

## Creating an Online Survey for Use in the Participant Pool

These instructions assume you already have a Sona researcher account, and are familiar with the basics of Sona System and the Psychology Participant Pool. If you are new to the pool, please start by reading the Procedural Manual for Researchers, which is available on the Psychology Department website.

It is important that you read through all of these instructions before starting to input your online study. It will save you a lot of time.

These instructions describe creating an online study entirely within the Sona system. It is also possible to host your online study on an external website, such as through Qualtrics, and have Sona redirect participants to this site. If you need help with creating an online external study:

- A brief description of credit granting options is described at the end of this document.
- If this is your first external survey, once you have the survey setup we suggest contacting [ppadmin@uoguelph.ca](mailto:ppadmin@uoguelph.ca). The ppadmins can help you test whether your survey is correctly granting credits before you make it widely available to participants.
- Creating externally hosted surveys goes beyond the expertise of the ppadmins. A good option for more information is the Sona Systems Advance User Manual, available on the Psychology Department Website.

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## Creating an Online Survey Hosted Internally through the Sona System

### Let's get started:

1. Log-in to Sona Systems using your user name and password.
2. Click 'Create a new study.'
3. For 'Online Survey Study', chose either 'Paid' or 'Credit' and then click the 'Continue' button. Read the instructions that appear and then click 'Continue' again.
4. You should now be at a screen that allows you to enter study information. Read the instructions at the top of the screen, and when ready click the 'Add This Study' button'.
  - The description of the study should use the text specified in your REB application.
  - It doesn't really matter whether you set 'Active Study' to 'yes' or 'no'. Once you have created your survey questions, and go to finalize the questions, you will be prompted to activate your study.
  - The Eligibility Requirements field is not enforced. It is simply a message you can convey to potential participants, but it is up to them to follow it or not. To implement enforced eligibility requirements, you have two options. One, under advanced settings, you can specify course and study restrictions (i.e., exclude participants if they already completed a very similar study). Two, after clicking the 'Add This Study' button, you can add restrictions based on participants' responses to the Prescreen Survey.
  - **IMPORTANT.** Under Advanced Settings, you are asked: "Should survey participants be identified only by a random, unique ID code?" If you select "No", your survey data will include each participant's first name, last name, and @uoguelph.ca ID.
    - If you plan to link the results of this survey to Mass Testing data, then you must select "No". You will need participants' @uoguelph.ca IDs to link the two data sets. Of course, your REB application should include approval to use Mass Testing and to collect this identifying information.
    - You do NOT need to collect this identifying information to make use of the prescreening survey and credit granting. The unique code generated by Sona is adequate for allowing you to screen participants based on prescreening and to assign credits.
5. You are now ready to input your study questions. From the dashboard for your study (which can be found by going to 'My Studies' and selecting the study), click on the 'Study Menu' and select 'Update Online Survey'.
6. Use the 'Introductory text' box for your consent form. (You will then make it so that your first question will ask if they have read/understood and agree.) You must include a line that asks participants to print a copy for their own records, or for them to contact you if they want a copy. It is also a good idea to paste your consent form below the instructions provided by Sona systems.
7. Use the "Closing text" box for the debriefing form information. Again, it would be good to tell participants to print it or to contact you for a copy. This is a requirement if the study has

involved deception.

- Every survey you create will have one or more sections that you create, each of which has one or more questions in it. Sona can randomize the order of the sections, and the order of the questions in sections. Here is when you specify if you want your *sections in a random order*. If you want them to always be in the same order for every person (think about counterbalancing), then select “no.” If you want your sections randomized, click “Some sections in random order, some in specified order.” This way, you can make sure your consent and debriefing forms are always at the beginning and end, respectively.
8. Click “Save and continue.” Now you can start adding in your questions. If you need to put two surveys online, you can copy sections from an existing survey by selecting ‘Copy From an Existing Section’. Otherwise, click “Add a New Section”.
  9. The “Introductory Section Text” box is for instructions. If you have instructions that you need to come before a specific section, put them here. Do not put your actual questions here. If you do not have instructions for that section, leave it blank, and select “Add section.”
  10. This is the screen where you enter in your first question (remember: your first question should be your consent question).
    - “*Abbreviated Question Name*” is very important. This is where you input the variable name you want for that question (e.g., quest1, gender). This makes exporting the data much easier, as you will be importing your data with variable names, instead of having to use a question key to find out which answer belongs to which question (especially if your survey is randomized). Assign your questions variable names, and keep track of them for easy reference later.
  11. You then select whether the question is a free-entry, multiple choice with one answer, or with multiple answers. Read the other options as well (e.g., horizontal vs vertical, numeric, etc.). These options are up to you.
    - It is extremely important that you select ‘yes’ for “*Can students decline to provide an answer for this question?*” Ethically, students must be able to skip questions. The only exception is for your first question, the consent form question. Participants must answer this question. If they happen to click ‘no’, you cannot use their data.
    - It is also important to contemplate how you want your data to be exported from the system. If you want your responses to be downloaded as numbers (instead of as string characters), you should select ‘yes’ for “*Are all choices numeric?*”. If you do not want the numbers to show to participants, you should click ‘no’ for “*Display numeric value?*”. If you do not do this, you may have to do a ‘find/replace’ in SPSS for analysis.
  12. Click “Save changes.”
  13. If you want another question in this section, scroll down and click “Add a Question” at the bottom of the page. (If you only have one set of instructions for the entire survey, you can

continue adding questions, and only have one section. Sections are included in case you have different instructions for different parts. If this is the case, click 'Section List' to add a new section.

