Northcentral University
Qualtrics Guide

Prepared by:

Office of Planning & Institutional Effectiveness

Table of Contents

Introduction

The purpose of this guide is to provide you with the step-by-step instructions you will need to get started in creating and launching a survey for your research project. Northcentral University has a site license for Qualtrics, a software application for designing, distributing, and analyzing surveys. Qualtrics is a preferred tool for surveys because it meets stringent information security requirements not found in most free online survey tools. Qualtrics also has important quality control features, such as preventing multiple submissions from a single survey participant and the anonymization of participant responses. For additional support and step-by-step instructions, please visit Qualtrics' website.

Getting Started

Before getting started, you will need a Qualtrics account. Northcentral University provides dissertation researchers access to Qualtrics free of charge. Access to Qualtrics is provided prior to NCU IRB approval to ensure students have plenty of time to learn how to use the tool and prepare the survey. Students my not, under any circumstances, distribute any recruitment or other research related materials to or have contact with potential participants, or begin collecting data prior to NCU IRB approval. To ensure accurate record keeping and tracking, NCU has developed a process for requesting researcher Qualtrics accounts. Email the request for a Qualtrics account to the Office of Planning and Institutional Effectiveness at oair@ncu.edu. The request should include your name and email address. A staff member will send the researcher login credentials for their Qualtrics account and links to Qualtrics training resources.

Trial Accounts

Trial Qualtrics accounts are not provided by Northcentral University. The purpose of a trial account is to provide an environment where the user interface can be experienced by building a survey and experimenting with the analysis and reporting tools. Trial accounts have a limited set of permissions and functionalities not suitable for a research project. Because of these limitations, we discourage the use of a trial account to conduct a thorough research project or using the trial account as a baseline for what Qualtrics offers. We recommend obtaining a full account license under NCU. If you require further information about how to export an existing survey from a trial account to an NCU Qualtrics account, please contact oair@ncu.edu.

Browser Compatibility & Cookies

Qualtrics currently supports the following browsers: Apple Safari, Google Chrome, Microsoft Edge, Microsoft Internet Explorer, and Mozilla Firefox. Versions of these browsers no longer supported by their maker may not function as intended and may expose the user to security vulnerabilities. Qualtrics recommends that users always use the most up-to-date version of their browser. Beginning January 15, 2018, users or survey participants on end-of-life browsers (e.g., Internet Explorer 7 or 8 with Windows XP) may encounter the following error when accessing the XM Platform: "Internet Explorer cannot display the webpage." We strongly recommend upgrading to a supported operating system and browser to ensure compatibility. In addition to browser and operating system compatibility, browser cookies must be enabled to ensure essential functionality of the survey tool. Cookies are also stored on the

respondent's browser to keep track of how far into the survey the respondent has progressed. This allows a respondent to exit the survey and continue where they left off at a later time.

Qualtrics Security Statement

Qualtrics' most important concern is the protection and reliability of customer data. Our servers are protected by high-end firewall systems and scans are performed regularly to ensure that any vulnerabilities are quickly found and patched. Application penetration tests are performed annually by an independent third-party. All services have quick failover points and redundant hardware, with backups performed daily.

Access to systems is restricted to specific individuals who have a need to know such information and who are bound by confidentiality obligations. Access is monitored and audited for compliance.

Qualtrics uses Transport Layer Security (TLS) encryption (also known as HTTPS) for all transmitted data. Surveys may be protected with passwords. Our services are hosted by trusted data centers that are independently audited using the industry standard SSAE-18 method.

ISO 27001 Certification

In April 2018, Qualtrics achieved ISO 27001 certification. To independently verify the status of the certification, please visit the Schellman Certificate Directory.


schellman

CERTIFICATE OF REGISTRATION
Information Security Management System - ISO/IEC 27001:2013

The Certification Body of Schellman & Company, LLC hereby certifies that the following organization operates an Information Security Management System that conforms to the requirements of ISO/IEC 27001:2013

Qualtrics, LLC

FedRAMP Authorization

Qualtrics is FedRamp Authorized. FedRAMP is the standard of U.S. government security compliance, with over 300 controls based on the highly-regarded NIST 800-53 that requires constant monitoring and periodic independent assessments. More information is found at the FedRamp website.

HITRUST

To better support our healthcare customers, Qualtrics achieved the HITRUST certification in September 2018. The validated report is available upon request.

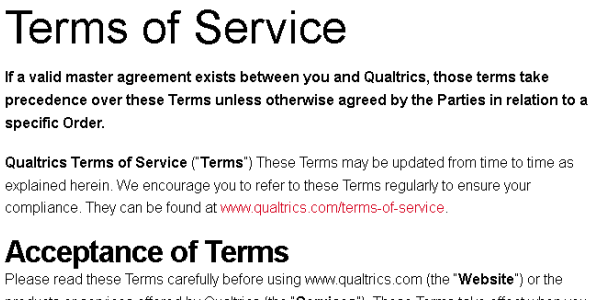
Participant Panels

You have two options when it comes to gathering responses for your survey – outsource to Qualtrics (extra costs) or manage your own research panel (free). Northcentral University does not cover the costs associated with purchasing a panel or targeted populations. To inquire about the costs associated with purchasing a panel and panel integration processes for your study, please contact Qualtrics at 1-800-340-9194. If you plan to manage your own contact list for your study, this guide will assist you with Creating a Contact List.

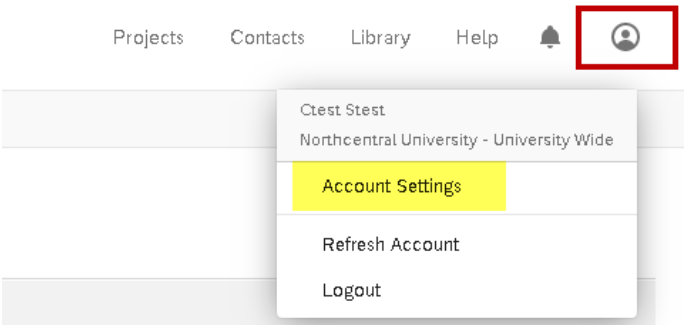
Before you can calculate the size of your panel, you will need to determine a few things about the target population and the sample you need. The size of your panel (sample size) really depends on many factors such as the size of the total population, the margin of error you are willing to accept, the response rate you expect to receive, and how sure you are that the sample population accurately reflects the total population. Online sample size calculators will help you to determine how many people you will need in your panel to get results that reflect the total population. It is common to go 10-20% above your minimum sample size to cover you in case people opt-out of your survey or to ensure you hit your target response rate. There is a limit of sending no more than 25K emails per week, as this amount is typically more than enough for any study.

