



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Seicoleg a Cwnsela
Psychology and Counselling

Researcher Guide



Contents

How to Use This Guide	3
Part 1: Using EMS on Mobile Devices.....	4
Part 2: First Login	5
Creating a Lab-Based Study	6
Basic Information.....	6
Advanced Settings	8
Creating an Online Survey Study	9
Basic Information.....	9
Advanced Settings	11
Creating an Interview Study	13
Basic Information.....	13
Advanced Settings	15
Creating a Focus Group Study	16
Basic Information.....	16
Advanced Settings	18
Part 3: Credits and Participant Compensation	19
Calculating Credits	19
Part 4: Study Approval	20
Part 5: Booking Time in the Psychology Labs	21
Part 6: Adding EMS Timeslots (Standard Studies).....	23
Adding a Single Timeslot.....	23
Adding Multiple Timeslots	24
Calendar Integration.....	25
Part 7: Adding EMS Timeslots (External Online Studies).....	26
Adding an Online Study Timeslot	26
Part 8: Managing Participants and Awarding Credits	27
Mobile App and QR Code Check-In	27
Automatic Credit Allocation	28
Manual Credit Allocation	28
Part 9: Study Configuration	29

How to Use This Guide

This handbook has been organised by study type so that you only need to read the sections relevant to your project.

Although the study setup process is similar across study types, some settings, timeslot configurations, and recruitment procedures differ. For this reason, each study type has its own dedicated guidance and examples.

Begin by identifying the type of study you are planning to conduct:

If your study involves...	Read this section
Laboratory experiments, behavioural tasks, or face-to-face studies	Creating a Lab-Based Study
Online data collection platform (e.g., Qualtrics surveys, Gorilla)	Creating an Online Survey Study
Individual interviews (face-to-face or online)	Creating an Interview Study
Focus groups (face-to-face or online)	Creating a Focus Group Study

After reading the section relevant to your study, all researchers should also read the following sections:

[Part 3: Credits and Participant Compensation](#)

[Part 4: Study Approval](#)

[Part 5: Booking Time in Psychology Labs \(if applicable\)](#)

[Part 6 or Part 7: Adding EMS Timeslots \(depending on your study type\)](#)

[Part 8: Managing Participants and Awarding Credits](#)

[Part 9: Study Configuration](#)

Following the guidance for your specific study type will help ensure your study is configured correctly and ready for participant recruitment.

Part 1: Using EMS on Mobile Devices

The Sona Mobile App provides researchers with a convenient way to manage studies and participants without needing to log in through a web browser.

Downloading the App

The Sona Mobile App is available for:

- Apple Devices (iPhone and iPad) via the Apple App Store
- Android Devices via the Google Play Store

Search for "Sona Mobile" and install the application on your device.

Logging in:

When you first open the app, you will be prompted to enter your site information. Use the following details:

Setting	Value
Site	uwtsd-uk
User ID	Your EMS username
Password	Your EMS password

Using the App

Once logged in, you will be able to:

- View your active research studies
- Manage participant bookings
- Review upcoming timeslots
- Monitor participant sign-ups
- Record attendance and award participation credits

Part 2: First Login

As a researcher you have two functions available to you with your login details:

- As a PARTICIPANT
- As a RESEARCHER.

Participant:

This profile includes:

- Prescreen questions
- Participant profile

Researcher:

This profile includes:

- My Studies
- Add New Study
- Study Configuration
- Timeslots
- Reports

Human Subject Privacy Notice:

As a researcher you are going to collect data from participants, and you **MUST** treat these data with the respect they deserve, with regard to your ethical considerations and your compliance with GDPR and OECD guidelines. By clicking 'yes' you are agreeing to abide by these guidelines, which are available from your Moodle pages and the university research pages. If you are in any doubt about any of these guidelines you should consult them prior to agreeing, but you must agree to this in order to gain access to the system.

Creating a Lab-Based Study

Examples Include:

- Cognitive experiments
- Memory studies
- Attention tasks
- Eye-tracking studies
- Computer-based experiments
- Face-to-face testing

Basic Information

Step 1: Add Your Study

Select "Add New Study"

From your Researcher Dashboard:

Add New Study → Standard Study

Step 2: Enter your Study Name

Use the agreed departmental format:

SWAN_credit_KES

Step 3: Complete the Abstract

The abstract should be brief and participant-friendly.

