Best Practices for UW-Whitewater Users

PLEASE NOTE: *This tip sheet is not intended as a step-by-step guide.* It was developed to provide information that UW-W users have found important to know *in addition* to what is easy to find on the Qualtrics website. Please refer to Qualtrics' "Support" (https://www.qualtrics.com/support/) for additional guidance.

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A. Things to Think About Before You Launch Your Survey

1. How will you distribute your survey to your participants?

Option 1: Email invitations through Qualtrics Email. Using Qualtrics to distribute your invitational email is the best distribution method if a) you have accurate email addresses and b) your survey participants regularly read their email. By sending a customized email with a personalized link to each participant, this option allows you see who has and has not responded to your survey, and to limit email reminders to those invitees who have not yet participated. In addition, if the respondent breaks off mid-survey, s/he needs only to click the

link in his or her email again to resume the survey right where s/he left off. This method also helps eliminate duplicate entries because it blocks participants from being able to complete the survey more than once using the same customized link.

Option 2: Open access with authentication. In some situations, you may not be able to email individual links to participants, but they may have a unique identifier (e.g. student or employee ID, email address, etc.) that can be used to ensure that only legitimate participants complete your survey. Alternatively, you may assign and distribution a unique identifier (for example, a "mail-merged" letter or email containing a unique login code) to your target participants. If you have a list of potential respondents with their unique identifier, you can embed an authentication question at the start of your survey. This limits participation in the survey to individual with an access code – questions beyond the authenticator question can only be accessed after a user enters a valid identifier from this list. In addition, once a participant has used an identifier to complete the survey, that identifier cannot be reused to complete the survey – thus preventing duplicate responses from the same participant. You can set up authentication by creating a new contact list containing the name of each target individual, along with their access code in the "External Data Reference" field, then using Qualtrics' Survey Flow to add an "Authenticator" item at the beginning of your survey.

Option 3: Open access. If your survey is open to everyone, then you can provide potential respondents with an anonymous link to your survey. In the Distributions tab, Qualtrics generates a unique link to each survey, and this can be personalized so that it is easier to include in a listserv, a newsletter, or non-electronic correspondence. It is important to note that this method has several potential drawbacks:

a) Qualtrics cannot automatically track who has participated in the survey, which means you have no way to know whose survey responses are whose (unless you begin your survey by asking for a respondents name & address);

b) You cannot send out reminder emails to non-respondents;

c) You have fewer options for keeping someone from responding multiple times and for resuming interviews surveys if participants break off in mid-survey. (See Section E for more on this topic.)

2. How will you format your survey to encourage participation?

As you create your survey, it is important to remember your audience. University students, faculty and staff are bombarded with requests to complete online surveys. In order to increase your response rate, you should format your survey so that a) the survey is as brief as possible, b) questions are easy for the respondent to understand and easy to answer, and c) the survey can be completed easily on either a computer or a smart phone. Here are some tips for making your survey easier for respondents to complete:

a) *Use the simplest question format possible*. Qualtrics offers a number of specialty question formats. However, not all question formats are appropriate for all questions, and some are difficult to use on a mobile devise. If the question format is overly complicated, it increases the likelihood that a) your respondent might inadvertently provide you will inaccurate information, and b) you might have difficulty interpreting responses to this question when you try to interpret your results.

b) *Limit the number of questions you place on a page*. Ideally, the number of questions on each page of a survey should be limited to those that a typical respondent can see on one screen without scrolling up or down. You should also remember that **responses are only saved to the database when the respondent clicks the button to proceed to the next screen**. For example, if you put 20 questions on one screen, and your respondent accidentally closes her browser when answering question 19, none of her responses will have been saved. Even if your respondent decides to resume 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, only 2 responses would have been lost.

c) *Preview and test your survey before distributing it.* The Preview Survey option allows you to see how your survey will appear to respondents both on a computer screen and on a mobile device. It is a good idea to take the survey yourself more than once (especially if you have included skip or display logic) so that you can see if all of the survey functions are working. In addition, it is advisable to ask a colleague or friend to take the survey, in order to see if the survey questions and the survey structure make sense to someone who is not familiar with the survey. Be sure to examine your test results before your finalize your survey, so that you confirm that the way in which the survey is collecting data can be easily interpreted once the survey is closed (See Section D).

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

Qualtrics provides some basic tools for online analysis, including frequency distributions and cross tabulations. If you only need descriptive statistics that are filtered based on responses to particular questions, then the tools in the Report tab in Qualtrics should meet your reporting needs. While the reporting tool can generate snazzy graphics (pie charts, histograms, etc.) with the click of a button, some UW-W users have been disappointed to complete their surveys and set about generating their reports only to find that Qualtrics cannot parse the data in the way they need or perform exactly the analyses they desire. Before embarking on a Qualtrics survey, make sure that you understand the limitations of the Qualtrics reporting tool – it may not have the capability to do the type of analysis *your* project needs. For more advanced reporting – including statistical analysis, analysis of survey and respondent populations, etc. – you will need to consider examining your results using another type of software. From Qualtrics View Results tab, 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 statistical 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.

