INSTRUCTIONS for RESEARCHERS

I) INTRODUCTION

The Brian Lamb School of Communication is now using the **Research Participation System** to schedule and credit students' participation in communication research studies. <u>As a researcher</u>, you can set up your studies in the system, schedule the sessions (timeslots and location) when students may participate in your study, and grant or revoke credit after students comple<u>te your stud</u>y. As a student, the **Research Participation System** provides an easy online method for them to sign up for research studies, to keep track of the studies they have completed, and to view how many credits they have earned for each study.

II) OVERVIEW: RESEARCH PARTICIPATION SYSTEM

- You can log in as a researcher.
- You can create one or more lab studies (or online studies).
- You can create any number of timeslots (with locations) for each of your lab studies (these are the times when you plan to run the study and the location of the specific study).
- Participants sign up for the timeslots by viewing a list of available studies and available timeslots.
    o   The list of studies is randomly ordered each time a student views the list.
- After a student participates in your study, you give them credit for participating (or penalize them if they fail to show up for the study without prior notification), all online.
- Review and modify your study's schedule, see who has signed up, get a summary of who has participated in your study, etc.
- The system also sends you and the participants emails about when their appointments are and about the credit they have received.
- At the end of the semester, the administrator (Tillman) will automatically generate and email a credit report to the respective instructor for each course.

III) GETTING STARTED

The system works well with Internet Explorer version 4 and above, Netscape version 4 and above, and Firefox version 1.0 and above. No functionality will be lost, however by using an older web browser. This documentation assumes a basic knowledge of how to use the web.

Logging In

- Your administrator (Tillman Russell) will provide you with a username (e.g., russell6) and a password to login to the **Research Participation System** (http://purdue-comm.sona-systems.com/). *(When you go to login page you will see a link to request an account on the bottom left hand corner of the page. This link is only for participants; do not use this link to request an account).*
- Once you login, you will need to acknowledge Purdue's IRB policy (this occurs every 6 months).
- After acknowledging the policy, you will be directed to the **Main Menu**.
- Your login session will expire after 60 minutes. If this happens, simply log in again.

Retrieving a Lost Password

- If you have forgotten or do not have your password, you can also click a link on the bottom left of the login page. Your password will then be emailed to you.

Logging Out

- When you are done using the system, choose Logout from the top toolbar to log out.

Changing Your Password and Other Information

- To change your password or other information about yourself, choose **My Profile** from the top toolbar on the **Main Menu**. To change your password, type your new password (twice, for confirmation) in the provided boxes.
- It is recommended you provide your phone number and office location –IRB requires that this information be made available to research participants. If you are a researcher, this information will be displayed to participants when they view information about a study.
- You may also choose to receive a daily reminder (by email) with information about all of your study sessions scheduled for the following day (**highly recommended**).

Email Address Options

- There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that a participant has signed up or cancelled their sign-up for your studies, but there are a few other cases where it may be used as well. The email address is also displayed to the participant when they view information about the study, in case they need to contact you with questions.
- You have two choices for your email address. When you update your personal information, you will see a box where you may provide an alternate email address. If you provide such an address (e.g., Hotmail account), this is the address where any notifications will be sent, and this is also the address that will be displayed to other users (including participants in your studies).
- If you do not supply an alternate email address, the system will derive your email address from your username, for example: jones@purdue.edu.

IV) WORKING WITH STUDIES

> Most of your time on the system will be spent using the study-related features of the system. Be sure to read this section closely, in its entirety, as there are special features and situations you should be aware of.

Adding a Study

- You can set up your study in the system before you have received IRB approval to run the study, however, the study will not be visible to students.
- To have your study made visible to students, you will need to give a copy of your IRB approval to the administrator (Tillman).
- To add a study, choose the **Add New Study** option from the top toolbar. Pick from the following 4 types of studies (most common option: Standard Study):
    o *Standard Study*:
        A study that is scheduled to take place at a specific place (i.e. not online), and where there is only one part to the study that participants will participate in
    o *Two-Part Standard Study* (See Appendix for more details):
        A study that is scheduled to take place in two parts (i.e., a specified number of days apart), and a participant must sign up for both parts of the study at one time.
    o *Online Survey Study*:
        An online survey study set up in the system, and administered by the system
    o *Online External Study*:
        An online study that is set up outside the system (i.e. on another website).
- Please choose your study option carefully-you cannot change this later.
- After you choose the study type you will see a form asking for more information. You will need to fill out a number of fields, which are explained in the following table.

o Some of the fields listed below may not appear, depending on the type of study you selected. All fields must be filled out unless otherwise noted.

