, your study may cost more than 1 researcher hour to run a single participant. Because we factor in the commute time for students, below is the translation between researcher hour and length of study:

0.5 credit/researcher hour = 25 mins	2.0 credit/researcher hours = 110 mins
1.0 credit/researcher hour = 50 mins	2.5 credit/researcher hours = 140 mins
1.5 credit/researcher hours= 80 mins	3.0 credit/researcher hours = 170 mins

### 4) How do I get researcher hours?

To request an allocation of hours, you must fill out the Credit Pool Hours Request Form online (link on the department website) and submit it before the deadline noted on the first page of the form (typically 1 week before the first day of classes).

### 5) Once I have a researcher hours allocation, how do I use them in SONA?

The Participant Pool Coordinator will email you with the hours you have been allocated. Once you have your hours allocation, you have to request your study to be set up in the **Course Credit** Pool. To do this, fill out the Credit Study Activation Form (link available on the department

website). See the “Instructions for Conducting Research Using the Credit Pool” regarding what documents you need to upload to complete the form.

#### *6) How do participants sign up for my study?*

Participants sign up on-line at the **Credit SONA** website [<https://uiuc.sona-systems.com/>]. Both the **Course Credit** and Paid Research System studies use the online SONA platform, but the two systems are kept completely separate, and there are separate links and instructions for each system.

#### *7) What is the Free-For-All Period?*

The Free-For-All is the last ~5 weeks of the semester for in-person studies and the last ~2 weeks of the semester for online studies (see Participant Pool Calendar for specific dates). During this time, you may run as many participants as you wish. You are no longer limited to the number of hours you were allocated. This procedure is intended to motivate you to use your allocated researcher hours earlier in the semester while also providing more options for participants as the semester winds down. Note that you must still be eligible to use the Course Credit Participant Pool (see #1) to run studies during the Free-For-All.

#### *8) How do I get hours for the Free-For-All Period? Do I need to ask for my study to be included?*

If your study is approved and active in the **Course Credit** Pool system, Free-For-All hours will automatically be added to your study. You will be notified when that happens. You do not need to send a special request to get them.

#### *9) What is the pretest/prescreen? How do I use it?*

The pretest (or prescreen questionnaire) is a series of questions that all participants are required to answer each semester when they set up their **Course Credit SONA** account. It must be done separately for the **Course Credit SONA** and the Paid SONA. It includes a variety of basic informational questions that researchers can use to screen out certain populations, or to recruit a very specific population of participants. To set up requirements using the prescreen, from your study’s main page, click on *View/Modify Restrictions*. An age restriction has automatically been included in your study’s prescreen restrictions. This is so that under-18 students do not participate. Do NOT remove this age restriction. Select any other questions you want to use for prescreening that are allowed in your IRB protocol. Click *Set Restrictions*. Select the response options that you want to be eligible for participation in your study. Click *Save Changes*.

Researchers have the opportunity to request changes to the prescreen questionnaire during summer. The Participant Pool Coordinator will email researchers during summer with details on how to request updates/new prescreen questions. Questions must be approved by the IRB before they can be included in the prescreen. Note that in SONA, researchers will NOT have access to individual-level data from the prescreen (i.e., the purpose of the prescreen is to set study eligibility, not to analyze the prescreen data). Any changes to the prescreen questionnaire (which

must also be approved by the HSC) will be implemented during the academic year. Often, there will be another opportunity to suggest new questions during winter break.

*10) What is the sign-up/cancellation deadline for participants to sign up for a study?*

For both the **Course Credit SONA** and Paid SONA, participants can sign up for a study or cancel an appointment online as long as it is before the set deadline. Researchers can set their own deadlines and they will appear on the information page of each study. For in-person studies, we recommend that you do not set a deadline for more than 24 hours or less than 6 hours.

*11) I need to add more hours to my **Course Credit** study. How do I do that?*

If you want to add more hours to a study that has already been activated, send an email to the Participant Pool Coordinator that includes the number of hours you want added, whose hours will be used, and what study number you want the hours added to. You do not need to fill out any forms to accomplish this.

*12) I want an additional (or new) study number for a protocol that already exists in the **Course Credit** system. What do I need to do?*

To request a new study, fill out the **Course Credit Study Activation Form** (link available on the department website) and follow the instructions (e.g., attaching the most recent IRB approval letter, debriefing sheet, etc.). If you're requesting a study number in the **Course Credit** system for a study that already exists in the Paid SONA system, you still need to fill out the **Course Credit Study Activation Form** and also indicate the corresponding Paid SONA study number on the form.

