RPP Guidelines for Researchers

This document is designed to assist researchers with the tasks associated with managing RPP studies.

This document is divided into two parts. The first part clarifies and updates RPP policies for researchers, and the second part provides instructions for using the online system, Experimetrix, to run your RPP studies. This document should be read BEFORE applying to use the RPP pool or posting studies to the Experimetrix website. It is every researcher's responsibility to adhere to the policies below, to ensure that use of the pool is fair for everyone, and that students do not have any adverse impact on their well-being or grades.

Program Eligibility

Psychology professors, graduate students, postdocs, postbac and honors students, and lab managers are eligible for access to participants from the Research Participation Program (RPP) provided they meet the following eligibility criteria:

- Researchers must have CPHS approval for all studies.
- Researchers must apply for RPP access by the posted deadline in order access to Phase 1; otherwise, they must wait until Phase 2. (See more below on the two phases.)
- Researchers must abide by all of the RPP policies.

Please note: access to the pool to affiliates outside of the psychology department will be considered as an exception, but is not guaranteed.

The Prescreening Survey

The RPP prescreening survey is an online survey, including demographics, that is a bundle of individual researchers' surveys. The purpose of the prescreening survey is to allow researchers to selectively recruit participants for their studies based on specific background characteristics of the participant (e.g. high self-esteem). It is administered during the first week of the Fall and Spring semesters, and Summer Sessions A and D.

Researchers can put measures assessing relevant background characteristics in their prescreening survey and will receive the data from their survey, as well as the demographics data, and contact information of prescreening participants, within the first two weeks of the semester. The RPP coordinator will send out an open call for applications, a few weeks before each term. You may also email rpp@berkeley.edu for additional information about participating in the Prescreening Survey.

RPP System Rationale

The 2-phase system described below was created to ensure fairness of access to the RPP pool at the beginning of each term (semesters or summer sessions). Each researcher who applies and meets the eligibility criteria will be granted an equal number of credits to award during Phase 1, which begins during the second week of the term. During Phase 2, which begins approximately midway through the term, there will be open access and credits will not be limited.

We STRONGLY ENCOURAGE researchers to consider their data collection needs EARLY, before the start of the term. The system rewards researchers who apply for RPP access by the Phase 1 deadline and are prepared to use their Phase 1 credit allocation before Phase 2 begins.
Applying to Use the Program

- Researchers who anticipate using the program at any time during the semester should complete an online RPP application. The link to the application will be emailed to relevant Psychology lists just prior to beginning each semester (Fall, Spring, and Summer Sessions A). Researchers must submit this application by the deadline stated in this email, and posted on the RPP webpage on the Psychology website, for access to use RPP during Phase 1.

- If you complete an online application by the Phase 1 deadline, during the first week of classes the RPP coordinator will send you an email with additional instructions on when and how you can file the paper portion of the application, in the Psychology office. Once you do so, you will be issued an experiment number; keep this safe. Soon after the RPP coordinator will email you the password that corresponds to your experiment number, enabling you to post your study to the online system for RPP, which is called Experimetrix. Detailed instructions on how to use Experimetrix are listed below.

- If you have applied for approval for your studies from CPHS, but have not received it as the Phase 1 application deadline is nearing, you should still submit a RPP application by the deadline. This will ensure that you get a credit allocation for Phase 1. Then, as soon as your protocol is approved, you can submit a copy of the approval letter and other paper parts of the application, to the Psychology Dept. office in Tolman Hall, as outlined below, and then use RPP during Phase 1.

- If you wish to apply for using the pool in the middle of the semester, email the rpp coordinator at rpp@berkeley.edu.

Distribution of RPP Credit-hours for Phase 1

- The RPP semester is divided into 2 phases. Phase 1, the first opportunity for running sessions, begins in the second week of the semester and ends around the middle of the semester. Approximately 2/3 of the available participant credit-hours will be distributed evenly among all researchers who have submitted their RPP applications by the deadline. Each researcher is limited to only awarding the number of allocated credits until the end of Phase 1.

- Researchers are responsible for monitoring their use of allocated credits in addition to the monitoring done by Experimetrix and the RPP coordinator. Researchers who exceed their Phase 1 allocations before the start of Phase 2 risk losing their access to the RPP.

- The Phase 1 allocation of credits applies to ALL experiments being run by a given researcher in a given semester. This allocation may be divided among all of their proposed experiments as they see fit. Also, collaborating researchers may each apply for a credit allotment and then pool their allotments for use on one or a few experiments. If you are planning to do this, you must inform the RPP coordinator about how the credits will be pooled and then applied (to which experiments), so we may know that you are not going over the limit.