Field	Explanation
Study Name	A short name, which identifies the study throughout the system. The system is configured so studies show in a <u>random order to participants</u>. Study names must be unique, and you will be prevented from adding a study if there is already another study in the system with the same name.
Brief Abstract	This is a short one or two line description of the study, which is displayed to participants when they view the entire list of studies, so you may want to list the most pertinent details here. 'For-pay' studies usually include the compensation information here.
Long Description	This can be a longer description (1-2 paragraphs) about the study, which is displayed when a participant clicks on the study to get more information before they sign up.
Eligibility Requirements	If there are any restrictions on who may participate (for instance, only those who are left-handed), list them here. Otherwise, leave the field as-is. Any restrictions will be displayed when participants view a list of all available studies. **Note the system <u>does not enforce</u> these restrictions, but it is expected a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit**. In most cases, you will leave this field as-is.
Pre-Requisites	If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies. You can also specify that participants must have participated in *all* of the studies you specify, or *at least one* of the studies specified. The system will handle enforcement of the pre-requisites in a strict fashion: the participant must have *received credit* for the pre-requisite studies.
Disqualifiers	If there are any studies a participant must *not* have participated in, select them here. You may select multiple studies. The system will handle enforcements of the restriction, during the sign-up process.
Duration	The amount of time, in minutes, that each study session will take.
Preparation	Enter any advanced preparation a participant must do here (e.g. "do not eat 2 hours before session"). If no preparation requirements, leave as-is.
Sign-Up Password	If you would like to have a sign-up password for a specific study, enter it here. Participants must know the password to sign up. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the password to the desired participants. If you do not need a sign-up password, leave this field blank.
Is this a web-based study?	If an online study, choose the type of online study it is. If you have set up the study on another website, note that the study is administered outside the system. To set up an online study to be administered by the system, select the appropriate option.
Study URL	A URL is only required for web-based studies administered outside the system. Further detail in Online Studies section appendix.

Credits/Pay	Enter the **percent credit** (or pay) that students can earn for participating in the study: studies up to **30 minutes** long are worth .5 percent; studies **30-60 minute** long are worth 1 percent; studies **60-90 minute** long are worth 1.5% percent; studies over **90 minutes** long are worth 2%. A value of 0 is acceptable, e.g., in cases where the study is part of a set of studies, where only the final study is credit-earning. See Appendix for more information on how to fill out this field in the case of **for-pay studies**. After a study has sign-ups, you may not change the study's credit value.
Researcher(s)	Select the researcher for this study. Most likely, this is you, and your name will automatically be selected. If you are a researcher, then you may not change who the researcher is. However, you can specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The pulldown box lists only users who are researchers.
IRB Approval Code	**SKIP**: we do not need to use this component.
Visible to Participants?	The system is configured such that only the administrator can make a study visible to participants. You should contact the administrator when you are ready to make the study visible to participants. However, as a researcher, you can always make a visible study invisible to participants.
Active Study?	• Select Yes if this study is in progress. You must select Yes and the study must be Visible if you want the study to show up to participants so they can sign up for it. • If a study is Not Visible but *is* Active, then it does not show up (to participants) on the listing of studies, but it is accessible through other links if the participant has participated in it before and they are viewing their participation history. It will also show up on the study information page (for an individual study) when it is listed as a pre-requisite or disqualifier for a study. • The reason to select No is if the study is being kept for historical purposes, but should not show up to participants on the list of studies they may sign up for. Often, this is done so the system can enforce pre-requisites, where the inactive study is a pre-requisite for an active study.
Email to researcher when participant signs up or cancels?	If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up, or cancels their sign-up, for this study (**highly recommended**).
Researchers at Timeslot-Level	If set to Yes, it will be possible (but not required) to assign a specific researcher (from the list of researchers for the study) to a timeslot. If set to No, then it is assumed that all researchers (assigned to the study) are responsible for all timeslots. See Timeslots Linked to a Specific Researcher for more information.
Automatic Credit Granting	If set to Yes, timeslots that are more than a specified number of hours old and still in the Awaiting Action state will be changed to a credit grant. The check for timeslots in this situation is made only once per day. If an automatic credit grant is done, you may still change it later if necessary.
Private Comments	This is optional, you may enter any comments or notes about the study, which are only visible to the researchers for this study.
Participant Sign-Up Deadline	Enter the deadline before the study is to occur that the participant may sign up, in whole hours.

