Melbourne School of Psychological Sciences

Experiment Management System

Research Experience Program
Researcher Support Manual

www.unimelb.sona-systems.com

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Introduction

The on-line Research Experience Program is used for the scheduling and management of the Research Experience Program participants and the studies they participate in. As a researcher, you can set up your studies in the system, schedule times when students can participate and grant or revoke credit after the session. The system is accessed using any standard web browser. The website address is: https://unimelb.sona-systems.com

Accessing the on-line Research Experience Program

Prior to submitting your REP application you need to contact REP-psych@unimelb.edu.au for a username and password that can be used to access the system.

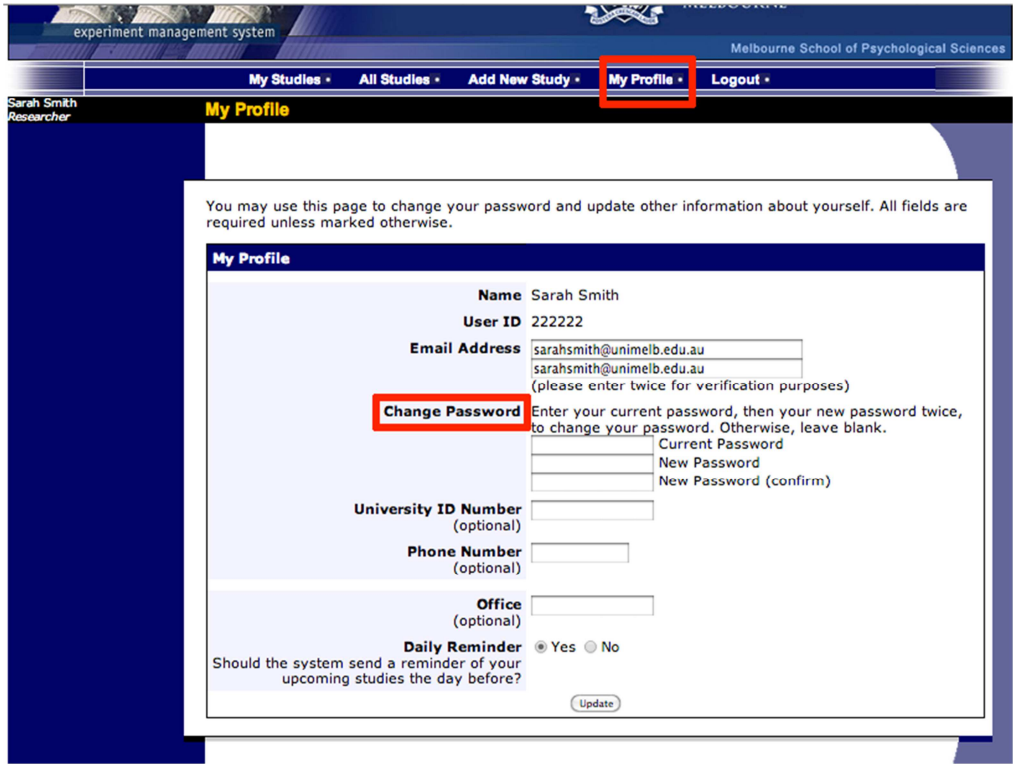
When you have received ethics approval for your study, you will need to upload your study details online and send your REP application form, ethics approval letter and a copy of the advertisement to REP-psych@unimelb.edu.au. The study information uploaded will be checked before being made available to students.

When you login for the first time, you will be asked to review the University's policy for Human Research and agree to its terms and conditions. Following this you will be taken to the main menu. When you are done using the system, click 'Logout' from the toolbar at the top of the screen. You will be automatically logged out after 20 minutes of inactivity.

Note: On the login page of the on-line REP system you will see a link that says 'Request an Account'. This link is **for students only**, not researchers.

Changing your password

If you would like to change your password, click on the 'My Profile' link on the top toolbar.
To change your password, enter your old password once and your new password twice.