Logging into Qualtrics

To log into Qualtrics, you will enter the credentials oair@ncu.edu emailed to your NCU email address using the NCU login for Qualtrics. Upon logging into your account for the first time, you will be prompted to agree to Qualtrics' Terms of Service.



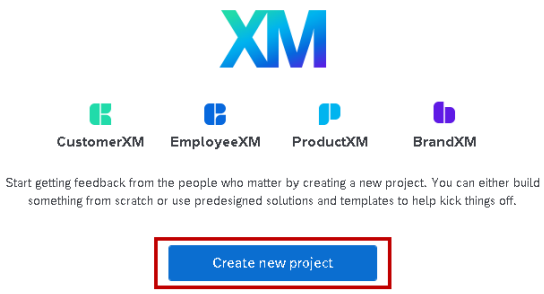
If logging in for the first time, remember to change your password by clicking the person icon and selecting "Account Settings" once you have logged into your account.



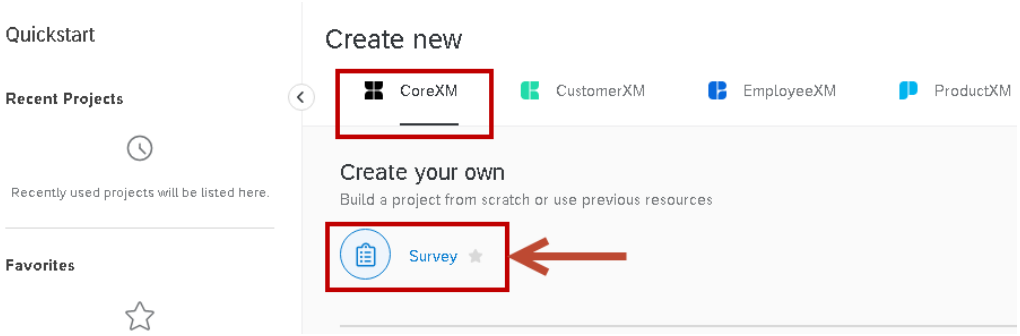
Creating a Survey

In this section we will discuss how to: create a new survey from scratch, properly format a consent letter, edit and add survey questions, edit answer choices, format the font type and size, add page breaks, copy and move questions, add skip logic to an answer choice, and preview and publish your survey.

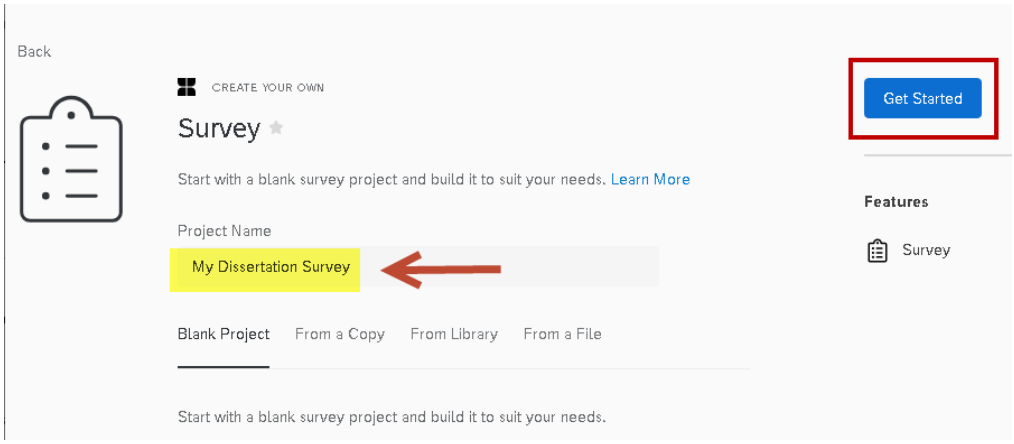
Step 1: When you log into Qualtrics for the first time you will click the "Create New Project" button.



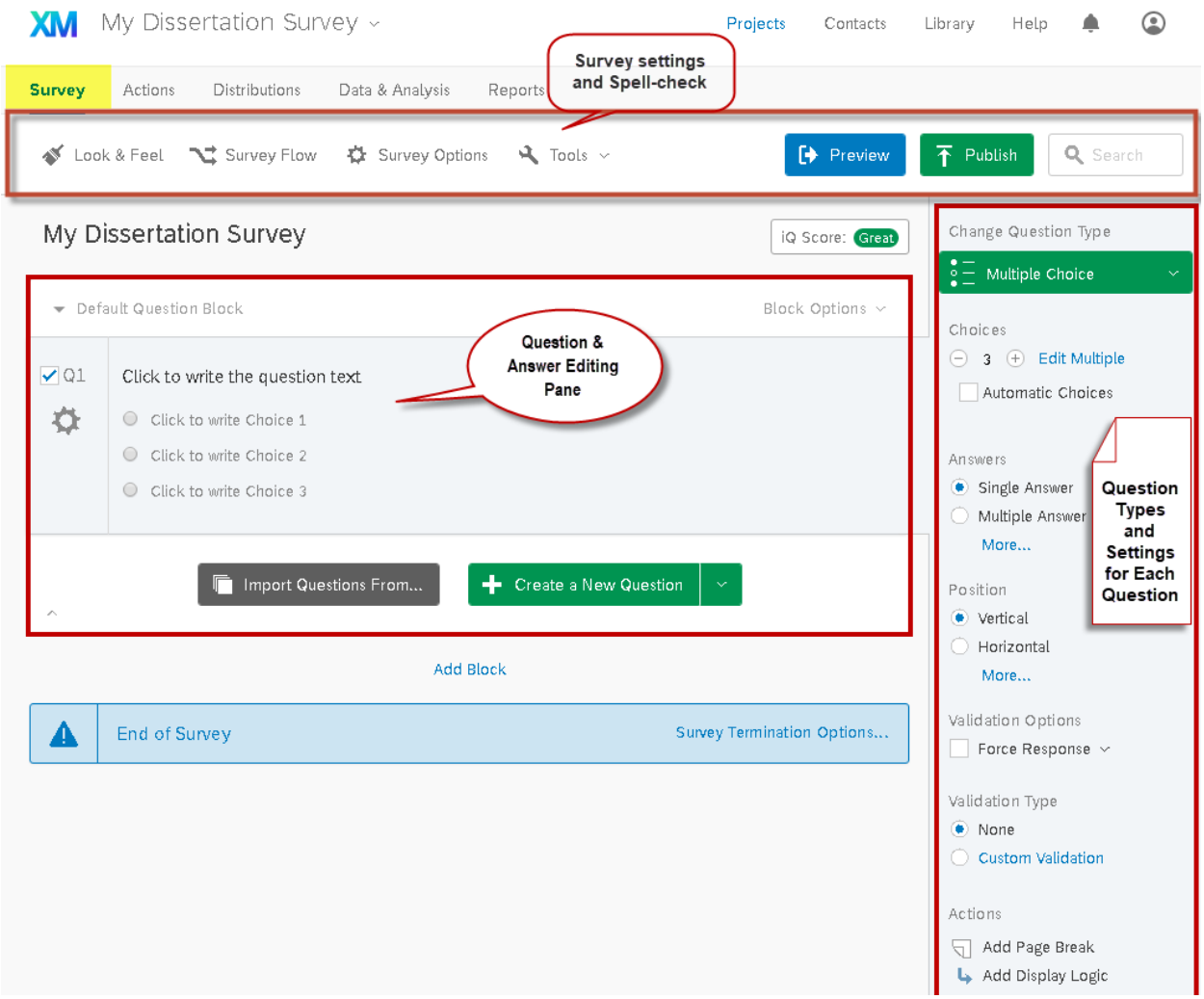
Step 2: Then you will click "Survey" to create your own survey. Notice the "CoreXM" tab at the top of the page is selected.



