



# **Psychology Participant Pool**

## **Researcher Manual**

Department of Psychology  
University of Windsor

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Fifth Edition

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All policies within the fifth edition supersede the policies in the previous editions.

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## Researcher Policies

### ***Purpose and right of access to the participant pool***

The Participant Pool facilitates the convenient collection of research data using undergraduate psychology students. It is a service provided by the psychology department to researchers within the department (faculty, graduate students, and honours students). It is a privilege, and not a right, to use the pool. Failure to comply with participant pool regulations may result in temporary or permanent loss of access to the pool as a researcher.

The Pool is the only way to access students in Department of Psychology courses for the purpose of conducting research. However, the Participant Pool is not the only way in which research may be conducted at the university. Researchers with special recruitment needs for which the Pool is not ideal are encouraged to seek other methods of recruitment. The Participant Pool committee reserves the right to deny researchers the use of the Participant Pool if they deem that their proposed research does not conform to the purpose and/or function of the Participant Pool.

### ***Participant Pool policy and procedures are approved by the University Research Ethics Board (REB)***

By indicating to the Research Ethics Board (REB) that you are using the Participant Pool, researchers agree to comply with all Participant Pool policies and procedures. Participant Pool policy and procedures are designed to protect research participants. They also ensure fair access to participants for researchers.

It is the role of the REB to approve studies and changes to studies. In addition to the initial proof of ethics clearance, any changes to a study (e.g., title, sample size, recruitment criteria, description, etc.) must be approved by ethics, and then be submitted to the pool for altering the study in the system. All requests to change study criteria will be referred back to researchers for evidence of ethics clearance.

It should be noted that the REB is responsible for ensuring that studies conform to ethical guidelines, whereas the Pool committee administers access to participants. It is possible for a study to be approved by the REB but still not be consistent with Pool policy. Please be sure your studies conform to Participant Pool policy and procedures before applying for ethics clearance.

The Participant Pool committee does not have access to researchers' REB applications when researchers apply to the Participant Pool (as these files are confidential). Should circumstances arise that the Pool staff deems it necessary to determine if a researcher's use of the Pool within a study is operating in compliance with their application to the REB, the Chair has the discretion to speak with the researcher(s), or to communicate directly with the REB.

Because the Participant Pool is a protocol that operates under the review of the REB, the Pool is frequently in contact with the REB. The Pool is a pre-cleared standard operating protocol (SOP), the procedures for which are reviewed by the REB. Any deviation from this SOP (documented in this manual) without prior approval from the Chair of the Committee on Participant Recruitment is a de facto violation of the researcher's own REB clearance as well as the Pool's approval.

### ***Conflicts of interest***

It is advisable that researchers who interact with participants in other roles articulate how students will be protected (e.g., instructor-student). The Pool is designed to assist in helping instructors avoid knowing which of their students have participated in their studies. For example, when an instructor receives the list of students who earned points in their course at the end of a term, the instructor does not know in which studies a student took part. Many researchers have a third party, such as a research assistant, handle crediting of participants in the Pool.

Issues related to any instructor dual relationships with research participants, and related issues regarding the handling of participant identity and confidentiality, should be addressed before a study becomes active or as soon as the researcher becomes aware of these issues (See “Ethical Guidelines for Pool Researchers who are also Course Instructors / GAs / TAs” on p. 30.).

### ***Violations of participant pool policies***

Should a researcher violate any Pool policy, the Participant Pool committee reserves the right to suspend or deactivate a researcher from use of the Pool.

The Participant Pool committee reserves the right to report researcher conduct and policy violations to the REB as adverse events—especially, but not exclusively, those which negatively impact participants.

In the event that the Participant Pool deems it necessary to deny a researcher access to the Participant Pool for ethical or policy violations, researchers have the right to present relevant documentation in an appeal to the chair of the Participant Pool committee. Failing a resolution, researchers may then request that the head of the psychology department mediate. If a resolution cannot be achieved, then the issue can be brought to the Psychology Department AAU to select an external and unbiased party (i.e., a faculty researcher external to the psychology department) who will assist the Participant Pool committee and the Department Chair to come to a final and binding decision.

## **Before you Begin**

A standard study in the Participant Pool is one in which participant data will be collected in a single time period with no special restrictions other than those imposed by the researcher’s screening questions. If a study falls outside of a standard study (e.g., requires access to a specific or restricted population within the Psychology Department) or if any unusual or special needs exist, please consult with the Participant Pool coordinator before submitting a study for ethics review by the REB. The Participant Pool committee will be able to advise researchers on how best to obtain your needed sample, as there may be an established (and often more efficient) way of setting up a study in the Pool. This will save researchers time in the future, as researchers occasionally need to resubmit to ethics after realizing the procedure, they had approved by the REB will not work within the Participant Pool constraints. Please see page 29 for examples of special situations.

Any special requests, even if approved by the pool committee, should be documented in writing and included in pool applications.

### ***Researchers cannot offer anonymity to participants***

Identifying information needs to be retained to assign bonus points. Hence, Pool based studies cannot offer complete anonymity. Student names and email addresses *must* be collected in order to credit participants. Sometimes this information can be collected separately from other data, rendering the data non-identifiable. At other times, researchers need to collect this information along with data and discuss how confidentiality will be protected. Because of this, researchers using the Pool should refrain from describing their studies as anonymous. If researchers wish, they may create barriers between the collection of study data and the collection of information for crediting purposes. This would involve describing for which components of a study the data is anonymous. It is noted that under the TCPS2, researchers are obligated to extend confidentiality, and not anonymity, to participants.

### ***Access to participants***

- Faculty in the Psychology AAU have access to the Participant Pool. Graduate and Undergraduate students in the Psychology AAU have access to the Participant Pool, via a supervisory relationship with a member of the Psychology Faculty.
- The Participant Pool Committee may extend access to other parties at its discretion.
- Access is typically on a first-come first-served basis.
- However, should researcher need exceed the availability of participants during any given term, the participant pool committee will restrict access in an equitable manner.
- Certain limited populations are in high demand (men, first year psychology students). Researchers are asked to carefully consider whether such populations are essential for their work. The pool committee will restrict access to such populations in an equitable manner.
- Access to participants is typically granted by researchers posting sessions to the pool system, now available at: <http://uwindor.sona-systems.com> and participants signing up for these sessions online. Current exceptions to are:
  - Researchers who have strong reasons to require randomized lists.
  - Researchers who are accessing very limited populations based upon screening criteria.
  - Researchers who are having difficulty recruiting participants into their study through the standard route.
  - Complex studies (multiple-part, large time requirements).

***Note: All exceptions will require a written explanation for the request.***

### ***Compensation through the Pool***

- The only form of compensation provided through the Participant Pool is bonus marks. Presently each 30 minutes of research participation is awarded .5 bonus points.
- The maximum credits that a study can allocate are 3 points (3 hours of participation), unless otherwise approved.
- Under no circumstances can bonus points be offered through the Pool for a study which is not approved and run through the Pool.
- Under most circumstances, compensation in addition to bonus points is not permitted.
- On occasion additional compensation may be approved by the Pool committee, providing:



- provision of additional compensation is justified due to the nature of the research (e.g., exceptionally long studies, incentives to complete multiple session studies).
  - any additional compensation is not mentioned on the Pool website, and is only raised once participants attend the study.
  - No financial or other incentive(s) is offered in addition to bonus points.
  - Studies not providing bonus points must be run outside of the Pool, with appropriate ethical clearance, unless otherwise approved by the Pool committee head.
- Generally, once participants begin a study they should receive credit commensurate to the time spent and/or proportion of the study completed.

***Language for Research Ethics Board (REB) Applications***

The following is the required wording for Research Ethics Board (REB) applications when describing the allocation of Participant Pool bonus points as incentives for research study participation (on Pool advertisements, informed consent forms):

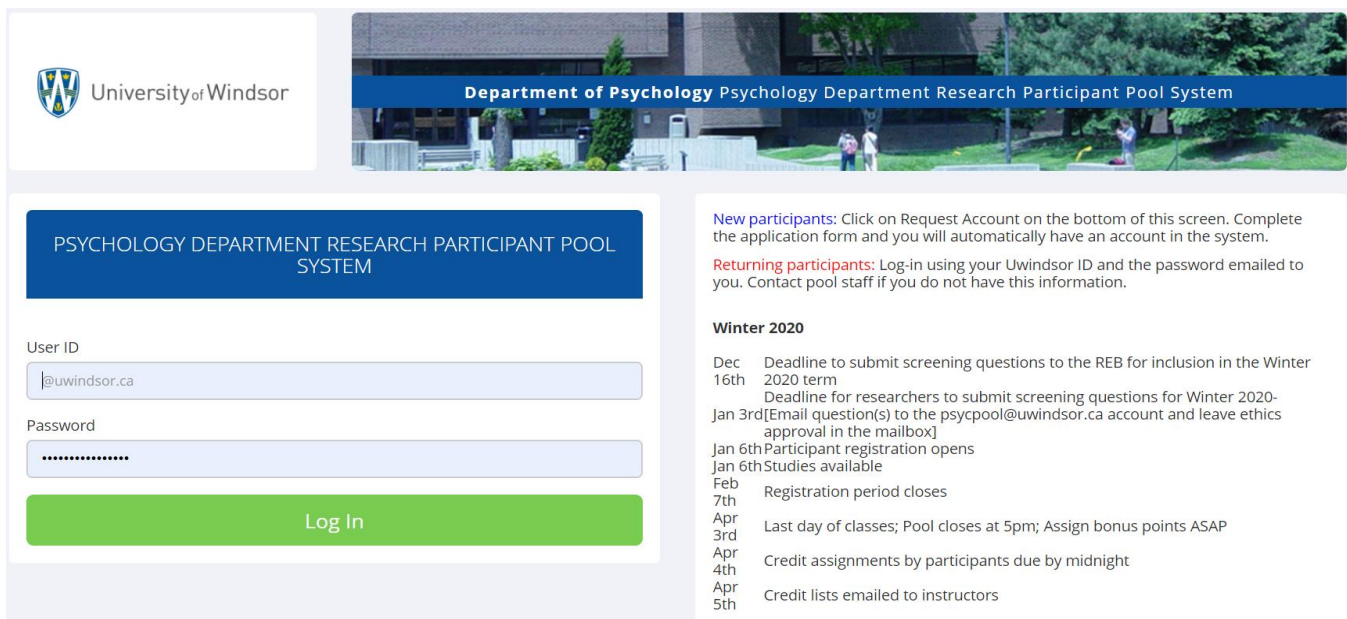
- *Participants will receive X bonus points for Y minutes of participation towards the Psychology Participant Pool, if registered in the Pool and enrolled in one or more eligible courses.*