Email address options

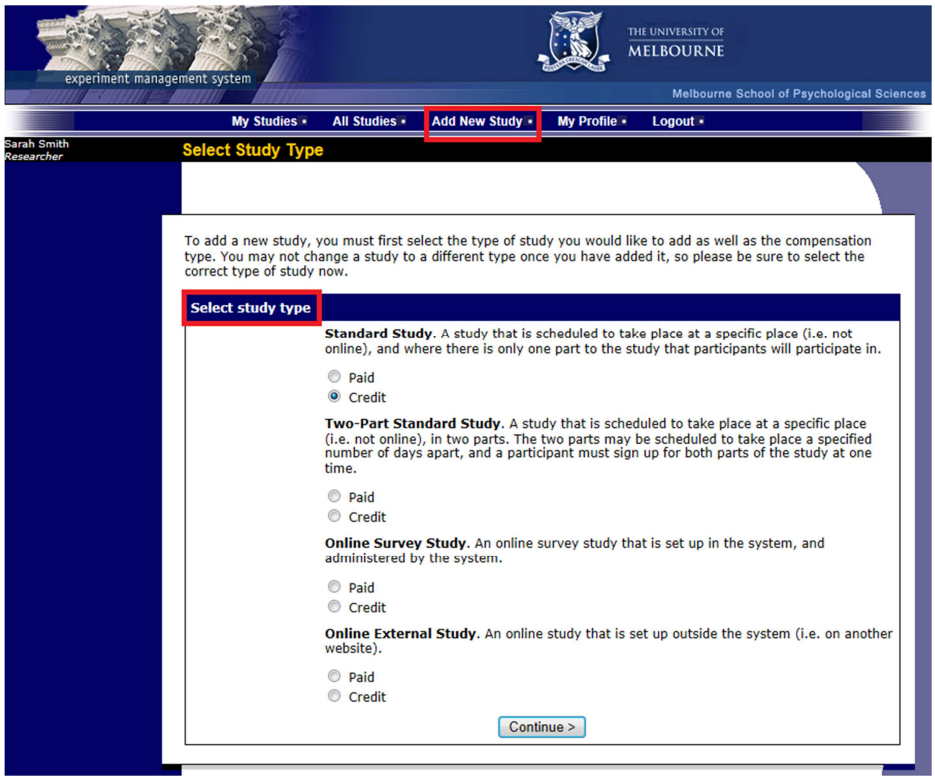
There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that a participant has signed up for cancelled their sign up for your studies. Your email address will also be displayed to participants when they view information about the study in case they have any questions.

The email address in your profile should **always** be your University email address and not a personal one. Because students will use this address to contact you with any questions, it is important that you check your University email account regularly.

Working with Studies

Adding a Study

To add a study, select the 'Add New Study' option from the top toolbar. Here you will need to pick from four possible types of studies. Please choose carefully as you are not able to change this later.



Note: whilst options exist to select paid compensation for study participation, on the on-line REP researchers must **always** select 'credit.'

Once you have selected your type of study, you will see a form asking for more information. You will need to fill out a number of fields, each of which is explained in the following table. Some fields are specific to online/two-part studies and have also been included in the table.

Field	**Description**
Study Name	Enter the name of the study as outlined in your ethics approval. This is how the study will be identified in the system. Study names must be unique and can be up to 100 characters. Study names **must** also have the type of study in them (i.e. **Q** or **NQ).**
Brief Abstract (optional)	This is a short one-two line description of the study. This will be viewable to participants when they view the list of all studies available. This is where the most pertinent details should therefore be listed. This can be up to 255 characters in length.
Detailed Description	This is a lengthy description about the study that is viewable to participants when they click on your study title from the list of all studies available. If you would like to add a paragraph break in this section, type **<p>**. This can be up to 15,000 characters in length.
Eligibility Requirements	You should list any restrictions on who can participate here (e.g. Females only; Left-handed people only etc). If you have no eligibility requirements, leave this field blank. **Note:** the system does not enforce these restrictions, but it is expected participants will only sign up for studies for which they are qualified, otherwise they will not receive their credit. This field may be up to 245 characters in length.

Duration	The amount of time, in minutes, it will take participants to complete the study. If you are setting up a two-part study, this applies only to the first part.
Credits	Enter the number of credits participants will receive for the study. Credits must be in increments of 0.5. If you are setting up a two-part study, this is the value for the **first** part of the study. After a study has sign-ups, you may not change the credit value of the study.
Preparation	Enter any advanced preparation a participant must do here (e.g. do not eat 2 hours before the start of the study).
Researcher(s)	Select the researcher for this study. Most likely this will be you and your name will be automatically selected. If there are other researchers assigned to your study, you can select their names also by holding the Ctrl key when you click. If you specify multiple researchers, each researcher has full control over the study.
Principal Investigator (PI)	Select the Principal Investigator for this study. In most cases this will be your Honours/Masters/Ph.D. supervisor. A PI must be selected and thus it may be your responsibility to ensure that the study's PI has an account created for them (see Accessing the EMS on page 3).
HREC Approval Code	You **must** enter your ethics approval number in this field.
Approved?	Researchers can only begin to fill out this form to post their study once it has already received ethics approval and approval to use the REP pool. You should therefore always select yes for this option.
Active study?	Select yes if you want the study to go live as soon as you post it.
Pre-Requisites	If there are studies that a participant must have completed before they participate in your study, you can select and enter those here. You can select multiple studies from the list by holding down the Ctrl key and clicking the desired studies. You can specify that participants must have participated in *all* studies you select or *at least one* of the studies specified. The system will handle enforcement of pre-requisites in a **strict** or **lenient** fashion as specified by you. - In strict enforcement mode, the participant must have already received credit for the prerequisite study - In lenient enforcement mode, the participant must only be scheduled to participate in the prerequisite study.
Disqualifiers	You can select studies here that participants must not have completed if they want to participate in your study. The system will prevent participants from signing up to any study in which they meet the disqualifying criteria.
Course Restrictions	If you only want students from semester 1 to participate in your study, select PSYC10003 as a course restriction. Likewise, if you only want students from semester 2 to participate, select PSCY10004. If it does not matter, select NONE.
Is this a web-based study?	If this is an online study, you need to select the kind of online study it is. If you have set the study up outside of the system (e.g. on Qualtrics, Survey Monkey etc), you should note the study is administered outside the system. You can also select to set up the online survey to be administered by the system.
Study URL	Enter the web address for your online study if the survey is hosted by an external survey site (e.g. Qualtrics, Survey Monkey).

