Adding an ONLINE (Online External) Study to Sona
Edited Jul 23, 2025

A. GET A RESEARCHER ACCOUNT

☐ Email the current Sona administrator to get a Researcher account. The administrator's name is listed at the bottom of every Sona page. You cannot use your Participant account. (For Advanced Research: One account per research group please. Pick a contact person.) Please allow 24-48 hours for a reply. You will receive an email (at the address used to make your request) with instructions when the account is created. Read those instructions carefully. A link to this document will be included.

☐ You will then login to SONA using your OneLogin credentials. If you also have a Participant account, you will be given the choice of which role to use when signing in.

☐ You must create your study using **Qualtrics** unless otherwise instructed. You should be completely finished creating your Qualtrics survey before beginning this process. You will need the study's URL from Qualtrics.

B. ADD YOUR STUDY & CONNECT QUALTRICS TO SONA FOR AUTOMATIC CREDITING

Please note!

Read these instructions **very carefully**. You may wish to print them and check the boxes as you complete the steps. This isn't difficult, but it is tedious and sensitive to small errors. Choose the most detail-oriented person in your group for this task. **This process will likely take between 30-60 minutes.**

1. Click "Add New Study" and select study type: "Online External Study"

2. Study Name
   - ☐ Use the same title as the one on your Informed Consent Statement, as per your approved Ethics proposal, section "Participant Recruitment"

3. Brief Abstract
   - ☐ Leave blank.

4. Detailed Description
   - ☐ **Required**. This is a brief description of the general types of tasks Participants will be doing (e.g., completing survey questions). Please copy the language used in the "Participant Recruitment" section of your Ethics Application.

5. Eligibility Requirements
   - ☐ If relevant, enter restrictions on who can participate in your study, as specified on your Ethics Proposal. Example: "Only people who identify as women."
   - ☐ If you wish to restrict your study to Participants who are/are not *currently* enrolled in a particular class, you can use Advanced Settings (see end of document for instructions).

6. Duration
   - ☐ Estimate how long your study will take. If in doubt, estimate more rather than less time.
   - ☐ **You must enter at least 20 minutes**.
     - Entering less time may attract Participants to your study, but will unfairly disadvantage other studies.

7. Credits
   - ☐ Unless given explicit permission, leave the credit value at 1.

8. Preparation
   - ☐ Enter anything you want Participants to do or not do before they arrive. Example: "Find a quiet place where you will not be interrupted before beginning the study."
   - ☐ This is typically left blank.

9. Researcher
   - ☐ Your Researcher account will already be selected. In rare instances there are additional researchers you can add here.

10. IRB Approval Code
    - ☐ Please enter the approval code from the approved ethics document.

11. IRB Approval Expiration
    - ☐ Typically one year after original ethics approval.

12. Approved?
    - ● This will say "Currently not approved. Approval is required." You will request approval for this SONA listing in Section E below.

13. Active Study
    - ☐ Click 'yes' if you are ready for Participants to sign up.
    - ☐ Click 'no' if you are not ready, or wish to suspend sign-ups. You will have to return to this setting and switch to 'yes' before Participants can see or sign up for your study.

    WAIT – You are not finished yet. You MUST complete **Advanced Settings.**

14. Advanced Settings - A few of these are required to enable SONA and Qualtrics "talk" to each other and automatically grant your participants credit for completing your survey. See end of this document for uncommon advanced settings.

   REQUIRED ADVANCED SETTINGS

   Study URL
   - ☐ Cut & paste your Qualtrics URL here.
   - ☐ At the end of the URL, type exactly the following text: ?id=%SURVEY_CODE%
     - ○ For example, if your Qualtrics URL is
       https://muhlenberg.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE
     - ○ Add the text above so the **Study URL** reads:
       https://muhlenberg.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE?id=%SURVEY_CODE%
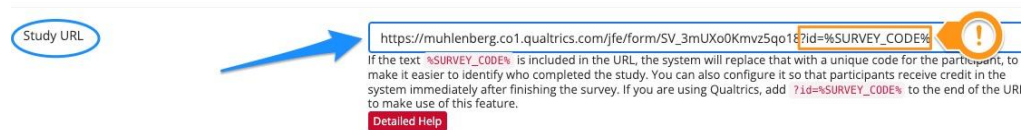
   Study URL *Display*:
   - ☐ Change or leave set to "No" (unless there is a specific reason you want participants who have already completed your study to be able to revisit the study webpage).

   Participant Sign-Up and Cancellation Deadlines
   - ☐ Change both to 0 hours.

15. Click "Add This Study." You should see a screen similar to this (zoom in to see details):

    WAIT--You are not finished yet.

16. In the Study Information table, look for the red "View Study Website" button. Below that button, look for "Qualtrics Redirect to a URL."

