



Sona Systems, Ltd.
Experiment Management System

—

Master Documentation Set
9 February 2022

About This Manual

This manual covers usage of the system from a variety of perspectives: Participant (Student), Researcher/Principal Investigator, Instructor, and Administrator. The manual is broken out into sections based on the type of user. In cases where the administrator has access to features also available to the researcher/PI, the functionality is documented in the Researcher/PI section of the documentation. Only administrator-specific features are covered in the Administrator section of the documentation.

As a user of this software, you are granted the right to copy, modify, and distribute this documentation within your organization. You may not distribute it outside of your organization without prior written permission from Sona Systems, Ltd.

You are encouraged to modify this documentation to suit the needs of your organization. You will find that this documentation covers every feature of the software, while your organization may have chosen to disable certain features during your implementation. Your users may prefer to read documentation that covers the system exactly as they will experience it, as opposed to this documentation, which may cover features that may not be enabled for them.

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PARTICIPANT (STUDENT) DOCUMENTATION

Introduction

The Experiment Management System provides an easy method for you to sign up for studies, and tracks your progress throughout the term. Everything is done through the software's web-based interface, so you can access the system at any time, from any computer, using a standard web browser.

It should be noted that this documentation covers all features in the system, but your organization may have chosen to disable certain features. Do not be alarmed if the documentation covers options and features that are not visible on the system that you are using.

Getting Started

We hope that your interaction with the system will be minimal and hopefully as painless as possible. After you log in to the system, you can view a list of available studies and any restrictions, sign up for studies you are interested in, and track your progress throughout the semester. The system will also track when you receive credits for a study, which can be viewed online.

The system works best on any popular web browser that is less than 2 years old, such as Firefox, Safari, and Chrome. It will also work with other web browsers, and with older versions of web browsers noted above. However the layout may not be as clean. No functionality will be lost when using an older web browser. Additionally, the software will work with a screen reader or other assistive tools for those with disabilities.

This documentation assumes you have a basic knowledge of how to use the web. While using this system, it is not necessary to use the Back button. You can use the toolbar on the top of every screen to navigate the site.

Mobile App

There is also a free mobile app available for Apple (iOS) and Android. You may find it by searching for "Sona Mobile" in the Apple App Store or Google Play Store. The mobile app has all the same functionality as the web interface.

Single Sign-On (SSO)

In some cases, the system will be configured so you can log in through your organization's existing login process, known as single sign-on (SSO), instead of needing to remember a separate username and password to use this system. If that is the case, you will see an option on the front page of the system.

Requesting an Account

If you see a link on the front page of the site to request an account, then your organization has enabled the feature that allows you to request an account. Once you click the link, you will be required to provide some basic information. Depending on how the system you are using is configured, you may receive an email notification immediately with your login information, or you will receive the

notification only after the administrator has approved your account request. The email notification will include login instructions for the system. You may be assigned a default password, which you may be allowed to change after your first login. In many cases, you may also provide an alternate email address (after your first login) if you prefer to receive future notifications at a different email address. The email will come from the administrator's email address (typically listed on the request account page), so be sure to configure your junk mail filters to allow emails from that address.

The form is titled "ACCOUNT INFORMATION" in a dark red header. It contains several input fields: "First Name", "Last Name", "User ID" (with a placeholder "@yourschool.edu"), "User ID (re-enter for verification)" (with a placeholder "@yourschool.edu"), "Student ID Number", and "Telephone". Below these is a "Course(s)" section with two columns: "Available Courses" and "Selected Courses". The "Available Courses" list includes "Hebrew Class", "Poter Course Spring 14", "Psych 100", "Sociology 2300", and "Summer 2014". A double-headed arrow is positioned between the two columns. At the bottom of the form is a grey button labeled "Request Account".

Figure 1 - Requesting an Account

If your organization has not enabled this feature, then your organization will create an account on your behalf. You will receive this account information, via email.

If you did not receive your login information, please check your email program's junk mail folder before contacting the administrator. One of the most common reasons for not receiving login information is that an email program misclassified the email as junk mail.

If your system is configured with SSO, then you will log in through SSO first, then go to Request Account (if you do not already have an account) to provide additional information so you can complete the account creation process in the system.

If you already have an account of another role, like a researcher account, then using this feature will add the participant role to your existing account.

Logging In

Once you have your login information, go to the front page of the site and proceed to log in.