OR

- *This study will take no more than 30/60/90/120/150/180 minutes of your time, and is worth .5,1,1.5,2,2.5,3 bonus points if you are registered in the Pool and you are registered in one or more eligible psychology courses.*

## Day-to-Day Researcher Use of the Participant Pool

- Credit for attendance, and indication of no-shows, must occur in **no more than 48 hours after the study session is completed**. Researchers are encouraged to assign credits immediately upon completion of the study session.
- Researchers *must* provide all participants with **at least 48 hour notice of any cancellation**. If you do not provide this length of notice, you must credit all individuals with the points they would have received had you run the session as scheduled.
- Researchers may post up to 50 credit hours per study **per week**. This is to ensure fair access of all researchers to the Pool across terms.
  - This means: Week 1, a researcher may post 50 credits. Assuming a 1 credit (1 hour) study, this equals 50 slots. These slots may occur at any point in the future during the current term. One week (7 days) later the researcher may post another 50 slots for this study, again for any points in the future during the current term. **See page 22 for the procedure on adding timeslots to a study.**
- Important dates for current and upcoming terms are posted on the login page to the Pool.  
<http://uwindsor.sona-systems.com>



University of Windsor

Department of Psychology Psychology Department Research Participant Pool System

PSYCHOLOGY DEPARTMENT RESEARCH PARTICIPANT POOL SYSTEM

User ID  
@uwindsor.ca

Password  
\*\*\*\*\*

Log In

**New participants:** Click on Request Account on the bottom of this screen. Complete the application form and you will automatically have an account in the system.

**Returning participants:** Log-in using your Uwindsor ID and the password emailed to you. Contact pool staff if you do not have this information.

**Winter 2020**

|          |   |
|----------|---|
| Dec 16th | Deadline to submit screening questions to the REB for inclusion in the Winter 2020 term         |
| Jan 3rd  | Deadline for researchers to submit screening questions for Winter 2020-approval in the mailbox] |
| Jan 6th  | Participant registration opens  |
| Jan 6th  | Studies available   |
| Feb 7th  | Registration period closes  |
| Apr 3rd  | Last day of classes; Pool closes at 5pm; Assign bonus points ASAP                               |
| Apr 4th  | Credit assignments by participants due by midnight  |
| Apr 5th  | Credit lists emailed to instructors   |

### ***Partial completion and Failure to complete studies***

**Participants should receive credit proportional to their participation.** Awarding credit when it has not been earned undermines the educational mandate of the Pool and awards undeserved academic credit. This also devalues the participation of students who take part fully in studies.

This section of the manual is directed at circumstances in which the researcher wishes to withhold part of the total credit that could be earned during a study.

These are some circumstances that a researcher can withhold a proportion of points from students including failure of validity checks or failure to complete a study with authentic engagement (such as answering at random, answering all questions the same etc.). These circumstances may warrant giving less points to participants. However, participants should still receive compensation proportionate to the time they spent on the survey.

For example, if a study takes 3 hours (i.e., is worth 3 credits) and a student participates for just 15 minutes and decides to leave without any explanation, awarding 3 credits is excessive. Or, if an on-line study takes 2 hours and a student completes just 10% of the questions, awarding 2 credits is also excessive. **Generally, once participants begin a study they should receive credit commensurate to the time spent and/or proportion of the study completed.** In both of these examples, the participant clearly deserves .5 points for their time; and perhaps more based on their reason for withdrawal and the surrounding circumstances.

Another example is if a researcher uses validity checks and a participant fails their validity checks, they should still receive compensation that is proportionate to the time they have spent. For example, if a study is 1 hour (i.e. is worth 1 credit) and a participant has completed 30 minutes and then failed validity checks, they are entitled to .5 bonus points for the time they invested in completing the study.

*Researchers must describe the ways in which credit (including partial credit) will be determined on the consent form.* It is important that researchers articulate how partial and full completion are determined, and specifically how awarding of partial credits is handled. The conditions for earning full and partial credit need to be communicated clearly on the consent form, prior to the start of data collection. In addition, the relationship between withdrawal from a study and earning compensation should be communicated up front.

*It is important that legitimate reasons for non-completion are recognized.* Participants have a right to withdraw from a study without penalty. In the case of legitimate withdrawal (due to discomfort or unexpected events), researchers are asked to consider rewarding full credit. In addition, it is important that researchers allow respondents to choose to not answer some questions or to choose to not complete a part of a study, without loss of credit. If in doubt, favor the participant and award the credit.

*Data must be identifiable in order to determine completion.* For studies in which credit is potentially withheld (in particular on-line surveys) the data needs to be identifiable so that proportion completed can be documented and appropriate credit awarded. In such cases, researchers cannot offer complete anonymity of data (but can continue to guarantee confidentiality). There are many ways of handling the degree of identification, which should be related to the sensitivity of the data being collected. For example, strict procedures can be put in place to ensure that only the researchers can identify the data, and identifiers can be deleted once participation is verified.

In cases in which a participant does not appear to complete the study in good faith, the researcher may wish to approach the participant and offer an opportunity to complete the study again. This seems fair in cases when a survey was completed very quickly and the responses do not appear to be meaningful

to the researcher (e.g., in 2 minutes, with the middle value selected for all questions, and the average participant takes 20 minutes). Such communications to participants must not be coercive.

Under no circumstance should a penalty (unexcused no-show) be applied for partial completion of a study. Penalties apply only when participants fail to commence a study as scheduled.

It is recommended that researchers include language on the consent form that states that the researcher has the right to withdraw the participant from the study, should circumstances arise warranting doing such. Failure to engage in the procedure or otherwise complete the study in good faith is a potential ground for removal.

*Recommendations for in person studies:* For studies in which the participant comes to meet with the researcher as scheduled, in the normative case the minimum .5 credits will be awarded. This is to recognize the time spent getting to the study. For lab studies worth less than 3.0 points (the maximum), participants can receive an additional 0.5 bonus credits in recognition of the additional effort required to participant in in-lab studies.

*Recommendations for online studies:* Participants can readily skip through online studies quickly, without meaningful engagement. Researchers can determine engagement by looking at the proportion of the procedure completed and/or the time to completion. One option is to define a proportion of the procedure that must be completed to obtain full credit. Researchers typically place the threshold for full credit between 80 and 90% of questions asked; this allows for people to skip questions that they choose without losing credit. Researchers can define a minimum threshold, below which zero credit will be awarded. For longer online studies, multiple thresholds could presumably be defined. Some on-line data collection tools allow the researcher to track the time spent on a study, which may help to inform whether the study was completed in good faith. Evaluating participant completion of online studies requires that participants can be linked to their data. (Note: The Pool and the REB asks that researchers be familiar with the features of the on-line survey tools that they use prior to submitting applications to the REB).

### ***Inclusion of screening questions***

- If you wish to select participants based on particular questions, you can e-mail these to the Pool by a predetermined date, which will be announced on the Participant Pool information website and through mass email distribution. Include the questions, and the date you received ethics clearance. Also, submit by hardcopy, in the pool mailbox, a copy of your ethics clearance letter and the questions you would like included.
- Use of any Pool screening questions or the inclusion of new screening questions requires REB clearance. That is, even if you are using a standard screening question (e.g., age; see Appendix for all standard questions), you need to have REB clearance. These are “special characteristics” of the sample. The specific wording of screening questions also needs to be reviewed.
- The REB is willing to “pre-review” screening questions for inclusion in the Pool. Sometimes a study will not receive REB clearance before the Pool screening question deadline at the beginning of a term. In this case, any screening questions can be submitted to the REB and reviewed for inclusion in the upcoming Pool registration period. Screening questions still must

be placed into context on the REB application for the study before researchers can use the question in a study.

- Under no circumstances will any screening questions be added after the deadline for submission each term.
- Questions will need to be resubmitted each term for inclusion. Screening questions may consist of: yes/no, true/false, categorical questions consisting of 8 or fewer categories, or Likert-type scales.
- Standard screening questions asked each term and available to all researchers who have included the item in their ethics application are: gender, age, ethnicity, major, English first language (y/n), number of languages spoken fluently, year in university, number of previous psychology courses, handedness, employment status, if employed part/full time.
- If you submit a question already addressed by the standard demographic questions, you will be asked to use that question instead, unless there is a substantive difference between the submitted question and the standard question.
- REB approval notwithstanding, the Participant Pool reserves the right to deny inclusion of any screening question.

