Instructions for Conducting Research
Using the Psychology Course Credit Participant Pool

Due to COVID-19 restrictions, all in-person research activities must have specific IRB approval with COVID safety precautions. The IRB determines whether your research is allowed to transition to an in-person mode. Individual research labs are responsible for ensuring that their in-person procedures are in compliance with all COVID-related directives from the department, campus/university, and state.

The Psychology Department's Course Credit Participant Pool is a participant recruitment system that department members can use to obtain participants for their research. The Credit Participant Pool is managed by the Participant Pool Coordinator using the SONA Systems—an online platform for recruiting participants. 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 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.
Note:

- Research projects of PSYC290/494 or PSYC492 (Capstone) students are not eligible.
- Thesis/Dissertation projects of students from a different department are not eligible.
- Research projects of faculty/postdocs from a different department are not eligible.
- Affiliated faculty are not eligible unless they have a zero-time appointment with the Psychology Department.

Below are instructions about conducting research using the Course Credit Pool. Read the information carefully. Note that there is a different instruction for the Paid Research System, which is a completely separate system from the Course Credit Pool. If you have questions, consult the FAQ on the department website or contact the Participant Pool Coordinator (**psych-subjects@illinois.edu**).

All studies must be approved first by the campus Institutional Review Board (IRB). Studies in the Course Credit Pool must also be approved by the Psychology Human Subjects Committee (HSC). To efficiently prepare your study, you should read the HSC Guidelines.

General Information about Study Types and Study Sessions

The Course Credit Pool participants consist of undergraduate students enrolled in PSYC100 for whom participation in 7 credits worth of research is required, and other students in some 200- and 300-level courses who have the option of participating in research for extra course credit. 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

There are 5 study types currently supported by SONA:

1. **<u>In-Person Study:</u>** In-person studies take place in a laboratory on campus, and participants must physically attend the session. These studies may include eye-tracking, brain imaging, physiological measurement, interactions with a confederate, etc. Participants sign up on SONA to schedule an appointment, physically go to the lab *at the scheduled day/time*, and complete the study by following the experimenter's instructions to receive credit. Credit must be assigned manually for each participant.

2. **<u>Online Study:</u>** Online studies include survey questionnaires, experiments, computer-based behavioral studies that participants complete on their own time. Participants <u>do not</u> physically visit the lab. Participants sign up on SONA, access the study link, and complete it *at any time before the deadline* to receive credit. Automatic credit assignment is available and highly recommended (see "Awarding Credit" section below).

3. **<u>Virtual Study:</u>** Virtual studies include studies conducted over video-conference (e.g., Zoom) that involve virtual, real-time interactions with an experimenter. Participants <u>do not</u> physically visit the lab. Participants sign up on SONA to schedule an appointment, access the study link *at the scheduled day/time*, and complete the study by following the experimenter's instructions to receive credit. Participants are given access to the Zoom link 10 minutes before the scheduled appointment. Credit must be assigned manually for each participant.

4. **<u>Multi-Part In-Person Study:</u>** These are in-person studies that have 2-4 parts. Researchers may customize their study such that each part is scheduled to take place a certain number of hours/days apart from the previous part (e.g., Part 2 must take place exactly 10 days after Part 1). Each part of a multi-part study may have a different credit value (e.g., 0.5 credit for Part 1, 2 credits for Part 2), but the total number of credits must not exceed 3. Participants must sign up for all parts of the study at once. Participants must physically attend at the scheduled days/times. If a participant attends the first part but misses the subsequent part(s), they may receive prorated credit for partial completion of a multi-part study (see "Awarding Credit" section below). Credit must be assigned manually for each participant for each part.

5. **<u>Multi-Part Online Study:</u>** These are online studies that have 2-4 parts and work in a similar way as the multi-part in-person studies (see above), except all parts are completed online. Time separation between each part is enforced based on when the participant is marked as "participated" for the previous part, and the URL for the next part will not be accessible until that time is reached (see "Setting Up Your Study" section below). Thus, automatic credit assignment is highly recommended.
   - The study URL for each part must be unique.
   - 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.
   - You may use different survey products for each part (e.g., Qualtrics for Part 1, Inquisit for Part 2).

Students can only sign up for Course Credit studies using the SONA system. Researchers may not sign students up manually or email study links directly to students who have not signed up for their study using the SONA system.

Advertising specific course credit studies in classrooms, course websites, etc. is NOT permitted. That is, instructors/TAs are NOT allowed to solicit participation from their students enrolled in courses that they are teaching (see the IRB's regulation and policies regarding potential for perceived coercion).