The screenshot shows the login page for the Research Participation System. At the top left is the Royal University logo. The header area contains the text "Department of Psychology Research Participation System". Below this is a login form with a red header "RESEARCH PARTICIPATION SYSTEM". The form includes a "User ID" field with a placeholder "@yourschool.edu" and a "Password" field. A green "Log In" button is positioned below the password field. To the right of the login form is an "Announcement" section with a red "Request Account" button and a grey "Forgot Password?" button. At the bottom of the page, there is a footer with the text "Email questions to researchadministrator@yourschool.edu Copyright © 1997-2014 Sona Systems Ltd."

Figure 2 - Login Page

Once you log in, you may be asked to review and acknowledge your organization's human subject and privacy policy for research. You will need to acknowledge this only once every 6 months. You may also be asked to participate in a prescreening. After you complete these tasks, you will see the Main Menu.

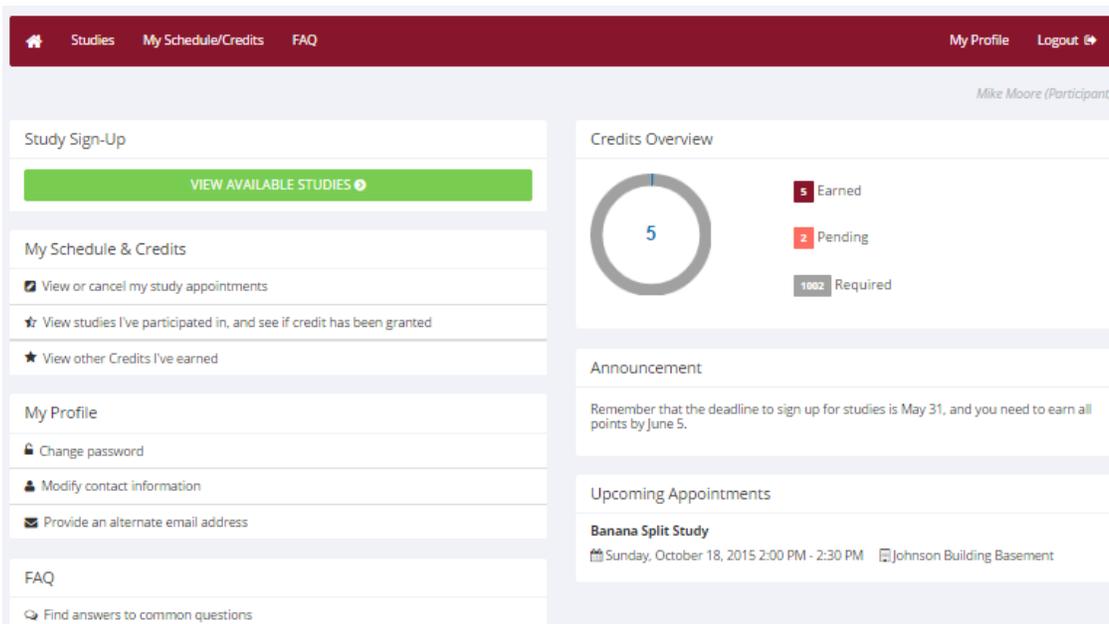


Figure 3 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, which is usually around 20 minutes. The system will warn you a few minutes before the expiration. This is done for security purposes. If this happens, you can always log in again. Once you are done using the system, it is better to fully log out, to prevent any problems that may arise if someone uses your computer before the session expires. This is especially important if you are using a public computer in a lab.

Retrieving a Lost Password

If you forget or do not have your password, and the feature is enabled on the system you are using, then you may choose to reset your password. You will see an option on the front login page if this feature is enabled. Using this option, a link to reset your password will be emailed to you after you make the request. This link is valid for 24 hours. Once you click the link, a new password will be generated and emailed to you. If you have provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address, which is derived from your user ID. If you requested a password reset and no email from the system has arrived after 30 minutes, then check your email program's junk mail folder in case the email was delivered there. Typically, the email is sent within a few seconds of the request, but sometimes there can be a delay on behalf of some recipient email servers.

Logging Out

Once you are done using the system, choose Logout from the top toolbar on the right side to log out. You are now logged out. It is always a good security measure to close all of your browser windows, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password (and the option is enabled), type your new password (twice, for confirmation) in the provided boxes. If you do *not* want to change your password, simply leave these boxes empty.

If you change your password, please be sure to select a password that you do not use on any other systems or websites, following good computing practice.