Shortly after it is received, a new study will be created in the system, researcher hours will be added, and you will be able to run your study. You will receive an email when your request has been processed. See the "Instructions for Conducting Research Using the Credit Pool" for more information.

*13) I requested Masters or PhD hours this semester, but I am not going to use all of them before the end of the semester. Can I return them so that I can use them during another semester?*

Unused priority hours can be returned but with a penalty. You must email the Pool Coordinator to return your hours; unused priority hours will NOT be automatically refunded. You should consult the Course Credit Pool calendar on the department website for the exact deadlines, but below is a general refund policy:

- 100% Refund: Priority hours returned before the course credit pool opens.
- 75% Refund: Priority hours returned within ~3 weeks after the course credit pool opens.
- 50% Refund: Priority hours returned within ~6 weeks after the course credit pool opens.
- 25% Refund: Priority hours returned after the 50% refund deadline but before the beginning of the free-for-all period.

Email the Participant Pool Coordinator with the number of hours to return, the type of priority hours (i.e., MS or PhD), whose account they will be returned to, and what study to take them from (if they have already been allocated to a study). The priority hours that were posted but never got filled can be returned without penalty. Let the Coordinator know in your email.

#### *14) My research was exempted by the IRB. What do I need to do to use the Course Credit Participant Pool?*

If your research was exempted by the IRB, you will not be required to provide a consent form. However, you are still obliged to inform participants you recruit from the Psychology Course Credit Pool of certain things (see the HSC Guidelines for more information):

- How much credit they will earn
- How much time the procedure will take
- How a failure to complete will earn less or no credit (depending on whether the study is more or less than 1 hour)
- How a failure to complete will not affect the student's relationship with the University

You can inform them via a document or by a verbal protocol, which should be part of your application to use the Psychology Course Credit Participant Pool when you request to activate your study. If you feel that your research merits an exception to this rule, you can include in your application a description of why you believe this to be the case. Your proposal will be reviewed by the entire committee, and you may consequently have to wait longer for a response.

#### *15) How do I post sessions for my study?*

To create timeslots for your study, from your study's main page, click *View/Administer Timeslots* and then click *Add a Timeslot*. Fill out the timeslot information: the date, time with AM/PM, number of participants in the session, and the location. Click *Add this timeslot*. This automatically deducts from the hours allocated to the study. Repeat this process for every session. Make sure to schedule your timeslots such that you have enough time to handle credit status updates to meet the mid-semester and end-of-semester deadlines (see the Course Credit Pool calendar).

For **in-person studies**, the “timeslot” is the date/time at which participants must physically show up to the lab. Use the “location” to indicate both the building (e.g., Psychology, Beckman Institute) and the room number of the study site.

For **online studies**, the “timeslot” you set refers to the date and time that the study must be completed by. You can think of it as the “participation deadline” for your study. Note that some students may participate as soon as they sign up, while others may wait a few days or even weeks before participating. See the Credit Pool calendar to set the appropriate timeslot (also see “Instructions for Researchers Using the Credit Pool”). For example, if you're opening a slot at the beginning of the semester, do not set any timeslot to be later than the mid-semester credit assignment deadline.

For **virtual studies**, the “timeslot” is the date/time at which participants must access the Zoom link to interact with the experimenter. Under the “location” part, use the second space (where it says “Videoconference URL”) to enter the Zoom link.

For **multi-part in-person studies**, make sure that there are enough available timeslots for all parts of the study; otherwise, participants will be prevented from signing up for your study altogether.

For **multi-part online studies**, set up one timeslot for each part of the study. The “timeslot” for the first part should be the last date you want to allow participation in the first part (again, think of online timeslot as participation “deadline”). The timeslots for the other parts should be any time on or after the deadline of the first part. See the Credit Pool calendar to set the appropriate timeslot (also see “Instructions for Researchers Using the Credit Pool”). For example, if you’re opening a slot at the beginning of the semester, do not set the timeslot for the first part to be later than the mid-semester credit assignment deadline. The time separation between each part of the study is determined based on the date credit was granted for the participant, and is specified in hours. Participants will be given access to the URL for each part of the study at the appropriate time, based on when they received credit in the previous part. Again, consult the Credit Pool calendar to plan your timeslots appropriately (e.g., you must avoid situations where participants complete the first part on time but are not given enough time to submit the subsequent parts).