- Once you fill out the information, save it and the system will immediately update the information.
  - Your next step is likely to add timeslots (sessions). See Working with Timeslots section of this documentation for more information.
- If you need to update a study, see the following Updating a Study section.

Updating a Study

- To update any of your studies choose **My Studies** from the top toolbar, and you will see a list of your studies.
  - Click on desired study, and choose **Change Study Information** link.
- You will see a form similar to the one you used to add the study. A few fields may no longer be changeable depending on the status of the study (e.g., if participants have already signed up for it).
  - See the Adding a study section of this documentation for an explanation of the fields.
  - The changes you make will take effect immediately after they are saved.
- If you need to change the credit value for a study, and there is no option to do so, this means the study already has at least one participant signed up for it. You cannot change the credit value when a study is in this situation because there is no easy way to handle past credits for the same study (e.g. should old credit grants for the same study be adjusted to reflect the new credit value, or kept the same).

Deleting a study

- You may delete a study **only** if participants have not signed up for it (you may not delete a study that has sign-ups).
  - If you need to delete a study which already has sign-ups, you should make it Inactive instead, which will make it invisible to participants.
  - If you want to delete a study that has sign-ups, please contact the administrator. The administrator can delete a study with sign-ups, but **only** if the sign-ups are all without credit values (usually occurs when study participation history from a previous semester was retained).
- To delete a study, choose **My Studies** from top toolbar, click on the desired study, then choose the **Delete Study** option. You will see a confirmation page. Choose Yes (at the bottom of the page) to delete the study.
- Once a study is deleted, it cannot be restored, so use this feature carefully. If you delete an online survey study, the **survey will also be deleted**.

Viewing Your Studies

- To view your studies (and not the studies of others), choose **My Studies** option on the top toolbar. The system will list all your studies in alphabetical order by study name, grouped by studies that are active, followed by your inactive studies.

Viewing Other Studies

- To view all studies that are visible to participants, choose the **All Studies** option from top toolbar. You will see a list of all Active studies. These studies will show up to participants on the list of available studies. The next group of studies (if there are any) are Inactive studies. These will *not* show up on the list of available studies (to participants), but participants can access information about these studies on links from the page with their progress (if they participated in the study) or if another study has the Inactive study listed as a pre-requisite or disqualifier.

V) WORKING WITH TIMESLOTS

Timeslots are the available times when a participant may participate in the study. Timeslots allow you to specify a date, time, location, maximum number of participants, and researcher for a session.

Creating Timeslots

- To add a timeslot for a study, first view your studies by choosing the **My Studies** option on the top toolbar. Click on the desired study, and click the **Timeslots** choice under the **View column**. You will see a list of any existing timeslots, and the **Add A Timeslot** option at the bottom of the page. Click on **Add A Timeslot**.
- The following table lists the information you may enter about a timeslot. All fields are required.

Field	Explanation
Date	The date for the timeslot.
Start Time	The start time for the timeslot, use the same format as the time you see presented. Note in particular how "a.m." and "p.m." are handled.
End Time	The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.
# of Participants	The number of participants for this timeslot. This limit is *not* visible to participants. They will only see whether the timeslot is full or not.
Location	The location where the study will take place, for this timeslot. It will be automatically filled with the location of the previous timeslot, when available, to ease in data entry. If it is a different location, you can simply type in the location in the text field.
Researcher	The researcher assigned to this specific timeslot. The list will contain a list of all researchers for the study. Choose ALL if all researchers (for the study) should be assigned to this timeslot. See Timeslots Linked to Specific Researchers for more information.