For virtual/in-person studies, researchers must be on time. Participants are told to wait 15 minutes past the scheduled start time. After that time, participants will receive credit regardless of actual participation. Researchers should place a note on the door of the room where the study is being conducted with instructions about where participants should wait. It is the responsibility of the researcher to check the hallway prior to closing the door at the start of the study to be sure that all participants are in the room. If a study is scheduled after building hours, the researcher must arrange for participants to be let into the building.

Unless a participant volunteers to stay past the study ending time, they must be allowed to leave at the end of the session even if they have not completed the study. Participants may not be awarded additional credit for volunteering to stay and complete the study (see the HSC Guidelines regarding this important policy).

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 participants are being disruptive, purposely providing inaccurate or inappropriate responses, or acting in a manner that makes the researcher believe the data will be unusable, a researcher can ask the participant to leave.

For online research, obtaining quality responses can sometimes be challenging. Unlike a lab study, students do not have the option to ask an RA if they are confused and/or have questions about the task. Thus, instructions should be clear, and students should have the option to re-read essential parts, if needed. In addition, embedding attention/comprehension checks in online studies is highly encouraged. The idea is to have a simple attention check question in the survey and/or an easy comprehension question to test students' understanding of the task before they begin. If students fail these easy questions or practice trials with very obvious answers, then it is clear that they are not paying attention and should not continue or receive any credit. You can then use branch logic (e.g., in Qualtrics) or similar programming features to prevent such students from proceeding with the rest of the study. By embedding attention checks, you will likely get better quality data and not waste your credits on unusable data. However, you should not make the attention checks too difficult. The goal is not to punish students who are trying but may make some mistakes on accident.

Requesting Allocation of Credit Pool Hours

To use the Course Credit Pool, you must request to have researcher hours allocated to you. 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).

Psychology department faculty, post-docs, graduate students, and undergraduate students who are writing honors theses supervised by department faculty member(s) are eligible to request researcher hours. There are 3 different types of hours that may be requested:

1. **Priority Hours**: Priority hours are guaranteed; 100% of the hours requested will be allocated. Active graduate students in the PhD program have 300 PhD and 200 Masters priority hours that can be requested at any time. Honors undergraduates have 100 priority hours. Priority hours may be all used in one semester or split over multiple semesters. Unused priority hours can be returned for use in a future semester 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 opening date.
   - 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.
   Note: Priority hours that are returned before the beginning of the free-for-all period will be redistributed to faculty members (who can then allocate them to the most-in-need graduate students) so that they are more likely to be used before free-for-all. The Pool Coordinator will notify faculty via email of any substantial updates to their hours allocation.

2. **Faculty Hours:** After priority hours are distributed, 70% of the remaining hours are allocated to faculty. Faculty may request a specific number of hours, or they may request the maximum available.

3. **Independent Researcher Hours**: The remaining hours are distributed to other researchers. These may be requested by Psychology graduate students and post-docs.
   Note: A PhD student cannot request both priority hours and independent researcher hours in the same semester.

Toward the end of the semester (typically ~5 weeks before the finals week for in-person/virtual studies, ~2 weeks before the finals week for online studies), you will be notified by email that the Course Credit Pool is going into "free-for-all" mode. During free-for-all, the hour restrictions will be removed for all approved active studies in the system, which means you may continue to collect data even if you may have run out of hours earlier in the semester.

Requesting a Study Number in the Course Credit Pool

Before you can run a study, you must request a study number by filling out the **Credit Study Activation Form** (link available on the department website). Submit the completed form and

required documentation online. Note that all course credit studies are deactivated at the end of each semester. Thus, researchers must request a study to be reactivated even if the study was active in previous semesters. <u>Do not create a new study on your own in SONA!!</u> If a new study request is sent via SONA, you will be asked to properly submit the Study Activation Form.

The Study Activation Form will walk you through the different types of study requests, but below is a general guideline:

1. **New study that has never been reviewed by the HSC:** The protocol for studies in this category has been approved by the IRB but has not yet been reviewed by the HSC. Fill out the Study Activation Form and attach (a) full approved IRB-1 form including amendments/ attachments, if any, (b) credit consent form(s), and (c) debriefing sheet. Note that the debriefing sheet must be supplied regardless of the study involving any form of deception. For online studies, additionally attach the waiver of documentation of informed consent. For in-person studies, the COVID-19 human subjects research safety plan and a copy of the email from OPRS approving the COVID-19 safety plan must also be attached. Once these materials are received, your request will be sent to a member of the HSC, who will review the protocol. Refer to the HSC Guidelines for more information about the HSC review process. Within 5 business days, you should receive an email updating you on the status of the review. If the study is approved, a new study number will be created in SONA, researcher hours will be added to the study, and you will be notified that you can run your study. If changes are required before the study can be approved, revisions will be sent back to the HSC member(s).