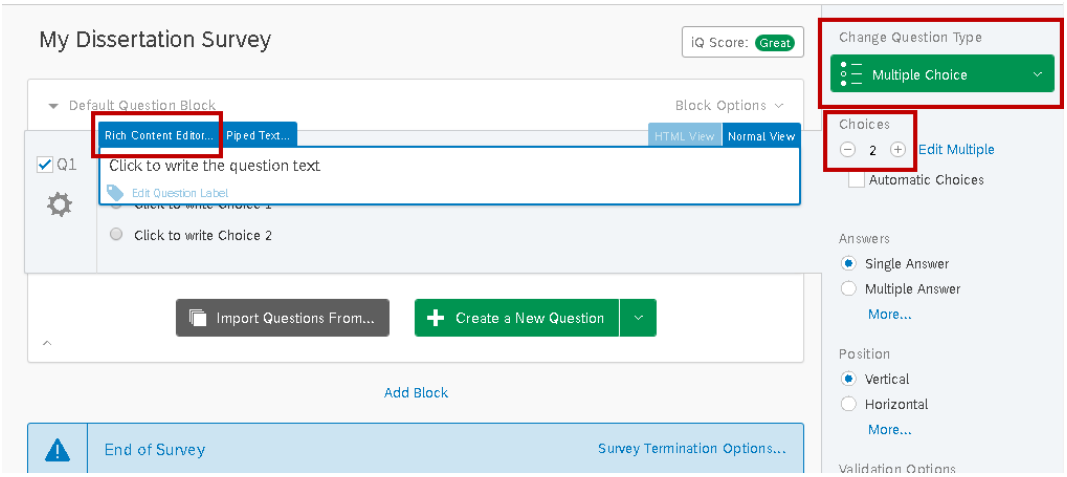
Step 3: Name your survey in the "Program Name" field and click the "Get Started" button.



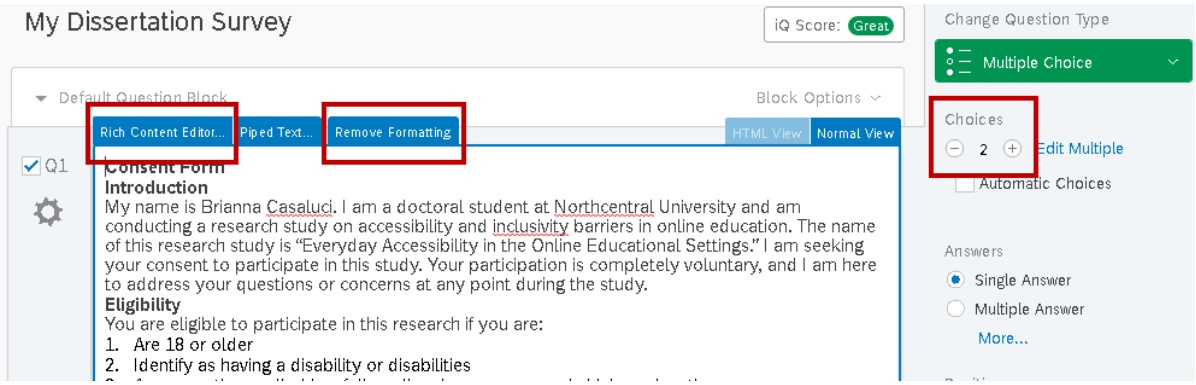
Step 4: After clicking the "Get Started" button, you'll be taken to the "Survey" tab where you can begin adding and editing questions to your survey.



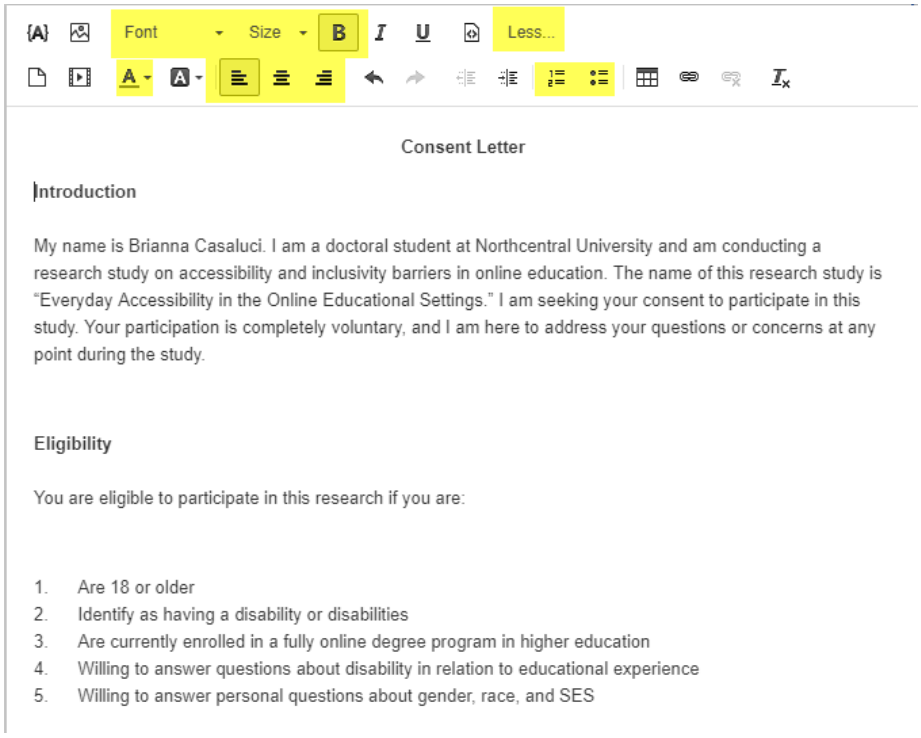
In the case of research study, a consent letter is used to provide potential participants the information they need to decide to volunteer for a research study. The consent letter is an essential component of ethical conduct of research with human subjects. To create a consent letter on the first page of the survey and provide an area for respondents to agree or not agree to participation, we will leave the question type defaulted to Multiple Choice. We changed the section labeled "Choices" in the right navigation bar from 3 to 2, and edited the question text to read our consent letter. By clicking into the text box editor window, we can copy and paste the consent letter into the question editing area. It is important note that if you are coping language from a Word document or other word editor, that you will need to paste it as plain text. To paste as plain text, first paste the consent letter into Notepad, and then copy the text from Notepad and paste it into the text-editor window. Text-editors are not recognized across platforms and therefore do not copy the same format from the source to the destination, so it is important that all formatting is removed prior to pasting the consent letter into the text-editor where you can add proper formatting to the consent letter like font size and type, proper spacing between paragraphs, bulleted/numbered lists, and bolded section headers.