- To ease data entry, the system will automatically fill in the date, time, and location based on the ending time of the last timeslot for this study.
  - A calendar is provided next to the form, click on a date to transfer it to the form.
- If you add a timeslot such that there is another timeslot (for any study) that occurs in the same time, at the same location, you will receive a warning (but the addition will be allowed).
- If you add a timeslot that will take place outside of normal hours (for example, at 1:00 am), the system will provide a warning but it will allow it to be scheduled.

Creating Multiple Timeslots

- To add multiple timeslots at once, choose the **Add Multiple Timeslots** link.
  - You can add a specified number of timeslots, or copy the timeslots from another week to a specified week. If you copy, the system will copy the time, location, and # of participants for a specified week to a desired week, for each day of that week (starting with Monday).
- If you create a specified number of timeslots, you can choose the number of timeslots to add, the start time and date, and the amount of time between each timeslot (allows for breaks).
  - You can also specify that timeslots that would occur outside normal business hours be shifted to the next business day.
- On the subsequent page, you may change any of the information to deal with special cases.
- Timeslots that you attempt to add that have errors will not be added.
- If you do not want to add a specific listed timeslot, choose No in **Add This Timeslot** column.

Modifying and Deleting Timeslots

- To modify or delete a timeslot for a study, you must first choose the study that you would like to deal with.
- First, choose the **My Studies** link from the top toolbar.
- Click the **Timeslots** choice under the **View column** for the desired study.
  - o You will see a list of all recent timeslots.
  - o Recent timeslots in the past with no participants signed up will not be displayed.
  - o To work with timeslots more than a few days old and to see all timeslots, you will see a link to view all timeslots for the study.
- Select the timeslot you would like to deal with, and click the Modify button.
  - o If the timeslot has no participants signed up for it, you will see a Delete button **(You may not delete a timeslot that has participants signed up for it)**.
  - o If you would like to delete the timeslot, click the Delete button, and you will see a confirmation page. Choose Delete again to delete the timeslot.
- If you would like to modify the timeslot, modify the desired information and click the Update button just below the timeslot information.
  - o *It should be noted that participants will not be notified (by email) of any changes you make to the timeslot, so you should contact them if information needs to be passed on to them (a link is provided on the same page to do so).*
  - o If you change the date or time of the timeslot, you will be warned that this was changed in case the change was unintended.
  - o If you change the maximum number of participants to a lower number than it was before, the system will *not* cancel the sign-ups for any participants who are over the new limit of participants.
  - o Generally, researchers only update timeslots with sign-ups to update the location, if it was not available when the timeslot was originally created.

Deleting Multiple Timeslots

- To delete multiple timeslots at once, select the desired study and click the **Timeslots** choice under the View column.
- At the bottom of the Timeslots page, you will see a **Delete Multiple Ti**meslots option.
  - o The option may not appear in certain cases where such an option is not available because of a lack of available timeslots to delete.
- After clicking the **Delete Multiple Timeslots** option, you will see a list of timeslots eligible for deletion.
- Choose the timeslots you would like to delete, and choose **Delete Selected Timeslots**.

Timeslots Linked to Specific Researchers

- You can link timeslots to a specific researcher. This is done primarily for organization purposes, and has no effect on who can view and modify the study, or any timeslots for that study.
  - o This feature is useful when there are a number of researchers running a study, and researchers are responsible for running specific timeslots.
  - o To use this feature, the system must be configured to allow multiple researchers per study. Then, the study itself must be configured to allow researchers to be linked to specific timeslots. Finally, the study must have more than one researcher connected to it.
- If a timeslot has a specific researchers linked to it, only that researcher will be listed as the contact point when a participant receives emails related to their participation in that timeslot.

- Only the researcher connected to that timeslot receives related notification emails, such as participant cancellation notification, and reminder emails.
- If a researcher is removed from a study, any timeslots that were linked to them for that study will be changed so all researchers (for the study) are now responsible for those timeslots.

