QUALTRICS TIPS AND TRICKS
FOR UNC-CH USERS

PLEASE NOTE: *This tip sheet is <u>not</u> intended as a step-by-step guide.* It was developed to provide information that UNC users have found important to know *in addition* to what is easy to find on the Qualtrics website. Please refer to Qualtrics' "Help and Tutorials" link at the top of every Qualtrics screen for additional guidance.

A. Things to think about <u>before</u> you start your survey

1. How will your survey link be distributed to participants?

Option 1: Email invitations through Qualtrics Mailer If you have good email addresses and your survey participants regularly read their email, then using the Qualtrics Mailer to send a customized email to each participant is the best method. It allows you to see who has and has not responded to your survey, and to tailor reminder emails and other follow-up efforts to only those who have not responded. In addition, if the respondent breaks off in mid-interview, he or she needs only to click the link in their email again to resume the survey right where they left off. This method also prohibits participants from being able to complete the survey more than once; when the survey associated with a particular customized link is completed, Qualtrics will not allow that link to be used again.

Option 2: Open access without authentication If distributing the survey link to individual email addresses through the Qualtrics mailer is not an option for you, then every respondent will enter the survey via one single URL (as opposed to customized URLs as described above). This is necessary when respondents are being invited to the survey via a listserv, a newsletter, or through a third party who will not provide individual email addresses. This method has several potential drawbacks: a) you have no way to track who has responded and who hasn't, b) no way to know whose survey responses are whose (except if you ask them "What is your name/ID number?" as a question in the survey), and c) you have fewer options for keeping someone from responding multiple times and for resuming interviews if participants break off in mid-interview. (See Section E for more on this topic.)

Option 3: Open access with authentication In some situations, you may not be able to email individual links to participants, but you may have a means for issuing them a unique identifier of some sort (e.g. a "mail-merged" postal letter containing unique login codes) or they may already have a unique identifier (e.g. member number, employee number, email address, etc.) that can be used to ensure that only legitimate participants complete your survey. If you have a list of the valid entries for such an identifier, you can use *authentication*. Described briefly, this is set up by loading the list of valid entries into a panel, then using Qualtrics' Survey Flow to add an "Authenticator" item at the beginning of your survey. Questions beyond the authenticator question can only be accessed after a user enters an identifier that is found on the list. In addition, once a survey has been completed for a given value of the identifier, that value cannot be used to complete the survey again—thus preventing respondents from answering more than once. For more information, search "authentication" on the Qualtrics Help and Tutorials page.

2. **Will your survey have multiple pages or all questions on one page?**

A good guideline is to put 1 to 3 questions per page. Why? Because you want the task of responding to be as easy as possible. That means not requiring your respondent to scroll up and down to find all the questions. Try to put only as many questions on one page as the typical respondent can see on one screen without scrolling. You should also remember that **responses are only saved to the database when the respondent clicks the button to proceed to the next screen**. So if you put 20 questions on one screen and something unfortunate happens when a respondent is answering question 19 (let's say a power failure or accidental close of the browser window) or if he/she closes the browser window, then those 19 pieces of data have not been saved. When (if) your respondent resumes her survey, she will have to answer those 19 questions again. If those 20 questions had been spread onto 10 screens of two items each, she would have lost at most 2 items.

3. **What tool(s) will you use to analyze your data and prepare your report(s)?**

Qualtrics provides tools for online analysis, but they are very basic—frequency distributions and crosstabulations primarily. If this is all your project requires, you can consider using Qualtrics for your analyses, but be cautious. Some UNC-CH users have been disappointed to complete their surveys and set about generating their reports only to find that Qualtrics can't quite subset the data or perform exactly the analyses they need. The reporting tool can generate snazzy graphics (pie charts, histograms, etc.) with the click of a button, but before embarking on a Qualtrics survey assuming you will do online analyses, make sure that it has the capability to do exactly what *your* project needs.

From Qualtrics, you can easily download your data into an SPSS dataset or into a comma separated values (.csv) file that can be read by Microsoft Excel and several other programs.

B. Creating your Survey

Creating a survey in Qualtrics is generally an intuitive process, but there are a couple of exceptions. We provide guidance for those non-intuitive situations below.

➢ To create a page with only information (text) and no questions (such as a survey welcome or introduction page), create a "question" of the type Text/Graphic.

➢ Unless there is a specific reason not to, include a Back button so that respondents can back up to correct answers if they make an error. To add a back button, click "Survey Options" and check the appropriate box.