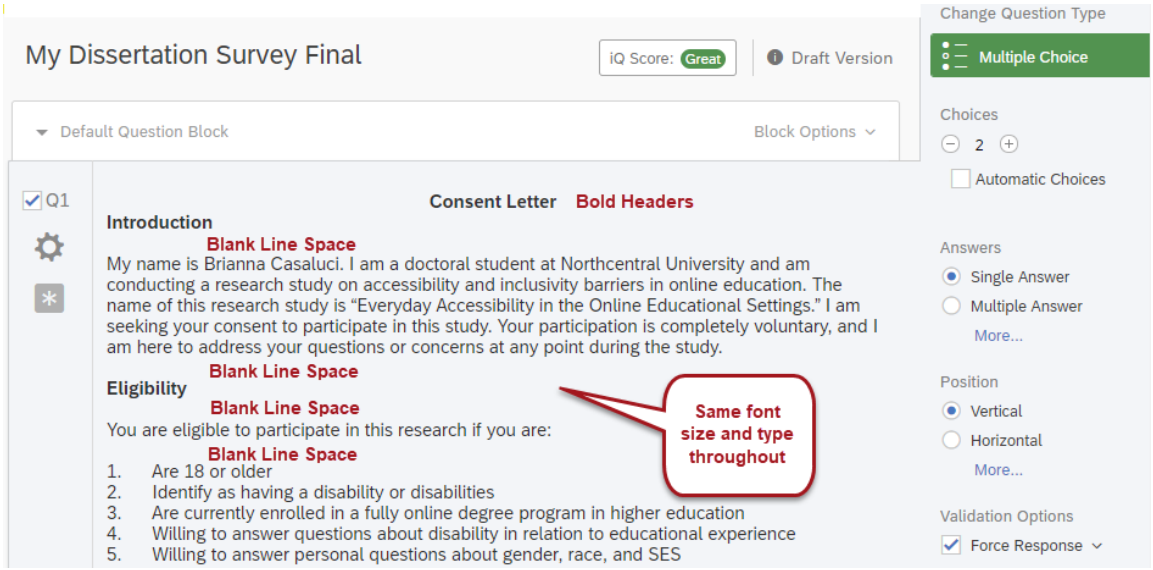
As an alternative to pasting as plain text, once you have pasted the consent letter into the question editing area, you can click the "Remove Formatting" tab to remove any special formatting that carried over from a source text editor like Word.



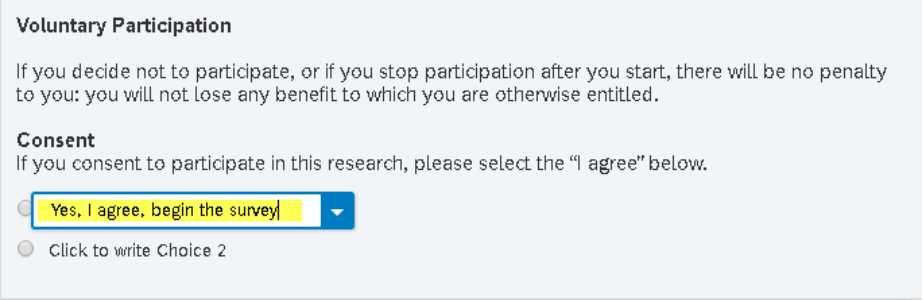
Step 5: Click the "Rich Content Editor" tab as shown in the previous screenshot to add special formatting to your text like shown in Appendix A. Using this editor, you can bold font, underline text, create number lists, add bullets to statements, and change font colors, sizes, and types.



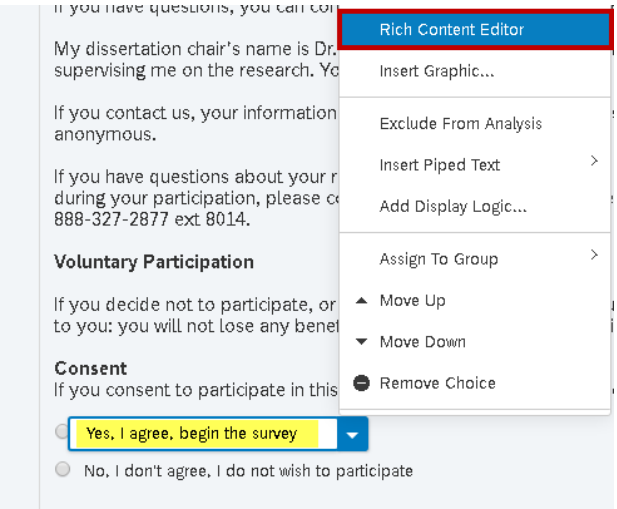
Clicking any blank space outside of the window will exit you from the text editor. Below is an example of a correctly formatted consent letter. Notice the bolded headings, spacing between paragraphs and headings, and numbered lists for ease in readability.



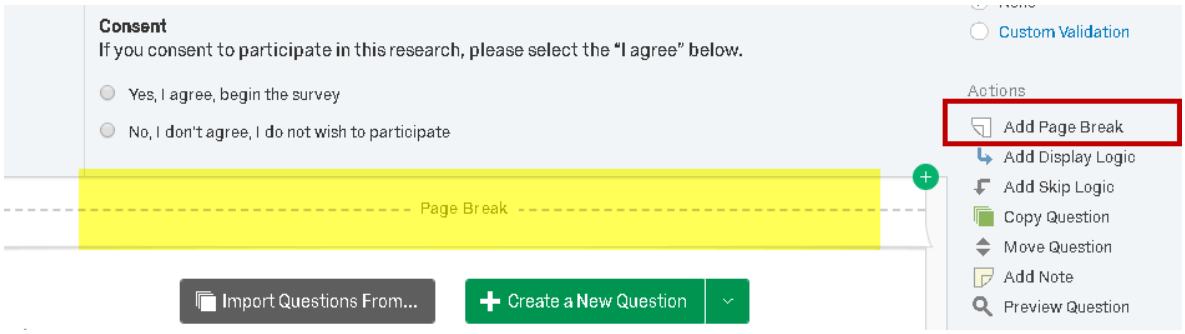
Step 6: At the bottom of the consent letter, we can edit the language by clicking in the text box and typing the appropriate answer choices.