The screenshot shows two side-by-side panels. The left panel, titled 'My Profile', contains a header with instructions: 'You may use this page to change your password and update other information about yourself. All fields are required unless marked otherwise.' Below this are several form fields: 'Name' (Mike Moore), 'User ID' (mmoore@yourschool.edu), 'Alternate Email Address' (with a note that it's optional and for verification), 'Change Password' (with three input boxes for current, new, and confirm passwords), 'Student ID Number', and 'Phone Number' (708 134 8864). A green 'Update' button is at the bottom. The right panel, titled 'Credits', shows 'Credits Earned: 5' and 'Credits Required: 1002'. Below this is a table of courses: 'Astrology 101' and 'Sociology 2300', with a 'Change Courses' button. The 'Prescreen Status' is 'Completed'.

Figure 4 - Updating Your Profile

Email Address Options

There are certain events in the system that will cause an email notification to be sent to you. Most often, these are notifications that you have received credit for a study, or confirmation that you have signed up for a study. If Unique ID codes are *not* enabled (see Unique ID codes), your email address is also displayed to the researcher when they view who has signed up for their study, in the event they need to contact you.

You have two choices for your email address. When you update your profile, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Yahoo

account, for instance), this is the address where all notifications will be sent, as well as the address that will be displayed to researchers (if enabled).

If you do not provide an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain (if there is one) to the end of your user ID to form the address. For example, if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then the system would create the email address "jsmith@yourschool.edu".

In situations where the system is configured to enter an email address on this page, you will be asked to enter it twice, to ensure that it is typed correctly.

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as "Email Address" instead of "Alternate Email Address") and all emails sent to you will go to that address.

On some systems, the Alternate Email Address option is not available. In other cases, it is listed but you are not allowed to change it, in which case you should contact the administrator for assistance in changing it.

You may have the option to opt out of receiving certain emails, specifically study invitation emails and a weekly announcement of upcoming available studies.

Changing Courses

Depending on how the system is configured, you may see an option to change the courses you are in. If this is an option, then you will see a "Change Courses" option just below the list of courses you are in.

You may have the option to remove yourself from existing courses and add yourself to new courses, or you may only have the option to add yourself to new courses. If you remove yourself from a course, and had credits assigned to that course, the credits will *not* be reassigned to another course. You will receive a warning about this and be taken to a page where you can reassign those credits. You can go to My Schedule/Credits at any time to assign unassigned credits to a course.

Unique ID Codes

If enabled, the system will automatically assign a unique, numeric ID code to you. You should continue to use your normal login ID to log in to the system. The purpose of the numeric ID code is to identify you to researchers in a way that does not reveal your identity or compromise your privacy. If this feature is enabled, you will see this ID code when you go to view your profile, as well as, in email confirmations and reminders about your upcoming study sessions. You should bring this ID code with you when you go to studies or when communicating with researchers, as they will only know you by your ID code and not your name.

Studies

With the system, you may view studies, sign up for studies that are interesting to you, and be made aware of any special eligibility restrictions. You may also cancel your sign-up through the system.

You may see that some studies are online studies. You should read the details of these studies closely, but generally you may participate in them online, without having to go to a lab. It is presumed that you will participate in the study shortly after you sign up for it, though you have until the Participation Deadline Date to participate.

Viewing Studies

To view a list of studies, click on Studies from the top toolbar. You will see a list of studies. A brief description of each study will be listed, as well as any special requirements that may restrict your eligibility to participate in the study.

Currently Viewing: **All Studies**

View studies with available timeslots on :

Available?	Study Information	Eligibility
	External Survey Monkey (4 Credits) (Online Study)	
	Managing Costs When Abroad (1 Credits)	Invitation code required.
	Memorable Events in Life (1 Credits) This study focuses on events that have affected your life since.	
	Mobile vs Landline Study (1 Credits)	Invitation code required. Must be 18 or older. Prior study restrictions
	Pronunciation of Words (1 Credits) Study of word pronunciation	Invitation code required.
	Climate effects on happiness (1 Credits) brief description of the study	eligible if you like As Prior study restrictions
	Math Problems (0.5 Credits) (Online Study)	
	External Study Limesurvey (1 Credits) (Online Study)	
	Historical Events (1 Credits) (Online Study)	Invitation code required.
	Banana Split Study (1 Credits)	

Figure 5 - Viewing Studies

Studies that currently have available participation times (timeslots) will have “TIMESLOTS AVAILABLE” listed next to the name of the study. If none of the studies have available timeslots, you may want to log on to the system a few days later to see if new timeslots have been added. You may also select a specific date to view studies with available timeslots on that date.

To view more information about a study, click on the name of the study.

