UNC | **ODUM INSTITUTE FOR RESEARCH IN SOCIAL SCIENCE**

Qualtrics Tips and Tricks

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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" link (?) at the top of every Qualtrics screen for additional guidance.

Contents

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, they only need 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: Personal Links using third-party mailer. For those cases where you need to use a third-party mail system to distribute survey invitations but also need to track which response belongs to which recipient, Qualtrics can generate a list of unique, or "personal", survey links. These links are tied to specific survey recipients, and the names and any other uploaded <u>embedded data</u> will be included with the responses in the results. When you generate personal links, Qualtrics provides a spreadsheet that contains a row for each recipient including their name and their personal survey link.

Most mailing systems can accept such a spreadsheet and will have a [mail merge](#) capability to include each recipient's survey link in their email.

Option 3: 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, a link on a website, QR code, 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 surveys if participants break off in mid-survey.

(See [Section E. Resuming Partial Interviews, "Preventing Multiple Submissions" and Other "Survey Options"](#) for more on this topic.)

Option 4: 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), then those 19

pieces of data have not been saved. When (if) your respondent resumes their survey, they will have to answer those 19 questions again. If those 20 questions had been spread onto 10 screens of two items each, they would have lost 2 items at most.

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 consisting primarily of frequency distributions. If this is all your project requires, you can consider using Qualtrics for your analyses. The reporting tool can generate 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.

1. To create a page with only information (text) and no questions

Create a "question" of the type Text/Graphic. To do this, create a new question. While this question is highlighted, click on the downward-facing arrow inside the "Question Type" box in the "Edit Question" panel along the left side of the Survey Builder screen.

2. Enabling Back Button

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. NOTE: In some cases, a back button will not show on a page of the survey even if you have the setting enabled in your survey options. This is caused by having elements between blocks in your survey flow. Any element (branch logic, embedded data, randomizer, web service, etc.) will disable the back button on the first page of the block that follows it.

3. Piped Text

If you want a question to contain text from a previous question (referred to as "piping"), click the question text area. A blue tab will appear above it that says "Piped Text." Click this. In the dialog box that opens, use the 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 their favorite vegetable from a list and they chose "carrots" and you wanted the next question to reflect that choice, as in "How often do you eat [carrots]?")

4. Carry Forward Choices

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. In the "Edit Question" menu along the left, scroll down to the "Question Behavior" section, and select "Carry Forward Choices", and use the drop-down boxes to create the appropriate logic.

5. Validation

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.)

Another validation option is "Request Response" where a participant **can** move on without answering a question; however, when they click to go to the next page, a dialog box informs them that they didn't answer a question and gives them the option to either continue without answering or go back and answer the question. This can be helpful to make sure participants aren't forgetting to answer a question.

6. Look and Feel

On the menu ribbon along the left when inside your survey, there is an option called "Look and Feel". In this section you can change the background and format of your survey. There is a 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 by clicking "Theme".

In addition to the colors, font, and logos, you can set headers and footers, front and back buttons, and questions per page among various other settings. You can also add custom CSS formatting code here.

Note that you can control how many questions appear on each page manually within the Survey Builder itself by clicking on "Add page break" between any two questions.

C. Adding Skip Logic and Display 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. Display logic works similarly, but if this option is used then the question is only displayed to participants who match the logic specified.

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 instructions.

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

- Note that Qualtrics will automatically insert a page break before a question with Skip or Display logic.

- Be sure to test all logic carefully! Preview the survey several times and test that the logic functions as intended for all possible responses, including what happens if a question is left blank (this is especially important when carrying forward responses)

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

D. Previewing & Publishing Your Survey

1. Previewing your survey

You can see what your survey is going to look like to respondents by choosing the "Preview" button on the top right corner of your survey.

To allow others to preview the survey before it is activated (e.g. your advisor, research collaborator, etc.), click on "Share Preview". A URL will be generated for "brand only", which would be viewable to anyone with a UNC Qualtrics account, or "public" which could be viewed by anyone on your team from another organization or with no account.