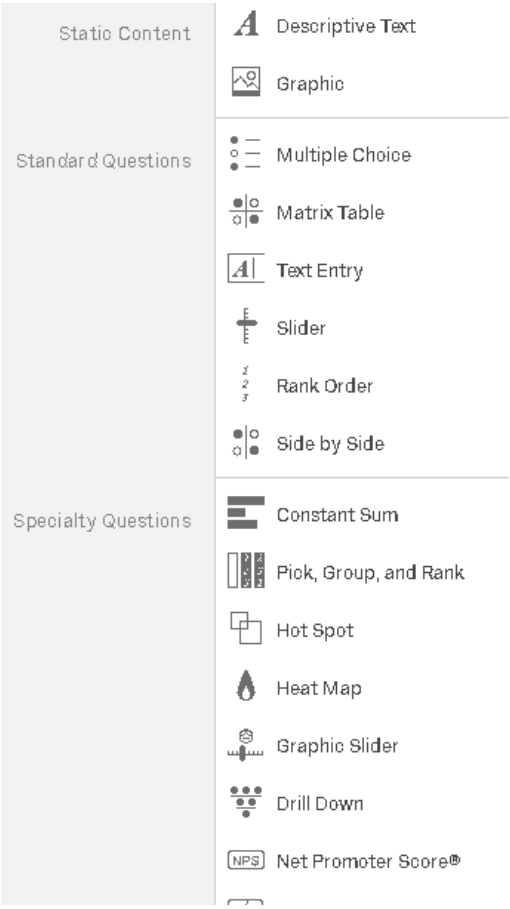
Like the question editing area, you can also edit the font size and type of answer choices through the Rich Content Editor. To access the Rich Content Editor, click on the choice text and then click the blue dropdown menu to access the Choice Options menu. Select the "Rich Content Editor" from the list. This will allow us to match the font type and size of the answer to the font size and type used in the question being asked, or in this case the consent letter. See also Adding Skip Logic to an answer choice.



Step 7: To add a page break between the consent letter and the first survey question, click the "Add Page Break" link located in the right navigation bar.



Step 8: To create a new question, click the down arrow on the green "Create a New Question" button as shown in the previous screenshot to view just some of the question types available to you.



Each of the question types described below can be added to your survey by either (1) clicking the dropdown arrow next to the green "Create a New Question" button to add a new question or (2) using the "Change Question Type" dropdown menu in the right navigation bar to change an existing question.

Descriptive Text: Descriptive Text question types can be used to add an introduction or instructions to your survey, or wherever you need to display content to the respondent, without asking for feedback.

Graphic: Graphic questions can be used to display an image to your respondents without asking for feedback.

Multiple Choice: Multiple Choice questions form the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.

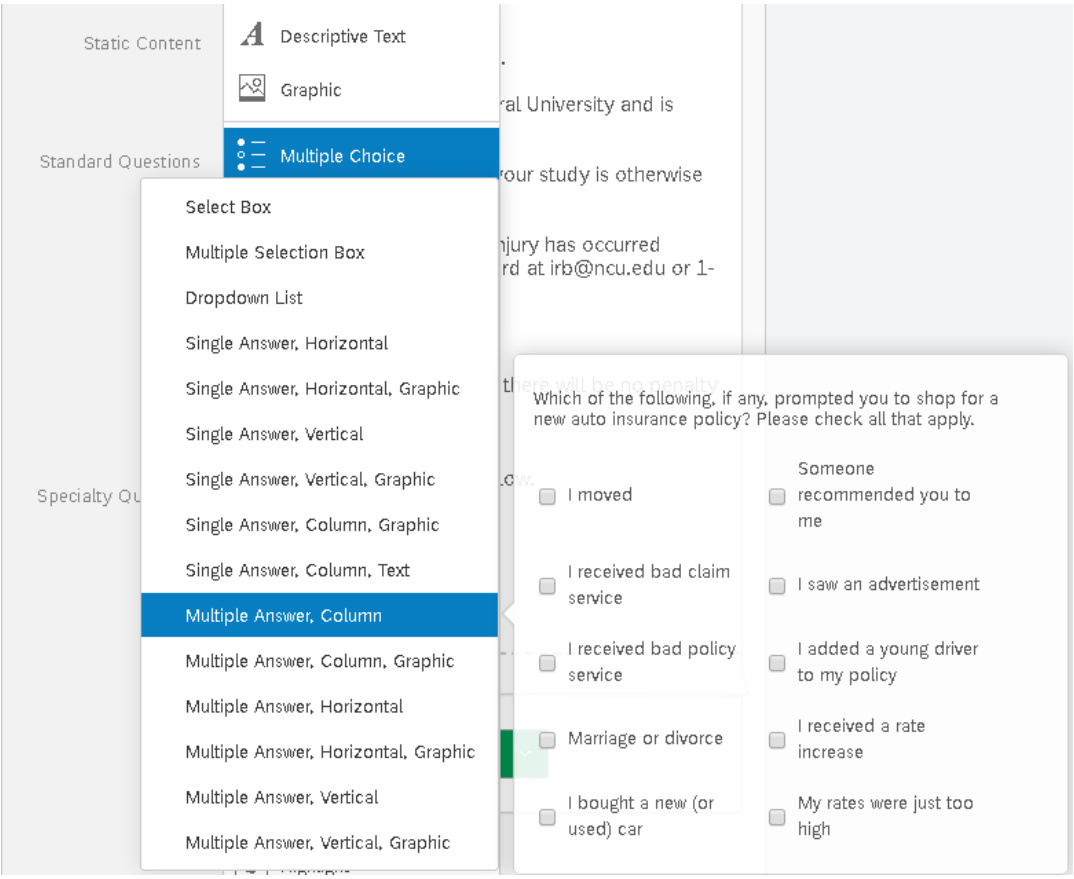
Text Entry: Text Entry is used to gather open-ended feedback from respondents. These responses can be lengthy essays, standard form information such as name and email address, or anything in between.

Matrix Table: Matrix Table is used to collect multiple pieces of information in one question. This type provides an effective way to condense your survey or to group similar items into one question.

