# Workflow for Researchers –

**Applying for Research Ethics Review for Experiments with Participants from the Subject Pool**

1. Submit "Subject Pool Allocation Request" at the beginning of a semester by completing the following form:
   https://esurvey.psy.cuhk.edu.hk/jfe/form/SV_2sPxGxGCmMo5509

   Please note that the window for applying for Subject Pool Allocation is the **FIRST TWO WEEKS** of a semester.  Result of Subject Pool Allocation will be announced at the beginning of Week 3.

2. Obtain the "Survey and Behavioral Research Ethics Training Certificate" by following the instructions stated in the Research Ethics Training website https://www.research-ethics.cuhk.edu.hk/orktsResearch/ of the University.

3. i) Prepare relevant documents (Consent Form, Debriefing Form, Supervisor Endorsement Form, and Survey and Behavioral Research Ethics Training Certificate) for applying for Research Ethics Review.

   Templates and samples of Consent Form, Debriefing Form and Supervisor Endorsement Form can be found under the "Documents required for applying for Research Ethics Review (Subject Pool Experiments)" Section of the "Research Ethics" page of the Department Website.

   ii) Merge all of the above documents into **ONE file**.
   iii) Name the file using the following convention:

   > [**expID-ethicsForm.docx** or **expID-ethicsForm.pdf**]*
   > (e.g.: **23241001-ethicsForm.docx** or **23241001-ethicsForm.pdf**).

   > **\*REMARKS:** expID is a number assigned to an experiment that recruits Participants from the Subject Pool.

4. From the beginning of Week 3 to the end of Week 10, Researchers with allocated Subject Pool hours can apply for an Experiment ID (expID), and a Researcher Account on the Sona Systems (for new users) using this form:
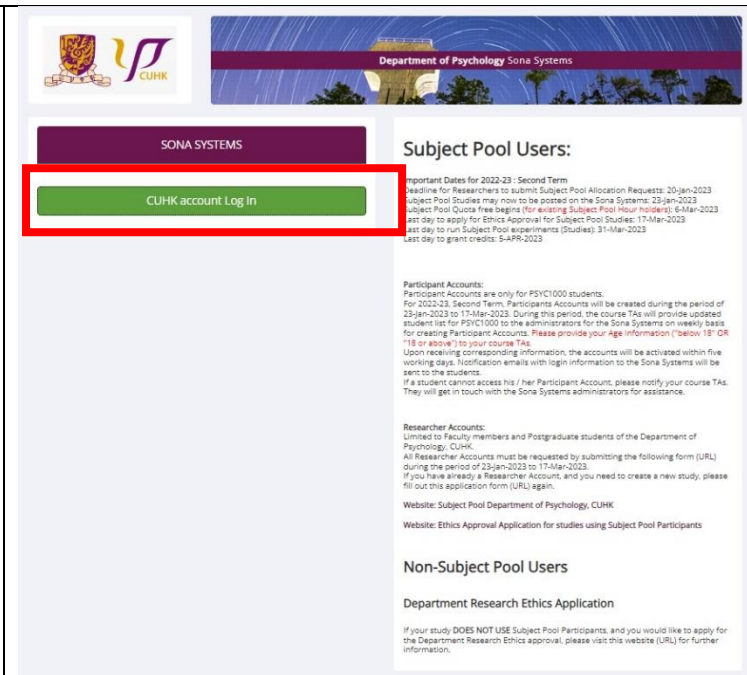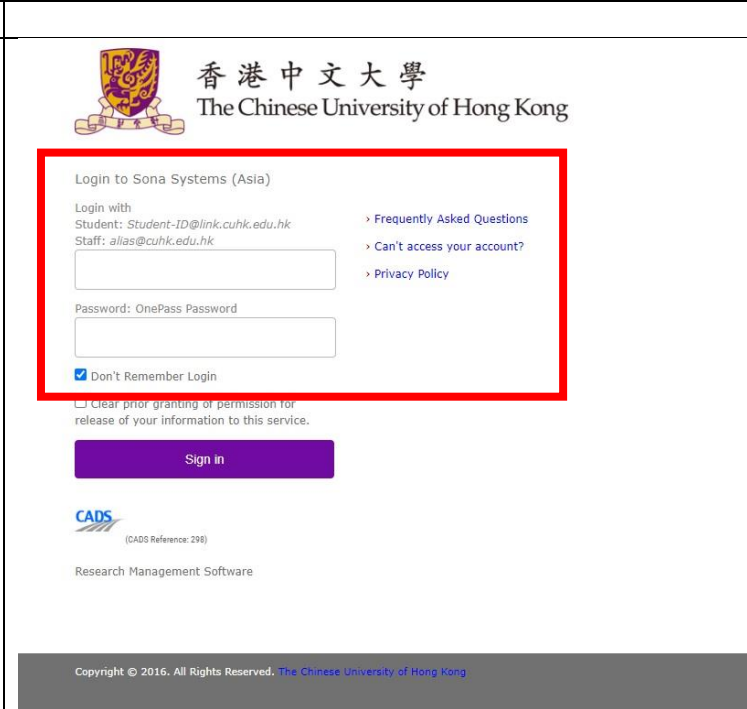   https://esurvey.psy.cuhk.edu.hk/jfe/form/SV_eEiDeMO7cAwtUAB