#### ***Participant cancellations / no-shows***

- A participant can cancel 24 hours in advance without being penalized.
- If the individual provides notice, you can either manually cancel their session (which they can also do from their end), so as to open it up to other participants, or you can assign a credit of “excused” no-show.
- If they do not provide this length of notice, you should assign a credit of “unexcused” no-show to your study. This is the penalty for non-attendance.
- It is up to the individual researcher to decide whether the reason a person missed without ample notification is sufficient for an “excused” versus an “unexcused” no-show.
- If you have assigned an “unexcused” no-show to a participant, and later receive a legitimate reason for non-attendance, please email the details to the Pool to have the credit assignment changed.
- All appeals from participants that are directed to the Pool will first be referred to individual researchers. If a participant remains unsatisfied, the Pool committee will review the circumstances and decide on the issues.

#### ***Dates during the term***

Actual dates for upcoming terms are posted on the login page to the web-based system. The term progresses as follows:

1. Submission of screening questions.
2. Registration opens.
3. Registration closes.
4. Studies visible to participants.
5. Pool closes for data collection; all timeslots must be actioned.
6. Participants assign credits to courses.
7. Credits distributed to course instructors.

Studies can be posted, at any point before, during, or after terms.

### ***Study signup throughout the term***

Keep in mind that signup rates are typically the highest at the beginning of the Fall and Winter terms. Signup rates tend to be lower around midterms and vacations. About 20% of participants do not take part in studies until the final weeks of terms.

## **Registering as a Researcher and Registering Studies in the System**

To become a researcher, you must attend one of the scheduled workshops offered by the Participant Pool committee, which will orient you to the new SONA system. This includes Research Assistants, so please consider choosing people to fill these positions in time for them to attend one of the workshops. Please contact the Participant Pool ([psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca)) if you are unable to attend any of the scheduled times.

### ***Returning researchers***

Researcher accounts are moved to inactive following terms. If you need your account reactivated, please email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca). Data from studies held during prior terms are retained and may be continued or used for screening purposes for newer studies.

### ***New researchers***

To become a new user, you will need to email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) with your name, student ID number, uwindsor email address, contact information, role (faculty, graduate student, honours student, research assistant, etc.), date of your last researcher orientation, and name of any supervisor(s). We will add the account and you will receive an email with a randomly generated password.

All requests for accounts and other inquiries will typically be replied to/processed within **3** business days.

Once you have received your email with account information, you can go to <http://uwindsor.sona-systems.com> and login. If you forget your password, please click on the link under “Lost Password?” to the left of the login fields.

The screenshot shows the SONA system login interface. On the left, there is a login form with a text input field and a green 'Log In' button, which is circled in red. To the right of the login form is a calendar of events for the current term, listing dates from January 6th to April 5th with corresponding activities. Below the calendar, there is a section titled 'Researcher orientations will be held on the following dates:' followed by the date and time for the next orientation. At the bottom of this section, there is a line of text asking users to email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) 24 hours before a chosen session, noting the session they will attend. Below this text is a grey button labeled 'Forgot Password?', which is also circled in red. At the very bottom of the page, there is a blue footer bar with the text 'Email questions to psycpool@uwindsor.ca'.

| Date    | Event   |
|---------|---|
| Jan 6th | Participant registration opens                                    |
| Jan 6th | Studies available   |
| Feb 7th | Registration period closes  |
| Apr 3rd | Last day of classes; Pool closes at 5pm; Assign bonus points ASAP |
| Apr 4th | Credit assignments by participants due by midnight                |
| Apr 5th | Credit lists emailed to instructors                               |

**Researcher orientations will be held on the following dates:**  
January 24, 2020 - Location TBA; 10am - 11am  
Please e-mail us ([psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca)) 24 hours before a chosen session noting the session you will attend.

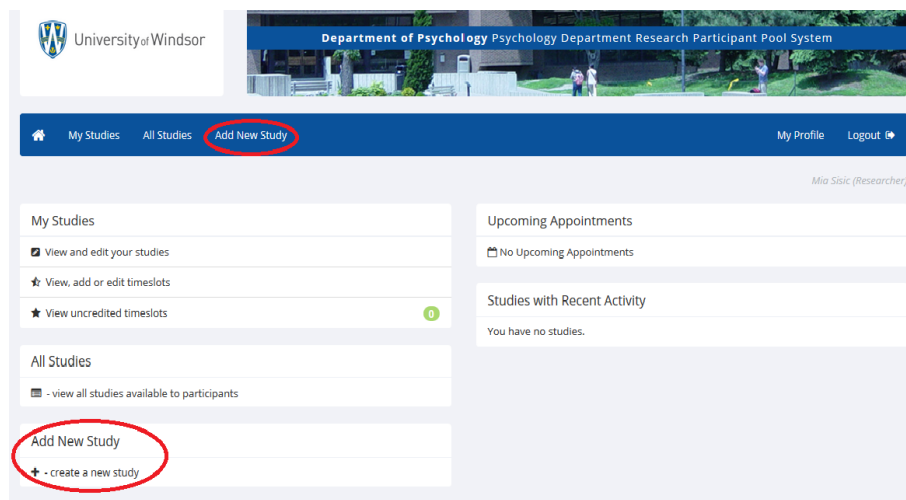
[Forgot Password?](#)

Email questions to [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca)

## Registering a study in the system

Once registered as a researcher in the system, researchers can post studies to the system.

1. Complete the ethics clearance process.
  2. Post the study to Participant Pool system.
  3. Submit paperwork to Pool mailbox.
  4. Your study will be approved within **3** business days, unless questions arise.
- To add an experiment, login and click on the “Add New Study” tab or section.



- You will be asked which type of study you are creating. If you have questions about this, please email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca). Most studies will be “Standard Study.” Then click Continue.

The 'Select study type' form provides instructions: 'To add a new study, you must first select the type of study you would like to add as well as the compensation type. You may not change a study nor the compensation to a different type once you have added it, so please be sure to select the correct type of study now.' The form lists three options:

- Standard Study** (represented by a building icon): 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. Compensation options: ☐ Paid, ☒ Credit.
- Two-Part Standard Study** (represented by two building icons): A study that is scheduled to take place at a specific place (i.e. not online), in two parts. The two parts may be scheduled to take place a specified number of days apart, and a participant must sign up for both parts of the study at one time. Compensation options: ☐ Paid, ☐ Credit.
- Online External Study** (represented by a laptop icon): An online study that is set up outside the system (i.e. on another website). Compensation options: ☐ Paid, ☐ Credit.

A 'CONTINUE' button with a right arrow is located at the bottom.

- You will need to include:
  - **Study name:** The name of the experiment is visible to participants, and therefore probably should not be the title that fully describes the study to the ethics committee. It is recommended that a title for participants to view is approved by the ethics committee as part of the research advertisement.

- **Description:** The description you post should be that which was approved by ethics. We would like to see a copy of the approved description with your application package.
- **Eligibility requirements:** A brief list of important requirements. Participants are responsible for reading this and so you may turn away (without issuing credit) anyone who signs up and does not meet these requirements (Note: Participants often do not read these requirements).
- **Study duration:** This should be approved by ethics prior to submission. You will need to offer .5 credits for each half-hour the participant would take to complete the research. You should pilot the study to determine how long the study will take for the average participant before submitting to ethics.
  - 30 minutes or less, .5 points, “30” in duration
  - 31 – 60 minutes, 1 point, “60” in duration
  - 61 – 90 minutes, 1.5 points, “90” in duration
  - 91 – 120 minutes, 2 points, “120” in duration
  - 121 – 150 minutes, 2.5 points, “150” in duration
  - 151 – 180 minutes, 3 points, “180” in duration.
  - NOTE: The study duration field and your approved study description should use the same time frame. This means, even if your study takes 10 minutes, you must write “no more than 30 minutes” in all descriptions that participants view, and tell participants “no more than 30 minutes” in all communications with them.
  - Guidelines regarding establishing study duration
    - The Pool assumes that the estimated time for completion of a study is known. This usually requires piloting the procedure.
    - The Pool assumes that researchers will not inadvertently discover that their study takes considerably more time or considerably less time than originally reviewed by the REB and communicated to the Pool. For example, finding that a planned 2 hour study only takes 70 minutes to complete would be unusual.
    - Small unanticipated misestimations may sometimes occur (e.g., a study thought to be completed in 30 minutes takes closer to 40 min), though researchers are encouraged to make efforts to avoid these.
    - In the case of a misestimation, the Pool asks that a researcher suspends recruitment until the error is resolved.
    - Any changes to duration (and therefore credit) associated with a study must be reviewed by the REB (or other appropriate ethics committee) as a ‘Request to revise’. Changes will typically require an explanation, and the submission of new recruitment materials and consent forms.
- **Preparation:** Anything you expect the participant to have done prior to attending the session.
- **Researcher(s):** The experimenter(s) are anyone whom you would like to have access to your study (i.e.: supervisor, research assistant, research coordinator for a lab). You can select multiple researchers by holding down the *control* key as you click on each name. The individual must be an active researcher to be in the list, so be sure that all individuals involved in your research have attended a workshop and have contacted us to be active in the system. Researchers may be added or removed by the Participant



Pool staff at any time. Please note that at the current time all individuals with researcher status have the ability to post sessions, delete sessions, and issue credits for that experiment. Include your supervisor here.

