Instructions for Conducting Research using the Psychology Course Credit Participant Pool

Below are instructions about conducting research using the Psychology Department's Course Credit Pool. Read the information carefully. 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). Note that there is a different instruction for the Psychology Paid Participant Pool.

The Course Credit Pool participants consist of undergraduate students enrolled in PSYC 100 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. Because we factor in the commute time for participants, 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

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 received. 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 Participant 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.

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. Participant Pool Coordinator will notify faculty via email of any substantial updates to their hour 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 given to independent researchers. These may be requested by Psychology graduate students and post-docs.

Toward the end of the semester (typically ~5 weeks before the finals week), 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. Do not create a new study on your own in SONA; a new study activation request sent via SONA will not be approved.

The 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) most recent IRB approval notice, (b) full approved IRB-1 form including amendments/attachments, if any, (c) consent forms, and (d) debriefing sheet. Note that the debriefing sheet must be supplied regardless of the study involving any form of deception. 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 document 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 Psychology 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. Shortly after receiving your request, the Participant 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.

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 amended. 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.

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, or credits**. Click *Save Changes* when you are finished. Note that there is no communication between the Course Credit and Paid Pools. That means you cannot set up restrictions for a study in one system that depend on studies 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 <u>NOT</u> remove this age restriction**. Select any other questions you want to use for prescreening. 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, number of participants in the session, and the location. Include both the building (e.g., Psychology, Beckman Institute) and the room number. Click *Add this timeslot*. This automatically deducts from the available hours. Repeat this process for every session.

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. 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.

Awarding Credit

You must record credit within 48 hours after the study session. Online studies must record credit within 48 hours after the participation deadline at the latest.
- 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.
- Use the *Comments* box for information about a participant's absence or conduct.

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 assigned by the deadline. Students' grades partially depend on their SONA credits, and assigning credits in a timely manner is very important.

Participants may receive prorated credit for partial completion of a multi-session or multi-hour study. To get prorated credit, participants must fill out an Early Withdrawal Form (available on the department website) and return it to the Participant Pool Coordinator.

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.

If you change a participant's credit from *No Show* to *Participated* for any reason, you must email the Participant Pool Coordinator because such changes can affect the participant's account.

There are certain situations in which a participant's "*No-Show*" will be excused. If any of these situations occur, a researcher must mark the participant as an *Excused No-Show* and use the *Comments* box to explain the situation (e.g., "Researcher cancelled").
- A participant who is using a cell phone, being disruptive, or purposely providing inaccurate/inappropriate responses can be asked to leave and not given credit.
- 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.

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 a credit earned; it just does not add credit 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 chooses to or is asked to leave, or if a participant has a valid and documented reason (e.g., McKinley note) for missing a study or arriving late to a study.
- **Unexcused No-Shows:** Includes situations in which the participant does not have a valid and documented excuse for missing a study, arriving late to a study, or not completing an online study by the deadline. If a participant receives two unexcused No-Shows, their account will be locked.

Please provide details about the No-Show in the Comments box (e.g., "Absent", "Researcher cancelled", "Participant withdrew early", "Disruptive").

Cancelling Studies

Whenever a researcher cancels a study session, they must email the participant(s) individually and also email the Participant Pool Coordinator a list of the participants' names, emails, and date/time of the session that was cancelled. Please be courteous to participants and try to avoid short-notice cancellations.

- **If cancelling more than 24 hours in advance:** Send emails to the participant(s) and Participant Pool Coordinator 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 from *No Action Taken* to *Excused No Show*. In the *Comments* box write "Researcher cancelled."
- **If cancelling less than 24 hours in advance**: Send emails to the participant(s) and Participant Pool Coordinator alerting them to the cancelled session. 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 from *No Action Taken* to *Participated*. In the *Comments* box write "Researcher cancelled after deadline."

Participant Cancellation: If a participant emails to cancel before the cancellation deadline of your study (the default is set to 24 hours), 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."

Consent Forms & Debriefing Sheets

Unless a Waver 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 to take home.

The debriefing sheet is key in making the Course Credit Participant Pool an educational experience for students. Therefore, researchers must provide a written debriefing sheet to each participant. It should include:

- An explanation of research goals and methods written in plain English.
- Suggestions for further reading (2-3 references).
- Contact information for a faculty 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 or is multi-session, 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 filled out and returned to the Participant Pool Coordinator for the participant to receive their partial credit.

General Information about Study Sessions

Participants can only sign up for Course Credit Pool studies using the online SONA system. Researchers may not sign participants up manually.

Researchers must be on time. Participants are told to wait 15 minutes past the scheduled start time. At 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 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 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.

Special Types of Studies

Certain types of studies differ from the traditional single-session laboratory study. Any special requirements or changes from the typical study are described in detail below.

1. **Online Studies**: Participants sign up on SONA and then complete the study via a link posted on SONA. Participants must complete the entire study in one sitting. The study cannot be started, stopped and finished later. If the study is not completed at the time it is started, an *Unexcused No-Show* should be recorded. This information should be included at the beginning of the study or as part of the description of prerequisites. 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.

2. **Multi-Session Studies**: Participants in multi-session studies must attend at the scheduled times or cancel according to the standard cancellation procedures. If participants cancel a part of a multi-part study, the subsequent parts (but not preceding parts) will also be cancelled. Such participants will need to ask the Participant Pool Coordinator to manually sign them up for the other parts again, if they would like to participate in it at a later date.

   If a participant fails to attend the first session, it is the responsibility of the researcher to contact them and have participants cancel subsequent sessions on their own or mark the remaining sessions as *Excused No-Show* and note in the comment, "Participant did not attend Session 1." If you mark *Unexcused No-Show* on all sessions after a participant has missed only the first session, it will lock their account (which will not be fair to participant as they have technically missed only 1 study).

   If a participant attends the first session but misses the subsequent session(s), they may receive prorated credit for partial completion of a multi-session study. The researcher must provide a Course Credit Early Withdrawal Form (available on the department website), which must be filled out and returned to the Participant Pool Coordinator for the participant to receive their partial credit.