Participant sign up deadline	Enter the deadline before the study is to occur that a participant must have signed up by in whole hours (e.g. 24, 8, 1 etc).
Participant cancellation deadline	Enter the deadline before the study is set to begin that participants may cancel their existing sign up, in whole hours. Generally, the cancellation deadline should be shorter than the sign up deadline so participants can easily cancel an accidental sign-up.
Should the researcher receive email notifications?	Select whether you would like to receive notifications for sign ups and cancellations, cancellations only or none. Emails are sent to **all** researchers assigned to the study, unless a specific researcher is assigned to the timeslot that the email notification is being sent about (see below).
Researchers at timeslot level	If set to yes, it is possible to assign a specific researcher (from the list of researchers approved for this study) to a timeslot. If set to no, it is assumed that all researchers (approved for the study) are responsible for all timeslots.
Can a participant sign up for this study more than once?	If you would like to allow participants to sign up (and receive credit) for your study more than once (at different times), choose yes. Otherwise, choose no. If no is selected, participants can only sign-up again if they cancelled their participation or were a 'no-show.'
Shared comments	This is an optional area where you may enter any comments or notes about the study, which are visible to any researchers/PIs in the system, but not to participants. This field is useful if you want to make the technique used in the study visible to other researchers, so they can set your study as a disqualifier if necessary. The maximum length of this field is 1000 characters.
Private comments	This is an optional area where you may enter any comments or notes about the study, which are only visible to the researchers and PI for this study, and not to participants. The maximum length of this field is 3000 characters.
Additional options for two part studies	
Is this a two part study?	Select yes or no. You can only decide this when creating the study, not when editing it.
Part 2 credits	Enter the number of credits to be received for participation in part 2. Credits must be in increments of 0.5.
Part 2 duration	The amount of time, in minutes, that part 2 of the study will take
Part 2 scheduling range	Specify the number of days (as a range) after part 1 is scheduled, that part 2 should be scheduled. The range may be the same value (e.g. between 7 and 7 days) if desired.
Part 2 scheduling latency	In some cases, you may want to ensure that the participant schedules the second part of the study to take place at exactly the same time (on a different date) as the first part. If so, select yes.

Once you have filled in all of the required information. Click 'Add this Study' and it will be immediately uploaded to the system. Following this, you will need to add timeslots to your study so that participants can begin singing up (see the Working with Timeslots section on page 10).

Web-based (online) studies

If your study can be done online, you can set this up internally in the system (i.e. EMS hosts your online survey) or outside of the system (programs such as Qualtrics/LimeSurvey/Survey Monkey host your survey). Things to note about web-based studies:

- Once you indicate to the system that the study is web-based, you will not be able to change it so that it is no-longer web-based
- Web-based studies are typically set up so there is one timeslot. That timeslot contains the maximum number of participants you would like to participate and the **last** date and time when they can participate. It is not recommended that you make multiple timeslots for participation as it can confuse participants.
- It is assumed that participants will complete the web-based study at the time they sign-up for it. Because of this, the system will expect you to grant their credit shortly after they sign up for it. If you are creating an online survey **within** the system, credit will be granted automatically, immediately after the participant completes the survey.
- If the study is hosted externally, participants will be given the URL to the study immediately after they sign-up.

Two-part studies

You can create a two-part study in the system. Often, these are studies involving memory research, where a 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 parts of the session at the same time. Each part of a two-part study may have a different credit value and duration. Online studies may not be two-part studies. If one part of a study is online, simply create two separate studies (one for each part), and set the first study as a prerequisite for the second study.

You should ensure that there are enough available timeslots for both parts of the study, or a participant 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 at a later date, you or the administrator will have to manually sign them up for 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 receive a reminder of this should you wish to cancel the second part.

Two-part study configuration scenarios

Listed below are some common scenarios and how to configure them in the system.

Scenario	**Configuration**
Second part to take place a week later, at any time during that day	Scheduling range: 7 and 7 Scheduling latency: No
Second part to take place three days later, at exactly the same time as part 1	Scheduling range: 3 and 3 Scheduling latency: Yes
Second part to take place one to two weeks later, at any time during the day	Scheduling range: 7 and 14 Scheduling latency: No
Second part to take place later on the same day as the first part	Scheduling range: 0 and 0 Scheduling latency: No

The system will enforce these restrictions by only allowing participants to sign-up for timeslots for the second part of the study that meet the scheduling range and latency relevant to the time they complete part 1. As a researcher, it is your responsibility to ensure that there are timeslots available that meet these restrictions.