   Within three working days, a Sona Researcher Account will be created, and an email notification will be generated by the Sona Systems.  If you do not hear from us after 3 working days, please contact the Department Subject Pool Administrators via email subjectpool@psy.cuhk.edu.hk for assistance.

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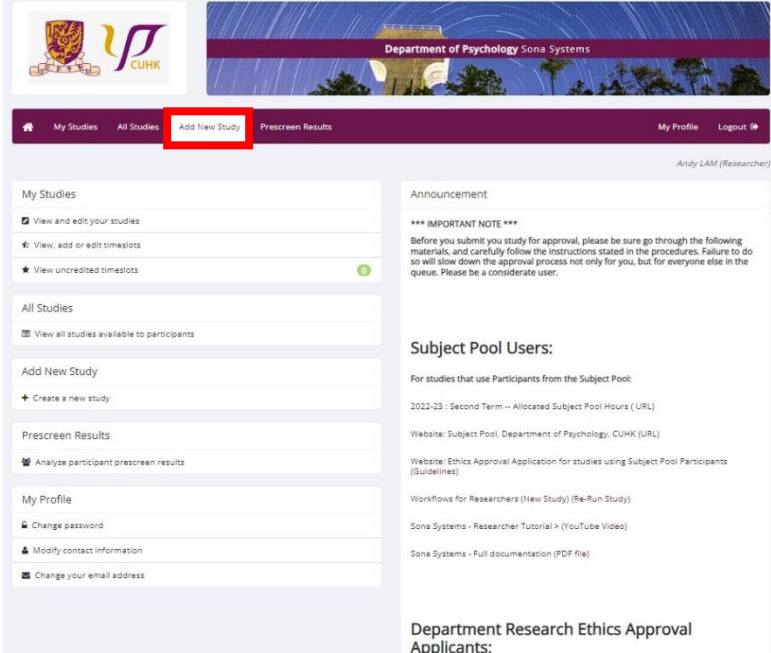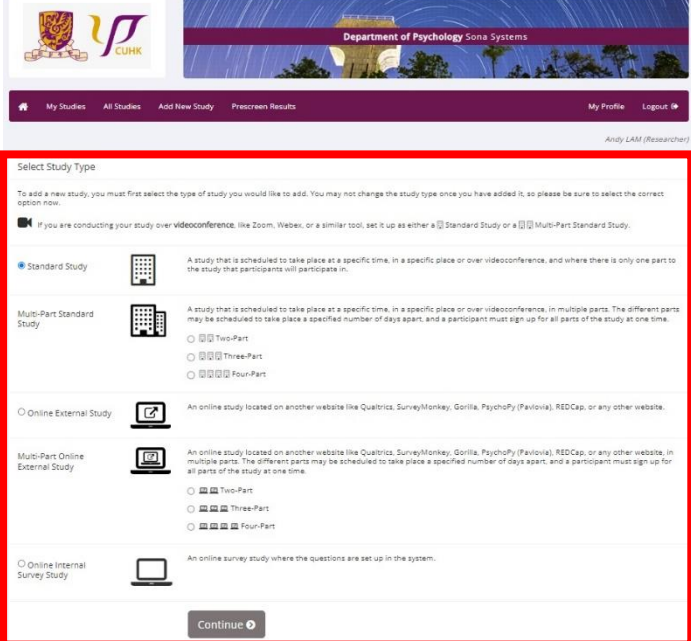5. To file your Research Ethics Review via the Sona Systems:

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| i) |  |
| | Visit the Sona Systems – Department of Psychology, CUHK website https://cuhkpsy.sona-systems.com/.  Press the "CUHK account Log in" button. |
| ii) |  |
| | Log into the Sona Systems with your CUHK OnePass credentials |

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5.  To file your Research Ethics Review via the Sona Systems (Cont'd):

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| iii) |  |
| | Select "Add New Study" in the menu bar |
| | |
| iv) |  |
| | Select the study type that best suits your experiment.  Press the "Continue" button to proceed. |

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5. To file your Research Ethics Review via the Sona Systems (Cont'd):

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| v) |  |
| | **Under Basic Study Information:**<br>• for "Study Name", please use this convention [expID study_title] (e.g. 23241001 My Study Title);  for a Rerun study, please use the convention  [expID study_title RERUN].  You can remove "RERUN" after the study is approved by the Reviewers.<br>• for "Researcher", please select your name, if it is not already.<br>• for "Principal Investigator", please select the name of your Supervisor if you are a Student Researcher. |

5. To file your Research Ethics Review via the Sona Systems (Cont'd):

| vi) | |
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| | **Under "Advanced Settings":**<br>• for "Age Restriction", please enter the targeted age range of your Participants if needed. |

5.  To file your Research Ethics Review via the Sona Systems (Cont'd):

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| vii) |  |
| | **Under "Advanced Settings":**<br>• For an External Online Study, please enter "Study URL".<br>• enter "Share Comments", "Private Comments" if needed.<br>• press the "Add This Study" button once you have correctly entered all study information. |

5. To file your Research Ethics Review via the Sona Systems (Cont'd):

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| viii) |  |
| | • Press the "Send Request" button in the "Study Menu" page. |

5. To file your Research Ethics Review via the Sona Systems (Cont'd):

| ix) | |
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| |  |
| | • Upload the consolidated file for required documents required. The file should contain the 1) Consent Form, 2) Debriefing Form, 3) Supervisor Endorsement Form, and 4) Survey and Behavioral Ethics Certificate. |
| | The file should be named using the following convention: |
| | [**expID-ethicsForm.docx** or **expID-ethicsForm.pdf**]* (e.g.: **23241001-ethicsForm.docx** or **23241001-ethicsForm.pdf**). |
| | • Press the "Send Request" button to submit your request for Research Ethics Review. |

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6.  If your study is NOT APPROVED, the Reviewers will contact you via email for providing further clarification / information. Please carefully follow his / her instructions on revising the information accordingly, and re-submit for approval again in the Sona Systems. Failure to do so will result in longer processing time for your application.

7.  After your study is approved by the Reviewers, you will receive an email notification generated by the Sona Systems. You can make your study "Active" under the "Basic Study Information" section of your study. Participants can sequentially sign up for your experiment.

8.  If you do not hear from us after 10 working days upon sending in an Approval Request on the Sona Systems, please contact the Department Subject Pool Administrators via email subjectpool@psy.cuhk.edu.hk for assistance.