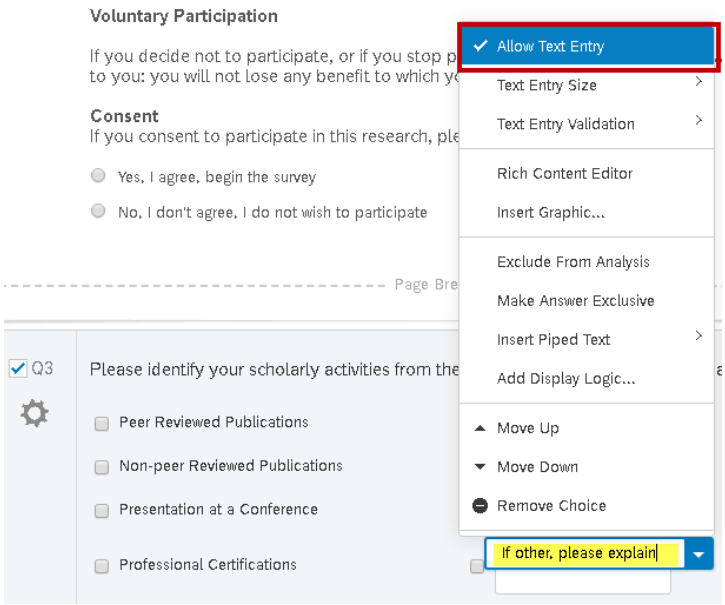
You can find additional information on Qualtrics question types on the Qualtrics website.

Multiple Choice

In this example, we are going to add a question type called "Multiple Answer Column" by clicking the down arrow on the green button called "Create a New Question" and navigating through the Multiple-Choice options to select "Multiple Answer Column". As you highlight each option for a question type, you will see a preview of what the question will look like.

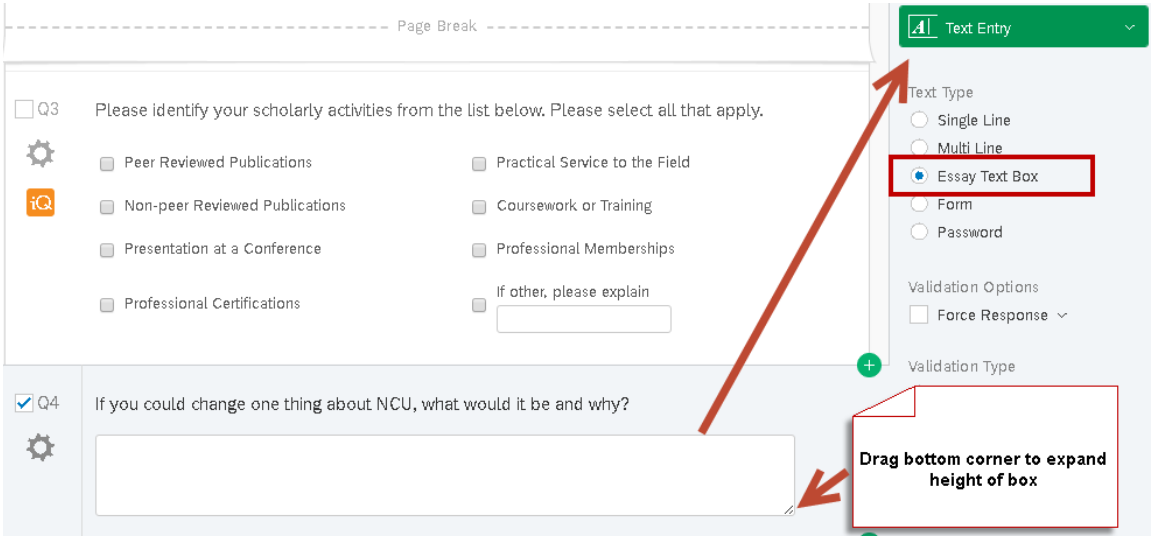


"Multiple Answer Column" allows respondents to select multiple items from a list (selecting all that apply). Additionally, we are able to create an option for the respondent to type their own response if it is not provided in the list. To do this, click an answer choice, click the down arrow for the answer choice, and choose "Allow Text Entry". "Allow Text Entry" places a text field next to an answer choice. This is commonly used when placing an "Other (please specify)" answer choice into the question.



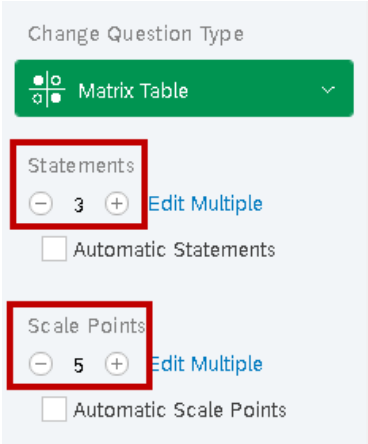
Text Entry

The Text Entry question has several variations that change the size and type of the text box. Here we have selected the radio button for Essay Text Box and expanded the height of our box by dragging the corner of the box out with our computer's mouse. The radio buttons for "Essay" and "Multi-Line" refers to a default size of the text box that will be set. If you click and drag the handle on the bottom-right of the text box, you may make Essay and Multi-Line text boxes as tall and as wide as you need to, making these two variations interchangeable. Note that once you resize a text box, you cannot reset it to its default size except by manual resizing.

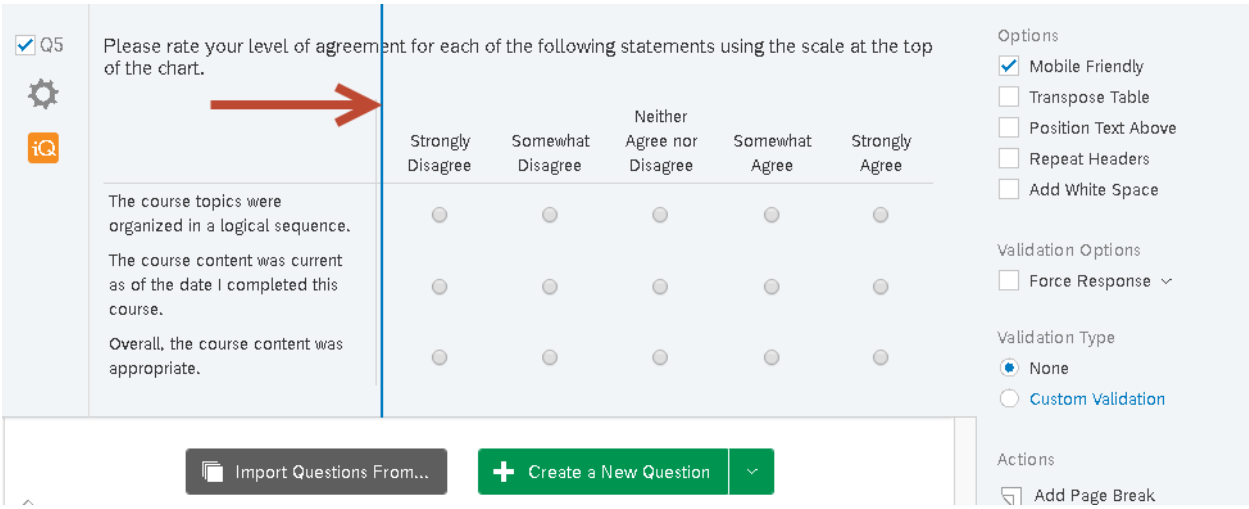


Matrix Table

Matrix Table questions allow you to ask about multiple items in one question. There are several variations on the Matrix Table question. Each variation has unique options and a unique format. To increase or decrease the number of rows or columns in a matrix table, use the plus (+) and minus (–) buttons under headings “Statements” (i.e., rows) and “Scale Points” (i.e., columns).

