SONA PSYCHOLOGICAL RESEARCH SYSTEM USER GUIDE for
RESEARCHERS AND PRINCIPAL INVESTIGATORS

The UAB Department of Psychology uses the web-based SONA system to administer screening schedule research appointments and assign students credit for research participation. The following information is provided to help Researchers and Principal Investigators understand how to use the system.

I. General Information

A. Researchers Versus PIs

1. Researchers are individuals proximally responsible for conducting studies. PIs are their faculty supervisors.

2. If a faculty member is proximally responsible for conducting a study, then he or she will technically be both the research and the PI. However, within SONA, he or she should set up an account as a researcher (see account instructions below).

3. If the faculty member is distally responsible for a study or set of studies (e.g., supervising a student’s project), then he or she will be the PI only and should set up only a PI account.

4. As PI, a faculty member will be able to access information about all studies that he or she supervises.

B. Access to SONA

To directly access the SONA system, please use the following URL: https://uab.sona-systems.com. You also can access the system by going to the home page for the UAB psychology department and following relevant links.

C. Account Set-Up

1. Researchers and PIs must set up a user account on SONA in order to be able to use the system. To do so, e-mail an account request to Ed Cook at ecook@uab.edu.

2. Once researcher and PI accounts are established, they will remain active until they are actively terminated by the system administrator. Researcher and PI accounts are distinct from approved studies. A study’s approval will expire when its IRB approval expires. However, related researcher and PI accounts will not expire.

II. Using the System

A. Set Up a Researcher or PI Account

Send a note to Ed Cook at ecook@uab.edu. Please state which type of account you need.

B. Set-up a Study

1. Login to SONA (https://uab.sona-systems.com) using your research user account.

2. Select the “Add New Study” option from the top toolbar and select study type.

3. Insert basic information (required):
a. **Study name** (Assigned subject pool number)

b. **Eligibility Requirements** (Indicate any restrictions.)

c. **Duration** (The maximum amount of time that your study will take to complete.)

d. **Credit Hours/Pay** (Indicate type and amount.)

e. **Researcher** (Select your name from the researcher list; can select multiple researchers.)

f. **PI** (Faculty Supervisor)

g. **IRB Protocol Number and Expiration Date**

h. **Approved?** (Note that your study will not be visible to participants until you complete a study request form and submit it to the Subject Pool Coordinator and you receive approval.)

i. **Active Study** (When you are ready to post timeslots, select your study and then select “change study information”. Scroll down to “Active Study?” section and select YES. This will make your approved study visible to participants.)

Note the following distinction: “Approved?” refers to the Subject Pool Coordinator’s approval of the study for use within the subject pool. By contrast, “Active study?” refers to Researchers (Experimenters) allowing participants to see the study information and timeslots.

C. **Create a Screen Shot**

1. You might wish to keep a digital (screen shot) file in your records for a quick view of study details. To do so, after you have added your study you will see a screen with your study information. If all information is correct, press the “Print Screen” key on your keyboard. Open a word processing document, and paste the screen shot into the document. You can adjust the size of the print screen in your document. Save and print a copy.

2. As an alternative to the above, you also could simply log back into the system to review study details.

D. **Add Timeslots for a Study**

1. Select “My Studies” from the top toolbar.

2. Click on the study and then choose the Timeslots option.

3. Click on the ADD A TIMESLOT option at the bottom of the page. You can also add MULTIPLE TIMESLOTS for consecutive times in one day.

E. **Grant (Assign) Credit Hours and Report “No Shows”**

1. After a participant has completed your study, select “My Studies” from the top toolbar and select the appropriate study.
2. Next to the participant’s name, either grant the appropriate number of hours for participation or indicate that the participant did not show up (no-show).

III. Policies

D. Last Day of Participation

The SONA system will stop assigning research credits at the end of the last day of regular classes. Students will not be allowed to participate in research during or after the finals period in a given semester.

F. Negative Credit Policy – modified for 2011-2012

For many years the Psychology Department had a policy that students who missed appointments for research participation received a “negative” research credit that ultimately increased their research participation requirement in PY101. However, in 2010 the federal Office for Human Research Protection (OHRP) issued an opinion that disallowed such penalties.

On the basis of this ruling, our department’s SONA research participation system no longer permits negative credits to be awarded when students fail to appear for a research participation appointment.

No-shows are clearly an annoyance for researchers, and fellow students are also inconvenienced when time slots they might have needed or preferred were taken by students who ultimately failed to appear at the scheduled time. PY101 instructors are asked to emphasize this information with their students, and the SONA system does send reminder e-mails to participants. We are monitoring the no-show situation as a basis for deciding whether other steps need to be taken. To inform this process, researchers are encouraged to continue to indicate on SONA if a student does not show up for an appointment and has not given notice in advance.

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