- ☐ Click in the gray box with the URL to select it.
- ☐ Copy the link, save it somewhere you can find it again after switching over to Qualtrics. Here's an example of what the URL looks like:
  https://muhlenberg.sona-systems.com/webstudy_credit.aspx?experiment_id=7&credit_token=65633ceb3304d8281e6bc532eccde42

17. Now, login to Qualtrics and find your survey. For this section you can follow these written instructions, and/or switch to a video tutorial, **starting at timecode 4:53**. **The video tutorial provides screenshots of Qualtrics for each of the below steps.**

- ☐ In your Qualtrics study, click on "Survey Flow"
- ☐ Click "Add a New Element Here"
- ☐ Choose "Embedded Data."
- ☐ The box labeled Create New Field will be selected/highlighted.
- ☐ Type "id" in lower-case letters to replace the words "Create New Field." Do not type anything else.
- ☐ **In the lower right hand corner, click "Apply" to save your changes.**
  - Adding this field gives Qualtrics a place to record the unique survey ID your Sona Participant will transfer when they sign up for your study in Sona, and click the link in Sona to start the study.
- ☐ Stay in Qualtrics and click on the Builder icon (clipboard) to return to the design of your survey.
- ☐ Scroll to the bottom of the survey and click inside the "End of Survey" block. Options for this element will be shown in the menu on the left side of the screen.
- ☐ Open the Messaging dropdown menu and select "Redirect to URL."
- ☐ In the Website URL box, paste in the link you saved in Step 16 above.
  - Notice that the information in the End of Survey block has changed to indicate participants will be taken to the URL you just copied when they finish the study.
- ☐ **PUBLISH your survey again to save this change** (upper right corner click Publish, then click Publish again).
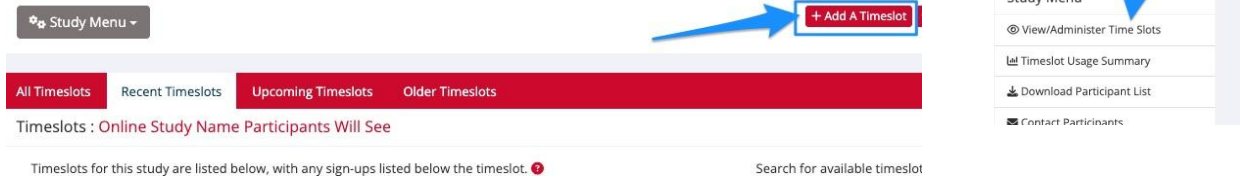
 The video tutorial ends here, but you are not finished yet.

C. ADD TIMESLOT (Participants cannot sign-up for your study if you do not complete this step)

18. Go to "Study Menu" and select "View/Administer Timeslots."

    ☐ On the menu bar, click "Add a Timeslot."

    ☐ **Final Participation Date/Time**: Enter the deadline for participants to take your survey. Choose carefully. Once you have participants sign up, you must keep the study posted in SONA and active on Qualtrics until that deadline. You can download your data from Qualtrics and begin data analysis anytime you wish, but you have to leave the study available to award LOC credit until this deadline. If you set a deadline that is too early, you may get fewer participants completing your study.

    ☐ **Max. Number of Participants**: follow this guide –

PSY 490 Advanced Research	80
Senior Thesis/PSY 970	100
Faculty Research	120

    ☐ Click Add this Timeslot

19. The system will automatically send Participants an email when they sign up. If you wish to contact your Participants for any other reason, choose "Contact Participants" from the gray "Study Menu."

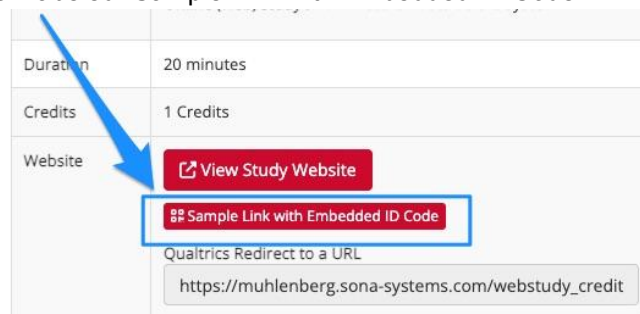   *Give the system a few minutes to update before expecting to see your new study listed.*

D. CHECK YOUR SETUP

20. You can check to be sure you've set everything up properly.

21. Begin by signing out of Qualtrics, returning to SONA, and going to your Study Information page.

22. Look for the red button labeled "Sample Link with Embedded ID Code.

    ☐ Click on that link. It should take you to your Qualtrics survey.

☐ Click through your survey.

☐ Click the arrow (or 'next' or 'submit') on the debriefing page.