- **REB clearance number:** The experiment number is provided by the ethics committee.
- **REB clearance expiration:** The date provided on your ethics clearance cover sheet.
- **Active study?:** Select “yes” if you will be using this study for collecting rather than screening purposes. We will make it visible from our end.

| Basic Study Information  |   |
|--|---|
| Study Name   | <input type="text"/>  |
| (Participants see the list of studies in random order not alphabetical order.) |   |
| Brief Abstract<br>(Up to 255 characters, optional)                             | <input type="text"/>  |
| Detailed Description<br>(Up to 15,000 characters, optional)                    | <div><div></div></div>  |
| Eligibility Requirements   | <input type="text" value="None"/>   |
| Duration   | <div><input type="text" value="30"/><input type="text" value="Minutes"/></div>  |
| Points<br>(Points must be evenly divisible by 0.5)                             | <input type="text" value="0.5"/>  |
| Preparation<br>(Up to 255 characters, optional)                                | <input type="text"/>  |
| Researcher   | <div><div><input type="text" value="search..."/></div><div><div>Abbruzzese, Alexander</div><div>Abdel-Nabi, Dalal</div><div>Abdullah, Derya</div><div>Abdulle, Safia</div><div>Abeare, Christopher</div><div>Abid Maqbool, Emaad</div><div>Adair, Jewels</div><div>Adam, Tichana</div><div>Adekoya, Ibukunoluwa</div><div>Adeniyi, Paul</div></div><div>Available</div></div> <div><div>⇌</div><div><div>Bailey, Emma</div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Selected</div></div> |

|   |   |
|---|---|
| REB Approval Expiration                       | Friday, 10 April 2020   |
| Approved?                                     | <input type="radio"/> Yes<br><input checked="" type="radio"/> No  |
| Email Approval Notice?                        | <input type="radio"/> Yes<br><input checked="" type="radio"/> No<br><small>(sends an email to the researchers to notify that their study has been approved)</small>   |
| Active Study?                                 | <input type="radio"/> Yes<br><input checked="" type="radio"/> No<br><small>(inactive studies are sometimes kept for historical purposes; a study must be active and approved to show up on the list of available studies to participants)</small> |
| <input type="button" value="Add This Study"/> |   |

- **Pre-requisites and Disqualifiers:** Prerequisites are selected if there was a study you would like to ensure the participant had already completed. For example, if you would like to have a follow-up study involving only those participants who took part in a prior study. This can also be used when setting up multi-part experiments. Contact [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) for help if you plan to run a multi-part experiment. Disqualifiers are selected when you want only individuals who have not completed another study or studies. For example, you can select your own study name and/or those of lab mates to ensure individuals only enter your lab once. Or, if you are running more than one study and do not want duplicate participants across the studies.
- **Course restrictions:** You select here any courses you would like to restrict from participating in your study. For example, those conducting honours research can restrict all those who are currently taking the honours course.
- **Sign-up Password:** You would only need a sign-up password if you, 1) are conducting a multiple part experiment; or 2) are running research from randomly generated lists. In this case, you would set up timeslots, but insert an authorization code. Then, you would contact those people from your random list and provide them with the password if they are interested in participating. This allows you to ensure that people outside of this list will not sign up. However, you should still check individual appointments against your original list to ensure that someone you have contacted has not passed the password on to a friend.
- **Study URL:** This field can be used to provide a web link to more information about the study, or to a data collection web site. Any such methods should be included in the ethics clearance.
- **Participant Sign-up Deadline:** This is the amount of time prior to the session you wish to have participants no longer be able to sign up. For example, if you will check your list of appointments an hour before, you would set the close time to one hour, and thus no one that is not on this list will have been able to sign up. If you wish to allow people to sign up right up until the time you will start the session, you can write "0".
- **Notification preferences:** Select what you would like to receive emails about.

- **Researchers at timeslot level:** This would apply where you would like one researcher to have their information attached to, and to view only certain timeslots.
- **Private comments:** These are notes that can only be seen by the Participant Pool committee. For example, you may write, “Application package will be in mailbox by tomorrow, Date”. You do not need to fill this field in unless you have something you want to tell us. This is also a good location to remind us of prior discussions specific to administering your study.

Advanced Settings

Pre-Requisites

☒ Participants must participate in ALL of these studies before they may sign up
 ☐ Participants must participate in AT LEAST ONE of these studies before they may sign up

(1) Reaction Time and Individual Differences<br>(2) Influence of Publication Type on Memory - Part 1 (Inactive)

(1) Reaction Time and Individual Differences<br>(2) Influence of Publication Type on Memory - Part 2 (Inactive)

(1)Birth Order & Self-esteem among Women (2)Employment,Depression & Opinions of Self - Part 1 (Inactive)

Available

Selected

Disqualifiers

Participants must **not** have participated in ANY of these studies before they sign up:

(1) Reaction Time and Individual Differences<br>(2) Influence of Publication Type on Memory - Part 1 (Inactive)

(1) Reaction Time and Individual Differences<br>(2) Influence of Publication Type on Memory - Part 2 (Inactive)

(1)Birth Order & Self-esteem among Women (2)Employment,Depression & Opinions of Self - Part 1 (Inactive)

Available

Selected

Course Restrictions

Participants must be in one of these courses:

Available

All Courses


Selected

[16]

|   |   |
|---|---|
| Invitation Code   | <input type="text"/>  |
| (leave blank if participants do not need a special password to sign up for this study)      |   |
| Is this a web-based study?  | No  |
| Study URL (optional)  | <input type="text"/>  |
| Participant Sign-Up Deadline  | <input type="text" value="24"/> hours before study is to occur  |
| Should the Researcher receive an email notification when a participant signs up or cancels? | <input checked="" type="radio"/> No<br><input type="radio"/> Yes -- for sign-ups and cancellations<br><input type="radio"/> Yes -- for cancellations only                                     |
| Researchers at Timeslot-Level   | Can researchers for this study be assigned to specific timeslots? Only applies if the study has more than one researcher.<br><input type="radio"/> Yes<br><input checked="" type="radio"/> No |
| Shared Comments<br>(Up to 1,000 characters, optional)                                       | <input type="text"/><br>Visible to all researchers in the system, but not visible to participants   |
| Private Comments<br>(Up to 3,000 characters, optional)                                      | <input type="text"/><br>Visible only to researchers for this study, but not visible to participants or other researchers in the system  |
| Research Alternative  | <input type="radio"/> Yes<br><input checked="" type="radio"/> No  |
| <input type="button" value="Add This Study"/>   |   |

- Once you add the study, the next screen will list the information you have provided:
  - View/Modify Restrictions:** Clicking on this button, you will see a list of questions that were answered in the screening pretest. If you have ethics approved screening questions, select those questions from the list and click "Set Restrictions"

Study Information

|              |  |  |
|--------------|--|--|
| Study Name   | Standard Study   |  |
| Study Type   |  <b>Standard (lab) study</b><br>This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time. |  |
| Study Status | <b>Not visible to participants</b> : Not Approved<br><b>Inactive study</b> : Does not appear on list of available studies  |  |
| Duration     | 30 minutes   |  |
| Points       | 0.5 Points   |  |

Restrictions


Prescreen Restrictions

No Restrictions  
[View/Modify Restrictions](#)

Additional Study Information

|                              |  |
|------------------------------|--|
| Participant Sign-Up Deadline | 24 hours before the study is to occur  |
| REB Approval Code            | REB: 364334 (expires 10 April 2020)  |
| Direct Study Link            | <a href="https://uwindsor.sona-systems.com/default.aspx?p_rei">https://uwindsor.sona-systems.com/default.aspx?p_rei</a><br>This is a direct URL for participants to access the study. You may use this in an email or study advertisement. |
| Date Created                 | 12 December 2019   |

Researcher Information

|            |  |
|------------|--|
| Researcher | Emma Bailey<br> |
|------------|--|

- The next page will display the options for each of these questions. These correspond to questions that participants must answer when they register in the system. Check the ones you want to include and click “Save Changes.”

## Section 1

Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response. Please note: if you choose not to include your phone number(s), then it will limit your access to some studies.

- ☐ **(gender)**  
What is your gender?
- ☐ **(ethnic)**  
Your ethnic background
- ☐ **(major)**  
What is your major?
- ☐ **(yearuni)**  
Your year in university?
- ☐ **(numpsyc)**  
Number of psychology courses taken?
- ☐ **(engfirst)**  
Is English your first language?
- ☐ **(handed)**  
Are you right or left handed?
- ☐ **(lang)**  
How many languages do you speak fluently?
- ☐ **(employed)**  
Are you currently employed?
- ☐ **(jobstat)**  
If employed, are you working full or part time?
- ☐ **(timecall)**  
Best time to contact you by phone:
- ☐ **(18yrsage)**  
Are you atleast 18 years of age?
- ☐ **(age1)**  
What is your current age?
- ☐ **(thesis/lafrenie)**  
Are you enrolled in PSYC-4970 - Thesis: Research?

- Your contact information will be attached to your name when the participant goes to sign up. It is based on the information provided to use when you registered your researcher account. The contact information should be for the individual you would like participants to contact if they have questions or need to cancel. They may very well call you, so be sure that the number you have listed is one at which you are willing to receive participant calls.
- Please enter the details of your experiment exactly as indicated by your ethics forms.
- Once you have posted the study to the system, submit copies of the Participant Pool cover sheet (Appendix A), ethics clearance letter, study selection criteria, approved research advertisement, and approved consent form to the Participant Pool mailbox on the first floor of CHS. The paperwork will be reviewed and compared with your study in the system. Assuming there are no questions, the study will be approved within **3** business days.