a) Only the owner of a survey can share the survey with another user. See Section J for more details about collaboration.

b) To create a page or heading that only contains information/text and no questions (such as a survey welcome or introduction page), create a new "question" using the question type called

"Descriptive Text". You may also consider adding a final information/text question at the end of the survey, just to let your respondent know that once they press **>>** *or* **NEXT** *or* **SUBMIT** that their responses will be recorded.

c) DO NOT put a "thank you" message as the last question in your survey. When respondents see this message, they are unlikely to click the next button on the bottom of the screen – and this would mean that all the responses from that page would be lost when they close the browser page in which they are taking the survey. Instead, you can add a custom "End of Survey" message by visiting the Survey Options tab. This customizable message will automatically appear once the respondent completes the last question in the survey and clicks the NEXT button at the bottom of that last page.

d) Unless there is a specific reason not to, you should include a Back button in your survey. This allows respondents to return to a question and correct answers if they realize that they have made an error earlier in the survey. To add a back button, click the Survey Options tab and check the appropriate box.

e) You may wish to bring in text from the response to a previous question into a later question – for example, if you asked the respondent to choose his favorite vegetable from a list and he chose "carrots", you may want the next question to reflect that choice, as in "How often do you eat [carrots]?"). If you want to "pipe" text from a previous question, click the question text area. The box will turn yellow and a blue tab will appear above it that says "Piped Text" (this option is located next to the "Rich Text Editor"). After you click Piped Text, the dialogue box will provide you with options as to what type of text can be piped into your question. Click anywhere outside the dialog box to save your changes and return to the main screen.

f) 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 "gear" icon, which provides a drop down box to the left of the question and select Carry Forward Choices.

g) The values associated with certain responses can be recoded for each question in your survey. For example, Qualtrics assigns a default value of 1 to "Yes" responses and a default value of 2 to "No" responses. However, you may wish to recode "No" responses to equal 0 to facilitate your analysis of the results using software other than Qualtrics. You can recode the values associated with different responses by clicking on the grey gear icon on the left hand side of each question in your survey.

h) The "Force Response" option in the question "validation" options should be used carefully. If you select this option, the respondent will not be able to proceed with the survey unless they provide an answer. This may result in a respondent who wants to skip a particular question deciding to quit the survey altogether. Most IRB approvals at UW-Whitewater 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; if this is the case, it is best 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.

As you finalize your survey, consider tailoring the way that it appears to your respondents:

a) On the top of the survey, there is a Look & Feel tab, which allows you to use any of the formats available in the Qualtrics format library. In addition, UW-W faculty and staff have access to a UW-W branded template. This template allows you to send a more professional looking survey for university business that will appear authentic to your survey respondents.

   Note: 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.

b) As you compose your survey, you may add new questions at various points in the survey, or decide to change the order of question. However, all questions are numbered chronologically according to when they were created. When finalizing your survey, it is advisable to renumber your questions, so that the survey questions are numbered in the order in which they currently appear in your survey – this makes it much easier to understand and report on your results once the survey has closed. To automatically renumber questions in their current order, click on the Tools tab, and use the "Auto-Number Questions" option.

C. Adding Skip Logic and Display Logic

In survey methodology, "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 at the UW-W health clinic, you may want to ask those questions only if a respondent has visited the clinic in the past 12 months. To do this, you would first ask a "gateway" question such as "Have you visited the UW-W health clinic the past 12 months?" Only respondents who answered "Yes" to this question would see the detailed questions about their visit; all other respondent would "skip" over these questions and only see the next topic in the survey.

Here are some tips regarding Skip Logic and Display Logic:

a) Enter all the survey questions involved in the logic first, before adding the skip and display logic instructions.

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

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

d) You will not be able to delete an item associated with your skip or display logic. If you need to remove a question or response involved in skip or display logic, it is best to modify the logic first.

D. Previewing Your Survey

You can see what your survey is going to look like to respondents by clicking on Preview Survey at the top of your project screen. To allow other people 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 this 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 formally launching your survey, it is advisable to 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 Surveys, "Ballot Box Stuffing" and Other "Survey Options"

One of the most common questions submitted by UW-Whitewater 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:

a) Did you use a Qualtrics Contact List to invite participants to the survey via a customized email?

b) Did you check the "Save and Continue" box in the Survey Options tab?

c) Which option did you select under "Partial Completion" on the Survey Options page?

Inviting participants via the Qualtrics Contact list allows respondents to access the survey via the personalized URL that Qualtrics generated for this individual in the body of the Qualtrics email. If a Contact List is used to distribute a survey, respondents can break off and resume the survey by clicking the link in their email again at any time (until their link expires – see Section G). Qualtrics keeps track of where s/he left off and takes him or her straight back to that page. This happens regardless of whether the "Save and Continue" box on the Survey Options tab is checked, and regardless of what computer the respondent uses to access the survey. In order to ensure that respondents are able to resume a survey, you should select "Only allow those who receive invitation emails to take the survey" in the Survey Protection section of the Survey Options tab.