Before fielding your survey, delete any data that has accumulated from previewing/testing the survey instrument. Click on "Data & Analysis" on the top row of tabs. A list of all data records will appear on the screen. Select the test/preview responses by clicking on the box to the left of each response, then click on the delete (trash can icon) button which will appear on the top right corner of your page.

You could also "select all" by clicking on the box in the top of the column above all responses to delete every response. As a safeguard, Qualtrics will prompt to confirm if you are sure you'd like to delete the responses.

2. Publishing your survey

Once you are ready to distribute your survey, you must publish. The first time you publish, you are activating the survey, and a survey link will be created. **Once the survey has been published, you will have to press publish after making any future changes, or else the active survey will look like the last published version**. NOTE: You can preview any edits before publishing using the "Preview" function. Changes will not be viewable from the survey link until you click "Publish" again.

Publishing is a vital step in the survey distribution process, since it determines the edits that are live to your respondents. Instead of every edit to an active survey going live the moment you make it, you can instead control when all edits will be presented to new respondents using publishing.

Survey versions can be named each time you publish and allow you to save multiple iterations of your survey. You can preview or even restore old versions of your survey at your convenience.

E. Resuming Partial Interviews, "Preventing Multiple Submissions" and Other "Survey Options"

One of the most 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 whether you use the Qualtrics mailer to invite participants to the survey via a customized email, whether you check the "Allow Respondents to Finish Later" box on the "Survey Options" page, and the option you select under "Incomplete Survey Responses" on the Survey Options page.

1. Survey options when using the Qualtrics mailer

The Qualtrics mailer feature allows 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. Distributing your Survey). Qualtrics keeps track of where they left off and takes them straight back to that page. This happens regardless of whether the "Allow Respondents to Finish Later" 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 Access" on the "Security" page, you have selected "Invitation Only")

The "Incomplete Survey Responses" setting on the Survey Options page also affects how breakoffs are handled. When a respondent answers part of a survey but not all of it, Qualtrics stores the data in a special "holding" area; they are not accessible in your results data file until either the survey is completed by the respondent or

closed by the survey owner.   Once they *are* written to the results data file, the respondent will no longer be able to resume that interview.

In this section, you can determine how long Qualtrics "holds" partial data records. You can then select if you'd like to delete or record the responses to the data file. In general, it is recommended to select an interval that is longer than your anticipated data collection period in case you end up keeping your survey open longer than originally anticipated. This ensures your respondent will be able to come back to the survey during the entire data collection period. The longest setting is currently 1 year. In this case, the respondent has 1 year to complete the survey, and you can set this to count beginning on the date they started the survey, or the date of the last edit. If they do not do so within 1 year, they will no longer be able to resume. In addition, when you close your survey, all partial data records that aren't already in the data file will be added.

2. Survey options when using an anonymous link

If you do not use the Qualtrics mailer to issue survey invitations, then how Qualtrics handles breakoffs and resumptions in the survey is affected by the "Allow Respondents to Finish Later" option and the "Prevent Multiple Submissions" option on the Survey Options tab.

a. Allow Respondents to Finish Later

If the "Allow Respondents to Finish Later" box in the "Responses" section is checked, then Qualtrics attempts to store a cookie on the respondent's browser. If it succeeds, then when the respondent returns to the survey URL from that same username on that device, it will take them directly to where they left off. If, however, the respondent has disallowed cookies, 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 respondent begins the survey on one device, such as their work computer, and then tries to finish from another device, such as their cell phone, they will also start from the beginning on the new device. This is also true when a user logs in with a different username/login on the same device.