Updating a study

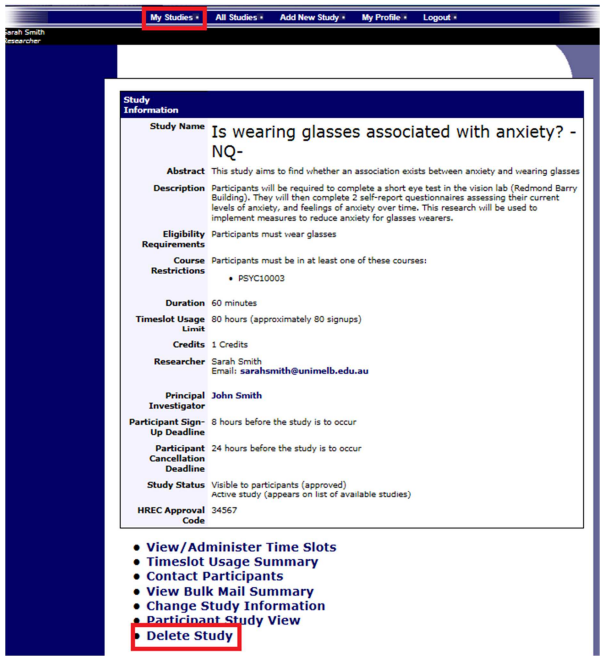
You can update your studies at any time. To do so, choose My Studies from the top toolbar. Click on the desired study, and choose the 'Change Study Information' link. You will be taken back to the form you used to create your study but some options may no longer be changeable depending on the status of the study (i.e. if participants have already signed up for it).

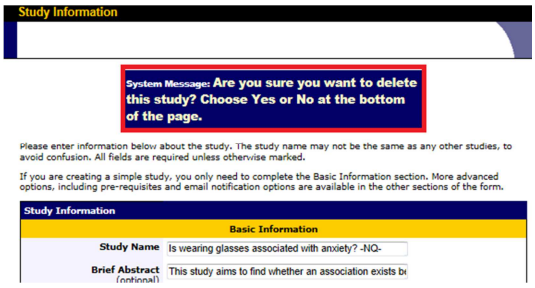
The changes you make will take effect immediately after they are saved. **Note:** any changes you make **must** be in accordance with your HREC ethics approval. Some changes may require additional approval from the HREC and thus cannot be made until this has been obtained. It is considered a serious violation to make changes to a study without obtaining the necessary ethics approval and appropriate actions/consequences will be taken should this occur.

Deleting a study

You can delete a study, only if participants have not signed up for it. If you need to delete a study which already has sign-ups, you should make it inactive instead and it will no longer be visible to other participants. If you need to delete a study that does have sign-ups, you must contact the system administrator REP-psych@unimelb.edu.au.

To delete a study, choose My Studies from the top toolbar, click on the desired study, then choose the 'Delete Study' option. You will see a confirmation page in which you can click 'Yes' to delete the study. Once a study has been deleted it **cannot** be restored. If you delete an online survey study hosted by the EMS, the **survey and all data collected** will also be deleted.

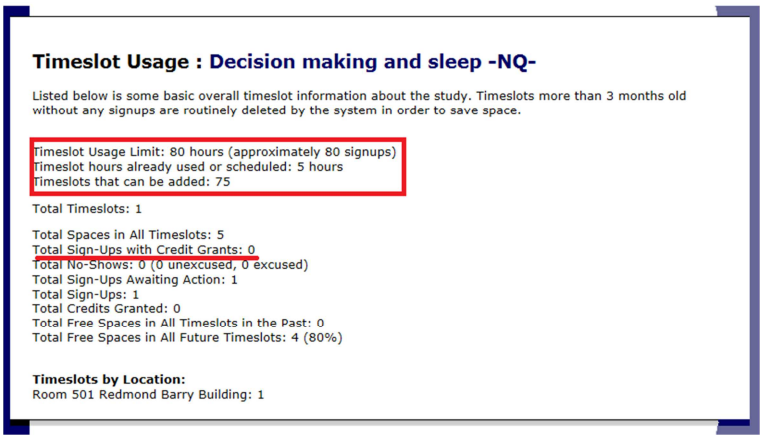




Timeslot usage summary

The timeslot usage summary is available when viewing your study. Click on the 'Timeslot Usage Summary' link under your study description. This gives some basic information about timeslot utilisation in the past and future, the credits that have been granted and the number of no-shows.

Given that researchers also have a limit to the number of REP credits they can grant (usually 80), this summary will also provide information regarding how many more timeslots you can add.



Viewing your studies

To view your studies (and not the studies of others), click the '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, then inactive studies.

Participant study view

If you would like to see how your study appears when participants view it, click on the 'Participant Study View' option underneath your study description.

If for some reason you think your study is not visible to participants, it may be due to various restrictions that you have set on the study, such that few (or none) of the participants in the pool qualify. You can ask the administrator to use the Check Study Configuration tool (available to them when they view your study) to provide advice on why your study may or may not be visible to participants.

Viewing other studies

To view all studies that are visible to participants, choose the 'All Studies' option from the top toolbar.

Working with Timeslots

Timeslots are the available times you have specified when students may participate in your studies. Timeslots allow you to specify a date, time, location, maximum number of participants, and researcher for a session. **Note:** if you are setting up timeslots for a web-based study, please read the section on Web-based (online) studies for special information.