➢ If you want the question to contain text from a previous question (sometimes referred to as "piping"), click the question text area. The box will turn yellow and a blue tab will appear above it that says "Rich Text Editor." Click this. In the dialog box that opens, use the "Smart Text" icon (which has the symbol "{a} on it") and follow the prompts. Click anywhere outside the dialog box to save your changes and return to the main screen. (You would use this feature if, for example, you asked the respondent to choose his/her favorite vegetable from a list and he chose "carrots" and you wanted the next question to reflect that choice, as in "How often do you eat [carrots]?")

➢ If you want the response categories to be dependent on what the respondent did or didn't select in a previous question, click on the survey question, then click on the purple box next to the question and select "Carry Forward Choices".

➢ Under "Validation," use the "Force Response" option carefully.   If you select this option, the respondent will not be able to proceed with the survey unless they provide an answer. A respondent who wants to skip a particular question and can't may decide to stop the survey altogether. Most IRB approvals at UNC-CH require that the respondent be allowed to skip questions they don't want to answer. (Note: some researchers prefer to require a response to every question but to include "Don't Know" and/or "Decline to Answer" as response categories on every question. This is acceptable, but be aware that in most cases, making these categories visible on the screen will result in more respondents choosing them than if they are not visible and respondents who do not want to answer are just allowed to leave the question blank.)

Here are some tips regarding the "Look and Feel" of your survey.

➢ Notice that on the right side of this dialog box, there is a drop-down menu for "Look and Feel Library". In the "Odum" library, there is a single format with white background and Carolina blue accent which has been created specifically for UNC. You may also use any of the formats available in the "Qualtrics" look and feel library.

➢ Some of the Qualtrics style formats offer a version with multiple questions per page and a version with a single question per page. In actuality, any format can be turned into a single question per page format simply by adding a page break after each question.

C. Adding Skip Logic and Display-if Logic

"Logic" refers to the situation where some respondents follow one path through a questionnaire while others follow a different path. For example, if part of your questionnaire asks about recent experiences in a dentist's office, you may want to ask those questions only if a respondent has visited a dentist in the past 12 months. To do this, you would first ask a "gate" question such as "Have you visited a dentist in the past 12 months?" The detailed questions would be asked only if the respondent had seen a dentist during the past 12 months; otherwise the respondent would be "skipped" over these questions and on to the next topic in the survey.

Here are some tips regarding Skip Logic and Display-if Logic:

➢ Enter all the survey questions involved in the logic first.   Then add the skip and display-if instructions.

➢ You can have multiple skip instructions one after another. During survey administration, they will be processed in the order you place them in.

➢ Be sure to test all logic carefully! Preview the survey several times and test that the logic functions as intended for all possible responses.

➢ You will not be able to delete an item to which your skip or display-if logic points. Change or delete the logic first, then delete the item you want to remove.

D. Previewing Your Survey

You can see what your survey is going to look like to respondents by choosing "Preview Survey." To allow other persons to preview the survey before it is activated (e.g. your advisor, research collaborator, etc.), highlight and copy the URL from the preview browser window and send it to them. Note that the URL will be very long; if their email system doesn't support the "point and click" feature for multi-line URLs, they may need to highlight and copy the URL and paste it into their browser window.

IMPORTANT NOTE: Before fielding your survey, delete any data that have accumulated from previewing/testing the survey instrument. Click on "View Results" on the top row of tabs and then click the "Responses" icon. Make sure the tab for "Recorded Responses" is selected (as opposed to "Responses in Progress.") A list of all data records will appear at the bottom of the screen. Click "Advanced Options" and select "Delete Survey Previews." If you have used the Qualtrics feature to create test data, repeat and select "Delete Survey Tests."

E. Resuming Partial Interviews, "Ballot Box Stuffing" and Other "Survey Options"

One of the most commonly-asked questions by UNC Qualtrics users is "What happens if a respondent stops in mid-survey and wants to finish it later?" The answer to this question depends on three things: 1) whether you use the Qualtrics mailer to invite participants to the survey via a customized email, 2) whether you check the "Save and Continue" box on the "Survey Options" page, and 3) the option you select under "Partial Completion" on the Survey Options page.