If the "Allow Respondents to Finish Later" box is not checked, then each time a respondent goes to the survey URL, the survey will start at the beginning.

b. Prevent Multiple Submissions

There is another setting which comes into play when a respondent goes to the survey URL a second time. Also in the "Survey Options" tab, there is a check box for "Prevent Multiple Submissions." If the cookie on the respondent's browser indicates that this survey has already been completed, then Qualtrics will not allow the survey to be completed again from that username on that browser 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 device but can cause problems if they do.

c. Multiple Users Taking the Survey from the Same Device

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 "Allow Respondents to Finish Later" nor the "Prevent Multiple Submissions" is checked. If "Allow Respondents to Finish Later" 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 Multiple Submissions" is checked, 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 & Directories

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 answers)

- Graphic image files for use in your survey or messages

- Invitation, Reminder, and Thank You Emails (for using the Qualtrics mailer)

- Surveys, or questions (for example, you can store groups of questions that are used repeatedly and paste them into your surveys)

You can access your library by clicking the "Library" tab on the menu on the upper left side of the page when you are logged into your Qualtrics account.

To view your lists of respondent email addresses, click on the "Directories" tab on the same menu. Your contacts are referred to as "Lists" inside your Directory.

G. Distributing your Survey

1. Steps to Distributing

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).

1. In the Directory, create the contact list of respondents (typically by uploading a .csv file which can be easily created using the "File/Save As" menu option in Excel).

2. In your Library, create the text of the invitation email.

3. In your Project under "Distributions", choose the tab for "Emails" on the left side of the screen and then click the blue button on the right side of the page titled "Compose Email". When creating this mailing, keep the following in mind:

a. By default, the individualized links generated by the Qualtrics mailer will expire 60 days after the email invitation is sent. You can customize this in the dropdown menu under "Advanced Options" at the bottom of the email screen. 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". NOTE: This is different from the survey expiration date and is only applicable to the distribution itself. Once the survey is closed, all links in distributions will close as well.

b. There is a column on the Distribute Survey/Mail History screen that lists how many email messages "failed." **It is important to maintain up-to-date, and accurate lists with low bounce rates to prevent being flagged as spam**. Qualtrics keeps a keen eye on bounce rates and will deactivate distributions for our entire brand if the rate is collectively too high.

2. SPAM filters/ blockers

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. Some hints to prevent this include:

- to not use special characters (including "$") in the subject line of the message

- Avoid sending attachments, excessive HTML, or graphical images in the email

- Use a known "from" email address and name (must be a UNC domain)

- Ask respondents to add you to their Address books

- Write engaging subject lines. Instead of "We want your opinion on our customer service," try, "How was your support call with Qualtrics?" Try to use your company's name where applicable.

- Avoid using words and phrases commonly used by spammers in either the body text or subject line. Some such words include "free," "discount," "opportunity," "money back," "incredible," "targeted," "offer," "this isn't spam", and any words or phrases that could be construed as pornographic.

- Avoid all caps, red or green font, and the following additional words/ phrases

  o This isn't spam

  o Free

  o Discount

  o Opportunity

  o money back

  o incredible

- o targeted

- o offer

- For more information about how to avoid being marked as spam, see the Qualtrics documentation here: [Avoid Being Marked as Spam (qualtrics.com)](#)

3. Fraud/ Bot Detection

Some of the biggest threats to data quality are bots and cheaters. Often bots will complete surveys en masse, or a person will take surveys on behalf of someone else multiple times. Qualtrics offers several built in features such as "prevent multiple submission", reCAPTCHA technology, and more, so you can ensure your surveys are collecting only the highest quality of data. To learn more about these features, see the support article here: [Fraud Detection (qualtrics.com)](#)

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 individuals 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, on the row showing the invitation you sent to your contact list in the "Distributions" tab, click on the dropdown arrow and "Schedule Reminder". Here you can schedule when to send the reminder email to participants.

I. Data Security and IRB Information

Qualtrics has been approved by the UNC Information Security Office for collecting Tier 3 restricted information, For more information: ([Qualtrics | Safe Computing at UNC)](#). 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 captures and stores 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 disable IP capture, click on "Anonymize Responses" in the 'Security" section in "Survey Options".