- In Phase 2, all approved researchers, including those who applied after the Phase 1 deadline, will have open access to the program with no specific credit allocation. Phase 2 begins in about midway through the semester and ends on the last day of classes.
Additional Important RPP Policies

1. You cannot penalize for no-shows. Our CPHS approval requires participants to be allowed to decline to participate at any time without penalty. We can't get rid of the penalty option on Experimetrix, but please do not use it.

2. Lab-based studies are compensated at the rate of 1 RPP credit per hour. Give one credit for your lab-based study if it lasts 1 hour or less. Please advertise all lab-based studies that may be less than one hour as 60 minute studies. This policy helps keep recruitment even. If your study is approximately 2 hours, give 2 credits, etc. However, all online studies should be awarded 1/2 credit, since online studies don't require travel time, and are often much shorter than 1 hour.

3. Please ensure you have a contact email included in your Experimetrix experiment header. If you do not have a contact email listed in your experiment header, your study will have to be made invisible until you have it there.

4. In your description of your study you may not use any language indicating your study is shorter than an hour (quick, short, easy etc.)

5. You may not mention nor give any rewards beyond RPP credit (e.g. candy, cash).

6. Do not post study sessions for more than one week from the date you are posting. For example, if you were posting sessions on September 1st, we ask that you do not post sessions that fall after September 8th.

7. If you need to cancel a participant's session, please do so at least 24 hours before their scheduled session. If you have to cancel a participant's session with less than 24 hours notice, you MUST give this participant credit for participating in your study.

USING EXPERIMETRIX TO MANAGE STUDIES ONLINE

A Note about Terminology
For the sake of consistency, this document uses the terms preferred by Experimetrix, which may be slightly different from what we use in everyday language.

- Research supervisors are the people who apply for access to the RPP (may be Psychology faculty, postdocs, graduate students, postbac students, lab managers, or undergraduate honors thesis students).
- Experimenters are the people who actually conduct individual research sessions; they may also be research supervisors or they may be undergraduate research assistants.
- Users are undergraduate students or research participants who will sign up for studies.

THINGS AN EXPERIMENTER SHOULD KNOW

Getting Started:
• Complete the online RPP application by the posted deadline and pick up an experimenter number in order to post to Experimetrix. You will need a password that corresponds to your experiment number; this will be emailed to you by the RPP coordinator after your application is complete, but not before the day before experiments can begin. Please see pp. 1 & 2 of this document for instructions on filling out an RPP application and obtaining a number and password. Detailed instructions on how to use Experimetrix are immediately below.

Posting the Details of Your Experiment

• Go to the main Experimetrix page (www.experimetrix.com/berkeley) and select the “Experimenter Area” link at the bottom of the left hand column. Enter your logon number and password for the experiment you want to post. Your logon is the experiment number. Use the password given to you by the RPP coordinator. After your initial logon, please change the password, to optimally protect the information on participants who will be signing up for your experiment. Please do not lose your password.

• Logging on will take you to the “Experimenter Options” page that corresponds to the experiment number.

• Select “Edit Header” (in the second column, towards the bottom of the page) to enter the information about the study that will appear when potential participants search for sessions on Experimetrix.

• In the “Faculty Supervisor” boxes, please enter the name of the person who submitted the CPHS protocol (for example, the faculty, grad student or honors thesis undergrad who is overseeing the study). We realize this is odd, but that’s the way Experimetrix works.

• In the “Experimenter” box, please enter the name(s) of the individual (for example, graduate student or undergraduate research assistant) who will actually be running the study sessions.

• In the “Location of Study” box, please enter the room number where the study is being run (e.g., 4105 Tolman Hall). If your experiment meets in different places on different days, write “variable” in the “Location of Study” box and then give the exact location details in the “Description of Experiment” box.

• In the “Selection Criteria” box, please enter any participant restrictions to your study (e.g., 20/20 vision, no left-handedness, Psych 1 and 2 students only). Note that this box does not actually restrict anyone from signing up, it just lets potential participants know what your needs are.

• In the “Default Participation Credit” box, please enter the number of credits earned in the study.
  o If you are running a lab-based study enter 1 here if your study lasts 1 hour or shorter. If your study is 2 hours enter 2 here, etc. For each hour that your study lasts, participants should receive 1 rpp credit/hour.
  o If you are running an online study enter .5 here for a study lasting 1 hour or shorter. Online studies are compensated in this way because they are typically much shorter than an hour and require less travel time than laboratory studies.
• In the “Default Session Duration” box, please indicate the amount of time it takes to complete the experiment. Please list all studies that take one hour or shorter as 60 minute studies.