2. **Same study run in previous semester(s) [none or minor revision]:** This is a study that has a pre-existing SONA study number in the Course Credit system, which only needs to be reactivated and have researcher hours allocated to it. If studies in this category have had only minor IRB revisions (e.g., research team update) or routine renewals since they were last approved by the HSC, they do not have to be re-approved by the HSC. Fill out the Study Activation Form, indicating the existing study number, and attach the most recent IRB approval letter. For in-person studies, the COVID-19 human subjects research safety plan and a copy of the email from OPRS approving the COVID-19 safety plan must also be attached. Shortly after receiving your request, the Pool Coordinator will reactivate the existing study number, add researcher hours to it, and email you. You will then be able to run your study.

3. **New study with previous HSC approval [none or minor revision]:** This is a new study under an IRB protocol that has already been approved for the Course Credit Pool by the HSC. If studies in this category have had only minor IRB revisions (e.g., research team update) or routine renewals since they were last reviewed by the HSC, they do not have to be re-approved by the HSC. Simply follow the same instructions described in #2 ("same study run in previous semester(s) [none or minor revision]") above. For in-person studies, the COVID-19 human subjects research safety plan and a copy of the email from OPRS approving the COVID-19 safety plan must be attached.

4. **Same or new study with previous HSC approval [major revision/amendment]:** This is an existing study (i.e., has a SONA study number) or a new study under an IRB protocol that was previously approved by the HSC but the protocol has been modified (e.g., new study procedures). Studies in this category must be reviewed by the HSC again. Follow the same instructions described in #1 ("new study that has never been reviewed by the HSC") above. To facilitate the review process, upload the amendment form and/or highlight the changes that were made since the last HSC review. For in-person studies, the COVID-19 human subjects research safety plan and a copy of the email from OPRS approving the COVID-19 safety plan must be attached.

Setting Up Your Study in the Course Credit Pool

Once a study is approved and activated, you must set up some information on SONA so that the study runs properly. Even if the study is the same as previous semesters, double-check all of the information by following the steps below:

1. Go to the Course Credit SONA website and log in to your researcher account.

2. Click *My Studies*. Your study number should be in the *Active Studies* box.

3. Click on your study number. This takes you to the main page for your study.

4. Click *Change Study Information*, near the bottom of the screen. This allows you to modify settings including eligibility, researcher access, cancellation deadline, and reminder email options. **Do not change the study name, duration, credits, or age restriction**. If you add text in the eligibility or preparation sections, the system will require an admin approval (notify the Pool Coordinator what you changed and the study will be reapproved shortly). Click *Save Changes* when you are finished. Note that there is no communication between the Course Credit Pool and the Paid Research System. That means you cannot set up restrictions for a study in one system that depend on study participation status in the other.

5. To set up requirements using the Prescreening, click on *View/Modify Restrictions*. An age restriction has automatically been included in your study's restrictions. This is so that underage participants 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. Click *Set Restrictions*. Select the response options that you want to be eligible for participation in your study. Click *Save Changes*.

6. To create timeslots for your study, click *View/Administer Time Slots*, then click *Add A Timeslot*. Fill out the Timeslot information: the date, time with AM/PM, and number of participants in the session. Click *Add this timeslot*. This automatically deducts from the available hours. 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 **<u>in-person studies</u>**, 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 **<u>online studies</u>**, 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 "Awarding Credit" section below). 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 **<u>virtual studies</u>**, 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 **<u>multi-part in-person studies</u>**, 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 **<u>multi-part online studies</u>**, 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 "Awarding Credit" section below). 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).

Except for the free-for-all period, the number of hours allocated to your study on SONA will be based on what you indicated in the Study Activation Form. You can check by looking at the *Timeslot Usage Limit* under *Additional Study Information* on the study information page. The number of "sign-ups" indicated in parentheses should equal to the number of hours you requested to allocate to this study divided by the number of credit(s) your study is worth. Note that the number of "hours" you might see there correspond to clock hours (i.e., not researcher hours), and you can safely ignore that number.

If you want to add more researcher hours to a study that has already been activated, send an email to the 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. If you are requesting to use someone else's hours, be sure to copy that person in your request email.