For Example:

This study investigates attention and concentration. You will complete a short questionnaire followed by a computer-based task.

Avoid long academic explanations or technical terminology.

Step 4: Complete the Detailed Description

Provide enough information for informed consent.

Include:

- What participants will do
- Approximate duration
- Any equipment used
- Any potentially sensitive material

For example:

Participants will complete a series of computer-based tasks designed to measure memory and attention. Following these tasks, participants will be asked to complete two short questionnaires about their study habits and experiences of learning. The study will take approximately 30 minutes to complete.

Step 5: Add Eligibility Criteria (If Needed)

Only include criteria that are scientifically justified and approved within your ethics application.

For example:

- Current students on a specific program
- Normal or corrected-to-normal vision
- No colour blindness (for colour perception tasks)

Step 6: Set Study Duration

It is always best to overestimate rather than under.

Never guess, always base duration on pilot testing. So, if your pilot studies run for an average of 16 minutes, round it up to 20

Step 7: Set Credit Value

Credit allocation should be based on the total study duration, including any participant briefing, task completion, interview time, and debriefing. Guidance on calculating credits is provided in the Credits and Participant Compensation section below.

Step 8: Principal Investigator

Select:

1. Researcher = You
2. Principal Investigator = Supervisor

Advanced Settings

Review the Advanced Settings to ensure your study is configured correctly for participant recruitment and data collection.

Setting	Description
Pre-Requisites	Only use if participants must complete another study before accessing this one (e.g., a follow-up survey).
Disqualifiers	Useful if participants should not complete your study because they have already completed a similar study.
Course Restrictions	Only apply restrictions where there is a scientific justification for recruiting a specific group.
Invitation Code	Most Empirical Projects will not require invitation codes. These are typically used for invitation-only or follow-up studies.
Participant Sign-Up Deadline	This setting determines how close to the study end date and time participants can sign up for your study.
Email Notifications	Useful to keep track of signup activity
Researchers at Timeslot-Level	This should normally be left at the default setting. It is primarily used in studies involving multiple researchers managing different sessions.

Recommended settings:

Setting	Recommendation
Pre-Requisites	None (unless part of a multi-part study)
Disqualifiers	If similar studies exist
Course Restrictions	None (unless targeting a specific participant group)
Invitation Code	None
Participant Sign-Up Deadline	24 hours/12 hours before the session (change this based upon your availability – this can also be changed throughout your data collection)
Email Notifications	Yes - Sign-ups and Cancellations
Researchers at Timeslot-Level	No (default setting)

Step 9: Save Study

Your study remains inactive until approved by your supervisor and PsychLabs.

Creating an Online Survey Study

Examples include:

- Qualtrics studies
- Survey studies
- Questionnaire research

Basic Information

Step 1: Add Your Study

Select "Add New Study"

From your Researcher Dashboard:

Add New Study → External Online Study

Step 2: Enter the Study Name

Use the agreed departmental format:

SWAN_credit_KES

Step 3: Complete the Abstract

The abstract should be brief and participant-friendly.

Good Example:

*This study explores attitudes and experiences relating to everyday behaviours.
You will complete a short online questionnaire consisting of a series of questions
and rating scales.*

Avoid long academic explanations or technical terminology.

Step 4: Complete the Detailed Description

Provide enough information for informed consent.

Include:

- What participants will do
- Approximate duration
- Any equipment or software required
- Any potentially sensitive material

For example:

Participants will complete a series of online questionnaires examining attitudes, beliefs, and experiences relating to the study topic. The study can be completed on any device with internet access and will take approximately 20 minutes to complete.

Step 5: Add Eligibility Criteria (If Needed)

Only include criteria that are scientifically justified and approved within your ethics application.

For example:

- Current university students
- Participants aged 18 years and over
- Individuals with experience of a particular activity or event

Step 6: Set Study Duration

It is always best to overestimate rather than under.

Never guess, always base duration on pilot testing. So, if your pilot studies run for an average of 16 minutes, round it up to 20

Step 7: Set Credit Value

Credit allocation should be based on the total study duration, including any participant briefing, task completion, interview time, and debriefing. Guidance on calculating credits is provided in the [Managing Participants and Awarding Credits](#) section below.