• In the “Cancellation contact and e-mail address” boxes, please put an e-mail address you would like participants to contact you at for cancellations and other questions.

• In the “Description of Experiment” you should provide a summary description of the research (e.g., "visual perception", "social interaction", individual differences in personality", as well as a brief description of any aspects of the study procedure that might be relevant to informed consent (e.g., "brain electrical activity will be recorded, "subjects may be exposed to unpleasant pictures", "subjects may receive brief electrical shocks"). Characterizations of the study designed to enhance recruitment (e.g., "fun", "no work", "only 5 minutes for 1 hour's credit") should be avoided, and will be deleted by the RPP supervisor. In this box, you can also post any unusual details of your study. For example, if your experiment meets in different places on different days, you can give the exact location details (e.g., Tuesdays, the location is 4105; Wednesdays, the location is 5101).

• Click on “Apply Changes” when finished. Screen will blink very quickly but it may not be apparent that changes occurred. You will be able to see these changes after you post session times (see below).

**Setting Lead Time**
Unless you change the default, participants can sign up for your experiment up until the last minute. By setting the lead time, open appointments that are not taken within a certain lead time of the scheduled start time will be automatically removed from the schedule. This feature is particularly useful for preventing last minute signups. To do this:

• Go to the main page (www.experimetrix.com/berkeley) and select the “Experimenter Area” link at the bottom of the left hand column. Enter your logon number and password for the experiment you want to set the lead-time for.

• From the “Experimenter Options” page, select the “Set Lead Time” link. It’s the last link in the third column.

• Using the pull down menus set the lead-time you prefer. We recommend 2 hours. Then click “Set Lead Time”.

**Posting Session Times**
• Go to the main page (www.experimetrix.com/berkeley) and select the “Experimenter Area” link at the bottom of the left hand column. Enter your logon number and password for the experiment you want to add sessions for.

• From the “Experimenter Options” page, select the “Add New Sessions” link. It’s the second link in the second column.

• From this page, you can create sessions with multiple participant slots. Select the time and date. Then select a number of “Times to Add” (i.e., the number of participants that can take part in the
session). Select the “Add New Times” button to finish. You can do this again until you have the
number of experimental sessions you need for the next week. **Remember that you can ONLY post
sessions one week in advance of the session time**

- There are two ways to view the current schedule you have posted:
  1. From the “Add New Sessions” page, select the “Click here to check the current schedule”
     link. You will see your experiment as it will appear to potential participants. Make sure the
     box “Only Show Available Appointments” is checked!
  2. From the “Experimenter Options” page, select the “View Schedule” link (the first link in the
     second column). To view future sessions that are still open for sign-up, select “Future:
     Available” and the option will display the schedule of sessions that are still available for
     sign-up. Make sure the box “Display Experiment to Students” is checked! You’ll notice that
     you can also view past sessions that are pending the assignment of credit or penalty (choose
     “Past: Awaiting credit or penalty”) and future sessions that participants have already signed
     up for (choose “Future: Taken”) from this “View Schedule” link.

NOTE: In either option, you must check the box “DISPLAY EXPERIMENT TO
STUDENTS” or “ONLY SHOW AVAILABLE APPOINTMENTS” at the top of the page so
your sessions are displayed to students looking to sign up for an experiment.

**Creating Special Sessions**
You may want to create special sessions when you recruit participants from prescreening, run studies
involving two sessions with the same participants, etc. There are two ways to create special sessions for
participants. The researcher supervisor should choose the method that is most appropriate and
convenient for their study.

**Option 1:** Create Sessions for Participants Individually
- From the “Experimenter Options” page, select the “Schedule Session for Participant” link. It’s the
  second link in the second column.

- In the “Select Participant” section, select the first letter of the participant’s last name and then select
  the participant that you would like to schedule. Set the date and time you wish to schedule that
  participant into the boxes above. Be sure to click the “add session” button below.

- Go back to the “Experimenter Options” page and select the “View Schedule” link. It’s the first link
  in the second column. Select “Future: Taken” and the special session you created should be
displayed. Again, make sure the box “Display Experiment to Students” is checked!

**Option 2:** Create Sessions that Special Groups of Participants May Sign Up For
- From the “Experimenter Options” page, select the “Set Authorization Code” link. It’s the third link
  in the third column.

