

## Instructions for Conducting Research using the Psychology Course Credit Subject Pool

Below are instructions about conducting research using the Psychology Department's Course Credit Subject Pool. Read the information carefully. If you have questions, consult the FAQ or contact the Subject Pool Coordinator. All studies must be approved first by the campus Institutional Review Board (IRB). Studies in the Course Credit Subject Pool must also be approved by the Psychology Human Subjects Committee (HSC). Note that there is a different instruction file for the Psychology Paid Subject Pool.

### Requesting Allocation of Subject Hours

To use the Course Credit Subject Pool, you must request to have subject hours allocated to you. To request an allocation of hours, you must fill out the Subject Hour Allocation request form (Link on the department website) three days before a semester starts.

Faculty, post-docs, graduate students, and honors undergraduates in the Psychology Department are eligible to request Subject Hours. There are three different types of hours that may be requested, as described below

For participants, one subject hour equals one credit. Because we factor in the commute time for participants, below is the translation between subject hour and length of study:

½ subject hour = 25 mins	2 subject hours = 110 mins
1 subject hour = 50 mins	2.5 subject hours = 140 mins
1.5 subject hours = 80 mins	3 subject hours = 170 mins

1. **Priority Hours:** Priority hours are guaranteed; 100% of the hours requested will be received. Active graduate students 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:

- Priority hours returned before the subject pool opens will not incur any penalty.

- Unused priority hours returned within 3 weeks after the subject pool opens will incur a 25% penalty.
- Unused priority hours returned within 6 weeks after the subject pool opens will incur a 50% penalty.
- Any priority hours that have not been used before the beginning of the free-for-all period will be automatically returned with a 75% penalty.

Note that priority hours that are posted but never filled by participants can be returned without penalty, but the researcher need to point it out in the email communication to the Subject Pool coordinator regarding returning hours.

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. Returned hours will be redistributed immediately after each return date, and the subject pool coordinator will notify faculty via email of any updates to their subject 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.

*Requesting a Study Number in the Course Credit Subject Pool system*

Before you can run a study, you must request a study number by filling out the Study Activation Form for Course Credit Subject Pool (Link available on the department website; notice that there is a different form for requesting study numbers for the Course Credit and Paid Subject Pools). Submit the completed form and required documentation online. There are different types of study requests depending on whether the study is already in the Course Credit Subject Pool system or the Paid Subject Pool system.

**1. Studies run in previous semesters in the Course Credit Subject Pool:** These are studies that have a pre-existing SONA study number in the Course Credit Subject Pool system which only needs to be reactivated and have subject hours allocated to it. If these studies have had only minor IRB revisions or renewals since they were last approved by the Psychology HSC, they do not have to be re-approved by the HSC. Fill out the form to request activation of an existing study number and attach the most recent IRB approval letter. Shortly after receiving your request, the Subject Pool Coordinator will re-activate your researcher account (if necessary), reactivate the study number, add subject hours to it, and email you. You will then be able to run your study.

**2. New studies with previous HSC approval:** These are new studies that are part of a project that has already been approved for the Course Credit Subject Pool by the HSC. If these studies have had only minor IRB revisions or renewals since they were last approved by the Psychology HSC, they do not have to be re-approved by the HSC. Fill out the form to request a new study number and attach the most recent IRB approval letter. Shortly after receiving your request, the Subject Pool Coordinator will re-activate your researcher account (if necessary), create a new study number, add subject hours to it, and email you. You will then be able to run your study.

**3. New studies that have never been in the Course Credit Subject Pool:** These are studies that have never been set up in the Course Credit Subject Pool before. The protocol has been approved by the IRB but has not yet been reviewed by the HSC. Fill out the form requesting a study in the Course Credit Subject Pool and attach (1) most recent IRB approval notice, (2) Full completed IRB-1 form, including amendments if there have been any, (3) Consent Forms, and (4) Debriefing sheets. 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. You will receive an email confirming that your request has been sent to the HSC. Within 72 hours, you should receive a second email updating you on the status of the review. If the study is approved, a new study number will be created, researcher accounts will be created/re-activated, subject hours will be added to the study, and you will be emailed that you can set up and run your study. If changes are required before the study can be approved, revisions will be sent back to the HSC member.