Inviting participants via the Qualtrics mailer allowed respondents to access the survey via their own unique URL within their message. In this case, they can break off and resume the survey by clicking the link in their email again at any point up to the expiration date of their link (see Section G). Qualtrics keeps track of where they left off and takes them straight back to that page. This happens regardless of whether the "Save and Continue" box on the Survey Options page is checked, and regardless of what computer the respondent uses to access the survey. (However, you should make sure that under "Survey Protection" on the "Survey Options" page, you have selected "Only allow those who receive invitation emails to take the survey.")

The "Partial Completion" setting on the Survey Options page also affects how break-offs are handled. When a respondent answers part of a survey but not all of it, Qualtrics stores those data in a special "holding" area; they are not accessible in your results data file. Once they *are* written to the results data file, the respondent will no longer be able to resume that interview. The dropdown box on the Survey Options page determines how long Qualtrics "holds" partial data records before writing them to the final data file.

In general, it is recommended to select the longest interval available for this setting (currently 6 months). In this case, the respondent has 6 months after the last time they accessed the survey to come back to it and resume where they left off. If they do not do so within 6 months, the partial data will be written to the data file and they will no longer be able to resume. (In addition, when you deactivate your survey at the close of data collection, all partial data records that aren't already in the data file will added.)

If you plan to distribute your invitations via the Qualtrics mailer, *do not read the rest of this section—it will only confuse you unnecessarily!*

If you do <u>not</u> use the Qualtrics mailer to issue survey invitations, then how Qualtrics handles break-offs and resumptions in the survey is affected by the "Save and Continue" option and the "Prevent Ballot Box Stuffing" option on the Survey Options page. If the "Save and Continue" box is checked, then Qualtrics attempts to store a cookie on the respondent's computer. If it succeeds, then when the respondent returns to the survey URL from that username on that computer, it will take them directly to where they left off. If, however, the respondent has disallowed cookies on their computer, then they will not be able to resume where they left off. Rather, when they go to the survey link a second time, they will have to start the survey all over again.

If the "Save and Continue" box is <u>not</u> checked, then each time a respondent goes to the survey URL, the survey will start at the beginning.

HOWEVER: There is another setting which comes into play when a respondent goes to the survey URL a second time. Also on the "Survey Options" page, there is a check box for "Prevent Ballot Box Stuffing." If the cookie on the respondent's computer indicates that this survey has already been completed, then Qualtrics will not allow the survey to be completed again from that machine and will present a message to that effect. This is a good measure if you are sure that no two of your respondents will need to complete the survey from the same machine, but can cause problems if they do.

SPECIAL NOTICE CONCERNING MULTIPLE USERS TAKING THE SURVEY FROM THE SAME COMPUTER: Sometimes surveys are administered to several people using the same computer— such as a "kiosk" in a waiting room where patients are asked to complete a survey on their way in or out of the clinic. In this case, make sure that <u>neither</u> the "Save and Continue" nor the "Prevent Ballot Box Stuffing" is checked. If "Save and Continue" is checked, then if one participant stops in mid-survey, the next person's survey will start where they left off rather than at the beginning. If "Prevent Ballot Box Stuffing" is checked, then only the first participant will be able to complete the survey; the second and subsequent attempts will be met with an error message stating that the survey has already been completed.

F. Your Library

The Library is where you create and store items related to, but separate from, your survey questionnaire. These include:

End of Survey Messages (the screen respondents see after submitting their answer to the final survey question)
Graphic image files for use in your survey or messages
Invitation Emails (necessary for using the Qualtrics mailer)
Lists of Respondent Email Addresses (called "Panels")

For information on these topics, see the Help and Tutorials links.

G. Distributing your Survey

Here is a quick summary of the steps to distribute your survey via the Qualtrics survey mailer (i.e. individualized email invitations to each participant). For more information or if you are not using the Qualtrics mailer, see the Qualtrics Help information.

1. In your Library, create the Panel of respondents (typically by uploading a .csv file which can be easily created using the "File/Save As" menu option in Microsoft Excel).
2. In your Library, create the text of the invitation email.
3. Under "Distribute Survey", click on "Send Survey" and then choose the tab for "Survey Mailer" and follow the prompts." When creating this mailing, keep the following in mind:

> ➢ By default, the individualized links generated by the Qualtrics mailer will <u>expire</u> 60 days after the email invitation is sent. You can extend this to 90 days (or reduce it to fewer) in the dropdown menu under "Advanced Options." If you still want a respondent to be able to complete their survey more than 90 days after their invitation, you will need to send them a "reminder" email (see next section) which will contain a new link. (If a respondent clicks on the link in an email after the link has expired, the Qualtrics server will give an error message saying that the "survey cannot be found".)