#### *16) How do I give another researcher access to my Course Credit SONA study?*

From your study’s main page, click *Change Study Information*, near the bottom of the screen. This allows you to modify settings including researcher access. In the center of the screen, you will see a *Researchers* box. Search for and click on the name of the researcher you want to add to your study. Click *Save Changes* when you are finished. If the researcher’s name is not there, then they do not currently have a researcher account set up in the **Course Credit** system. Email the Participant Pool Coordinator and ask for a researcher account to be created for this person for the **Course Credit** system. The new researcher must be listed on your IRB Research Team Form for the protocol your study is under; be sure to attach this document to your email. Once their researcher account has been created, the new researcher will have access to your study.

#### *17) I tried to log in and my account says it’s been disabled. What’s wrong?*

The **Course Credit** and Paid SONA systems do not use the passwords that you use for other university services, but instead use passwords that are specific to them. If you already have an account in the **Course Credit** system but cannot remember your password, click *Lost Password*. You will be able to retrieve your password by following the steps outlined there. If you still can’t access your account, it may be that your account hasn’t been reactivated for the semester yet. Email the Participant Pool Coordinator to request reactivation of your account. Please note that during the time that the Course Credit Pool is closed, researcher accounts may be deactivated for routine maintenance.

*18) I am a researcher but don't have a researcher account in the Psychology Course Credit SONA system. How do I get one?*

Email the Participant Pool Coordinator to request for a researcher account, specify the study number(s) you wish to have access to, and attach the IRB document(s) listing you as a researcher. Then, a researcher account will be created for you. Typically, this is done automatically when a study is activated in the system, so you shouldn't need to request it separately.

*19) I want to run a second short study during my session that is under a different IRB. What do I need to do?*

If you want to add another short study during a session that is already in the **Course Credit** system and the second study is under a different IRB protocol, then it needs to be on file with the Participant Pool Coordinator, and the second study must also be approved by the HSC. If the new IRB protocol has already been approved by the HSC, this will be processed quickly. If not, then it will be sent out for an HSC review before it can be added to the existing study.

If the existing study is already active in the **Course Credit** system, then email the Participant Pool Coordinator and provide the study number and duration/credits of the existing study, and information for the second study you wish to add (e.g., IRB protocol, consent, debriefing, etc.).

If neither the existing study nor the second short study has been activated yet, fill out the **Course Credit Study Activation Form**, indicating that you will be using multiple IRBs under one study number and upload the IRB protocols, consent, debriefing, etc. for both studies.

*20) The Participant Pool Calendar says that it ends on Reading Day. Can I still run studies on Reading day?*

Yes. You can run studies until end of the day (5:00pm CST) on Reading Day. However, you must make sure that you record credit promptly since the course reports are sent to instructors shortly afterwards. You cannot allow students to participate in your study past the Reading Day deadline. Students are informed of this deadline, have the entire semester to earn credits, and are further reminded to not wait until the last day/hour to participate.

*21) Which email address do I use to contact the Participant Pool Coordinator?*

psych-subjects@illinois.edu

*22) What do I do with the sign-in sheets after participants have signed them?*

For in-person studies, researchers can have participants sign an attendance sheet at the beginning of the session. If so, researchers will keep the sign-in sheets for their own record (while following all IRB protocol regarding privacy). There is no need to turn in the sheet to the Participant Pool Coordinator.

*23) A participant forgot to sign in during a session. Is this a problem?*

Sign-in sheets are for researcher's own record; all credit assignment is done via SONA. Sign-in sheets may be informative as it provides confirmation that a participant did in fact show up for their study, if there is ever a discrepancy regarding credit assignment. However, as long as you are granting credit to participants on SONA for the correct study/date/time, participants failing to sign-in should not be a problem.

*24) I need to email the participants who have signed up for my study. How can I do that?*

There are two ways to do this. (1) From your study's home page, click *Contact Participants*. Select the type of participant you wish to contact, enter the message you wish to send them, and click *Send Message*. (2) From your study's home page, click *View/Administer Timeslot*. Select the session and click *Modify*. At the bottom of the screen (below the *Update Sign-Ups* button), click *Contact All Participants*. This allows you to email all participants who are currently signed up for that particular timeslot. Enter the message you wish to send them and click *Send Message*. Note that participants automatically receive reminder emails about your study 24 hours prior to the study session.

*25) I need to recruit a very specific sub-population from the participant pool. Can I email all eligible participants?*

Researchers are able to email less than 250 participants who qualify for their particular study at a time. Go to "Prescreen results" → "Prescreen qualification analysis" → specify the prescreening questions that narrows down your target population → "View question response data" → "Analyze" → directly enter your email message on the page.

Note that all email communication will be logged and can be monitored by the administrator. Please don't send out recruiting emails more than twice per month.