Multi-Part Studies

Some studies have more than one part. You must sign up for all parts of the study at once, and the each part may need to be scheduled to take place a certain number of days apart from the previous part. These studies will be clearly marked, and the system will ensure you are only able to sign up for timeslots within the appropriate amount of time between each part.

In the case of multipart online studies, the time separation between parts is based on when you complete the previous part. When you are marked in the system as having completed one part of the study, you will receive an email with a link to the next part of the study, and that will also include information about when that next part will be available for participation. In addition, if the next part became available in the last 24 hours, and is still available, you will receive a reminder email about it at that time. You can also access the URL for the study in My Schedule.

Videoconference Studies

Some studies may be conducted over videoconference (Zoom, WebEx, etc.). Just as with standard lab studies, you sign up for a timeslot to participate at a specific date and time. In some cases, only some timeslots for a study will be conducted over videoconference and others will be taking place at a physical location. This will be clear when you view the location of a timeslot, as well as by the videoconference (camera) icon next to such timeslots.

You will receive the URL for the videoconference in the confirmation email that is sent right after you sign up for the study, as well as in the reminder email sent the day before your appointment. You can also find the URL by logging in to the system and going to My Schedule. The URL will become available 10 minutes before your appointment. Videoconference studies do not count towards any online credit limit that may be in place.

Online Survey Studies

Some studies may be online survey studies that are administered in the system. If you sign-up for one of these studies, you will be taken immediately to the survey. As soon as you complete the survey, you will receive credit.

You may withdraw from the survey at any time by clicking the Withdraw button on the top right corner of the screen. When you withdraw you have an option to withdraw without the chance to receive credit, or with the chance to receive credit. If you withdraw *without* the chance to receive credit, then your sign-up will be completely deleted from the system. This is useful if you have changed your mind about participating in the survey, but might like to participate in it again at a later time.

If you choose to withdraw with the option to receive credit, then your sign-up will be logged and the researcher will be notified of the withdrawal. However, you will not be granted credit immediately. The researcher may then choose to grant credit to you for your participation in the study. If this is done, you will not have the opportunity to participate in this study again (because you may not participate or receive credit for the same online survey study more than once). With this withdrawal option, you are not required to provide any explanation of why you are choosing to withdraw, but you may provide an

explanation if you like. This information will be sent to the researcher when they are notified of your withdrawal.

With either withdrawal option, all the survey responses you provided are permanently deleted at the time you withdraw.

Signing Up For Studies

To sign up to participate in a study find the study you would like to participate in (see Viewing Studies in this documentation) and click on the study name for more information. You will see a list of any special restrictions or eligibility requirements, as well as a contact person if you have questions about the study. If the study has a principal investigator listed, you can click their name to view full contact information. In most cases, it is preferred that you contact the individual listed as the researcher if you have specific questions.

Some restrictions are automatically enforced by the system. If the study has certain pre-requisites or disqualifiers (studies you must *not* have participated in to participate in this study), those may be listed, as well as a note about whether you meet those eligibility requirements. If you have signed up for a study with another study listed as a disqualifier study, then you will be prevented from signing up for the disqualifier study.

Study Information

Study Name	Banana Split Study
Study Type	 Standard (lab) study This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Credits	1 Credits
Duration	30 minutes
Description	Studying the ice creams.
Preparation	Get ready.
Website	View Study Website
Researcher	Hugo Finkelstein
Principal Investigator	Billy Falcon
Deadlines	Sign-Up: 24 hour(s) before the appointment Cancellation: 24 hour(s) before the appointment
	View Time Slots for This Study

Figure 6 - Study Information

The study may have other restrictions listed as Eligibility Requirements. An example of an eligibility requirement is “Left-handed people only.” If listed, the system does *not* enforce this restriction. However, you should only sign up for the study if you meet this restriction. If you sign up for the study and you do not meet the restrictions, you will likely not receive credit for the study and could face a penalty.

If the study is not an online study, then the sign-up and cancellation deadlines for the study will be listed. Those deadlines are based on the date of each timeslot.

If you are viewing a study that you have signed up for in the past and have already participated in, then you will not see the list of timeslots for the study.

Some studies require a special password (known as an Invitation Code) to sign up. In this case, it will be noted. The researcher should have given you this invitation code. It is *not* the same as the password you use to log in to the system. You will need to enter the invitation code just before you click the Sign Up button to sign up for a timeslot.

