Instructions for Conducting Research using the Psychology Paid Subject Pool

Below are instructions about conducting research using the Psychology Department's **Paid Subject Pool**. Read the information carefully. If you have questions, consult the FAQ or contact the Subject Pool Coordinator. All studies must have prior approval from the campus Institutional Review Board (IRB) specifically to run paid participants. Studies in the **Paid Subject Pool** do not have to be approved by the Psychology Human Subjects Committee (HSC) in addition. Note that there is a different instruction file for the Psychology Course Credit Subject Pool.

*Requesting a Study Number in the **Paid Subject Pool** system*

Before you can run a study, you must request a study number by filling out a form to request creation or activation of a study number in the **Paid** Subject Pool (available on the department website; notice that there are different forms for requesting study numbers for the **Paid** and Course Credit Subject Pools). Submit the completed form and required documentation to the Subject Pool Coordinator. In addition to assigning a study number, the Coordinator will title all studies in the **Paid** Subject Pool "Paid Study ###". There are different types of study requests depending on whether the study is already in the **Paid** Subject Pool system or the Course Credit Subject Pool system.

1. **Studies run in previous years in the Paid Subject Pool**: These are studies that have a pre-existing study number in the **Paid** Subject Pool system which only needs to be reactivated. If these studies have had only minor revisions (e.g., personnel change) or annual renewal updates since they were last approved by the IRB, you do not have to be resubmit all of the IRB documents. The most recent IRB approval letter will suffice. Fill out the form to request activation of an existing study number in the **Paid** Subject Pool and attach your most recent IRB approval letter. Shortly after receiving your request, the Subject Pool Coordinator will re-activate your researcher account (if necessary), reactivate the study number, and email you. You will then be able to run your study.

2. **New studies that have never been in the Paid Subject Pool**: These are studies that have never been set up in the **Paid** Subject Pool before. They may or may not have already been set up in the Course Credit Subject Pool. Fill out the form requesting a study in the **Paid** Subject Pool and attach: (1) Most recent IRB approval notice, (2) Full completed IRB-1 form, including amendments if there have been any, (3) Consent Forms, and (4) Debriefing sheets. If the study has already been set up in the Course Credit Subject Pool, you still need to include all of the documents listed above the first time you request creation of the study in the **Paid** Subject Pool system. In that case, also include the study's number in the Course Credit Subject Pool on the request form for the study in the **Paid** Subject Pool. Shortly after these materials are received, the Subject Pool Coordinator will create a new study number and set up or reactivate researcher accounts if necessary and email you that you can now set up and run your study

*Setting up a study in the **Paid** Subject Pool system*

Once a study is activated, you must set up some information so that it runs properly. Even if the study is the same as previous semesters, double-check all of the information, following the steps below.

1. Go to the **Paid** Subject Pool website and log in using the user ID and password emailed to you by the Subject Pool Coordinator.

2. In the center of the screen, click *My Studies*. Your study number should be in the *Active Studies* box.

3. Click on the study number. This takes you to the main page for your study.

4. Click *Change Study Information*, near the bottom of the screen. This allows you to modify settings including eligibility (outside of the pretest), researcher access, course restrictions, payment amount, and reminder email options. Do not change the study name or duration. All studies are being set up in the **Paid** Subject Pool system with $1 as the payment amount but you should change that to the amount you will pay participants. They will see this amount when they look for studies to sign up for. Click *Save Changes*.

5. An important difference between the **Paid** and Course Credit Subject Pool online systems is that you are allowed to include brief descriptions of your studies in the **Paid** Subject Pool but you are not allowed to do so in the Course Credit Subject Pool.

6. There is no communication between the **Paid** and Course Credit Subject Pools. That means you cannot set up restrictions for a study in one system that depend on studies in the other system. That is, if you have the same or similar studies in both systems, you cannot set up restrictions for a study that automatically prevent people from signing up for the same or a similar study in the other system.

7. To set up requirements using the pretest, click on *View/Modify Restrictions* in the center of the screen. An age restriction has automatically been included in your study's prescreen restrictions. This is so that underage participants do not participate. Do not remove this restriction. Select any other questions you want to use for prescreening. Click *Set Restrictions*. Select the response options that you want to be eligible for participation in your study. Click *Save Changes*.

