RESEARCH PARTICIPATION POOL: RESEARCHER GUIDELINES AND INSTRUCTIONS

RESEARCH PARTICIPATION POOL OVERVIEW

A central characteristic of scientific knowledge is that it is based on systematic observations in empirical research studies. This is also true for management/organizational knowledge about human behaviour, which is based on observations from research studies in natural settings and laboratories. To familiarize students with the methods of scientific research studies in management and to provide first-hand experiences with the procedures presented in lectures, MOS 1021 includes a mandatory research experience component. This research experience component requires students to earn three research credits.

A research credit can be earned by doing either of the following:

- Participate in one (1) research study that will take no longer than one hour to complete.
- Complete an article review by reading and answering a series of questions about one (1) research article chosen from a selection available online at the DAN Management website.

Students who fail to earn three credits by 4:00pm on the last day of classes in the term will have 2% deducted from their final grades for each credit that they fail to earn (for a maximum possible deduction of 6% from their final grade).

Students who sign up for a study but fail to attend the study at the required time on two occasions will have no further opportunity to participate in a research study. Instead, the students must complete the article review option or receive a deduction to their grade (2% per credit missed).

Researcher access to the DAN Management Research Participation Pool is limited to full-time faculty from DAN Department of Management & Organizational Studies and their students.

The following sections include important information for researchers who wish to access participants via the Research Participation Pool. Please read the following carefully.

Accessing Participants Via the DAN Management Research Participation Pool
Researchers who wish to use the DAN Management Research Participant Pool to run research studies are required to provide the below completed form to the Research Participation Pool committee chair, Bonnie Simpson (via email at bonnie.simpson@uwo.ca).

Additionally, all researchers who wish to access the Research Participation Pool will need to provide a copy of their Research Ethics Approval protocol number to confirm that the research adheres to Western’s non-medical REB ethical standards. If the ethics process is not yet complete at the time of application to the Research Participation Pool, please indicate TBD and include an additional statement that indicates what stage the research project is at, and when approval is anticipated.

*The research participation pool administration cannot approve studies, and therefore access to the online software, until ethical approval is granted.*

**ONCE APPROVED: INTRODUCTION TO SONA Experiment Management System**

Once your request for access to participants is approved by the Research Participation Pool committee, you will need to set up your study in SONA. The SONA Experiment Management System is an online software that the research participation pool uses for the scheduling and management of research participants and the studies they participate in. Participants, researchers, principal investigators, and instructors all use the system for their respective purposes. As a researcher, you can set up your studies in the system, schedule the sessions (timeslots) when participants may participate, and grant or revoke students their credit after the session. All of this is handled through a simple web-based interface that you can access at any time, from any popular web browser.

As you move through setting up your study, if you have any questions about using SONA contact the administrator, whose contact information appears at the bottom of every page on the system, for more information.

**Getting Started**

The system works best if you use any popular web browser that is less than 2 years old, like Internet Explorer, Firefox, and Safari. It will work with other web browsers, and with older versions of popular web browsers, however the layout may not be as clean.

This documentation assumes you have a basic knowledge of how to use the web. On this system, it is not necessary to use the Back button. You can always use the toolbar on the top to navigate to anywhere on the site.

**Logging In**

Your administrator (Committee Chair, Bonnie Simpson) will provide you with a username and password to login to the site, as well as the URL (web address), once your access to the Research Participation Pool has been approved. When you go to the front page of the site (the login page), you may see a link to request an account. *This form is only for participants. Do not use this form to request an account, as participant accounts have an entirely different set of privileges, and the privileges are not appropriate for a researcher.*

**System Basics**
Once you login, you will see the below screen:

In the system, you will have FOUR primary responsibilities:

**Responsibility #1**) To create your study and provide the timeslots, which are the times when you plan to run the study (unless the study is online). Participants then sign up for the timeslots (or online study) by viewing a list of studies and available timeslots.

To do so – go to ‘create a new study’ on the above page, and respond to each of the requests of the system (e.g., type of study, study name, eligibility requirements, etc) and then click ‘add this study.’ Please note that the system is set to automatically allocate 1% credit for all studies. This cannot be changed as all studies, irrespective of time (but less than 60 minutes) are worth 1% credit. Then click ‘view/administer time slots’ to add timeslots as you require. If you’re running an online survey study, you will still need to create a time slot; however, only create one timeslot with a time stamp of the day in which you plan to close the survey.

Return to the ‘study information’ main page for this particular study, and beside ‘study status’ click ‘send request’ to have the study approved to send the details to the Committee Chair for review. Once approval is granted, your study will be active for participants to register.
When participants register for a lab-based timeslot, they will automatically receive a reminder email the day before to remind them when and where to show up to participate.