Timeslot usage restrictions

All researchers will have a limit on the number of participants they can recruit (and thus credits they can grant). Generally researchers are allocated 80 credits and each credit is equivalent to one hour of research participation (i.e. if your study goes for 30 minutes it is worth 0.5 credits and you can recruit 160 participants). The system will monitor the number of credits you have granted and ensure that you do not go over your allocated maximum.

Your timeslot usage is computed by adding the past timeslots where credit was granted, to the future timeslots (i.e. participant sign-ups that have not yet completed the study), regardless of credit status. If a participant who has signed up is a 'no-show', that time will be added back into the timeslots you still have available.

Timeslots linked to specific researchers

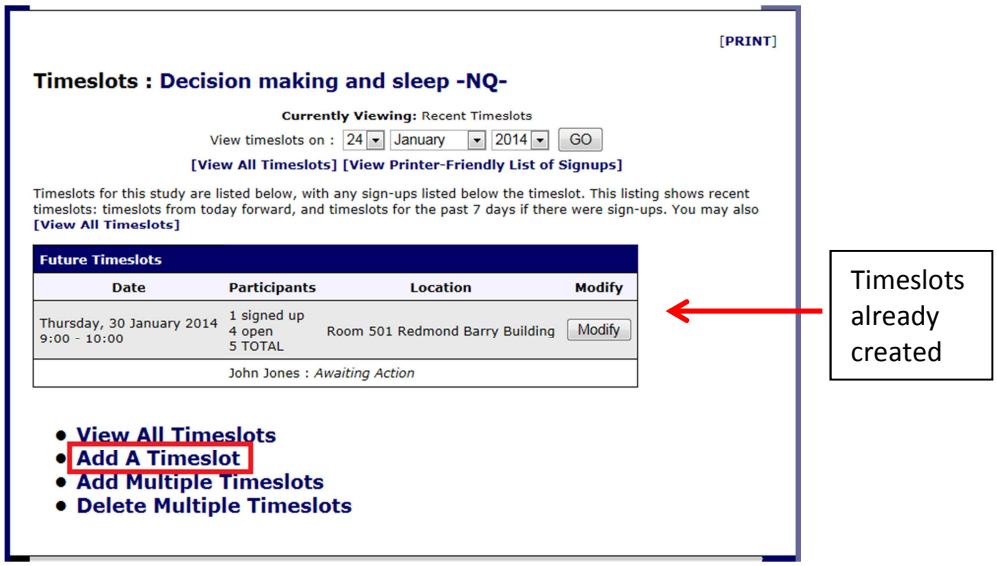
If you have allocated multiple researchers to your study, you will have the option to link timeslots to specific researchers. This is useful if a study has a number of researchers and researchers are responsible for running certain timeslots. If a timeslot has a specific researcher linked to it, only that researcher will be listed as the contact point when a participant receives emails related to their participation in that timeslot. Similarly, only the researcher linked to that timeslot will receive notification and reminder emails, instead of all listed researchers.

It is possible to have some timeslots where a specific researcher is linked to them, and others where all researchers assigned to the study are responsible for them. If a study has 3 researchers however, it is not possible to link only two of them to a timeslot. All researchers, or one researcher only, can be linked to the timeslot.

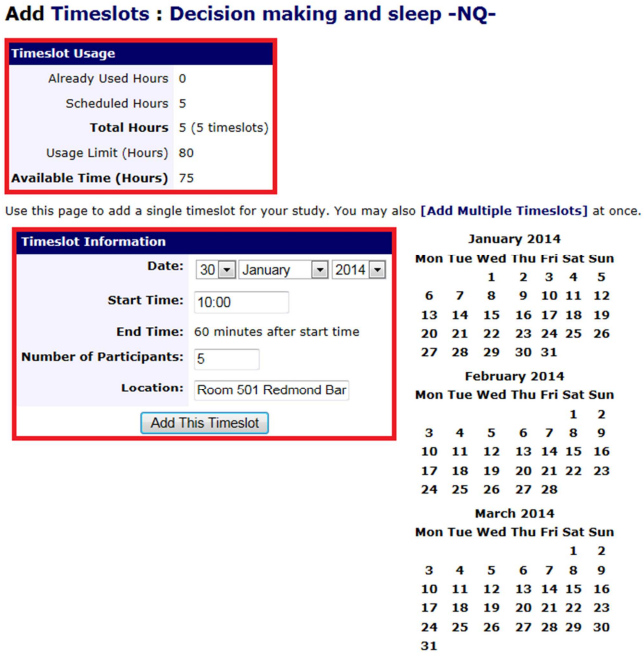
If a researcher is removed from a study, then any timeslots linked to them will automatically be linked to all remaining researchers.

Creating timeslots

To add a timeslot to a study, click on the desired study and choose the 'View/Administer Timeslots' link from under the study description. You will see a list of any existing timeslots, and the 'Add a Timeslot' link at the bottom of the page.



When you click on 'Add a Timeslot' you will be taken to the following page. This page contains a summary of your timeslot usage to date, as well as a field for entering the information relevant to the timeslot you are creating.



The following table lists gives an explanation of all information you can enter about a timeslot. All fields are required.