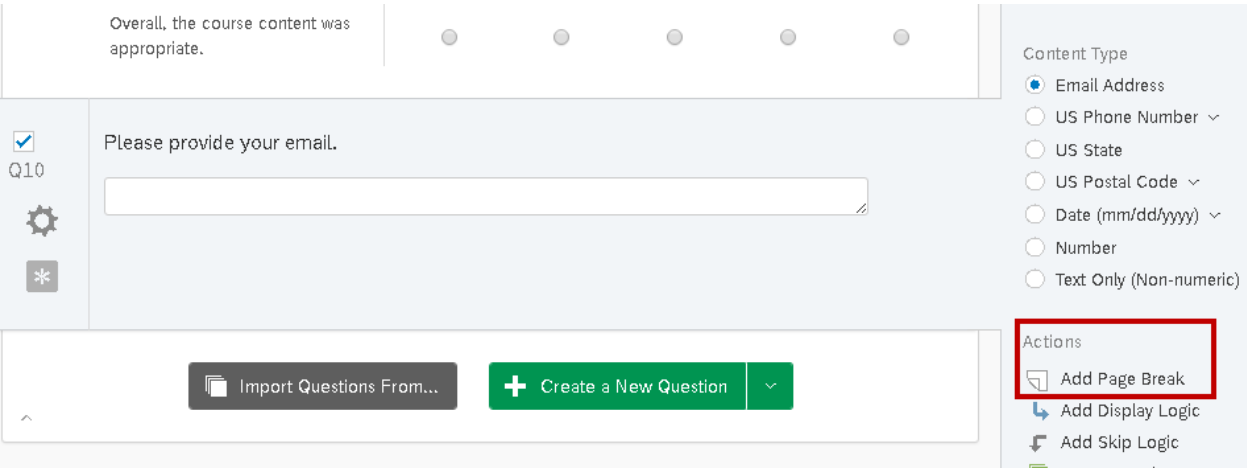


You can adjust the width of the column containing your statements by clicking and dragging on the vertical line to the right of your statements.



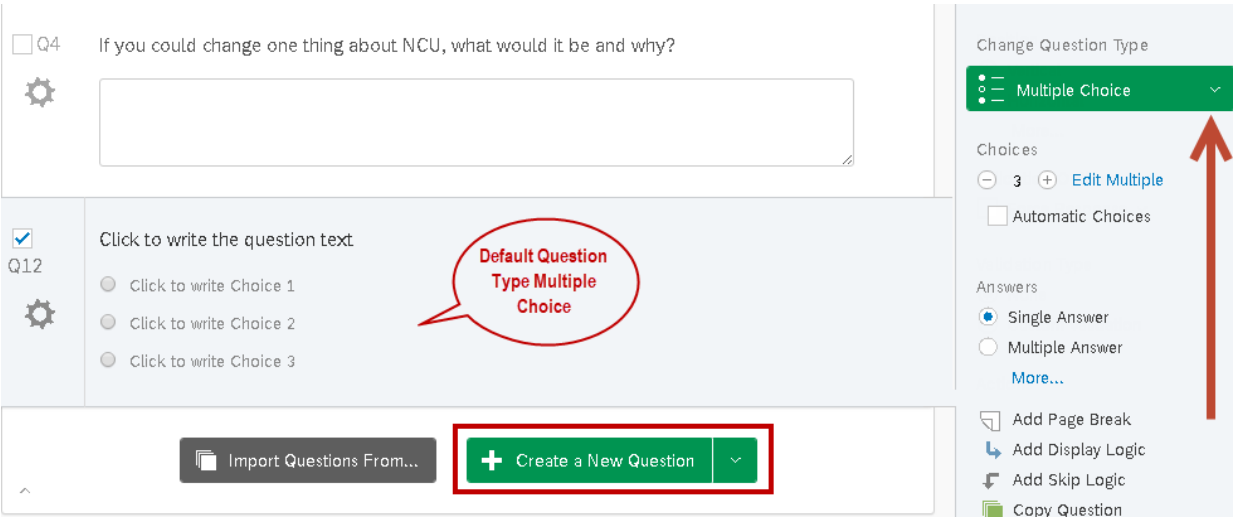
Adding Page Breaks

Page breaks allow you to break questions into separate pages. By keeping your survey in screen-sized chucks, the participant is not overwhelmed by having to scroll through pages and pages of questions. To add a page break, select the question you would like to add a page break after and click the "Add Page Break" link to the right of the question. In this example, a page break would be added after the question "Please provide your email."



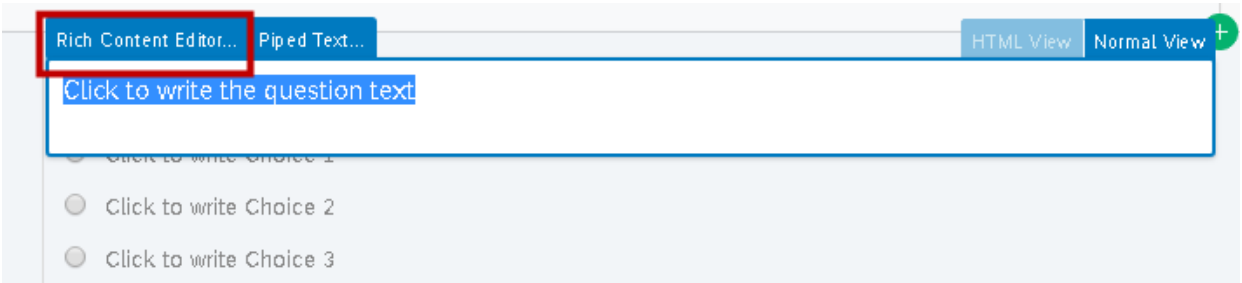
Changing a Question Type

When you create a new question, the default question type is multiple choice. You can change the question type by selecting the question (it turns a shaded color), then click the down arrow on the "Multiple Choice" button to adjust your question type. Please note that if you've already started collecting responses, changing the question type could result in the loss of collected data.