IMPORTANT NOTE: There is a column on the Distribute Survey/Mail History screen that claims to show how many email messages "failed." Do not be deceived by this! As of this writing (September 2010), it is <u>not</u> an accurate report of your failed emails (sometimes called "bouncebacks"). Unfortunately, when using the Qualtrics mailer, you have no way of knowing which emails bounced back to the Qualtrics server. If you are concerned about inaccurate email addresses in your distribution list, you may want to send a "prenotification" email to your participants a week or so in advance from your own email account in order to identify bouncebacks. (Prenotification contact has also been shown to improve survey cooperation rates.) The prenotification message can be very short, explaining *very briefly* who you are, what you're doing, and that the recipient should expect an email on [fill in the date] inviting them to participate. An added bonus of the prenote is that if the respondent knows the invitation is coming and doesn't receive it (perhaps due to SPAM filters), he/she can contact you about it.

SPAM filters/blockers. Sadly, there is no way to guarantee that your invitations reach your participants' inboxes; researchers are powerless over individuals' SPAM filter settings. Qualtrics works hard to keep their servers from getting onto any of the major blacklists in the U.S., but individuals, internet service providers, and employers also have their own systems.   There are no magic bullets for getting through them. Two small hints are to not use special characters (including "$") in the subject line of the message and not to include graphical images in the email.

H. Sending Reminder Emails

To maximize the response rate to your survey, it is generally a good idea to send at least one reminder email after a designated amount of time (e.g. 3 to 10 days, depending on your survey population). If you use the Qualtrics survey mailer, you can easily send a message to only to the persons who have not yet responded, saying "A week ago we sent you a survey invitation…We see that you have not yet responded….etc." To send such a reminder, select "Distribute Survey/Mail History."   On the row showing the invitation you sent to your panel, click on the dropdown box at the far right to choose "Send Reminder or Thank You" and follow the prompts.

I. Data Security and IRB Information

Qualtrics has been approved by the UNC Information Security Office for collecting and storing data, including private health information (PHI) and other sensitive data. The UNC IRB is aware of this so your IRB application needs to a) indicate that you will be using Qualtrics and b) focus on where the data will be stored and security precautions you will take if/when you download your data from Qualtrics.

Please be aware that by default, the Qualtrics system does capture and store the IP address used by the respondent. While you will not see it using the online analysis tools, it will be included if you download your data. To learn about disabling IP capture, search on "Anonymize Responses" in Qualtrics Help.

J. Collaborating With Other UNC-CH Researchers

You can "share" a survey with another UNC-CH Qualtrics user so you both have access to it. To do this, the original owner of the survey chooses "My Surveys" on the top row of tabs and then clicks on the "Collaborate" icon next to the survey.   A pop-up box allows the owner to designate which user(s) are to be given access and what types of actions that user should be allowed to do (edit the survey, view the results, etc.). When the collaborator logs into their Qualtrics account, on the "My Surveys" page, there will now be a "Shared Surveys" section where the joint survey will appear.

Note that you do *not* have to "share" a survey with someone if all they need to do is preview or test the survey as a respondent would see it. (See Section D for this.) Sharing a survey is to be used when two or more persons are creating the survey, sending invitations, viewing results, etc.

K. Advanced Features

Qualtrics has many more capabilities that are beyond the scope of this document. Below we list just a few that UNC—CH researchers have found helpful. See Qualtrics' Help and Tutorials section for more information on these and other advanced features.

- Cascading Style Sheets (CSS) can be used for additional control over screen appearance through your survey.

- HTML tags can be used for additional control over text appearance and spacing. When editing question text, you can click "View Source" to have direct access to the HTML source code.

- JavaScript can be added to any survey question to perform mathematical calculations, change the labels on buttons for a single screen only, move the progress bar to the top of the screen, and a myriad other things. Keep in mind that a few users may not have JavaScript enabled in their browsers.

- Randomization can be used to vary the order in which certain questions or blocks are presented to respondents, or to present only a subset of items to each respondent.

L. If you need additional help…

1. Use the yellow "Get Help" button on any Qualtrics screen.

2. Email (support@qualtrics.com) or call Qualtrics at 1-800-340-9194 from 9am – 8pm Eastern.

3. Go to the Odum Institute walk-in consulting hours which are posted at www.odum.unc.edu/qualtrics.

Prepared by

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