8. To create timeslots for your study, click *View/Administer Timeslots*, then click *Add A Timeslot*. Fill out the *Timeslot* information: the date, time with AM/PM, number of participants in the session, and the location. Include both the building (Psychology or Beckman Institute) and the room number. Click *Add this timeslot*. Repeat this process for every session.

9. You must update a participant's attendance status within 48 hours of the session. From your study's home page, click *View/Administer Timeslot*. Select the session, and click *Modify*, to bring up the *Credit* page. The default status is *No Action Taken*. To record attendance, select the *Participated* button next to the participant's name. To record failure to complete the study (for any sort of absence, cancellation, or other situation), select the *No-Show* button next to the participant's name. In the *Comments* box, include any details about the type of *No-Show* situation. See the *Recording Attendance*, *No-Show*, and *Cancellation* sections below for more details. It is important to follow these procedures even for paid studies (see below).

Recording Attendance

You must record attendance within 48 hours of the study in the **Paid** Subject Pool online system even though you will be paying these participants by whatever mechanism you usually use for paying participants, rather than assigning them credit. (This system is intended to facilitate getting people to sign up for your paid studies. It will not handle any aspect of paying them or the record keeping that is required about such payment.) Online studies must record attendance within 48 hours of the participation deadline. Use the *Comments* box on the *Credit* page to record information about a participant's absence or conduct. The Subject Pool Coordinator will check on the number of *No-Shows* people in the **Paid** Subject Pool have, and lock out people who have accumulated two Unexcused *No-Shows*.

By accident, a researcher may run a participant who has not signed up for their study (i.e., the researcher goes to record attendance for the participant and realizes that their name is not on their study's *Credit* page). If this happens, the researcher must email the Subject Pool Coordinator explaining the situation and providing the following: Participant's name, email address, study #, and session date/time. The Coordinator will review the information, and record attendance as necessary.

If you change a participant's attendance status from *No Show* to *Credit*, you must email the Subject Pool Coordinator, since such changes can affect the participant's account. If their account is locked because they have had two Unexcused *No-Shows* and you change a *No-Show* to a *Credit*, their account will not be unlocked automatically. Only the Subject Pool Coordinator can unlock the account.

There are certain situations in which a participant's *No-Show* will be Excused. If any of these situations occur, a researcher must mark the participant as a *No-Show* and use the *Comments* box to explain the situation so that the participant's *No-Show* is Excused. Using the *Comments* box to provide information is the only way to let the Coordinator know whether the *No-Show* should be Excused or Unexcused.

1. A participant who is using a cell phone, ipod, being disruptive, or purposely providing inaccurate/ inappropriate responses can be asked to leave and not given credit.

2. A participant who is not comfortable with a study can withdraw at any time. If a participant withdraws before completing a study, you should handle prorated payment for time spent in the way you said you would in your IRB application. Record in the *Comments* box whether partial payment was given. (We don't need to know the actual amount.)

<u>*No-Shows*</u>
In the online **Paid** Subject Pool system, a *No-Show* includes any situation in which the participant does not complete a study. A *No-Show* is <u>not in itself</u> a penalty. Any of the following situations can be classified as a *No-Show*: a missed session, a late arrival to a study, an incomplete online study, a session canceled less than 24 hours in advance, or a participant choosing to or being asked to leave. The <u>only</u> way to know what kind of *No-Show* a situation is (and whether it should be Excused or Unexcused), is by what the researcher writes in the *Comments* box. This is why it is the researcher is required to enter detailed information about the *No-Show* in the *Comments* box.

1. **Cancellations**: Details are in the *Canceling Studies* section below. All cancellations are marked as *No-Shows* in the online system. Use the *Comments* box to provide details about the situation.

2. **Participant Absences**: If a participant misses a study, they must be marked as a *No-Show*. Information about the absence <u>must</u> be included in the *Comments* box. This can include situations in which participants emailed to explain their absence, their justification for missing the study, etc. This information will be reviewed and in certain cases (emergency, documented illness, etc.), the *No-Show* may be Excused. Typically, if a participant cancels less than 24 hours in advance or misses an appointment, the *No-Show* will be Unexcused.

<u>*Canceling Sessions*</u>
Whenever a researcher cancels a study session that has participants signed up, they must email the participants and the Subject Pool Coordinator. Include a list of the participants' names in the email to the Subject Pool Coordinator.