You may sign up for a timeslot only up until a certain time before that timeslot is scheduled to occur. The system will not show a Sign Up button for timeslots that are too late to sign up for. If you sign up for a timeslot and already have another sign-up in the system that conflicts with that appointment time, the system will warn you of the scheduling conflict (though it will not prevent the sign-up).

September 2019						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	31
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
			1:45 - 2:30 2:30 - 3:15	9:00 - 9:45 1:05 - 1:50	9:00 - 9:45 1:05 - 1:50	
22	23	24	25	26	27	28
9:00 - 9:45 1:05 - 1:50						
29	30	01	02	03	04	05
9:00 - 9:45						

Figure 7 - Study Timeslots

Once you have determined you meet all the requirements, click on View Timeslots for This Study and you will see a list of available timeslots. For lab studies, you can choose between a list view and monthly calendar view using the option in the top right corner of the page. Choose a timeslot that is convenient for you, and click Sign Up.

After you click Sign Up, you will see information displayed confirming the time and location of the study you plan to participate in, and you can then choose to complete your sign-up. You may receive an email confirmation as well, depending on how your system is configured. You are now signed up for the study. To cancel your sign-up, see Canceling a Sign-Up in this documentation.

Canceling a Sign-Up

If you need to cancel a timeslot you have signed up for, you can do this from the My Schedule and Credits page. Choose the My Schedule/Credits option from the top toolbar.

You will see all the studies you have signed up for, as well as those you have completed (see the Tracking Your Progress section of this documentation for more information).

Studies that you have signed up for and that you are allowed to cancel will have a Cancel button next to them. There is a time limit before the study is scheduled to occur, where it will be too late to cancel. This restriction may be listed at the bottom of the page, or can be found by clicking on the study name and viewing the study details, depending on how cancellation deadlines are configured in your system.

System Message: Are you sure you want to cancel this sign-up? x

Cancel Study Signup

IMPORTANT: You may cancel a study sign-up up to 24 hours before the study is scheduled to occur. If you decide to cancel, you will receive an email confirmation of the cancellation, for your records.

Study Name	Banana Split Study
Date	October 18, 2015 2:00 PM - 2:30 PM
Location	Johnson Building Basement
Preparation	Get ready.
Researcher	Hugo Finkelstein Email: joseph@joseph-orr.com
Principal Investigator	Billy Falcon

Would you like to cancel this sign-up?

Yes, I want to cancel No, I do not want to cancel

Figure 8 - Sign-Up Cancellation

Once you click Cancel to cancel your sign-up, you will see a confirmation page. You will also be warned if your cancellation might affect your ability to participate in other studies that you have signed up for, due to pre-requisites and restrictions. If the cancellation affects your ability to participate in another study you are signed up for, it is *your* responsibility to deal with this issue (usually by canceling the dependent study as well). The system will warn you, but will not block the cancellation.

Click Yes to cancel your sign-up, and the sign-up will be cancelled immediately.

If you cancel a part of a multi-part study, the subsequent parts (but *not* preceding parts) will also be cancelled. You will need to ask the researcher to sign you up for the other parts again, if you would like to participate in it at a later date.

Tracking Your Progress

You may track your progress at any time by choosing the My Schedule/Credits option from the top toolbar.

When you view this page, at the top, you will see at the list of the number of credits you are expected to earn in addition to how many you have already earned thus far, and the number of unexcused no-shows you have earned if you have them. You may also have an option to view how many credits you have earned for each course, and you may also see the credit requirements for each course next to

that. Below that, if you have signed up for any studies, those will be listed as well. In the list of studies you will also see information about your credit status.

Credits Credits Earned by Cou.

Overall Credits Earned: 5 Overall Credits Pending: 2 Overall Credits Requirements: 1002

Remember you have until May 20 to reassign your credits between courses.

Study Signups

Study	Time	Location	Credit Status	Course	Comments	Cancel?
Climate effects on happiness Credits: 1 Credits	June 4, 2014 11:00 AM - 11:30 AM	Greeves Hall 399	Failure to appear - unexcused (1 Credits penalty).	Astrology 101 Reassign		
External Survey Monkey Study Type: Online Study Credits: 4 Credits	October 30, 2014 9:00 AM	Online	4 Credits granted on September 9, 2014.	Astrology 101 Reassign		
The Psychic Canine Comparison	November 4, 2014 11:05 AM - 11:35 AM	Greeves Hall 399	Awaiting action from researcher	Astrology 101		

Figure 9 - Viewing Your Progress

If you failed to appear for a study, it is possible you were assessed a penalty. That will be displayed in your progress. The penalty (if assessed) will either increase the number of credits you must earn, or be deducted from your current credit earnings depending on how the system is configured. It is possible you might end up with a negative value for the number of credits you have earned. Next to each sign-up, you can also see any comments the researcher has left regarding the study and your credit for it. In cases where the study was set up for monetary compensation and not credits, your participation will be noted as “participated.” This is done to ensure your eligibility for any studies where the study you just completed is a pre-requisite study.