DO NOT use this feature if you're recruiting mostly from the general population (e.g., study eligibility is 18+ years-old and right-handed with normal/corrected to normal vision, etc.).

*26) My study is a multi-part study, making it hard to attract participants. Can I email eligible participants to boost sign-ups?*

Yes. In this case, you can use the email feature mentioned in #25, even if your study isn't targeting a specific sub-population. In general, only multi-part studies and studies that are targeting a specific sub-population should be using the recruitment email feature.

*27) How can I recruit two different sub-populations separately for the same study?*

If you want to recruit two different sub-populations simultaneously for the same study, you can ask for an additional **Course Credit** study number to be created (see "Instructions for Researchers Using the Credit Pool"). Set each study to have one of the restrictions, which will allow you to separately recruit both sub-populations at the same time. You would also want to

set a disqualifier to each study such that a participant who takes one study would not be eligible to sign up for the other study, and vice versa.

### 28) *What is the difference between an Excused and Unexcused No-Show?*

A No-Show includes any situation in which the participant does not receive credit. A No-Show is NOT a penalty. A No-Show does not remove earned credits; it just doesn't add credits to the participant's account. There are two types of No-Shows: Excused and Unexcused.

- **Excused No-Shows:** Includes situations in which the researcher cancels a session, if a participant fails to complete an online study by the deadline, if a participant chooses to or is asked to leave, or if a participant has a documented reason (e.g., McKinley note) for missing or arriving late to a scheduled in-person/virtual study. A student who is not comfortable with a study can withdraw at any time. If a student withdraws before completing a 0.5- or 1-credit study, no credit will be given. See the "Instructions for Researchers Using the Credit Pool" about giving partial credit for longer studies.
- **Unexcused No-Shows:** Includes situations in which the participant does not have a documented reason for missing or arriving late to an in-person/virtual study. Note that *Unexcused No-Show* should NOT be marked for online studies. If a participant receives two unexcused No-Shows, their account will be locked.

Regardless of study format or whether it's excused or unexcused, please provide details about the No-Show in the Comments box (e.g., "Absent", "Researcher cancelled", "Participant withdrew early", "Disruptive", etc.).

### 29) *A participant showed up late to my study. Am I required to run them in my study?*

If a participant is late, you are not required to allow them to participate. If there is enough time remaining, or both you and the participant are willing to stay after the originally scheduled end time, you may choose to run the participant. However, participants should be aware that they will not be allowed to participate if they show up late, so you are under no obligation to run them. If you choose not to allow them to participate, mark them as an *Unexcused No-Show*, and write in the *Comments* box that they showed up late for their scheduled appointment. Note that for online studies, *Unexcused No-Show* should NOT be marked for incomplete responses, late submissions, or if the study was not started at all.

### 30) *A participant is being disruptive, on their cell phone, or purposely giving inappropriate answers. Is there anything I can do?*

Researchers should remind participants to turn off and put away all cell phones or other electronic devices that may be distracting. If these devices are used during the study when they should not be, the researcher may ask the participant to leave. If a participant is being disruptive, purposely providing inaccurate or inappropriate responses, or acting in a manner that makes the researcher believe their data will be unusable, a researcher can ask the participant to leave, and they will not receive any credit for the session. When updating attendance in SONA, the researcher should mark the student as an *Excused No-Show* and describe the conduct of the participant in the *Comments* box.



*31) A participant wants to withdraw from my study. What procedures do I need to follow?*

Students who are uncomfortable with a study can withdraw at any time. If it is a study shorter than 1-hour, they will not receive any credit for the session, and should receive an Excused No-Show (indicate in comments that participant withdrew). If the study is longer than 1 hour, participants can receive prorated credit for partial completion. To receive the prorated credit, you must provide a Course Credit Early Withdrawal Form (available on the department website), which the student must fill out and return to the Participant Pool Coordinator to receive partial credit. Note that the IRB requires you to keep track of the number of people who withdraw from your studies. They ask for that information as part of annual project renewals.

*32) I accidentally ran a participant who didn't sign up for my study. What do I do?*

By accident, a researcher may run a participant who has not signed up for their study (i.e., the researcher goes to award credit to the participant and realizes that their name is not on their study's credit page). If this happens, the researcher MUST email the Participant Pool Coordinator explaining the situation and provide the following: participant's name, NetID, email address, study #, session date/time, and amount of credit they should have received. The Coordinator will review the information and assign credit as necessary.