- In the “Set Authorization Code” page, select the numerical code you would like to use to authorize
  participants to sign up for your study and enter the code into the “Authorization Code” box. Click
  on the button “Set a Code” and it will tell you that the code is now set for use. Sign-ups for your
  sessions are now restricted to the individuals who have the appropriate Authorization Code.
• E-mail your special group of qualified participants to invite them to participate in your study. In that e-mail, let them know that they can sign-up for your study using the Authorization Code, a provide the code.

Canceling Sessions
• Please note that you should cancel a session 24 hours before the expected session time. If the experiment is cancelled within fewer than 24 hours or if the experimenter fails to show up (within 10 minutes of the start time), you must assign credit to all participants signed up for the session.

• From the “Experimenter Options” page, select the “View Schedule” link. It’s the first link in the second column.

• To cancel sessions that no one has signed up for, select “Future: Available” to view sessions that are still open for sign-up. Click on the future sessions you want to cancel and hit the “Remove” button. A dialog box will appear asking to choose the type of session removal. Choose “Remove.”

• To cancel sessions that participants have already signed up for, select “Future: Taken”. Click on the sessions you want to cancel and hit the “Remove” button. A dialog box will appear asking to choose the type of session removal. Choose “Cancel, Cancel and Remove.”
  a. Note that canceling a session that someone has already signed up for will automatically produce an e-mail message that is sent to participants informing them of the cancellation.
  b. Note that on the session cancellation screen, the participants’ names are links that also permit you to e-mail them individually.

Rescheduling a Session
• To reschedule a session, you can e-mail the participant individually by clicking on his/her name. Then you can either follow option 1 under the “Creating Special Sessions” section (see previous page) or have the participant sign up for another session time.

Keeping Track of Session Participants
For lab-based studies
You need to keep track of the participants who sign up for your study sessions and document whether they show up or not. To keep track of participants who show up to participate in your study sessions, please do one of the following:
  a. Print out the list of sign-ups for a session and use the list to track no-shows. To do this, go to the “Experimenter Options” page and select the “view schedule” link. It’s the first link in the second column. Select “Future: Taken” and print out the list of participants who are signed up for the session. Use this list to keep track of who needs to be awarded credits.
  b. Have participants write their name onto a sign-up sheet at the beginning of the session and use that list to keep track of who needs to be awarded credits.

For web-based studies
• Go to the main page (www.experimetrix.com/berkeley) and select the “Experimenter Area” link at the bottom of the left hand column. Enter your logon number and password for the experiment you want to add sessions for.
From the “Experimenter Options” page, select the “Edit header” link. In the box labeled “Web Experiment Options” be sure to select option “web experiment, participant sign-up is required”. If you fail to select this option, you will not have a record of who signed up to complete your online experiment in Experimetrix.

Click the apply changes button at the top of the page.

If you follow the steps above, your Experimetrix account will give you all the students’ names who signed up for your experiment. However this does not mean that they completed your online survey. In order to make sure you are crediting only those who completed your survey (which avoids wasting credits) you can cross check the participants who signed up for your experiment in the following way.

1. Create your online survey in Qualtrics.
2. Go to my surveys in Qualtrics and create another survey titled “Survey participant Identification”
3. For the first question click on a text entry format. For the question type in “Please type in your first and last name. This will allow us to give you credit for your participation, but your name will in no way be connected to your answers in the first part of the survey”
4. Then as a second question click on a text entry format. For the question type in “Please type in your numeric Student Identification Number (SID)”
5. Click “Distribute Survey” from the blue tabs at the top
6. It may ask you to activate your survey. Make sure you activate it and then you will receive a url. Copy the URL (Control +C)
7. Go into your original survey and click on “Survey options” in the grey bar towards the top of the screen.
8. A box will pop up. Go to “Survey Termination” and click “Redirect to a URL”
   a. A new box will pop up. Delete the writing in the box (http://) and paste in your URL (control +V)
9. Click “Save Changes”
10. Preview your original survey. See that it now links to the new survey you created.

What you have done by following the steps above is link the two-question survey that asks for the students first and last name and SID at the end of your original survey. This means that all students who fill out your survey will be automatically sent to the two-question survey before they are done. Then you can go into this two-question survey on your Qualtrics account and see a list of all participants who have taken your survey. Cross reference this list with the one provided by Experimetrix and only credit those on the two-question survey. Those who are only on the Experimetrix list signed up for your survey, but never took it and should not receive credit.