Field	Description
Date	The date for the timeslot (you can click on any date on the calendar next to the form and that date will be transferred to the form).
Start time	Enter the time participants must arrive to complete your study. **Note:** If you are not using 24 hour time, please remember to include am or pm when entering the time.
End time	This will be computed automatically based on the study duration you specified
Number of participants	This is the number of participants that can attend **this** specific timeslot, not the number of participants that can participate in your study overall. If your study is done in a computer lab with 20

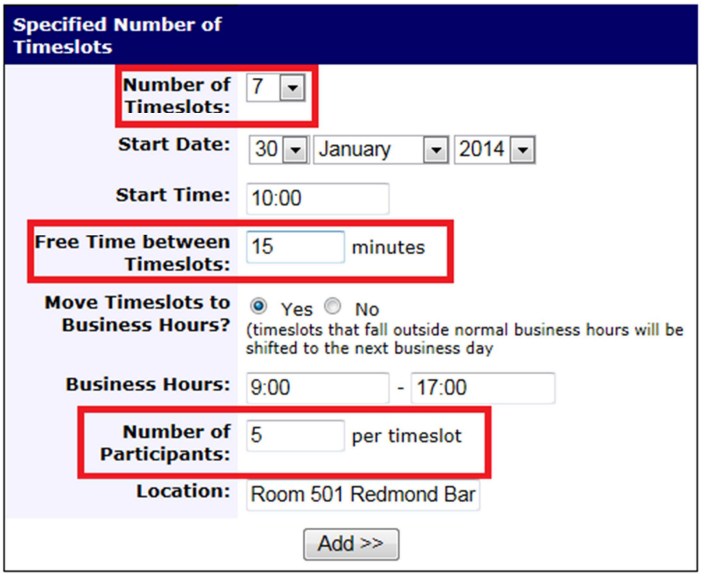
	computers, your number of participants is 20. If it is a one-to-one interview, your number of participants is 1 (assuming there is only one interviewer available at a time).
Location	The physical location where the study will take place, for this timeslot. Be sure to include building, floor and room numbers. This will be automatically filled with the location of the previous timeslot, when available, to ease data entry. This field does not apply for web-based studies.
Researcher	If you specified more than one researcher when adding your study, here you can assign one or all of them to this timeslot.

Creating multiple timeslots

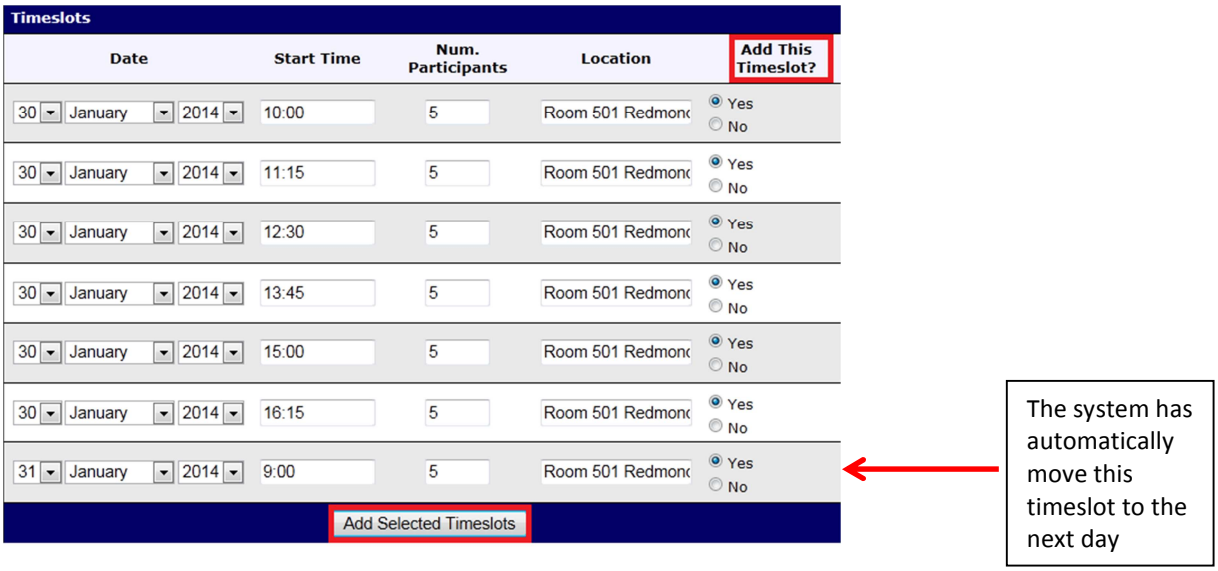
If you would like to add multiple timeslots at once, click the 'Add Multiple Timeslots' link from your studies' timeslots page. Here you have two options. You can:

1. choose to add a specified number of timeslots; or
2. copy the timeslots from one week to another

If you choose to create a specified number of timeslots (option 1), enter the number of timeslots you would like to add, the start time and date, and the amount of time between each timeslot (to allow for breaks). You also may specify that timeslots that would occur outside normal business hours be shifted to the next business day, and specify when business hours occur.



On the subsequent page, you may change any of the above to deal with special cases. Timeslots that you attempt to add, that either have errors or would result in exceeding the timeslot usage limit, will not be added.