*33) A participant showed up for my study, but they do not meet the prerequisites. What do I do?*

Participants are asked to only sign up for studies whose prerequisites they meet. If they do not meet the prerequisites that are posted with your study or those that you have selected using the prescreen, then you may choose not to run them. Mark the participant as an *Excused No-Show* and write in the *Comments* box that the participant did not meet the prerequisites for the study. They will not receive any credit for the session.

*34) I need to cancel a session for my study, what do I do?*

Whenever a researcher cancels a study session for which participants have already signed up, they must email the participants individually (e.g., use bcc, not cc). Note that the "cancellation deadline" indicated on SONA is the *participants'* cancellation deadline. Researchers must follow the cancellation policy below:

- **If cancelling more than 24 hours before the study:** Send emails to the participants, alerting them to the cancelled session. Then in SONA, select the session you want to cancel and click *Modify*, which brings up the credits page. Change each participant's status to *Excused No Show*. In the *Comments* box, write "Researcher cancelled."
- **If cancelling less than 24 hours before the study:** Send emails to the participants, alerting them to the cancelled session. You must also email the Pool Coordinator a list of the participants' names, emails, and date/time of the session that was cancelled. Since it is less than 24 hours in advance, students must receive credit for the study. In SONA, change each participant's status in the cancelled session to *Participated*. In the *Comments* box, write "Researcher cancelled after deadline." This situation should be avoided as much as possible.

*35) A participant emailed me to cancel their appointment. What do I do?*

If a participant emails to cancel before the cancellation deadline of your study (the default is set to 24 hours for virtual/in-person studies), please tell them it is their responsibility to cancel their timeslot in SONA (they can do so under *My Schedule/Credits*). If it is after the cancellation deadline of your study, then it is too late for them to cancel in SONA. On SONA, mark them as an *Unexcused No-Show* and in the *Comments* box, write “Participant emailed too late to cancel.” This will not excuse their *No-Show*, but it provides information about the *No-Show*, in case they appeal to have it excused. If it’s an online study, you must mark them as *Excused No-Show*, even if it’s past due. For multi-part studies, if a participant cancels one part, all subsequent parts are automatically cancelled as well.

*36) A student missed their appointment and emailed me explaining their absence. What do I do?*

If a student misses an in-person or virtual study, they must be marked as an *Unexcused No-Show*. Information about the absence should be included in the *Comments* box. This can include whether they emailed to explain the absence, the reason for missing the study, etc. The student can email the Participant Pool Coordinator and provide a valid documented excuse for missing the study. This information will be reviewed and in certain cases (e.g., emergency, documented illness), the *Unexcused No-Show* may be changed to *Excused*. After two unexcused *No-Shows*, the student will be locked out of the system and won’t be able to sign up for any more studies.

*37) A participant missed their appointment and asked if they can reschedule or do a make-up appointment so that they won’t be marked as an Unexcused No-Show. Can I do that?*

No. Researchers can’t offer make-up appointments or reschedule their appointments within the **Course Credit** SONA system. You must mark them as an *Unexcused No-Show* (see #36 above). However, participants can still sign up for your study again in SONA if they have not been locked out of the system.

*38) I want to give participants money and credit depending on their performance in the study. Can I do that?*

No. Payment cannot be offered for participating in studies in the Course Credit Participant Pool (see the HSC Guidelines regarding this policy). Credits are fixed for all participants in a given study (e.g., you cannot offer bonus credits based on performance, etc.). Participants cannot receive additional payment for a study they are doing for course credit, nor can they be enticed to stay late with the offer of payment. At the completion of the study (but not before), the researcher can ask a participant if they would like to provide their contact information in order to become part of a database of people willing to be contacted about future participation in paid studies (e.g., for Paid SONA). Participating in **Course Credit** studies is meant to be part of the student’s educational experience, for which they will receive course credit (and not monetary payment as compensation for their time).

*39) I want participants to complete follow-up questionnaires or provide third-party data. Can I do that?*

When a participant will be asked for third party data, they should know before signing up for the study. This information should be posted as a requirement for the study. To ensure that no coercion is involved, the consent form must emphasize that recruiting third-party data is entirely voluntary, and in no way alters course credit received for the study. There must be no additional compensation offered for recruiting a third-party participant (e.g., no extra credit, no monetary payment). The time involved to recruit a third party should not make the total amount of time spent participating in the study exceed what they have been told will be required. If a third party participates in research, the usual IRB guidelines regarding their informed consent apply. The debriefing procedure should make clear why third party data are important to the research. That is, it should be clear what research questions are being tested by way of third-party or follow-up data collection and how the results may inform knowledge within the particular domain under study (see the HSC Guidelines regarding third-party data).