Step 8: Principal Investigator

Select:

1. Researcher = You
2. Principal Investigator = Supervisor

Advanced Settings

Review the Advanced Settings to ensure your study is configured correctly for participant recruitment and data collection.

Setting	Description
Pre-Requisites	Only use if participants must complete another study before accessing this one (e.g., a follow-up survey).
Disqualifiers	Useful if participants should not complete your study because they have already completed a similar study.
Course Restrictions	Only apply restrictions where there is a scientific justification for recruiting a specific group.
Invitation Code	Most Empirical Projects will not require invitation codes. These are typically used for invitation-only or follow-up studies.
Participant Sign-Up Deadline	This setting determines how close to the study end date and time participants can sign up for your study.
Email Notifications	Useful to keep track of signup activity
Researchers at Timeslot-Level	This should normally be left at the default setting. It is primarily used in studies involving multiple researchers managing different sessions.

Recommended settings:

Setting	Recommendation
Pre-Requisites	None (unless part of a multi-part study)
Disqualifiers	If similar studies exist
Course Restrictions	None (unless targeting a specific participant group)
Invitation Code	None
Participant Sign-Up Deadline	1 hour before study closes
Email Notifications	Yes - Sign-ups and Cancellations
Researchers at Timeslot-Level	No (default setting)

Step 8: Add Study URL

Add the link to your online study in the Study URL field. This is the link participants will use to access your survey or experiment (e.g., Qualtrics, Gorilla, or Pavlovioa).

EMS will redirect participants directly to your survey.

Step 9: Configure Completion Method

Option A: Automatic Credit Allocation

If you are using Qualtrics to collect your data, the [Sona Systems Qualtrics Help Page](#) provides step-by-step instructions for linking your survey to EMS, setting up participant redirects, and configuring automatic credit allocation.

Option B: Manual Credit Allocation

Only use when automatic credit allocation cannot be configured.

Researchers must then manually award credits after checking responses. This must be done on a regular basis to ensure participants are awarded credits in a timely manner.

Step 10: Save Study

Your study remains inactive until approved by your supervisor and PsychLabs.

Creating an Interview Study

Examples include:

- Semi-structured interviews
- One-to-one interviews
- Teams interviews
- Qualitative dissertation projects
- Online interviews via Teams or Zoom

Basic Information

Step 1: Add Your Study

Select "Add New Study"

From your Researcher Dashboard:

Add New Study → Standard Study

Step 2: Enter your Study Name

Use the agreed departmental format:

SWAN_credit_KES

Step 3: Complete the Abstract

The abstract should be brief and participant-friendly.

For Example:

This study explores people's attitudes and experiences relating to everyday life. You will take part in a short interview where you will be asked a series of questions about your views and experiences.

Avoid long academic explanations or technical terminology.

Step 4: Complete the Detailed Description

Provide enough information for informed consent.

Include:

- Interview topic
- Interview length
- Recording procedures
- Whether cameras are required

For example:

Participants will take part in an individual interview exploring attitudes, experiences, and perspectives relating to the study topic. The interview will last approximately 30 minutes and will be audio-recorded for research purposes. If conducted online, participants will require access to Microsoft Teams or a similar platform.

Step 5: Add Eligibility Criteria (If Needed)

Only include criteria that are scientifically justified and approved within your ethics application.

For example:

- Individuals with relevant lived experience
- Members of a particular occupational group
- Fluent English speakers

Step 6: Set Study Duration

It is always best to overestimate rather than under.

Never guess, always base duration on pilot testing. So, if your pilot studies run for an average of 16 minutes, round it up to 20

Step 7: Set Credit Value

Credit allocation should be based on the total study duration, including any participant briefing, task completion, interview time, and debriefing. Guidance on calculating credits is provided in the Credits and Participant Compensation section below.

Step 8: Principal Investigator

Select:

1. Researcher = You
2. Principal Investigator = Supervisor

Advanced Settings

Review the Advanced Settings to ensure your study is configured correctly for participant recruitment and data collection.