If you choose to copy timeslots from another week, the system will copy the time, location, and number of participants for the specified week to the desired week, for each day of that week (starting with Monday). When you press 'Add' you will again be taken to a screen where you can confirm each timeslot you want to add.

2. Copy Timeslots from a Specific Week

Deleting and modifying timeslots

You cannot delete timeslots that already have participants signed up. To delete a timeslot, click the 'Delete Multiple Timeslots' link from your study's timeslot page. You will be taken to a page that will show all timeslots available to be deleted (i.e. timeslots without sign-ups). Select the timeslot you would like to delete and press the delete button. You will be taken to a confirmation page to where you can cancel or select delete again.

To modify a timeslot, click on the 'Modify' button next to the timeslot you want to change. Here you can update any necessary information and click 'update.' **Note:** participants will **not** be notified via email of any changes you make to a timeslot they are already registered in. However, a link is provided on the modification page to allow you to email them should you need to do so. If you change the date or time of a timeslot, you will be warned by the system in case this change was not intended.

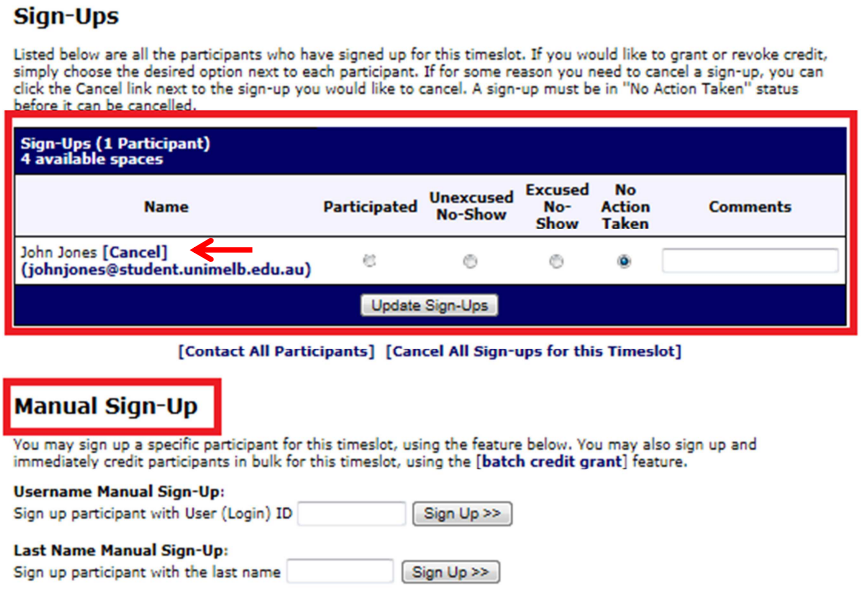
Manual sign-up

There are a number of situations where researchers may be required to manually sign-up participants, rather than the participant doing it themselves. Such situations include if a participant turns up for a timeslot that they have not signed up for and you have enough space to include them in the study at that time or if a participant wishes to sign-up for a

study but the sign-up deadline has passed. If necessary, you can also sign up a participant for a study that has already occurred.

Manual sign-up also overrides any prerequisites that the system may be enforcing (though the system will warn you that you are doing this). Finally, manual sign-ups are useful for two-part studies in which participants need to reschedule their part 2 participation. If they cancel their part 2, they system will not allow them to sign up for the study again, but you can manually sign them up for a different timeslot.

To manually sign up a participant, find the desired study and timeslot and click 'Modify.' Here you will see all participants that are signed up to do the study as well as the form for manual sign-up. Type in the participant's username and click 'Sign Up.'



Manual cancellation

Researchers 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 (see screenshot above). The participant will be sent an email about the cancellation (along with the name of researcher who cancelled it) with a confirmation code.

Granting or revoking credit

At the completion of a session, you must promptly grant or revoke credits to participants.

To grant/revoke credit you must first find the desired study and timeslot. In the study screen you should click 'View/Administer Time Slots' and then 'View All Time Slots.' When you have located the desired timeslot, click 'Modify.'

Here you will see a list of the names of all participants who signed up for that session. If the participant properly participated in the study, check the 'Participated' box next to their name and click 'Update Sign-Ups.'