1. **Researcher Cancellation**: Send emails to the participants who are signed up and Subject Pool Coordinator alerting them to the cancelled session. Then, in the online system select the session you want to cancel and click *Modify*, which brings up the *Credits* page. Change each participant's status from *No Action Taken* to *No Show*. In the *Comments* box you must write *Researcher Cancelled*. This lets the Coordinator know that this was a cancellation (an Excused *No-Show*) and not an Unexcused *No-Show*.

2. **Participant Cancellation**: If a participant emails to cancel more than 24 hours before a session, tell them they can cancel it themselves in the online system, under *My Schedule/Credits*. If it is less than 24 hours before the session, then it is too late to cancel in the online system. On the *Credits* page in the online system, mark them as a *No Show* and in the *Comments* box write *Participant emailed too late to cancel*. This will <u>not</u> excuse their *No-Show*, but it provides information about the *No-Show*, in case they appeal to have the *No-Show* excused.

<u>*Sign-In Sheets*</u>
For the **Paid** Subject Pool, you do not have to turn in attendance sheets to the Subject Pool Coordinator (but it's a good idea to use them and keep them with your payment records in the lab). You can print these out from the online system. It should show the date and time and the participant's name along with the study number. Participants should sign this sheet at the beginning of the session for your records. The

sign-in sheets will be helpful if you ever have a dispute with a participant about whether they showed up and did your study.

Consent Forms

Prior to the start of the study, participants must read and sign the consent form for the study that they are about to participate in and they should be given a blank copy of the consent form.

Debriefing Sheets

The debriefing sheet is key in making the subject pool an educational experience for participants. Therefore, researchers must provide a written debriefing to each participant to keep. It should include:

1. Explanation of research goals and methods written in plain English.
2. Suggestions for further reading (2-3 references)
3. Contact information (name/email/phone) for a faculty/graduate student who can discuss the research.

Voluntary Withdrawal

A participant who is uncomfortable with a study can withdraw at any time. How you handle prorated payment for time spent depends on what you said you would do in your IRB application. Participants who withdraw do not have to fill out the Voluntary Withdrawal form and you do not have to email the Subject Pool Coordinator about it. (Note, though, that the IRB does require you to keep track of the number of people who withdraw from your studies. They ask for that information as part of annual project renewals.)

General Information about Study Sessions

Researchers must be on time. Participants are told to wait 15 minutes past the scheduled start time. If they wait 15 minutes or longer for the researcher, they should be paid for the time spent waiting in addition to time spent doing your study. Researchers should place a note on the door of the room where the study is being conducted, with instructions about where participants should wait. It is the responsibility of the researcher to check the hallway prior to closing the door at the start of the study to be sure that all participants are in the room. If a study is scheduled after building hours, the researcher must arrange for participants to be let into the building.

If the study ends up taking longer than they were told it would, participants must be allowed to leave at the scheduled time if they want to. If they volunteer to stay to finish the study, they should be paid for the amount of time they actually spend.

Researchers should remind participants to turn off and put away all cell phones, pagers, ipods, or anything else that may be distracting. If these devices are used during the study, the researcher may ask the participant to leave. If participants are being disruptive, purposely providing inaccurate or inappropriate responses, or acting in a manner that makes the researcher believe the data will be unusable, a researcher can ask them to leave.

Special Types of Studies

Certain types of studies differ from the traditional single-session laboratory study. Any special requirements or changes from the typical study are described in detail below.

1. **Online Studies**: On-line studies scheduled through the **Paid** Subject Pool online system require the same sign-up procedure as other studies. If you are using a different website (e.g., Survey Monkey) for conducting such studies, you can still use the online **Paid** Subject Pool system to get people to sign up. It is best to schedule on-line studies no more than a couple of weeks ahead of time. Completion of online studies must be recorded within 48 hours of the study's participation deadline.
2. **Multi-Session Studies**: Two sessions is the most the online **Paid** Subject Pool system can handle. Participants in multi-session studies must attend at the scheduled time or cancel according to the

standard cancellation procedures. If a participant fails to attend the first session, it is the responsibility of the researcher to contact the participant and have them cancel subsequent sessions (if they have not already done so). When you pay participants in multi-session studies and whether you give prorated payment to those who do not complete all sessions depends on what the IRB has approved for your study. (In many multi-session studies, partitipants are not paid until all sessions have been completed, but participants who don't complete all sessions are still given prorated payment.)