### ***Participant Pool advertisements***

All Pool based studies require an advertisement that students view on the Pool website (unless the study justifiably requires an alternate recruitment method). All Pool ads should take the following format in REB applications:

Title (to be displayed to students; frequently differs from the REB application title; is limited to 100 characters):

Researchers (identified to participants on the Pool site):

Duration (30, 60, 90, 120, 150, or 180 minutes):

Credits (.5, 1, 1.5, 2, 2.5, or 3):

Description:

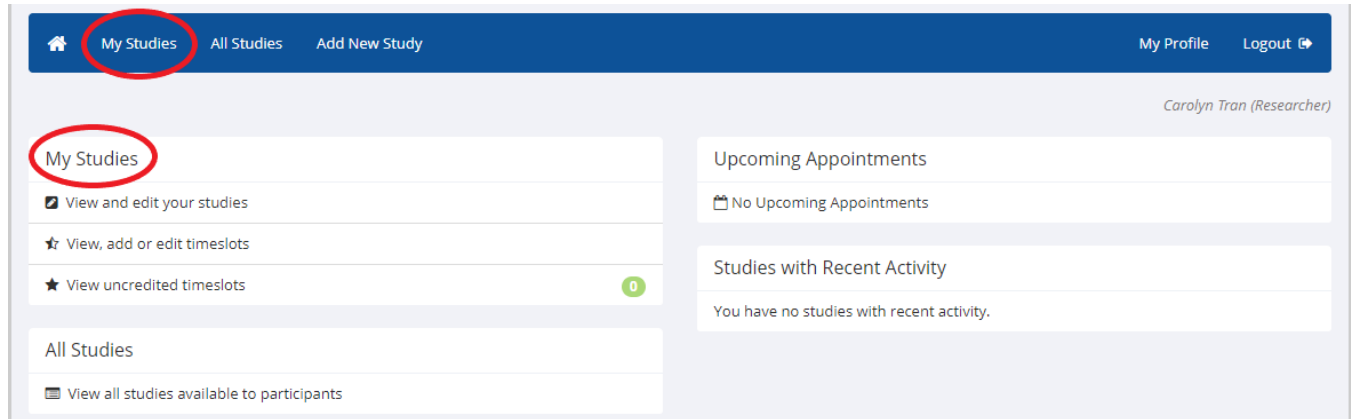
[Succinct description of what participants will be asked to do in simple, plain language. Possible details: Number of sessions, time commitments, particularly notable risks, screening requirements. References to time/credits are written in the format: *"This study will take no more than 30/60/90/120/150/180 minutes of your time, and is worth .5,1,1.5,2,2.5,3 bonus points if you are registered in the Pool and you are registered in one or more eligible psychology courses."*]

For lab studies worth less than 3.0 points (the maximum), this additional statement should be added to your compensation statement: "In recognition of the effort associated with participation in in-lab research, you will receive an additional 0.5 bonus credits."

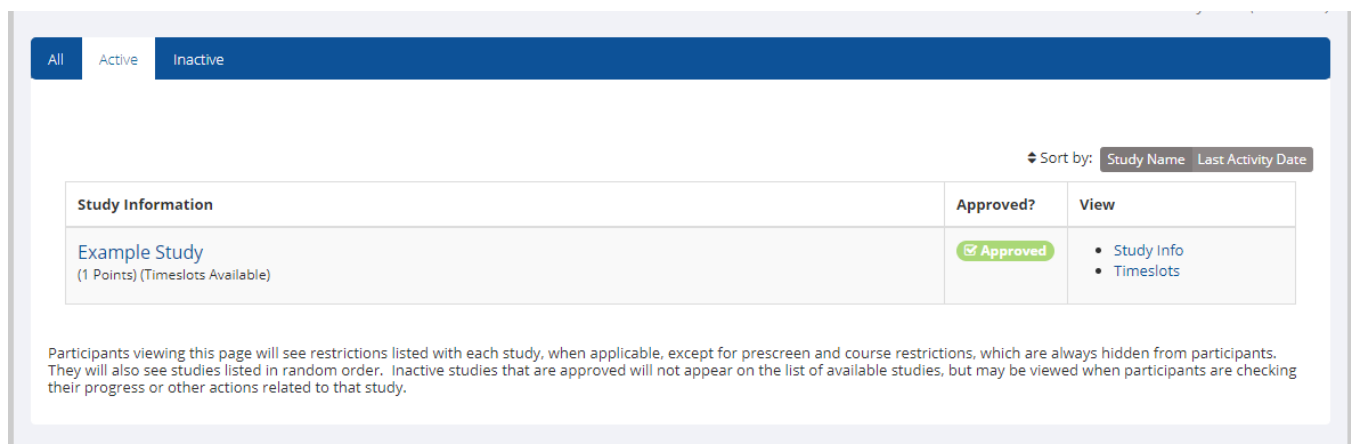
## Administering a Study in the Pool

### Viewing studies

To view your study, login to the system, and click the “My Studies” tab at the top.



You will see in the middle of the page a list of the studies that are currently associated with your name.



Click on the title or “study info.” link to see a summary of your study as you saw it when you submitted it initially.

A list of options will appear under the study, to view/administer time slots, get a timeslot usage summary, contact participants, change study information and delete the study. You can click on any one of these options. We ask that you DO NOT use the contact participants link to contact. If you need a list of people to contact, for methodological reasons, email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) to receive one.




### ***Adding timeslots to a study***

Every 7 days, researchers may only post up to 50 credit hours per study. This is to ensure fair access for researchers to the Pool across terms.

For example, this means: Week 1, a researcher may post 50 credits. Assuming a 1 credit (1 hour) study, this equals 50 slots. One week (7 days) later the researcher may post another 50 slots for this study for the following week.


*Researchers with multipart studies are restricted to this rule as well. For example, if a study has two parts a researcher can only post 50 credit hours across the two parts per week.*




You can access the page to add timeslots by clicking the “timeslots” link on the initial “My Studies” page or by clicking the “View/Administer Timeslots” link under the study information.

| Study Information |  |
|-------------------|--|
| Study Name        | Standard Study   |
| Study Type        |  <b>Standard (lab) study</b><br>This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time. |
| Study Status      | <b>Not visible to participants</b> : Not Approved<br><b>Inactive study</b> : Does not appear on list of available studies  |
| Duration          | 30 minutes   |
| Points            | 0.5 Points   |

| Restrictions           |   |
|------------------------|---|
| Prescreen Restrictions | No Restrictions<br><a href="#">View/Modify Restrictions</a> |

| Additional Study Information |  |
|------------------------------|--|
| Participant Sign-Up Deadline | 24 hours before the study is to occur  |
| REB Approval Code            | REB: 364334 (expires 10 April 2020)  |
| Direct Study Link            | <a href="https://uwindsor.sona-systems.com/default.aspx?p_rel">https://uwindsor.sona-systems.com/default.aspx?p_rel</a><br>This is a direct URL for participants to access the study. You may use this in an email or study advertisement. |
| Date Created                 | 12 December 2019   |

| Researcher Information |  |
|------------------------|--|
| Researcher             | Emma Bailey <br>Office: CHS 176 |

| Study Menu  |  |
|---|--|
|  | <a href="#">View/Administer Time Slots</a> |
|  | <a href="#">Timeslot Usage Summary</a>     |
|  | <a href="#">Download Participant List</a>  |

A list of all recent timeslots will appear, as well the names of those who participated for each, and whether you have credited them, or have taken some other action. You have the option to view timeslots by a particular date as well.

Study Menu
+ Add A Timeslot
Add Multiple Timeslots
Delete Multiple Timeslots
View Printer-Friendly List of Signups
Print

All Timeslots
Recent Timeslots
Upcoming Timeslots
Older Timeslots

Timeslots : Standard Study

Timeslots for this study are listed below, with any sign-ups listed below the timeslot.

Search for available timeslots on :

Fill Status
All
Full
Open Spaces

Thursday, 12 December 2019 GO

| Date  | Participants Pool                         | Participants | Location | Modify                 |
|---|---|--------------|----------|------------------------|
| Saturday, 14 December 2019<br>09:00 - 09:30 | Signed Up: 0<br>Open Slots: 1<br>Total: 1 |              | CHS      | <a href="#">Modify</a> |

Options for adding timeslots appear next. You can “Add a timeslot” for a particular date and time, and specify the number of participants that can be run at that one time. You **MUST** specify the actual location at this time, so be sure to secure a room prior to adding timeslots.

Add Timeslots : Example Study

Use this page to add a single timeslot for your study. You may also add multiple timeslots at once using the Add Multiple Timeslots option.

Date Friday, 20 December 2019

Start Time 10:00

End Time 60 minutes after start time

Number of Participants 1

Location CHS 188

Add This Timeslot

Once the timeslot is added, it will appear in your list of timeslots under “View/Administer Timeslots.

You can also add multiple timeslots in increments (i.e.,: 10 slots starting at 10 am on Tuesday, June 20th with 10 people each). You can specify the amount of time between each slot as well. Once you have timeslots in a particular week, you can COPY those to another week if you wish to hold exactly the same slots.

**It is recommended by the Participant Pool not to add timeslots for the whole semester at the beginning of the term. Instead, it is suggested to add timeslots every week. This is to minimize participant confusion of deadlines.**

Researchers are prohibited to post time slots after the Pool closing date as participants are unable to complete these timeslots. **Researchers posting time slots after the Pool closing date will be penalized.**

### Add Timeslots : Example Study

There are 2 options for adding multiple timeslots at once. You may add a specified number of timeslots, or you may duplicate the timeslot configuration from a specific week. If you duplicate the timeslot configuration from a specific week, the number of participants, locations, and times will be copied over.