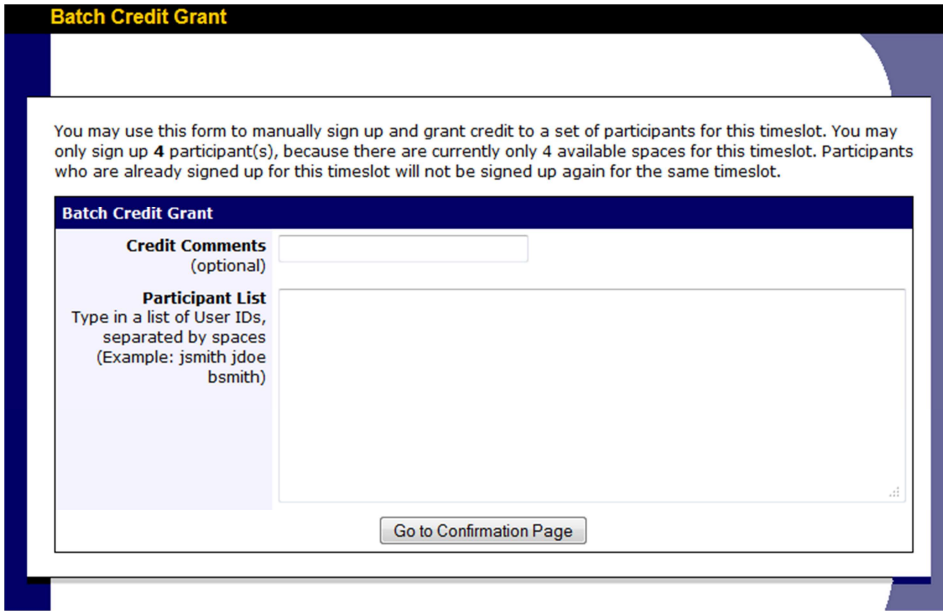
If the participant did not appear for the timeslot, you may choose to mark their no-show as excused or unexcused. Participants who have contacted you and are facing extenuating circumstances such as illness should be granted an 'Excused No-Show.' Participants who did not turn up for their session and did not contact you should be granted an 'Unexcused No-Show.' Though there are no penalties for unexcused no-shows, the system administrators will be able view all participants that have unexcused no-shows and the number of unexcused no-shows are also shown when participants view their credits.

Any comments you enter in the comments box will be visible to the participant and will also be included in their notification email when credit is granted/revoked.

Batch credit granting

In some cases you may wish to automatically sign up and immediately credit a group of participants. This is useful if you administered a study on an ad-hoc basis and you want to credit participants after the fact.

To do so, go to the appropriate timeslot and click 'Modify.' In the Manual Sign-Up section, you will see a 'Batch Credit Grant' link. Here you will be able to enter the User IDs of all participants you would like to sign-up and credit. Users will be signed-up/credited immediately. This feature overrides any sign-up restrictions on the study, just as a normal manual sign-up does.



You can provide a list of up to 50 participants, or as many participants as there are available spaces for the timeslot, whichever is less. For example, if you have said that there are 5 spaces available for the time slot and 1 person has already signed-up, you can use the Batch Credit Grant feature to sign up and credit 4 more participants.

Emailing participants

If you wish to contact participants in a particular timeslot for any reason, you can click on the participant's email next to their name in the sign-up list. Select the 'Contact All Participants' link underneath the sign-up list to email all participants in a particular timeslot

You will be taken to a page where you can fill out a message that the system will send to the selected participants. The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to.

In some cases, you may find it useful to contact all participants for the study, across all timeslots. This is useful if you are sending debriefing information when a study has concluded. To do so, go to 'My Studies' and click 'Study Info' next to the desired study. Once in the study screen, you can select 'Contact All Participants.' You cannot include attachments in these emails so if you need to send documents it may be best to include these as a link to a website where the document can be found.

The 'From' (sender) address on the email will be the administrator's email address to prevent the email being blocked by junk email filters. The 'Reply To' address will be that of the user/researcher who sent out the email. There is also the option to restrict the emails so they only go to participants who signed up for timeslots in a specified date range. The date range is based on the date of the timeslots, not when the participant signed up for, completed or received credit for the study.

There is also an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of the day (e.g. during the evening) when the email will be sent. If you have set up a delay, once the email has been logged, it cannot be deleted, regardless of whether it has already been sent to participants or not.

Finally, summary information about the email you sent and how many recipients you sent it to will be logged and made available to the administrator. This is done to ensure there is no abuse of the email facility in the system, in compliance with the University's Internet and Email Policies and Procedures.

Viewing uncredited timeslots

When you login to the system, you will receive a warning if you have any timeslots that are more than 2 days old with credits that have not yet been granted. You may view a list of all timeslots that have not been dealt with by choosing the 'View Your Uncredited Timeslots' option from the My Studies page.

From this page, you can enter simple credit grants (without comments), select either type of no-show or select to 'Mark all Grant Credit.' Once you have selected your option for each/all participants, select 'Grant Credits' at the bottom of the page.

In cases where a study has timeslots linked to specific researchers, you will see the warning only for timeslots that are specifically linked to you, or to everyone in the study (not timeslots linked to someone else. However, when you view the uncredited timeslots, you will see all uncredited timeslots for the study, even if they are linked to someone else. This is done to make it easier to give your fellow researchers (in your study) assistance with dealing with uncredited timeslots.

Uncredited Timeslots

Study	Researcher	Date	Participant	Grant Credit?
Students' Attitudes to Climate Change -Q-	ALL	**28 January 2014 10:00 - 11:00**	John Jones	(●) No Action Taken ( ) Grant Credit ( ) Unexcused No-Show ( ) Excused No-Show
Gym Use and Personality Traits -Q-	ALL	Online study ending **28 February 2014 9:00**	John Jones	(●) No Action Taken ( ) Grant Credit ( ) Unexcused No-Show ( ) Excused No-Show
Total number of uncredited timeslots: 2				( ) Mark all 'Grant Credit'

[Grant Credits] [Reset]

(Please be patient. It may take a few moments to complete.)