Manually Signing up Participants into Timeslots

- You can also manually sign up participants for your study.
  - o There are a number of situations where this is desirable. If the participant happens to show up for a timeslot they were not signed up for, and you elect to let them participate, you can sign them up on the spot for the timeslot. The participant in many cases cannot sign up on their own in this situation, because the sign-up deadline has passed. You may also sign up a participant for a study that has already occurred, if necessary.
- To sign up a participant for a timeslot, you must first find the desired study and timeslot.
  - o To view your studies, choose **My Studies** option from the top toolbar.
  - o Click the **Timeslots** choice under the **View column** for the desired study, then select the timeslot you would like to deal with, and click the **Modify** button.
  - o At the bottom of the page, you will see a **Manual Sign-Up** option.
  - o Type in the participant's User ID (you will have to ask them for this) and click Sign Up.
  - o You may also have the choice to enter their last name.
  - o After submitting the form, you will see a confirmation page that also lists any restrictions on the study.
  - o Choose Sign Up to complete the sign-up.

Manually Canceling Participants from Timeslots

- You can also cancel a participant's sign-up.
  - o You may only cancel sign-ups that are in a **No Action Taken** state.
- To cancel a sign-up, find the desired timeslot and participant, and click Cancel next to their name.
  - o The participant will be emailed an email about the cancellation, along with a confirmation code, and their sign-up will be immediately cancelled.

Viewing the Participant List and Timeslots

- To view the list of participants who have signed up for your study, first choose the **My Studies** option from the top toolbar.
- Click the **Timeslots** choice under the View column for the desired study,
- Select the timeslot you want to see, and click the Modify button.
- The list of participants, along with their email addresses, will be listed.

VI) PARTICIPANT CREDIT ALLOCATION

At the completion of a session, you should promptly deal with the participants, in the system, to ensure proper credit grants. The primary reason for the prompt handling of this situation is to ensure that participants can check their credit status in a timely fashion.

Granting or Revoking Credit

- To grant or revoke credit for a timeslot, first choose **My Studies** option from top toolbar.
- Click the **Timeslots** choice under the View column for the desired study, and then select the timeslot you would like to see, and click the **Modify** button.
- You will see a list of participants.
  - o If participant properly participated in the study, click the **Credit Granted** button next to their name.

- o If the participant did not appear for their scheduled timeslot and did not cancel the session up to 2 hours before the study, choose the Participant **No-Show** button.
  - ▪ If you choose the **No-Show** button, the student will be notified by the administrator that he/she will not be allowed to sign up for any studies for 30 days.
  - ▪ Choose the **No-Action** button if the participant had an acceptable reason for failing to attend the study and simply manually cancel their appointment by clicking cancel next to their name.
    - • However, do not just leave any sign-up for a timeslot that has occurred in the "No Action Taken" stage. This is a credit "limbo" and the system will warn you upon your next login about the offending timeslot that has not been dealt with properly. Note to cancel a participant's sign-up, the sign-up must be in No Action Taken state.
  - o If desired, enter any comments about the session in the Comments section (generally, this is used to indicate the reason for denying credit). Participants will see anything you enter in the Comments section for their sign-up, and these comments will be included in the email sent to participants when a credit grant/revocation occurs.
- Click on the Update Sign-Ups button at the bottom of the list of sign-ups to save your changes.
- Credit will be granted or a penalty assessed as necessary and the participant(s) will receive an email notification.
- The system will automatically grant credit to participants for timeslots that are more than **48 hours** old, and where the researcher has taken no action. You can always change the automatic credit grant later if it was in error. The automatic credit grant takes place once a day, usually overnight.

Viewing Uncredited Timeslots

- When you login to the system, you will receive a warning if no credit action has been taken on timeslots more than 2 days old.
  - o You may view a list of all timeslots that have not been dealt with by choosing the **View Uncredited Timeslots** option from the **My Studies** page.
- If you would like to do a simple credit grant (standard credit grant, no comments), you may do so directly from this page.
  - o Select the desired sign-ups/timeslots, and then choose Grant Credits. The action may take a short time to complete, so please be patient while the credit grants are processed.
- If you need to do something more complex, like mark a no-show, add comments, or do a special credit grant, you can easily click on the timeslot's date and time, and go directly to that timeslot.