**Responsibility #2)** To properly track participation of students to ensure credits can be granted.

To do so, there are two options (depending on whether your study is lab-based or online):

**Lab-based study:** You or your lab session assistant must keep track of those students who showed up to participate in your research. To do so, before your study begins, you MUST pass around a sign in sheet and request that students provide their name, student number, and their signature on this sheet to verify their participation in your study. This is the only record of students’ participation so it is important you ensure that all students have signed the sheet. This list must be anonymous and not attached to data or able to identify students from responses. You then can cross-reference this sign in sheet with the list of students who signed up online to participate in your study.

**NOTE on Ethics Protocols:** Within your Research Ethics Board protocol, you must specify how you will grant credit to students who have completed your lab-based study. Specifically, you must indicate that you will be administering a sign in sheet in which you will collect identifying information (e.g., student number, name) for the purpose of granting credit. It is important to indicate that this sign in sheet is confidential, will not be tied to the data and cannot be used to identify students from responses.

**Online study (e.g., Qualtrics):** You are required to keep track of students who completed your online survey by means of recording their name and student number in a separate online survey. That is, you must record this information in an online survey that is separate but linked (see below for instructions to link surveys using Qualtrics Survey Software) to your research survey so that identifying information cannot be linked to students' responses. You must first record student identifying information and then redirect students to your online survey. That is, you must first set up an online survey in Qualtrics that records students' name and student number (see below for a screen shot of an example of such a survey) and then link this survey to your research survey. Please note that your letter of information (LOI) and consent form must be included in this first “identifying information” survey. Thus, before you can ask participants their name and student number, you must first include your LOI and consent form. Once students complete the questions pertaining to their identifying information, they then will click a “next” button on the bottom of the survey that will bring them to your research study. You must create this “next” button through the multiple choice question option. Specifically, you must select a single response option within this type of study, that reads “next”. The question itself should read “please click on the next button below to be direct to the research study” (please see below for a screen shot). By recording identifying information in this way, and tracking student participation, identifying information will be downloaded in a separate spread sheet from responses, and therefore, cannot be linked to students’ responses.

To link the “identifying” survey to your research study you must first create both surveys as separate surveys using the Qualtrics software. Once you have created both online surveys, in the main Qualtrics screen that lists all of your studies, click on your “identifying” survey as if you were to edit it. Once you are in the editing screen of this survey, click on “survey options” located at the top of the screen. Scroll down the survey options screen until you see “redirect to a URL.” Click on this option and then enter the URL to your research survey. Once students click on the next button within your “identifying” survey they will be automatically directed to your research survey.
**NOTE on Ethics Protocols:** Within your Research Ethics Board protocol, you must specify how you will grant credit to students who have completed your online study. Specifically, you must indicate that before completing your research study, students will first complete a separate online survey where they will be asked to enter identifying information (e.g., student number, name) for the purpose of granting credit. Once students have entered their identifying information, they will then be redirected to your research survey. It is important to indicate that these two surveys are separate, and therefore, identifying information cannot be linked to students’ responses.

If you have any questions pertaining to linking surveys, please e-mail Bonnie Simpson for assistance.

**SCREEN SHOT OF IDENTIFYING INFORMATION EXAMPLE SURVEY**

Responsibility #3) To grant or revoke credit to participants after your research session occurs.

To manually grant or revoke credit for a timeslot, you must first find the desired study and the timeslot (if the study is an online survey you will only have created one timeslot). Choose the ‘My Studies’ option from the top toolbar. Click on the Edit link in the timeslots column for the desired study, then select the timeslot you would like to see, and click the Modify button.

You will see a list of participants. If the participant properly participated in the study (as per your above record), click the Credit Granted button next to their name (this text may appear as Participated if the study is set up for payment rather than course credit). If the participant did not appear for the timeslot or did not complete your online survey as per indicated by your participation tracking (see above), you may choose to mark their no-show as excused or
unexcused. Participants will then be automatically emailed with the status of their participation credit.

It is mandatory that researchers inform students at the time of participation as to when they can expect to see the credit granted. To do so researchers may wish to include a debriefing statement with this information at the end of the study.

Responsibility #4) To send all participants a debriefing regarding the study.

This can be provided to participants on the final page of an online study, on a small piece of paper as participants leave the room in lab-based studies, or by emailing all participants (via SONA main study page) once the data collection is complete. This debriefing must include a brief description of the study, hypotheses, and how the findings will be used.

For details on how to use the system with thorough explanations on all the above, visit:

http://www.sona-systems.com/support/docs/ems_docs.pdf

Questions:
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