### Setting up a study in the Course Credit Subject Pool system

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

1. Go to the Course Credit Subject Pool website and log in to your researcher account.
2. In the center of the screen, click *My Studies*. Your study number should be in the *Active Studies* box.
3. Click on the 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 (outside of the pretest), researcher access, course restrictions, 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 Subject Pools. That means you cannot set up restrictions for a study in one system that depend on studies in the other system.
5. To set up requirements using the pretest, click on *View/Modify Restrictions* in the center of the screen. An age restriction has automatically been included in your study's prescreen restrictions. This is so that underage participants do not participate. **Do not remove this 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 (Psychology or Beckman Institute) and the room number. Click *Add this timeslot*. This automatically deducts from the available hours. Repeat this process for every session.

7. You must update a participant's credit status within 48 hours of the session. 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. In the *Comments* box, include any details about the type of No-Show situation. See the Awarding Credit, No-Show, and Cancellation sections below for more details.

### *Awarding Credit*

You must record credit within 48 hours of the study. Online studies must record credit within 48 hours of the participation deadline. Use the *Comments* box for information about a participant's absence or conduct. Participants may receive pro-rated credit for partial completion of a multi-session or multi-hour study. To get pro-rated credit, participants must fill out a Voluntary Withdrawal Form (available on the department website) and return it to the Subject 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 Subject Pool Coordinator explaining the situation and provide the following: participant's name, 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* you must email the Subject Pool Coordinator, since such changes can affect the participant's account. If their account is locked because they have had two unexcused *No-Shows* and you change a *No-Show* to *Participated*, their account will not be unlocked automatically. Only the Subject Pool Coordinator can unlock the 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").

1. A participant who is using a cell phone, iPod, being disruptive, or purposely providing inaccurate/inappropriate responses can be asked to leave and not given credit.
2. A student who is not comfortable with a study can withdraw at any time. If a student withdraws before completing a 1-hr study, no credit will be given. See 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 participants account. There are two types of No-Shows: Excused and Unexcused.

1. **Excused No-Shows:** Includes situations in which the researcher cancels a session more than 24 hours in advance, if a participant chooses to or is asked to leave, or if a participant has a valid and documented reason for missing a study or arriving late to a study.
2. **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").

### Canceling Studies

Whenever a researcher cancels a study session, they must email the participant(s) and the Subject Pool Coordinator. Include a list of the participants' names in the email to the Subject Pool Coordinator.

**1. If cancelling more than 24 hours before the study:** Send emails to the participant(s) and Subject 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."

**2. Less than 24 hours before the study:** Send emails to the participant(s) and Subject Pool Coordinator alerting them to the cancelled session. Since it is less than 24 hours in advance, students must receive credit for the study.

**3. Participant Cancellation:** If a participant emails to cancel before the cancelation deadline of your study, tell them it is their responsibility to cancel their time slot in SONA, under *My Schedule/Credits*. If it is after the cancelation deadline of your study, then it is too late for them to cancel in SONA. On the SONA *Credits* page, mark them as an *Unexcused No Show* and in the *Comments* box write "Participant emailed too late to cancel."

### Consent Forms

Prior to the start of the study, participants must read and sign the consent form for the study that they are about to participate in. Participants should also be given a blank copy of the consent form to take home with them.

### Debriefing Sheets

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

1. An explanation of research goals and methods written in plain English.
2. Suggestions for further reading (2-3 references).

3. Contact information (name/email/phone) for a faculty/graduate student who can discuss the research.

### *Voluntary Withdrawal*

A student who is uncomfortable with a study can withdraw at any time. If it is a 1-hour study, they will not receive any credit for the session, and the session will be marked as excused no-show. If the study is longer than 1 hour or is multi-session, participants can receive pro-rated credit for partial completion. You must provide a Voluntary Withdrawal Form (available on the department website), which the student must fill out and return to the Subject Pool Coordinator to receive their partial credit.

### *General Information about Study Sessions*

Participants can only sign up for Course Credit Subject 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 attendance. 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.

Researchers should remind participants to turn off and put away all cell phones, pagers, iPods, or anything else that may be distracting. If these devices are used during the study, 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.

### *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:** On-line studies require the same sign-up procedure as other studies.

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 on-line studies no more than a couple of weeks ahead of time. This way, you will be able to record credit for those who didn't complete the study and you can add more timeslots if additional participants are needed. Credit for online studies must be recorded within 48 hours of the study's participation deadline.

2. **Multi-Session Studies:** Participants in multi-session studies must attend at the scheduled time or cancel according to the standard cancellation procedures. If a subject fails to attend the first session, it is the responsibility of the researcher to contact the subject and have them cancel subsequent sessions (if they have not already done so). However, participants may receive prorated credit for partial completion of a multi-session study. The researcher must provide a Voluntary Withdrawal Form, which the participant must fill out and return to the Subject Pool Coordinator to receive partial credit.