VII) CONTACTING PARTICIPANTS

In some case you may find it useful to contact participants for a study. This feature may be particularly useful if you are sending debriefing information when a study has concluded.

Emailing Participants

- If you want contact a participant in a particular timeslot, you may click on the Contact link that will appear next to each participant's name to contact an individual participant.
- To email a group of participants for a particular timeslot, click the Contact All Participants choice at the bottom of the Modify Timeslot page for that timeslot.
  - o In both cases, you will be taken to a page where you can fill out a message that the system will send to the selected participants.
  - o The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to. You may remove this information if desired. You may also choose to receive a copy of the email that you send.

- o **Remember that participants automatically receive a reminder about upcoming studies the day before they are scheduled to participate**.
- To contact all participants for a study, across all timeslots, go to **My Studies**, click **Study Information** under the View column for the desired study, and choose the Contact Participants option.
  - o You will then be able to select which group of participants to send to, and a message to send.
  - o Messages will be sent in groups of 300 (or less, depending on how your system is configured) to avoid overloading email servers.

FREQUENTLY ASKED QUESTIONS

Why do I have to acknowledge the Human Subjects Policy?
- Certain regulations and research guidelines either require or recommend it. You only need to do it once every 6 months, so it should not be too intrusive. You will not be asked to acknowledge the policy if this feature is disabled by your administrator.

What is the best way to setup a for-pay study?
- You may set it up as a pay study only (indicate a compensation amount), or a credit study if it is for both pay and credits. See the Studies for Pay section of this documentation for more information.

I want a participant to participate in an upcoming session, but the system says it is too late for them to sign up. What do I do?
- You can perform a manual sign-up. See the Manual Sign-Up section of this documentation.

Where are email notifications to me sent?
- Email notifications (e.g. sign-up notices) are sent to either an address derived from your user ID or your alternate email address. See the Email Address Options section of this documentation for more information.

I have finished running my study. What should I do?
- So it does not clutter the list of studies for participants, you should make the study **Inactive**. See the Updating a Study section of this documentation for more information.

Who has access to my studies?
- All users can see the information about your studies and the available timeslots. Administrators and the creator of the study are the only people who can see who has signed up, and modify the study.

How do I set up an online study?
- See the separate instructions for online surveys under the online survey instruction link.

APPENDIX

Studies for Pay

- You may have a situation where participants are compensated for their participation in the study. They may or may not also receive credit for the study. If the study is not for credit, you may set it up as a pay-only study and specify the compensation amount. If participants are compensated *and* they receive credit, you should set it up as a credit study and indicate additional compensation in the study's information section.

- Regardless of the type of study, after a participant participates in a study (including studies that are for pay only), you should still go into the system and indicate their participation by granting the "credit" (or revoking if they did not show). This allows the system to properly enforce certain restrictions on the participant and their studies.

Two-Part Studies

- You may create a two-part study in the system. Often, these are studies involving memory research, where the participant must return a specified number of days after the first session. When creating a study, you may specify the day range for the second part of the study (e.g. 7 to 10 days after the first part). Participants are required to sign up for both sessions at the same time, to reduce the chance they will forget to sign up for the second part. Each part of a two-part study may have a different credit value and duration, but each part must be the same type – either both parts are for credit or both parts are for compensation.

- You may specify that the second part of the study must be scheduled to take place at the exact same time as the first part (on a different date), or at any time on the dates that are the specified number of days after the first part.

- You should ensure there are enough available timeslots for both parts of the study, or participants will be prevented from signing up for either part. Participants may cancel either part of their sign-up if necessary. If they cancel the first part, the second part is automatically cancelled as well. If they cancel only the second part and the first part has already occurred, and they would like to participate in the second part later, you will need to manually sign them up for the second part (if you are allowed to do so), or ask the administrator to handle this.

- If you grant a no-show for the first part of a two-part study, the second part of that participant's sign-up will *not* be cancelled automatically, but you will be reminded of the situation in case you would like to cancel the second part. The cancellation is not automatic as there are some situations where automatic cancellation is not desirable.