- See below for *codes* used when inputting your questions to format the text (e.g., to bold sections, etc.)

14. Continue adding questions and sections until you have entered your entire survey.

- If, at any time, you need to *edit your sections or your questions*, you can view your study, then click "Update online survey", and "Edit questions and sections." You can also use this option to set the order of your questions, unless you selected the option to make them random.

15. Once you are finished entering in all of your questions, be sure to go to the 'Final Review' page to finalize the survey and any changes you made to it. Read it carefully to make sure there are no mistakes.

16. If you are satisfied with your survey, click "Apply changes, make active."

17. Contact the administrator to make your study visible. The best way to do this is from the dashboard for your study. Click the 'Send Request' button.

Once your hours have been added, you can add your timeslot. From the dashboard for your study, click "View/administer timeslots". Then click "Add a Timeslot." Because this is an online study, your timeslot is the last day you want participants to sign up. In other words, it is the last participation date you want. Be sure to type in the amount of participants you were approved for. You can view your timeslot anytime to see how many people have completed your survey. Participants are normally granted credit automatically by the system upon completion of the study. However if a participant withdraws you will receive an email informing you that action will need to be taken. Once the participant has indicated 'yes' to consent and begun the study, they must be compensated, and you will need to manually assign the credit for the participant.

### Important notes:

- To see what your survey will look like to participants, from the 'Study Menu' click 'Update Online Survey' and then 'Edit Questions and Sections'. From there you can preview each section individually by clicking 'Preview Section'
- Participants can withdraw from your study at any time. If they do, their data will be deleted.
- Students who complete your study will automatically be granted a credit by the system. If participants withdraw, you will receive an email from the system and must manually assign credits for these participants.
- Be sure to click the option to allow participants to skip questions.

### Enhanced Formatting of Question:

- To bold a section, insert `<b>` before the text, and `</b>` after the text you want bolded (do the same using an `i` for italics and `u` for underline)
  - Coded: Please indicate how often you have engaged in the phenomenon in the last 6 months. `<b>` Please use your best estimate.`</b>`
  - Displayed: Please indicate how often you have engaged in the phenomenon in the last 6 months. **Please use your best estimate.**
- To end a paragraph, for instance in your consent form, insert `</p>` at the end of the paragraph
  - You could also enter `<p>` at the start of the new paragraph
- You can also check out this website on html. This will provide you with a tutorial on how to use it: <http://www.w3schools.com/html/default.asp>

### Additional suggestion:

- Consider how you want your data downloaded into SPSS. If you only want your responses as numbers, instead of the full text of the response, be sure to click “yes” to “Are all choices numeric?” and “no” to “Display numeric value?”
  - If you don’t set it up this way, you will have to recode each question before you analyze your data as every response will end up a string variable and will need to be recoded before it can be changed into a numeric one.
  - For example, if the question was "Do you smoke?", and the response options are yes and no, then enter the choices as :
    - 1 Yes
    - 2 No
  - **Note:** there should be just a number (no period or anything else), then one blank space, then the text. Only the choices' text (not numeric value) will be displayed to participants.
- When you go to download data, there is an option only to download the numeric responses (e.g. "1" instead of "1 Yes") for the data.

### Exporting your data

- Once your study is complete, you will have to export your data from the system. To do this, use the following steps:
  - View your study, and click “Download Survey Responses”.
  - Then follow the instructions provided on the website.
  - Select to save the responses to a file. Be sure to select “all files” under the ‘save as type’. Also, when you enter in the file name, be sure to write .csv at the end. This will

allow you to import the file into SPSS very easily.

## Creating an Online Survey Hosted Externally to the Sona System

Although creating external surveys goes beyond the expertise of the ppadmins, we do have some suggestions that may be useful.

### Options for Assigning Credit

There are three options for assigning credit that we are aware of:

- 1) Use the External Study Credit Granting feature. This option involves some technical expertise, but is also the optimal solution for credit granting. You can set your external survey to send a message to Sona after each participant completes the survey, and Sona will automatically assign credit. Detailed instructions on this feature are provided in the Sona Systems Advanced User Manual, along with specific examples for various survey platforms (i.e., Qualtrics, Survey Monkey, etc). This manual is available for download on the Psychology Department website.
- 2) Use the Survey Code feature. This feature requires a little technical expertise but is simpler than the above option. It is possible to have Sona embed a different unique code for each participant into the URL they click to access your survey. If you set your survey to record this code, you can later use it to manually assign credit to the correct participants in Sona based on your recorded data. Detailed instructions on this feature are provided in the Sona Systems Advanced User Manual, which is available for download on the Psychology Department website.
- 3) Record the participant @uoguelph.ca ID in your survey, and then manually assign credits in Sona. Note that you will need approval from the REB to collect this identifying information.

### Where to Go for More Help

- The Sona Systems Advance User Manual, which is available for download on the Psychology Department website, has some useful instructions for interfacing your external survey with the Sona System.
- The University of Guelph CCS (Computing and Communications Services) offers support for some survey systems.
- The trickiest part of setting up externally hosted surveys is probably ensuring that credit granting is working properly. We suggest contacting [ppadmin@uoguelph.ca](mailto:ppadmin@uoguelph.ca) to test your survey before releasing it widely to participants (i.e., schedule a time to meet with them, create a fake participant, and run them through your survey).

***If you have any questions at any time***, feel free to contact the administrator who will get back to you, please allow one to two business days for a response: [ppadmin@uoguelph.ca](mailto:ppadmin@uoguelph.ca)