The "Partial Completion" setting on the Survey Options tab 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 that is 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 she left off. If she does not resume the survey within 6 months, the partial data will be written to the data file and she will no longer be able to resume the survey. *However, once you deactivate your survey, all partial data records that aren't already in the data file will be added.*

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

If you do NOT use the Qualtrics Panel 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 tab. 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 her directly to where they left off. If, however, the respondent has **disallowed cookies** on their computer, then she will not be able to resume where they left off. Rather, when she go to the survey link a second time, she will have to start the survey all over again.

If the "Save and Continue" box is not 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, called "Prevent Ballot Box Stuffing" on the Survey Options tab. 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 multiple respondents will NOT need to complete the survey from the same machine – however, it can cause problems if the survey is completed on a public computer (for example), since it will block a second respondent from completing the survey.

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 **neither** 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 the first respondent 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:

a) End of Survey Messages (the screen respondents see after submitting their answer to the final survey question)

b) Graphic image files for use in your survey or messages

c) Invitation Emails

d) Lists of Respondent Email Addresses (called "Panels")

Please note that these library items are only available to you – you cannot share them with collaborators or colleagues. 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 email option (i.e. individualized email invitations to each participant). For more information or if you are not using the Qualtrics email option, visit the Qualtrics Distribution overview.

Step 1: In your Contacts tab (top of page), create a Contact List of respondents. You can do this by uploading a .csv file (which can be easily created using the "File/Save As" menu option in Microsoft Excel), or by cutting and pasting a shorter list into the manual entry interface, or by typing in the names and email addresses of your potential respondents.

Step 2: In your Messages Library, create a New Message.

Step 3: In the My Projects tab under "Distributions", select "Emails" and follow the prompts.

When creating this mailing, keep in mind that *by default* the individualized links generated by the Qualtrics Email system will expire 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" (bottom left of page). 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: If you are concerned about the accuracy of the email addresses in your contact list, you may want to send a pre-notification email to your participants a week or so in advance from your own email account. Pre-notification contact can help identify bounce-backs and have also been shown to improve survey cooperation rates – since the respondent is expecting the survey invitation, s/he is less likely to ignore or delete the invitational email when it arrives. The pre-notification 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. In addition, you can personalize the "From Name" and "Reply-To Email" entries in your Qualtrics email invitation, so that the potential respondent can recognize the source of the invitation.

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 and may decide to blacklist certain providers. There are no magic bullets for getting through all spam filters. It is advisable to:

a) Avoid using special characters (including "$") in the subject line of the message and not to include graphical images in the email.

b) Include some text that allows potential respondents to opt-out of subsequent mailings. This text – "Follow the link to opt out of future emails: ${l://OptOutLink?d=Click here to unsubscribe}" – is automatically included in all new/blank email templates and can be modified to suit your needs.

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. These emails should be send 3 to 10 days (depending on your survey population) after the initial email invitation is sent. If you use the Qualtrics email feature, 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, click on the "Schedule Reminder" button under the distribution block associated with your survey and follow the prompts. Reminder and thank you emails can be composed and saved in your Library at any time.

I. Data Security and Institutional Review Board Information

Qualtrics is a best-in-class tool for collecting and storing data, including sensitive data. This is a particular asset if your project requires IRB approval. Your IRB application should indicate that you will be using Qualtrics and focus on where the data will be stored and security precautions you will take if/when you download your data from Qualtrics.

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 UW-Whitewater Researchers

If you are working on a joint project, you can provide another UW-Whitewater Qualtrics user with access to your survey. To do this, the creator or owner of the survey chooses "My Projects" on the top row of tabs and then clicks click the dropdown to the right of the to the survey, and selects "Share Project". 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.

There are three important items to note about collaboration:

a) 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 as survey is only necessary when two or more persons are creating the survey, sending invitations, viewing results, etc.

b) When two individual collaborate on a survey, they are both allowed to edit the survey text and view the results. However, collaborators will not be able to modify each other's distribution

lists or library messages. In addition, if a copy of the survey is shared, the new collaborator will not be able to see the results associated with the original survey.

c) In some cases, you may wish to "share" your survey with someone at UW-Whitewater whose access to the UW-W Qualtrics account differs from yours (academic staff sharing with students, for example). Qualtrics has added an extra layer of security in such cases, by requiring those with whom you are collaborating to click on the blue "Accept Collaboration" button at the top of their "Shared with Me" project folder and to enter the collaboration code they received via email associated with this collaboration request. More information on this feature is available at the Qualtrics website.

K. Advanced Features

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

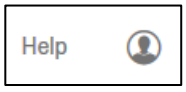
a) You can provide your respondents with a record of their responses to your survey by customizing the End of Survey element in the Survey Flow, and selecting "Show Response Summary" when the respondent completes the survey.

b) 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.

c) Cascading Style Sheets (CSS) can be used for additional control over screen appearance through your survey. In addition, 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.

d) 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.

L. If You Need Additional Help…

1. Use the 

link on any Qualtrics screen.
2. Email (support@qualtrics.com) or call Qualtrics at 1-800-340-9194.