If you cannot collect identifying information from survey participants but also are offering a drawing, gift card, etc., there is a way to keep survey responses anonymous while collecting information. To do so, you must create another survey that collects the information that you need (email address, etc.). Under the Distributions tab, generate and copy the anonymous link. Then going back to your

original survey, under the "Survey Options" tab, click the option to "Redirect to a full URL". This will allow you to input a URL that will automatically redirect participants to a new site after completing the survey. Here you will paste the URL for your new survey. Participants' responses to this second survey **will not** be tied to their responses to the first survey, allowing those responses to stay anonymous. Conversely, you can add the URL to a customized "End of Survey" element if you would like to route only those who indicate "yes" to entering a drawing.

J. Collaborating With Other Researchers, & Account Expiration

1. Collaborating

You can "share" a survey with another Qualtrics user so you both have access to it. To do this, navigate to the "Projects" page, click the three dots on the far right next to the survey you wish to share. Or you can navigate to the Survey Builder inside your project and click on "Tools". Choose "Collaborate". Note that if this option is greyed out, that means you are not the current owner of the survey. Only the survey owner can collaborate with others. In the pop-up box, type the user's name or PID into the search box or click 'User and Group Address Book' and choose from a list.

To collaborate with someone who does not have a UNC Qualtrics account, you can type in their email address here to send a collaboration request. You can then select permissions to allow your collaborator to do as much or as little as you wish with this survey. By clicking the dropdown arrow next to 'Edit or View Reports', you can specify even more precisely which types of actions the collaborator should be allowed to do.

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 D. Previewing & Publishing Your Survey.) Sharing a survey is to be used when two or more people are creating the survey, sending invitations, viewing results, etc.

2. Groups

To share copies of surveys, graphics, files, and messages in shared libraries, a group will need to be created. Users within groups can also share contact lists in their Directories page. Groups can include everyone in your organization, everyone in a specific division, or only specific users that you manually select. A Qualtrics administrator can set up a Qualtrics Group for you.

3. Account Expiration

Qualtrics accounts are available to anyone with "active" status at UNC. Users will not be able to access their Qualtrics account after graduating, or otherwise leaving the University and no longer being labeled "active" in the system.

Once your status at UNC changes from "active", **you will no longer be able to login to your Qualtrics account**. If you wish to continue to have access to your survey(s), you may request an ownership transfer to a colleague who can then collaborate the

survey(s) with you or other colleagues. If you wish to move your entire account, this would be considered a "user move". Ownership requests and user moves can be made by submitting a ticket at ITS [HERE](#).

For information about storage of data, go here: [Data Archive | The Odum Institute - UNC Chapel Hill.](#)

To view Information Technology Acceptable Use Policy, go [here](#).

K. Advanced Features

Qualtrics has many more capabilities that are beyond the scope of this document. Below we list 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 throughout 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 many other things.
- 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.
- Qualtrics has an offline app that allows you to administer your survey on a mobile device without internet connection. For more information about the offline app and how to set it up, please see [Setting Up the Offline App (qualtrics.com)](#)
- SMS Distribution: For questions about capabilities of the SMS module, see the [Qualtrics SMS support page](#). To request access to the SMS module, complete the [SMS Request Form](#). This agreement details the legal requirements of the Telephone Consumer Protection Act, and explains cost and billing procedures. Additional questions may be directed to [qualtrics@unc.edu](#).

L. If you need additional help…

- Use the search feature on the Qualtrics website for in-depth information about different features and options.
- Email the Qualtrics Consultant at the Odum Institute with questions at: [qualtrics@unc.edu](#)
- Go to the Odum Institute walk-in consulting hours (available in-person or zoom) which are posted at [https://odum.unc.edu/survey-research/#survey4](#)
- Attend a short course at the Odum Institute. View upcoming schedule here: [https://odum.unc.edu/events/category/survey/list/](#)

- For an easy step-by-step guide on how to use Qualtrics in general, please see https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/?parent=p002