Setting	Description
Pre-Requisites	Only use if participants must complete another study before accessing this one (e.g., a follow-up survey).
Disqualifiers	Useful if participants should not complete your study because they have already completed a similar study.
Course Restrictions	Only apply restrictions where there is a scientific justification for recruiting a specific group.
Invitation Code	Most Empirical Projects will not require invitation codes. These are typically used for invitation-only or follow-up studies.
Participant Sign-Up Deadline	This setting determines how close to the study end date and time participants can signup for your study.
Participant Sign-Up Display	Controls when and how study information is displayed to participants after they sign up.
Email Notifications	Useful to keep track of signup activity
Researchers at Timeslot-Level	This should normally be left at the default setting. It is primarily used in studies involving multiple researchers managing different sessions.

Recommended settings:

Setting	Recommendation
Pre-Requisites	None (unless part of a multi-part study)
Disqualifiers	If similar studies exist
Course Restrictions	None (unless targeting a specific participant group)
Invitation Code	None
Participant Sign-Up Deadline	24 hours before the session
Participant Sign-Up Display	Standard/default setting
Email Notifications	Yes - Sign-ups and Cancellations

For interview studies conducted via Microsoft Teams or Zoom, you can add the meeting link in the Study URL field. This allows participants to access the interview directly from EMS after signing up.

Step 8: Save Study

Your study remains inactive until approved by your supervisor and PsychLabs.

Creating a Focus Group Study

Examples include:

- Group discussions
- Focus groups
- Group interviews

Basic Information

Step 1: Add Your Study

Select "Add New Study"

From your Researcher Dashboard:

Add New Study → Standard Study

Step 2: Enter your Study Name

Use the agreed departmental format:

SWAN_credit_KES

Step 3: Complete the Abstract

The abstract should be brief and participant-friendly.

For Example:

This study explores people's attitudes and experiences relating to everyday life. You will take part in a small group discussion where you will be asked to share your views and experiences with other participants.

Avoid long academic explanations or technical terminology.

Step 4: Complete the Detailed Description

Provide enough information for informed consent.

Include:

- Focus group topic
- Session length
- Recording procedures
- Whether cameras are required (if conducted online)

For example:

Participants will take part in a small group discussion exploring attitudes, experiences, and perspectives relating to the study topic. The focus group will last approximately 60 minutes and will be audio-recorded for research purposes. If conducted online, participants will need access to Microsoft Teams or a similar platform.

Step 5: Add Eligibility Criteria (If Needed)

Only include criteria that are scientifically justified and approved within your ethics application.

For example:

- Current university students
- Participants from a specific year group
- Individuals with relevant experience of the topic under discussion

Step 6: Set Study Duration

It is always best to overestimate rather than under.

Never guess, always base duration on pilot testing. So, if your pilot studies run for an average of 16 minutes, round it up to 20

Step 7: Set Credit Value

Credit allocation should be based on the total study duration, including any participant briefing, task completion, interview time, and debriefing. Guidance on calculating credits is provided in the Credits and Participant Compensation section below.

Step 8: Principal Investigator

Select:

1. Researcher = You
2. Principal Investigator = Supervisor

Advanced Settings

Review the Advanced Settings to ensure your study is configured correctly for participant recruitment and data collection.

Setting	Description
Pre-Requisites	Only use if participants must complete another study before accessing this one (e.g., a follow-up survey).
Disqualifiers	Useful if participants should not complete your study because they have already completed a similar study.
Course Restrictions	Only apply restrictions where there is a scientific justification for recruiting a specific group.
Invitation Code	Most Empirical Projects will not require invitation codes. These are typically used for invitation-only or follow-up studies.
Participant Sign-Up Deadline	This setting determines how close to the study end date and time participants can sign up for your study.
Participant Sign-Up Display	Controls when and how study information is displayed to participants after they sign up.
Email Notifications	Useful to keep track of signup activity
Researchers at Timeslot-Level	This should normally be left at the default setting. It is primarily used in studies involving multiple researchers managing different sessions.

Recommended settings:

Setting	Recommendation
Pre-Requisites	None (unless part of a multi-part study)
Disqualifiers	If similar studies exist
Course Restrictions	None (unless targeting a specific participant group)
Invitation Code	None
Participant Sign-Up Deadline	24 hours before the session
Participant Sign-Up Display*	Yes
Email Notifications	Yes - Sign-ups and Cancellations

** With Participant Sign-Up Display, they can also see how many people have already signed up for each timeslot. This is particularly useful for Focus Groups that require a minimum number of participants to run. Researchers must explain in the study description how many participants are needed and that low-enrolment sessions may be cancelled.*

Step 8: Save Study

Your study remains inactive until approved by your supervisor and PsychLabs.