Non-study credit is also listed, when applicable. Non-study credit is usually granted for writing a paper, completing the prescreen, or some other special situation.

It is possible that older records of your participation are in the system, but not displayed. If that is the case, you’ll see an option to view your older sign-ups.

Saving Your Progress Report

If you would like to save a copy of the information for your records, use the Download option at the top right corner of the page. This will generate a digitally-signed and timestamped PDF that you can save to your computer.

Reassigning Credits

If you belong to multiple courses and the system is configured to allow it, you may reassign a credit from one course to another. To do this, simply use the Reassign link that appears when you view your progress. The link appears under the course entry for each item in your progress listing. You may not

split a credit between two courses. For example, assigning 2 credits of a 3-credit study to one course, and 1 credit from that study to a different course.

Online Prescreening

If enabled on your system, you may be asked to take an online prescreen before you use the system. Depending on how the prescreen is configured, you may have the option to opt out of the entire prescreen and/or individual questions. You should realize that declining to participate in the prescreen or certain questions may affect your eligibility for some studies, so participation is encouraged.

In some cases, you may earn credit for participating in the prescreen, and you may even earn credit if you decline to participate in the prescreen. If either case holds true, the system will inform you of this before you commence the prescreen.

The prescreen may consist of multiple sections. All questions are either multiple-choice or fill-in (free-entry) answer. At the end of the prescreen, you may have a chance to review and change any of your responses. After you save all of your responses, you may not participate in the prescreen again (unless the administrator has allowed this or deleted your existing responses), so answer all questions carefully.

Section Questions

Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.

1. What is your average household income in a year?

- \$... - \$15,000
- \$15,000 - \$25,000
- \$25,000 - \$35,000
- \$35,000 - \$45,000
- \$45,000 - \$...
- Check this box if you do not want to provide an answer for this question

2. Please describe your average day.

Check this box if you do not want to provide an answer for this question

Figure 10 - Prescreen Questions

Frequently Asked Questions

Immediately after I login and click on any menu option, I am taken back to the login page and I see a message that my authentication has expired. What does this mean?

Your web browser is not properly configured to accept cookies. You should turn on cookies in your web browser, try to use a different web browser (for example, switch to Firefox if you are currently using Chrome), or try to use a different computer. Detailed instructions can be found if you go to the site and

enter the URL “cookie_help.aspx” in place of “default.aspx” in the address bar of the browser, when you are on the front page of the site.

You can also try to use another computer. Usually the computers in university computer labs are configured correctly.

I participated in a study, but I have yet to receive credit. How do I receive credit?

The researcher must grant you credit. This is usually done shortly after your participation in the study. If it has been some time and you have still not received credit, contact the researcher.

Who can see the information about my sign-ups? I don't want everyone to know which studies I signed up for.

Only the researcher and principal investigator of the study may see that you have signed up for a study, along with the site administrator. No other users, including other researchers or your instructor can see this information.

How do I change the email address where email notifications from the system are sent?

Provide an Alternate Email address and notifications will be sent there. See the Email Address Options section of this documentation for more information. In some cases, this option may not be available.

I wrote a paper instead of participating in studies. How do I know I have completed my requirements?

View the My Schedule and Credits page and any non-study credit will also be listed there. See the Tracking Your Progress section of this documentation for more information.

I noticed that with some studies, I could sign up for them again even if I participated before, while others don't allow for this. Why is this?

Researchers can choose if their studies allow you to participate more than once. Not all studies allow you to participate more than once.

I attempted to sign up for a study, and I was prevented from doing so because the study I was trying to sign up for is a disqualifier for another study I am scheduled to participate in. Why is this?

If you have signed up for a study that has disqualifiers (studies you must *not* have participated in to participate in that study), you may not sign up for the studies that are listed as the disqualifier studies. You *are* allowed to sign up for the disqualifier studies if the disqualifier study will take place after the study with disqualifiers. You are also allowed to sign up if you have already participated in (and received credit for) the study with disqualifiers. The easiest way to sign up for both studies is to schedule the disqualifier study at a time later than the study with disqualifiers.