With either option, you will have an option to review the information before the timeslot addition is performed. Please choose one of the 2 options below:

Number of Timeslots

1

Date

Friday, 20 December 2019

Start Time

10:00

Free time between slots

0

Minutes

Location

CHS

Move timeslots to business hours?

☐ Yes

☒ No

Timeslots that fall outside normal business hours will be shifted to the next business day.

Business Hours Start

09:00

Business Hours End

17:00

Number of Participants (Per timeslot)

1

Add

### Copy Timeslots from a Specific Week

From the week of

16 December 2019 - 22 December 2019

To

16 December 2019 - 22 December 2019

Add

You will receive a screen asking you to verify the information. If it's correct, select "Add Selected Timeslot."

### Add Timeslots : Example Study

Use this page to add multiple timeslots at once.

Location conflict-checking is not enabled. Add a single timeslot to take advantage of that feature. Timeslots which are scheduled to occur after the REB approval expiration date (1 January 2020) will not be added.

[Add a Single Timeslot](#)

### Timeslots


| Date  | Start Time                         | Num. Participants              | Location                         | Add This Timeslot?  |
|---|------------------------------------|--------------------------------|----------------------------------|---|
| <input type="text" value="Friday, 20 December 2019"/> | <input type="text" value="10:00"/> | <input type="text" value="1"/> | <input type="text" value="CHS"/> | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| <a href="#">Add Selected Timeslots</a>                |                                    |                                |                                  |   |

Each study is limited to 50 credit hours in a week. So, if your study is worth .5 points, you will be able to hold 100 slots in any one week. You will only be able to hold 25 slots if your study is worth 2 points. This will be the standard set for all researchers at the beginning of Fall and Winter terms, which may be adjusted based upon demand for participants. The Participant Pool will notify researchers if any limit adjustments have been made. The limit will likely be lower for Intercession/Summer when participants are more limited in number. If you require more participants, email [psycpool@uwindor.ca](mailto:psycpool@uwindor.ca) with your reasoning and we will make a decision based on the number of studies and available participants.

### Deleting sessions

Once you have added timeslots, each time you click on the “View/Administer Timeslots” link, you will see all the sessions you have open and filled. By open, it means that no one has signed up for that slot. To delete an open slot, click the “modify” button next to the slot information. Then, click the “delete” box under the timeslot summary.

### Timeslot Information : Example Study

|  |  |                        |                                  |
|--|--|------------------------|----------------------------------|
| Date   | <input type="text" value="Friday, 20 December 2019"/>  | Number of Participants | <input type="text" value="1"/>   |
| Start Time   | <input type="text" value="09:00"/>  | Location               | <input type="text" value="CHS"/> |
| End Time   | 60 minutes after start time  |                        |                                  |
| <a href="#">Update Timeslot</a> <a href="#">Delete</a> |  |                        |                                  |

If anyone has signed up for your study, you cannot delete the slot. The participant must be in the “No Action Taken” status, and you can cancel their sign up by clicking cancel under their name. You will be prompted to confirm the cancellation.

All Sign-Ups   Uncredited Sign-Ups

Listed below are all the participants who have signed up for this timeslot. If you would like to grant or revoke credit, simply choose the desired option next to each participant. If for some reason you need to cancel a sign-up, you can click the Cancel link next to the sign-up you would like to cancel. A sign-up must be in "No Action Taken" status before it can be cancelled.

You may grant Points ranging from 0 to 2 Points. The standard value in Points for this study is 1 Points

(1 Participant) 0 available spaces

| Name                      | Participated                                      | No-Show  | No Action Taken                                  | Comments |
|---------------------------|---|--|--|----------|
| Mia Sisic ( @uwindsor.ca) | <input type="radio"/> Participated<br>1<br>Points | <input type="radio"/> Unexcused<br><input type="radio"/> Excused | <input checked="" type="radio"/> No Action Taken |          |

Once all participants are individually cancelled, you can delete the slot in full as above.

### Assigning credits

To assign credits to those who have booked appointments (within 48 hours of completion), click "View/Administer Timeslots." Click "modify" next to the completed session. You will see a list of all participants. Select the desired action (Credit Granted (with desired point value); Unexcused No-Show (with penalty); Excused No-Show (no penalty)). You may choose to write a note explaining a credit if you feel it is necessary. Once you have selected a value for all participants, click the "Update Sign-Ups" button at the bottom of the list. You can make changes to this at any time by clicking "modify" and changing the selection for a particular participant. So, if you issued an excused no-show or an unexcused no-show credit, but rescheduled the participant manually, you can go into this page to change the no-show to a credit granted. As mentioned, all credits must be assigned within 48 hours of the session ending. Researchers who fail to credit participants within 48 hours will receive a warning. **Following three warnings, a researchers account will be suspended for a week.**

We will consider generating lists from which researchers can contact participants directly under two conditions: a) if a random list is required for sound methodological reasons (your explanation should be emailed to [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) along with your request and REB clearance for such a procedure) or b) if you are experiencing recruitment problems. By recruitment problems, we refer to a week or more with open timeslots posted and no sign up rate. These cases will be reviewed on a case-by-case basis.

For those seeking limited populations (e.g., male participants, first year psychology students) your requests will be accommodated as much as possible; however, the precedence for access to such high-demand limited populations will be: 1) graduate PhD / MA research and funded faculty research; 2) honours research; 3) other faculty research; 4) other graduate research; 5) other research.

The number of participants you receive in a list, as well as the number of participants you are permitted to recruit may be monitored and may be restricted when the number of participants is limited (i.e., winter, intersession and summer terms). You will be asked to indicate the number you had hoped to recruit, and the urgency with which collection must take place in these terms. You will be notified of your initial limit, which may be reviewed as the term progresses.

***Study location***

You must secure your own study location and ensure that it is sufficient room to fit the number of participants you have opened up slots for. If you do not have a location to run your study, speak with your advisor; the department has rooms that can be signed-out. This must be secured prior to adding slots.

***“Visible?”***

This is located under “Change Study Information” and indicates whether your study is visible to participants. Once you have added sessions, and your study is approved and active in the system, we will make it “visible.” If you have any concerns about who is signing up, if you posted the wrong dates for sessions, etc. you can temporarily move to “Hidden” until the issue is resolved. If you are working from a list, and will be manually scheduling participants, you can leave your study as not visible, and add timeslots for your manual scheduling use only.

If you need to provide new information or a change to your study, such as a location change, you can click the “contact all participants” link under the list of signed up participants, and type your message directly into the text box that appears. The email addresses for each participant also appear under their names, so you can email them individually. It is preferable that you click each individual’s hyperlink (blue name), obtain their email, and email them directly from your uwindsor account, as using the system leads to missed replies and delays, as the emails are generated from the [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) address.

***Rescheduling***

The same participant cannot receive credit for the same study twice. If a participant formally cancels within 24 hours (either they cancel through the system or you cancel through the system from your end upon hearing from them), they can sign up in another slot at another time. However, participants who were previously credited with an excused or unexcused no-show cannot sign up for your study again.

The system is set up with automatic email reminders. Approximately 24 hours before a session start time, the system will generate and send an email to each participant signed up for the session letting them know when and where. If they reply to this email, the reply comes to the psycpool email account. All questions and concerns will be directed back to the researcher. Individual researchers may wish to consider phone reminders as well, so they have ensured that the person received the reminder.

***Do not allow walk-ins***

Check your appointment list after the close time, and prior to the session start by viewing your timeslot. Take the list with you on which to make notes of attendance. If someone is looking for a study location, do not enlist him or her in your study without checking that his or her name is printed on your list. If someone who is not signed up for another study shows up with enough time, you may take them to a computer to sign them up on the spot. You can always recommend another session you are holding that they may attend.

### ***Updating a study in the system***

You can make changes to your study details only with ethics clearance. After the clearance is granted, submit proof of clearance (through email or hardcopy) and the details of requested changes. These will be made within 3 business days through the administrative side of the system. If you find errors in your study details, email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) in order to make the change(s).

### ***Conducting research across terms***

At the end of each term, all studies will be changed to “Inactive” status. Prior to this being completed, an email will be circulated asking that you notify [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) by a particular date if you plan to continue recruiting through the next term. Those who have replied will have their studies remain “Active” and their researcher account remain “Active.” If you find that you cannot login due to “restricted” status or that your study is listed as “Inactive” (red “I” next to the study name), email [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca). Studies are maintained in “Inactive” status in the system for at least a year after their last activation. If your study is active across terms, individuals who participated in prior terms will not be able to take part in subsequent terms.

You can use previous studies as pre-filters for a new study by selecting its name from the “Disqualifier” list when you submit your new study details.

### ***Specific situations***

The following situations are ones that we request you contact us about before you submit your research plan for ethics review. Specifically, you should provide a written rationale for the request that is to be submitted with the Pool application. Frequently, customized methods for administering such studies in the system are required and it is easier to incorporate these into your proposal before sending it in for ethics review, rather than having to re-submit changes and wait for a second review.

#### **Examples of special situations:**

*Multi-part experiments*

*Web-based experiments*

*Access to high-demand special populations (male participants, first year psychology students)*

*Need for randomized lists of participants*

We will provide you with specific information on how to manually schedule participants should you need lists of participants to contact.