Part 3: Credits and Participant Compensation

Participants should receive credits based on the total amount of time required to complete the study.

This should include:

- Reading the participant information sheet
- Providing consent
- Completing questionnaires or tasks
- Interview or focus group participation
- Debriefing

Calculating Credits

The number of minutes awarded per credit is subject to change from year to year. You should therefore refer to the EMS guidance on the Empirical Project Moodle page for the current credit allocation requirements.

For example:

If 1 credit = 10 minutes and your study takes 30 minutes to complete, participants should receive 3 credits and the study duration should be set to 30 minutes.

As credits can only be awarded in whole numbers, you should round your study duration to the nearest appropriate credit allocation when creating your study.

Important

- ✓ Base your study duration on pilot testing.
- ✓ Ensure that credits accurately reflect the participant time commitment.
- ✓ Check the current credit allocation guidance before creating your study.
- ✗ Do not offer additional credits beyond those justified by the study duration.

Offering more credits than are warranted by the time commitment may be considered an attempt to unduly influence participation and is not permitted. Any study found to be offering an inappropriate number of credits relative to its duration may be suspended until the issue has been resolved.

Part 4: Study Approval

Once you have completed the study setup, your study must be approved before it can be made available to participants.

Students should not contact PsychLabs directly to request study approval. **Approval requests must be submitted by your supervisor once they have reviewed your study and confirmed that the necessary ethical approval is in place.**

After your supervisor has submitted the approval request and it has been processed, your study can be approved and made active within EMS. At this stage, the study is ready to begin recruiting participants.

Please allow sufficient time for approval requests to be reviewed. Requests submitted to supervisors or PsychLabs may take **up to 72 hours** to be processed, so you should plan your recruitment timeline accordingly.

Important: Even after your study has been approved and activated, participants will not be able to sign up until you have created and published at least one timeslot. This applies to all study types, including lab-based, online, interview, and focus group studies. Details on creating timeslots are provided in the next section.

Part 5: Booking Time in the Psychology Labs

Lab space is primarily used for lab-based experiments, but may also be required for face-to-face interviews and small focus groups (up to 4 participants).

Step 1: Receiving Your Lab Allocation

Before booking any lab space, you must contact PsychLabs (Psychlabs@uwtsd.ac.uk). Include specific information about your study:

- Your study title
- A brief description of your study
- Any software, equipment, or programme requirements

You should contact PsychLabs **at least one week** before your planned data collection period to allow sufficient time for your request to be processed.

Once your request has been reviewed, you will be:

- Allocated to a specific lab booth
- Provided with any necessary access arrangements
- Informed of any specifics related to the lab

Please note, you can only use the lab space that has been allocated to you.

Step 2: Book Your Lab Time

Once you have received your lab allocation, you can book into the Psychology Labs using the 'Lab Booking System' available on the Empirical Project Moodle page.

Lab bookings operate on a first-come, first-served basis, so forward planning is essential. The booking system opens one week in advance, from **Monday at 9:00am** until **Sunday at 5:00pm** for the following week's bookings.

For example, if you wish to collect data during the week beginning Monday 12 October, you should make your booking during the booking window that opens the week before.

Please note that researchers may be limited in the amount of lab time they can book. This is because lab booths are shared between multiple researchers and access must be distributed fairly across all active projects.

When making your booking:

- Only book the sessions you expect to use.
- Include sufficient time for participant sessions, setup, and pack-away time.
- Consider your likely recruitment rate before reserving large amounts of lab time.

Remember that lab space should be booked before creating EMS timeslots, and all EMS timeslots should match your confirmed lab booking.

Once a lab booking has been made, changes can only be made by the Lab Manager.

Repeatedly booking lab space and failing to attend, or making late cancellations, may result in access to the labs and EMS being restricted.

Step 3: Add EMS Timeslots

Do not create EMS timeslots until your lab booking has been confirmed.

Once your lab space has been booked, you can create the corresponding timeslots in EMS for participants to sign up to.

The dates, times, and locations entered into EMS should match your lab booking exactly.