**Awarding RPP Credits or Penalties**

**For lab-based studies**
- You must award credits and penalties to participants as soon as possible after an experimental session is run and no later than 1 week after the session has been run.

- From the “Experimenter Options” page, select the “view schedule” link. It’s the first link in the second column.
• To view past sessions that are pending the assignment of credit choose “Past: Awaiting credit or penalty”. For any past sessions, you have the option of awarding research credit or canceling the session (for a participant who failed to show up for the session) by clicking on the circle next to “credit” or the circle next to “cancel.” You **may not** penalize a participant for not showing up to a study. Although this option is available in Experimetrix, it is not permitted by our CPHS, so do not select the penalty option.

• To award credit to a participant who attended your session without signing up for it in advance online, select “direct credit” from the “Experimenter Options” page.
  a. Enter the participant’s name and follow the simple procedure. Note that to use this option you only need the participant’s name, NOT his/her SID number.
  b. If you do not have the participant’s name or you have a large number of students to do this for, go to “Batch credit.” To use this option, you only need the SID numbers of the participants. The SID numbers can be typed directly or pasted on the batch credit page. Please note that any SID numbers that the software doesn’t recognize will be displayed to you after you submit the numbers. Thus, you can be confident that the credit has actually been awarded unless you receive a message that tells you otherwise.

**For online studies:** There are two methods for awarding credit for online studies, detailed below

**Preferred method**
1.) Log into the Experimetrix account for your study.
2.) Click on “view schedule” at the top-middle section of the page
3.) You should see a gray tab that says “past: awaiting credit or penalty” at the top of the page followed by a list of names of students who have completed your survey.
4.) Using your Qualtrics data (described above) to cross-reference, credit participants who completed your survey, and cancel the session of participants who did not. **NOTE:** Do NOT use the penalty option—it is not permitted by CPHS nor is it applicable to online surveys.
5.) Make sure you hit “apply changes” or else your changes will not be saved.

**Alternative method**
This method is more prone to error, so you must follow instructions carefully to ensure that you are not crediting participants twice or canceling the credits of already credited participants.

1.) Log into the Experimetrix account for your study
2.) Go to “batch credit” (midway down the center of the page).
3.) Copy and paste the SIDs of participants who completed your Qualtrics survey into the box that says “Student IDs”
   a. List each Student ID, one to a line.
   b. Indicate that you wish this to be a credit (the default setting) and set the amount of credit to assign to each participant in the box labeled ‘Amount’.
   c. Click the Apply button.
   d. You will be told if credit could not be assigned to any Student IDs. This might happen if a Student ID is unrecognized or associated with an inactive student account. Those IDs will be shown in the box to the right after credit has been assigned to the recognized, active student accounts. **(Note:** Often students simply entered their student ID number incorrectly, and if you ask for their name in your Qualtrics Survey (as instructed above), you can simply credit these participants using the steps described in the preferred method of crediting participants above.)
e. After you credit, a new appointment will appear for each student under the “past: already assigned credit or penalty” tab under “view schedule” with the current date as the start date, the current time as the start time, and the current time plus one hour as the finish time.

4.) **IMPORTANT**: Pending sessions won't disappear automatically when you use batch credit—you also need to cancel the pending sessions of students you have just credited. Students get confused if you don’t do this because their credit for your study will simultaneously show up as both pending and earned in their personal accounts.

5.) To cancel pending sessions, go to "view schedule" and select the "past: awaiting penalty or credit tab" (this should be the default setting).

6.) Here you will see the pending sessions of ALL students that signed up for your study—regardless of whether they actually completed your study or whether you just awarded them credit using the batch credit function. You simply need to cancel these pending credits to clear the system. It’s ESSENTIAL that you're doing so under the "past: awaiting penalty or credit tab" and NOT the “past: already assigned credit or penalty” tab, or else you will be deleting the credits you just awarded using the batch credit function. It’s also ESSENTIAL that you are canceling participants’ sessions, NOT crediting them or else you will be awarding the participants credit twice.

**End of Semester**
By the last day of classes, research supervisors must quickly complete a final update of Experimetrix so that information about credit granted and no-shows is up-to-date. The RPP coordinator will be monitoring this daily until the Experimetrix reporting deadline passes, keeping in regular email contact with those supervisors who have credit pending. **All pending credit must be awarded or deleted by the posted deadline so that we know that all students have received what they earned toward their grades.**

**Questions?**
The faculty advisor (Prof. Iris Maus) and student RPP coordinator (Frances Nkara) can answer questions you have either in person or by e-mail, rpp@berkeley.edu.