### ***Online questionnaires***

The use of online questionnaires has increased in recent years and they present special challenges for the researchers using them. If you are thinking of conducting a study that uses an online questionnaire, it is your responsibility to be aware of the differences between administering an online questionnaire and a typical lab-based study, and ensure that you do not violate Pool policies.

Note: The Pool and the REB asks that researchers be familiar with the features of the on-line survey tools that they use prior to submitting applications to the REB.

***Some common issues of which to be aware:***

- Researchers are responsible to ensure that the online software they use has the functionality to conform to Pool policies.
- Participants must sign up for a slot in the Pool system before being directed to an external research web site. Typically participants will then be directed to the site.
- Researchers must collect sufficient information so that participants can be credited in the Pool system. Crediting of web-based studies is not automatic; researchers enter points on the crediting page, similar to other studies.
- Participants must be credited 48 hours after they complete the online questionnaire, NOT after the timeslot date. Therefore, you must be able to monitor participation in your study on a daily basis.
- Because participants complete online questionnaires at their convenience, researchers sometimes feel free to open an excessive number of timeslots. You must adhere to the timeslot posting cap (see *Adding timeslots to a study* on p. 22) Every 7 days, you may only post up to 50 credit hours per study. This is to ensure fair access for researchers to the Pool across terms.
- There are specific issues related to clearance of on-line studies by the REB. Researchers may wish to consult about procedures, confidentiality, informed consent, and data security prior to submitting applications for ethics review.



## Ethical Guidelines for Pool Researchers who are also Course Instructors / GAs / TAs

The Participant Pool is designed to protect students from any real and perceived risks that arise when individuals hold multiple positions of power over them. It is also designed to give a large group of researchers reasonable, fair, and timely access to this collective resource. The mission of the Pool is to provide students with a quality educational experience, while facilitating the completion of all research studies.

Maintaining a reasonable balance between protection of students and facilitation of research places a particular ethical burden on researchers who also teach courses from where Pool Participants are drawn.

- 1) As per Psychology AAU mandate, the Participant Pool is the single approved method for recruiting participants from psychology courses. There are just two exceptions:
  - a. When instructors study teaching methods in their own course;
  - b. When the chair of the participant Pool committee grants an exemption.
- 2) Participant Pool studies are advertised to students solely through the Participant Pool website or via alternative procedures approved by the chair of the Participant Pool Committee and the appropriate REB (see *Participant Pool advertisements* on p. 20 for further details about recruitment via the Pool).
- 3) It is important that instructors do not make announcements or send communications about their own research projects to students in their classes. If instructors encourage, instruct, or invite their students to take part in their own study:
  - a. There is an appearance of coercion.
  - b. Students may feel obligated or pressured to take part in their instructor's study.
  - c. Students may feel that this study has been promised to them. They may wait to take part in the study if it is not yet available. Students understandably become upset if they wait for a particular study instead of undertaking current studies.
  - d. Other researchers are disadvantaged.
- 4) The Pool is designed for students to access the Pool site and choose for themselves which studies they wish and do not wish to join. Instructors should tell participants to go to the Pool, review the studies available to them, and choose for themselves the studies they would like to join.
- 5) Instructors who conduct research using the Participant Pool need to articulate how they will handle this potential conflict of interest on their REB applications.
  - a. How will inappropriate communications with students be avoided?
  - b. How will student participation from courses be handled:
    - i. Will students from a course be excluded from participating?
    - ii. How will the researcher/instructor remain unaware of the participant of their students in their study while a term is on-going?

It is reasonable for instructors to periodically remind students that studies are available in the Pool, to mention that they conduct research that uses the Pool, and to thank participants on behalf of all researchers in the department for taking part in their studies. An instructor/researcher mentioning that they sometimes conduct research using the Pool and that they appreciate student participation is also appropriate.

The ethical line is crossed when an instructor/researcher intentionally or unintentionally communicates that they would appreciate students participating in their own study, or when they directly invite students to take part in their own study. (Again, the natural exception to this guideline occurs when instructor/researchers conduct research on teaching methods in their own courses; the University REB has recommended guidelines for this type of research). In addition, researchers are not able to advertise specific studies in classes eligible for Pool credit in order to prevent advertising one study over another.

The Participant Pool only works if all researchers comply with the spirit of these guidelines.

## Specific Guidelines for Honours Undergraduate Students

The details above apply to honours research as well – please read the complete manual carefully. You must obtain and submit ethics clearance. This clearance will typically come from the Departmental Ethics Committee. You will submit the entire ethics package. When you complete the details of your study, use the number provided by the ethics reviewer as your REB number. You should list the faculty member who signed your ethics application as the supervisor name.

It is expected that **50 credit hours per semester** is sufficient to meet the requirements of most honours thesis projects. If honours students wish to collect more participants, they must submit a written rationale to [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) (MS Word document attachment) outlining the reasons why more participants are necessary. This rationale should first be approved by the Honours Thesis course instructor.

As this is the first independent research experience for many honours students, here are some recommendations:

1. Try to begin collecting data sooner than later. The later into the Winter term that you wait, the less likely that you will be able to recruit enough participants.
2. Try to collect a reasonable number of participants. In most circumstances, you cannot expect to collect much more than 100 (assuming a 0.5 bonus point study) participants in each of the Fall and Winter terms. Access to participants in the intersession and summer terms will be increasingly limited. Plan accordingly.
3. Be respectful of participants, who many researchers rely upon for collecting data.
4. Practice good customer service. Answer questions and help with any problems which might arise.
5. Please assign bonus points promptly (we recommend immediately following the session). This is the single greatest point of frustration for participants.
6. Try to plan ahead. Research is a slow process; do not expect that you will complete any part of the process quickly.
7. The faculty and staff want to help you to succeed in your research, but please be patient and respectful throughout the process. You are one of many researchers using the Pool, and the needs of each must be taken into consideration.
8. If you have lost some data, we can accommodate up to 10% of your originally approved number. For example, with a 1 hour study, Honours researchers can post up to 50 credit hours per semester. If you experience issues such as loss of data due to unforeseen circumstances, you can e-mail us at [psycpool@uwindsor.ca](mailto:psycpool@uwindsor.ca) and we will typically allow for you to collect an additional 10% - or 5 participants.

## **Violations of the Pool SOP**

The Participant Recruitment takes complaints and protocol violations seriously. In the case that a problem appears to have arisen, the Chair of the Participant Recruitment committee will first attempt to gather information and informally discuss the concern(s) with the researcher(s).

In the case that an informal resolution cannot be reached. The Chair will initiate a formal investigation in consultation with the Participant Recruitment Committee. The Chair will seek to gather information from all relevant parties, who may include research participants, the researcher(s), the REB, and other parties knowledgeable of the circumstances leading to the complaint. Based on the information gathered, the Participant Recruitment Committee will decide upon a course of action. Actions may range from dismissal of the complaint up to loss of access to the Pool. Should restriction or barring of access to the Pool be deemed necessary, the conditions under which access can be re-gained will be articulated.

Serious violations of the SOP are considered 'adverse events' by the REB, and will be reported to the REB.

## **Pool from the Participant Perspective**

It may help to know how the Pool works from the participant's perspective. They are given a period of approximately a month in which to either register or reactivate their account (if they have participated previously). They are prompted to complete the demographic questions and select their courses.

After the close of registration, they can login and click a "Studies" tab. They will then be provided with a list of all of the studies that have open slots for which they qualify.

Qualification is based on whether their responses match the prequalifier, nonqualifier, and pre-filter selections tied to the study and whether they have participated in the study before. They can see how many credits each is worth and how many slots are open. They can select a study by clicking on the study name. They will see the contact information of the researcher, and the description, as well as a list of timeslots. Each time they return to the "Studies" screen, the list of experiments is in a new order, randomly determined.

They can then select a timeslot that they are interested in. They will see the details of the slot and location and will be asked to agree to the information. Once they confirm, they can view and cancel their appointments under the appointment tab.

After you have credited the participant, they can enter the "My Schedule/Credits" section to assign their credits.

# **Appendix**

## Application to Recruit Research Participants through the Psychology Research Participant Pool

NOTE: Incomplete applications will not be reviewed.

*Please submit the following two forms with your application and keep the third page for your records.*

Title of Study (to be posted on SONA): \_\_\_\_\_

Title of Study submitted to the REB (if different): \_\_\_\_\_

REB Number: \_\_\_\_\_

Dates of ethics clearance: \_\_\_\_\_ to \_\_\_\_\_

Type of Research: \_\_\_\_\_ Psychology Faculty (\_\_\_\_ Funded/ \_\_\_\_ Unfunded)

\_\_\_\_\_ Psychology Graduate Thesis or Dissertation

\_\_\_\_\_ Psychology Honours Thesis

\_\_\_\_\_ Other: (please specify) \_\_\_\_\_

\*Study duration (in minutes): \_\_\_\_\_ \*Number of bonus points to be awarded: \_\_\_\_\_

\* Please refer to "Compensation through the Pool" in the Researcher Manual. Researchers who overestimate the time that participants require to complete their study or who provide credits in excess of those approved for the study are violating Pool policy and may be barred from recruiting further participants.

Are you offering additional/alternative forms of compensation? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, please describe: \_\_\_\_\_

Total number of undergraduate psychology students to be recruited for this study: \_\_\_\_\_ (should not exceed number approved by the REB)

Are you using screening questions? \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, please attach separately.