Remember to leave sufficient time for participant sign-ups. If timeslots are created at short notice, you may struggle to recruit enough participants.

Part 6: Adding EMS Timeslots (Standard Studies)

Example 'Standard Studies' include:

- Lab-based studies
- Interviews
- Focus Groups

Once your study has been approved, you must create timeslots before participants can sign up. The type of timeslot you create will depend on the type of study you are running.

To add timeslots:

My Studies → View/Administer Timeslots → Add a Timeslot/Add Multiple Timeslots

The way timeslots are configured will depend on the type of study being conducted. For example, experiments and interviews typically require one participant per timeslot, whereas focus groups allow multiple participants to sign up to the same timeslot.

Adding a Single Timeslot

Setting	Description
Date and Time	The date and start time of the study session. For lab-based studies and interviews, this should match your lab or room booking. The end time will be calculated automatically based on the study duration.
Number of Participants	The maximum number of participants who can register for each timeslot. This is typically 1 for experiments and interviews and multiple participants for focus groups.
Location	The location where the study will take place. This can be: • A Psychology Lab booth • A room or meeting location entered manually (usually for larger focus groups) • A Microsoft Teams or Zoom link for online interviews and focus groups
Videoconference URL	If your study is conducted online (e.g., Teams or Zoom), you can provide the meeting link here so participants can access the session directly from EMS.

Ensure your location matches the lab you have been allocated to.

Adding Multiple Timeslots

Setting	Description
Number of Timeslots	The total number of timeslots you wish to create for that day.
Date and Time	The date and start time of the study session. For lab-based studies and interviews, this should match your lab or room booking.
Free Time Between Slots	The amount of time between sessions. This can be used for participant changeovers, study setup, or breaks.
Location	The location where the study will take place. This can be: • A Psychology Lab booth • A room or meeting location entered manually (usually for larger focus groups) • A Microsoft Teams or Zoom link for online interviews and focus groups
Videoconference URL	If your study is conducted online (e.g., Teams or Zoom), you can provide the meeting link here so participants can access the session directly from EMS.
Move Timeslots to Business Hours?	Determines whether EMS should automatically move sessions that fall outside business hours to the next available working period. For most Empirical Projects, this should be set to No.
Business Hours Start/End	Set between 9am and 5pm
Number of Participants	The maximum number of participants who can register for each timeslot. This is typically 1 for experiments and interviews and multiple participants for focus groups.

Ensure your location matches the lab you have been allocated to.

For Example:

A researcher has booked a lab from 10:00am to 1:00pm and wishes to run a 30-minute study with a 10-minute break between participants.

They could create:

- Number of Timeslots: 4
- Start Time: 10:00am
- Free Time Between Slots: 10 minutes
- Number of Participants: 1

EMS would then automatically create four individual participant sessions across the booking period.

Calendar Integration

Researchers can subscribe to a study calendar feed to view their EMS timeslots within Outlook, Google Calendar, Apple Calendar, or another calendar application.

To access this feature:

1. Open your study.
2. Select 'Timeslots'.
3. Click 'Calendar Feed'.
4. Choose either:
5. All Timeslots, or Only Timeslots with Signups.
6. Copy the Calendar Feed URL provided by the EMS
7. Add the URL to your preferred calendar app.

The calendar will update automatically when timeslots are added, modified, or removed. Changes may take some time to appear depending on the calendar provider.

Adding the Calendar to your calendar App:

Microsoft Outlook (Desktop)

1. Open Outlook and Select Calendar.
2. Choose Add Calendar > From Internet/Subscribe from web.
3. Paste the EMS calendar feed URL.
4. Select OK and confirm the subscription.

Outlook Web (Microsoft 365)

1. Open Outlook on the web and Select Calendar.
2. Choose Add Calendar.
3. Select Subscribe from Web.
4. Paste the EMS calendar feed URL.
5. Give the calendar a name and select Import.

Google Calendar

1. Open Google Calendar. Click the + next to Other Calendars.
2. Select From URL.
3. Paste the EMS calendar feed URL.
4. Click Add Calendar.

Apple Calendar

1. Open Calendar.
2. Select File > New Calendar Subscription.
3. Paste the EMS calendar feed URL.
4. Click Subscribe.
5. Choose your preferred update frequency.