Awarding Credit

Regardless of study format, you must record credit within 48 hours after the study session. Researchers must record credit after each session for multi-part studies too. Steps to manually grant credit are highlighted below (for in-person/virtual studies):

- From your study's home page, click *View/Administer Time Slots*. Select the session, and click *Modify*, to bring up the credit page. The default status is *No Action Taken*.
- To give credit, select the *Participated* button next to the student's name. To withhold credit, select the *Unexcused No-Show* or *Excused No-Show* options as appropriate (see the "No-Shows" section below).
- Use the *Comments* box for information about a participant's absence or conduct.

For **online studies**, SONA has automatic credit grant integrations with 24 online survey products: https://www.sona-systems.com/help/. It is highly recommended that you integrate this feature so that participants will receive credit as soon as they complete your study (i.e., without having to wait until you manually grant them credit). If you do not integrate automatic credit assignment, you must check SONA frequently and manually update participation status so that participants receive credit within 48 hours of completing the study. It is best to schedule online studies no more than a couple of weeks ahead of time. This way, you will be able to update credit statuses for those who didn't complete the study on time, add more timeslots if additional participants are needed, and avoid last-minute credit discrepancies.

For **multi-part studies**, if a participant fails to attend the first part, it is the responsibility of the researcher to contact them and have participants cancel subsequent parts OR assign *Excused No-Show* to the subsequent parts. Do NOT automatically assign multiple *Unexcused No-Shows* to a participant for missing the first part. Doing so will lock the participant's SONA account.

==There are 2 important deadlines for awarding credit: one at mid-semester and another at the end of semester (see the Course Credit Pool calendar). Participation status (credit/no-show) for all study sessions must be updated by these deadlines.== Students' grades partially depend on their SONA credits, and assigning credits in a timely manner is very important.

For **online studies**, when the deadline for your study is past, you need to check your data to see if the students with "awaiting action" status in SONA have completed your study and either grant credit (if they completed your study) or select *Excused No-Show* (if they didn't). See the steps indicated above to manually grant credit. Please check this even if you have automatic credit grant! 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. Also, you should NOT retract credits from participants from sessions that were completed more than 2 weeks ago.

Participants may receive prorated credit for partial completion of a multi-hour study. In that case, you must provide participants with the **Course Credit Early Withdrawal Form** (available on the department website), which must be submitted to the Pool Coordinator for participants to get prorated credit.

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 the participant's name is not on SONA). If this happens, the researcher MUST email the Pool Coordinator to explain the situation and provide the following: participant's name, NetID, email address, study #, session date/time, and amount of credit they should receive. The Pool Coordinator will review the information and assign credit as necessary.

If you change a participant's credit from *No Show* to *Participated* for any reason or if you change their status from *Participated* to *Unexcused No-Show*, you must email the participant and the Pool Coordinator because such changes can affect the participant's account lock status.

No-Shows

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 "Voluntary Withdrawal" section below 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.).

Cancelling Studies

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 <u>more than</u> 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 <u>less than</u> 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.

Participant Cancellation: Each study has its own participant cancellation deadline (the default is 24 hours for virtual/in-person studies, and 1 hour for online studies). If a participant emails to cancel before the cancellation deadline of your study, 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 the SONA *Credits* page (see "Awarding Credit" section above), mark them as an *Unexcused No-Show* and in the *Comments* box, write "Participant emailed too late to cancel." 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. If a participant cancels any part other than the first part, the Pool Coordinator will need to manually sign them up if they wish to participate in the cancelled parts of the study at a later date. In this case, contact the Pool Coordinator to reschedule the missed parts.

Consent Forms & Debriefing Sheets

Unless a Waiver of the Documentation of Informed Consent has been approved by the IRB for your study, participants must sign the consent form for your study prior to the start of the study. A blank copy of the consent form should also be available for participants upon request. See the HSC Guidelines for other requirements regarding the consent form.

The debriefing sheet is key in making the Course Credit Participant Pool an educational experience for students (see the HSC Guidelines). Therefore, researchers must provide a written debriefing sheet to each participant. Note that the debriefing sheet is required for all course credit studies, even for those without deception. It should include:
- An explanation of research goals and methods (e.g., What is the main hypothesis and how did you test it? What will this study tell us about human psychology?) written in plain English without technical jargon.
- Suggestions for further reading (2-3 academic references), preferably from easily accessible journal articles (i.e., rather than book chapters).
- Contact information (name/email/phone) for a faculty/graduate student who can further discuss the research.

Voluntary Withdrawal

A student who is uncomfortable with a study can withdraw at any time. If it is a 0.5- or 1-credit study, they will not receive any credit for the session, and the session should be marked as *Excused No-Show*. If the study is longer than 1 hour, a participant can receive prorated credit for partial completion. You must provide a **Course Credit Early Withdrawal Form** (available on the department website), which must be submitted to the Pool Coordinator for the participant to receive partial credit.