Are you also recruiting participants outside of the Participant Pool? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, please explain (attach a separate page if necessary) \_\_\_\_\_

\_\_\_\_\_

Name of Researcher: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Name of Supervisor: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**\*\*Please review the researcher and supervisor contracts of responsibility on the following page. The contracts MUST be signed in order for your application to be reviewed and approved by the Participant Pool Coordinator.**

### **Researcher Contract of Responsibilities**

As a researcher using the Participant Pool, you are responsible for ensuring that you have attended a Participant Pool New Researcher Orientation session (available dates are posted on our homepage) and that you are familiar with all current Participant Pool policies. Please see "Important Participant Pool Policies" on the last page of this document for an overview of the most critical policies (retain for your records).

Additionally, you are responsible for ensuring that you conduct yourself professionally and respectfully in all interactions with participants (e.g., in-person, e-mail, phone). Any problematic issues that arise regarding appointments or participant compensation should be brought to the immediate attention of a Participant Pool Coordinator. You are also responsible for ensuring that you respond to any communications from any Participant Pool representative in a timely manner.

*By signing and submitting this form, I (researcher) acknowledge that I have undergone the necessary preparation to use the Department of Psychology Research Participant Pool. I agree to abide by all policies and procedures regarding the Participant Pool. I understand that failure to abide by any Participant Pool policy could result in an indefinite loss of my, and/or my supervisor's, access to the Pool at the discretion of the Committee on Participant Recruitment.*

Name of Researcher: \_\_\_\_\_

Signature of Researcher: \_\_\_\_\_

Date: \_\_\_\_\_ Date of Orientation Session attended: \_\_\_\_\_

### **Supervisor Contract of Responsibilities**

As a research supervisor, you are responsible for ensuring that you, your student(s), and any research assistant(s) using the Participant Pool have attended a Participant Pool New Researcher Orientation session and are fully aware of all current Participant Pool policies. You will be held responsible for any breaches of Participant Pool policies by your supervisee(s). Breaches of policy may result in a loss of your access to the Participant Pool as well as the access of your supervisee(s). Please see "Important Participant Pool Policies" on the last page of this document for an overview of the most critical policies.

Research supervisors will be carbon-copied on all communication between student researchers and/or research assistants and the Participant Pool administration team.

*By signing and submitting this form, I (supervisor) agree to abide by all policies and procedures regarding the Department of Psychology Research Participant Pool. I acknowledge that I am responsible for the conduct of my supervisee(s) who use the Participant Pool. I understand that failure to abide by any Participant Pool policy, either by myself or by my supervisee(s), could result in an indefinite loss of my access to the Pool at the discretion of the Committee on Participant Recruitment.*

Name of Supervisor: \_\_\_\_\_

Signature of Supervisor: \_\_\_\_\_



Date: \_\_\_\_\_

Date of Orientation Session attended: \_\_\_\_\_

## **Important Participant Pool Policies**

### **Timeslot Posting Limit**

You can post up to **50 credit hours** of timeslots per **seven day period**

Example: If you post 50 credit hours of timeslots on a Monday, you must wait seven days before you post 50 more credit hours of timeslots.

### **Crediting Participants/“Actioning” Timeslots**

Participants must be credited within 48 hours of study completion.

Upon the Participant Pool closing (see date on SONA website), all remaining timeslots must be attended to or “actioned” immediately.

### **Timeslot Cancellations**

You must provide participants with a minimum of 48 hours notice if cancelling a scheduled appointment.

If you are unable to provide 48 hours notice, the participant must be credited for the session.

### **Dual Relationships**

If you are teaching a class or a lab and/or if you are a TA/GA for a class or a lab, you cannot advertise your study to your students. This includes classroom announcements, CLEW announcements, and any other form of communication about the study with your students.

\*For more information about these and other Participant Pool policies, please consult the Participant Pool Researcher Manual and/or the Researcher Fact Sheet & FAQ on the Psychology website.

## **Checklist for researchers submitting a new study**

*Be sure you have included the following in your application package to the Pool. Incomplete application packages will not be reviewed.*

- ☐ Pool Cover Sheet, including signatures (researcher and supervisor where applicable)
- ☐ Ethics Clearance Letter (Departmental or University REB)
- ☐ Informed Consent form
- ☐ Ethics approved study advertisement
- ☐ Screening questions (where applicable)

## Psychology Research Participant Pool REB Revision and Extension Form

*Please complete this form if you have made revisions to your study and/or if you have requested an REB clearance extension and attach a copy of your most recent REB clearance notice.*

Title of Study (posted on SONA): \_\_\_\_\_

REB Number: \_\_\_\_\_

Dates of original ethics clearance: \_\_\_\_\_ to \_\_\_\_\_

Dates of extended ethics clearance: \_\_\_\_\_ to \_\_\_\_\_

Have you made revisions to your study description, screening questions, procedures, sample size, etc?

\_\_\_\_ Yes\*      \_\_\_\_ No

If yes, please describe them in detail (attach an additional page, if necessary):

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Will you be recruiting additional participants beyond your originally approved number?

\_\_\_\_ Yes\*      \_\_\_\_ No      If yes, please indicate how many: \_\_\_\_\_

*\*Any change to your study requires approval from the Participant Pool. It is recommended that you discuss proposed study changes with a Pool representative (psycpool@uwindsor.ca) prior to seeking clearance for a change from the REB. REB clearance does not guarantee a change conforms to Pool policies.*

Name of Researcher: \_\_\_\_\_

Signature of Researcher: \_\_\_\_\_

Name of Supervisor: \_\_\_\_\_

Signature of Supervisor: \_\_\_\_\_

Date: \_\_\_\_\_

## Standard Screening Questions

(you need REB clearance to use any screening questions, including these)

### 1. What is your gender?

1. Identifies as Male
2. Identifies as Female
3. Transgender
4. Non-Binary
5. Two Spirited
6. A gender not listed above (please specify): \_\_\_\_\_

### 2. Your ethnic background

1. Aboriginal (North American Indian, Metis, or Inuit)
2. White
3. Chinese
4. Black/African
5. Southeast Asian (e.g. Vietnamese, Cambodian, Malaysian, Laotian, etc.)
6. West Asian (e.g. Iranian, Afghan, etc)
7. South Asian (e.g. East Indian, Pakistani, Sri Lankan, etc.)
8. Korean
9. Japanese
10. Latin American
11. Filipino
12. Mixed
13. Caribbean
14. Arab (e.g. Lebanese, Palestinian, Egyptian, Iraqi, etc.)
15. Other

### 3. Uwindsor email address:

Free entry

### 4. What is your major?

1. Undeclared
2. Biological Sciences
3. Business
4. Canadian Studies
5. Chemistry and Biochemistry
6. Communication Studies
7. Computer Science
8. Criminology
9. Dramatic Art
10. Earth Sciences
11. Economics
12. Education
13. Engineering

14. English
15. French
16. Geography
17. History
18. Kinesiology
19. Languages
20. Literature and Cultures
21. Law
22. Labour Studies
23. Mathematics and Statistics
24. Music
25. Nursing
26. Philosophy
27. Physics
28. Political Science
29. Psychology
30. Religious Studies
31. Sciences
32. Social Sciences
33. Social Work
34. Sociology and Anthropology
35. Urban Planning
36. Visual Arts
37. Women Studies
38. Other

5. Your year in university?

1. 1
2. 2
3. 3
4. 4
5. other

6. Number of psychology courses taken?

1. I am taking my first psychology course(s) this term
2. I have completed one prior psychology course
3. I have completed 2-3 prior psychology courses
4. I have completed 4-5 prior psychology courses
5. I have completed more than 5 prior psychology courses

7. Is English your first language?

1. Yes
2. No

8. Are you right or left handed?

1. Left
2. Right
3. Mixed

9. How many languages do you speak fluently?

1. 1
2. 2
3. 3
4. 4 or more

10. Are you currently employed?

1. Yes
2. No

11. If employed, are you working full or part time?

1. Full time
2. Part time
3. Not Applicable

12. Phone number (land-line):

Free entry

13. phone number (cell):

Free entry

14. Best time to contact you by phone:

1. Weekday morning (9am-noon)
2. Weekday afternoon (noon-5pm)
3. Weekday early evening (5pm-9pm)
4. Weekday late evening (10pm-midnight)
5. Weekend afternoon
6. Weekend evening

15. Are you at least 18 years of age?

1. Yes
2. No

16. What is your current age?

1. 17
2. 18
3. 19
4. 20
5. 21-25
6. 26-30
7. 31-35
8. 36-40
9. 41-45
10. 46-50
11. 51+

17. Are you enrolled in PSYC-4960 - Thesis: Research?

1. Yes
2. No

## Participant Pool Ad Template

**Note:** *The ad you post on line must match verbatim the ad which is submitted to and cleared by REB. This is the ad participants will see when signing up for studies through the Participant Pool system.*

**Study Name** *(up to 100 characters):*

*(This is what participants will see when they view the study. Your study name may differ from the title you use in your ethics application and/or your manuscript, though the alternate title must still be cleared by REB.)*

**Brief Abstract** *(up to 255 characters, optional):*

**Detailed Description** *(up to 15,000 characters, optional):*

**Eligibility Criteria** *(optional):*

**Duration** *(in 30 minute increments):* NOTE: The online Sona form only allows you to provide numerical responses (i.e., 30, 60, 90, 120, 150, 180) in this field.

**Points** *(in .5 increments):* NOTE: The online Sona form only allows you to provide numerical responses (i.e., 0.5, 1.0, 1.5, 2.0, 2.5, 3.0) in this field.

**Preparation** *(up to 255 characters, optional):*