Part 7: Adding EMS Timeslots (External Online Studies)

Once your study has been approved, you must create at least one timeslot before participants can access your study.

To add timeslots:

My Studies → View/Administer Timeslots → Add a Timeslot

Unlike standard studies, participants do not usually attend a specific appointment. Instead, researchers typically create a single timeslot that remains open for a defined recruitment period, allowing participants to sign up and complete the study at any point before the closing date and time.

Adding an Online Study Timeslot

Setting	Description
Final Participation Date	The final date that participants can access and complete the study.
Final Participation Time	The final time on the closing date that participants can access and complete the study.
Max. Number of Participants	The maximum number of participants who can sign up for the study. This should normally match or exceed your target sample size.

Recommended Good Practice:

Before opening your study to your full sample, it is a good idea to create an initial timeslot with a small number of participant spaces (e.g., 5-10 participants).

This allows you to:

- Check that your study link is working correctly.
- Confirm that responses are being recorded in Qualtrics, Gorilla, Pavlovia, or your chosen platform.
- Test any automatic credit allocation or participant redirects.
- Identify and fix any technical issues before large-scale data collection begins.

Once you have reviewed the initial responses and confirmed that everything is working as expected, you can create your main timeslot and begin recruiting the remainder of your participants.

Part 8: Managing Participants and Awarding Credits

Once participants begin signing up to your study, you are responsible for monitoring attendance and ensuring credits are awarded appropriately.

To manage participants:

My Studies → View/Administer Timeslots → Modify

After each study session, you should review the participant list and record whether participants:

- Participated
- Failed to attend (No-Show)
- Told you they were not able to attend (Excused No-Show)

Attendance records should be updated as soon as possible after each session.

***Tip:** Regularly updating attendance records helps ensure participants receive credits promptly and reduces queries from participants regarding missing credits.*

Mobile App and QR Code Check-In

The EMS mobile app provides researchers with a simple way to manage attendance during data collection.

Using the app, researchers can:

- View upcoming appointments
- Access participant sign-up lists
- Record attendance
- Award credits
- Manage no-shows

Participants can also use the Sona Mobile App to view appointments and receive reminders about upcoming studies.

For many studies, attendance and credit allocation can be completed directly from a mobile device without accessing EMS through a web browser.

Some EMS installations also support participant QR code check-in. Participants can scan a QR code when they arrive for their session, allowing attendance to be recorded quickly and accurately.

Automatic Credit Allocation

Many external online studies can award credits automatically once participants complete the study.

This is commonly used with:

- Qualtrics
- Gorilla
- Pavlovia

Researchers should test automatic credit allocation before opening recruitment to ensure participants are credited correctly.

Manual Credit Allocation

If automatic credit allocation is not available, credits must be awarded manually.

To award credits:

1. Open the relevant timeslot.
2. Select the participant.
3. Mark them as Participated.
4. Save the changes.

Credits should be awarded as soon as possible after participation.

No-Shows (Unexcused):

Participants who register for a study but fail to attend their scheduled session without providing notice beforehand.

Participants marked as an Unexcused No-Show will receive a penalty equivalent to the credit value of the study.

No-Show (Excused):

Participants who register for a study but are unable to attend and notify the researcher before the scheduled session, or where there are legitimate circumstances preventing attendance.

Participants marked as an Excused No-Show will not receive a penalty and will not lose credits for the missed session.

Part 9: Study Configuration

The Study Configuration page provides an overview of all settings associated with your study. Once a study has been created, this area can be used to review and manage recruitment settings, participant access, restrictions, notifications, timeslots, and study status.

Researchers should regularly review their Study Configuration page throughout data collection to ensure that study details remain accurate and that participant recruitment is progressing as expected.

The Study Configuration page allows researchers to:

- View and edit study information
- Monitor study approval status
- Manage participant eligibility requirements
- Configure advanced study settings
- Access and manage timeslots
- Track participant sign-ups
- Award participation credits
- Access recruitment and participation reports

Many common recruitment issues can be traced back to study configuration settings.

Before making your study active always check that:

- ✓ Your study information is accurate
- ✓ The correct study type has been selected
- ✓ Participant restrictions are appropriate
- ✓ Credit values match study duration
- ✓ Timeslots have been added
- ✓ Study links and online meeting details are correct
- ✓ Email notifications have been enabled