☐ If you have set up your study correctly, you will be sent back to the Sona login page and will see a system message. The system message should read: No credit given, because you are not a participant, and therefore cannot sign up for this study. This system message means you have CORRECTLY set up your study.
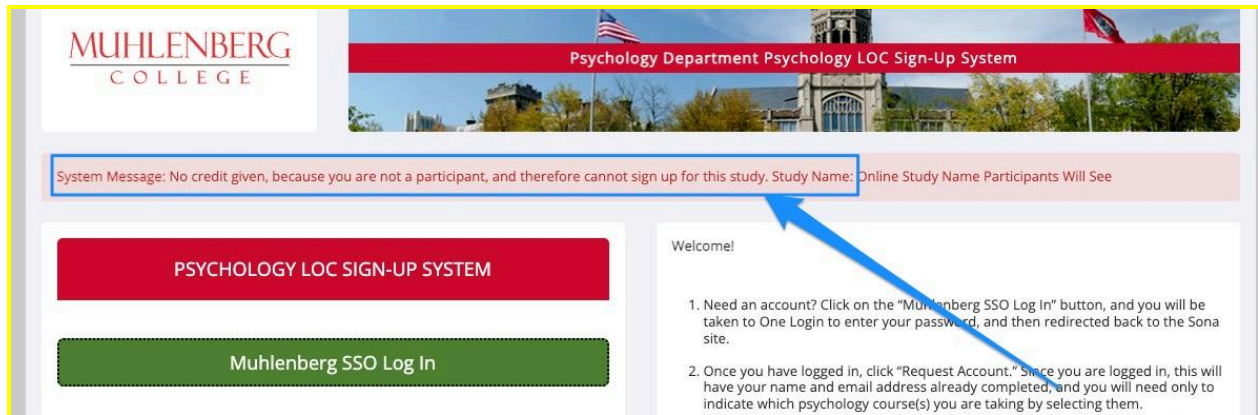
☐ *ANY OTHER OUTCOME* (a different message, an "end of survey" qualtrics screen), means you have NOT correctly set up your study and need to go through the instructions again (probably starting at B.17. - watch the provided video).

E. REQUEST APPROVAL FOR SONA LISTING

☐ You must request approval for your SONA listing before your study will be seen and eligible for sign ups. To do this, look at the study overview and click on the Send Request button next to Study Status. You do not need to add any information to the request, just click on the green Send Request button. Please give the SONA administrator 24-48 hours to review. Your study will either be approved and immediately available for sign up, or you will have to make corrections if it was not properly set up.

NOW YOU ARE FINISHED!

F. TO EDIT…

1. **Study Information**
   - Click on the study (if not already selected) and then click on the gray "Study Menu" button. Choose "Change Study Information."

2. **Timeslots**

Date	Participants Pool	Participants	Location	Modify
Friday, September 5, 2014 2:00 PM - 2:30 PM	Signed Up: 0 Open Slots: 4 Total: 4		Moyer 006	✏ Modify

   - To change the closing date of your study or the max. number of participants, click on the "Modify" button.
   - You may **not** close your survey *early* if there are still participants signed-up for it. The system may logistically let you do so, but Departmental policy (based on ethical principles) is that participants will have until your originally promised closing date to get LOC credit for participating in your study. (**You can download and analyze your data file at any time.** All signed-up participants must have until the deadline to receive LOC credit, but they don't have to be in your data set.)

G. TO VIEW…

1. **Participants who have signed up**
   - Click on study title to get to the gray Study Menu.
   - Select "View/Administer Timeslots."
   - If anyone has signed up, the "Participants" column will have names in it.
   - "Status: awaiting action" means they have not yet completed your study OR it means that you have not set up the automatic credit token correctly. If all participants say pending, this is more likely to be the case. Check and be sure that you have followed all the above instructions properly and fix any errors. You will also have to manually assign credit to each of the participants who are pending credit without knowing who has and hasn't completed to study (contact Sona administrator for assistance or questions)

2. **What the Participant will see about your study**
   - Select "Participant Study View" from the gray drop-down Study Menu.

UNCOMMON ADVANCED SETTINGS

- **Pre-requisites & Disqualifiers.** Use with care. If you have a two-part study you may wish to use a pre-requisite. If your study is a follow-up to a previous study and you only want new Participants, you may use a disqualifier. **Please note the SONA Participant data is deleted at the end of every semester.** If you need to refer to a study from a previous semester, try using the *Detailed Description* or *Eligibility Requirements*.

- **Course Restrictions.** Use with care. Sometimes you want Participants who are or are not taking a particular class to be in your study. **Please note that the SONA Participant data is deleted at the end of every semester.** If you want to exclude/include Participants who have EVER taken a particular course, try using the *Detailed Description* or *Eligibility Requirements*. Also note: **all courses *ever* taught are included in the list. Thus, you must check which courses are being taught in the *current* semester very carefully before selecting.** If you move over a course not currently being taught, no one will be able to see or sign up for your study.