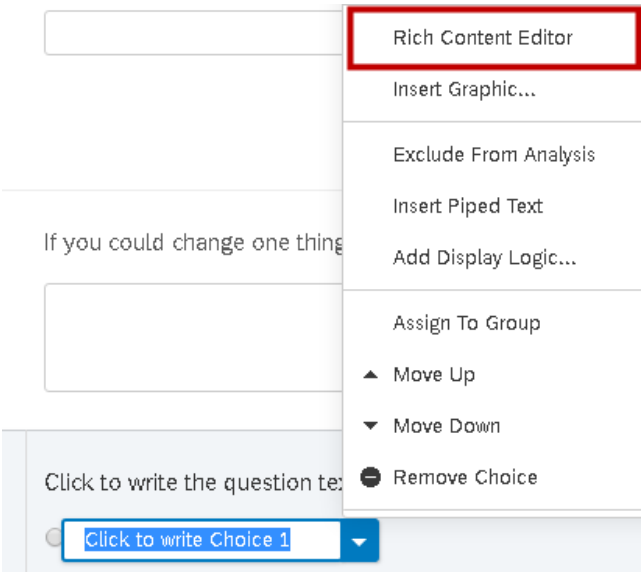


Editing Question and Answer Text

To edit question text, click directly on the question to write in what you would like to say. The Rich Content Editor allows you to format font sizes and types, create number lists, add bullets to statements, and change font colors. To use the Rich Content Editor, click the question that you would like to edit and click the "Rich Content Editor" tab. Clicking any blank space outside of the Editor will exit you from the text editor and save your changes.

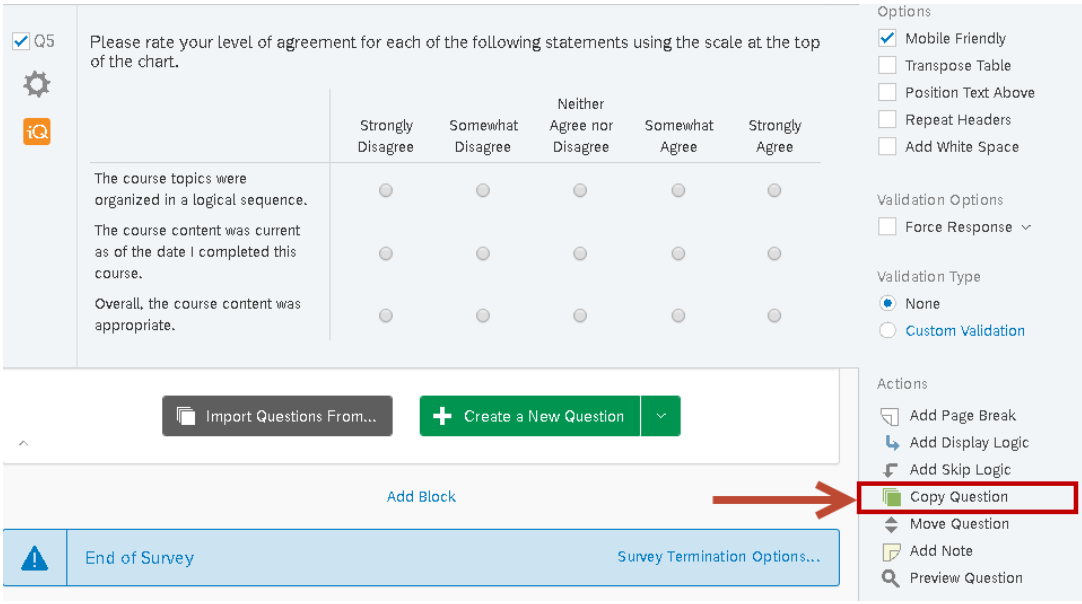


To edit an answer choice, click directly on the answer to write in what you would like to say. The Rich Content Editor for an answer allows you to format font sizes and types, create numbered lists, add bullets to statements, and change font colors. To use the Rich Content Editor, click the answer that you would like to edit and select the "Rich Content Editor" from the menu. Format your text in the Rich Content Editor and click "Save" when finished.



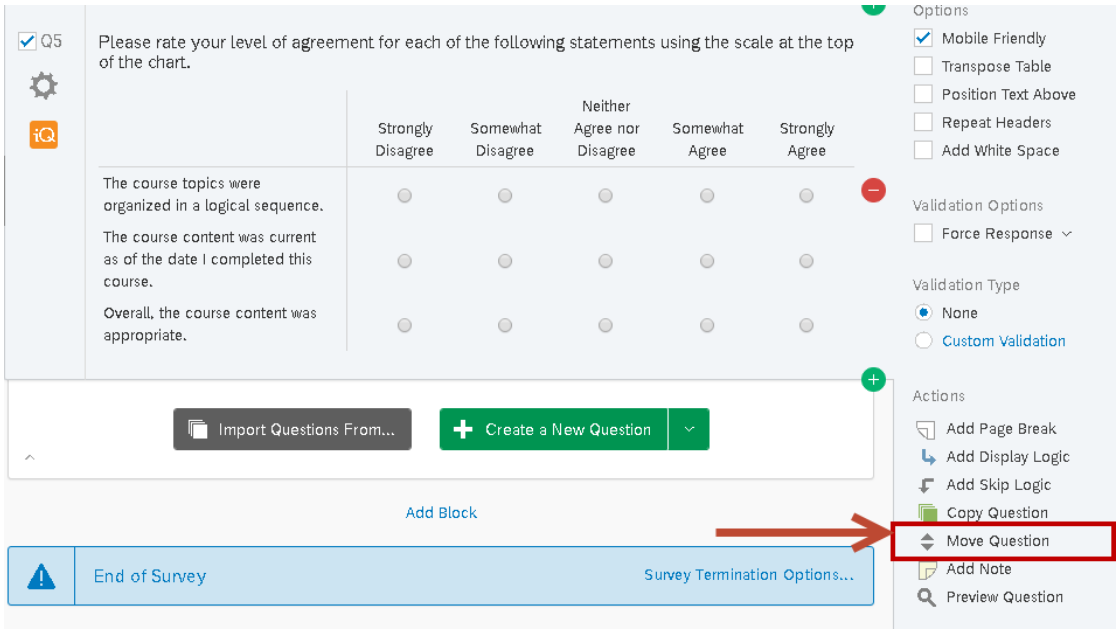
Copying Questions

To copy a question, click on the question you would like to copy (the question will turn a different color) and then click on the "Copy Question" link to the bottom right of the question. This is helpful when you want to keep the existing format from one question to the next.

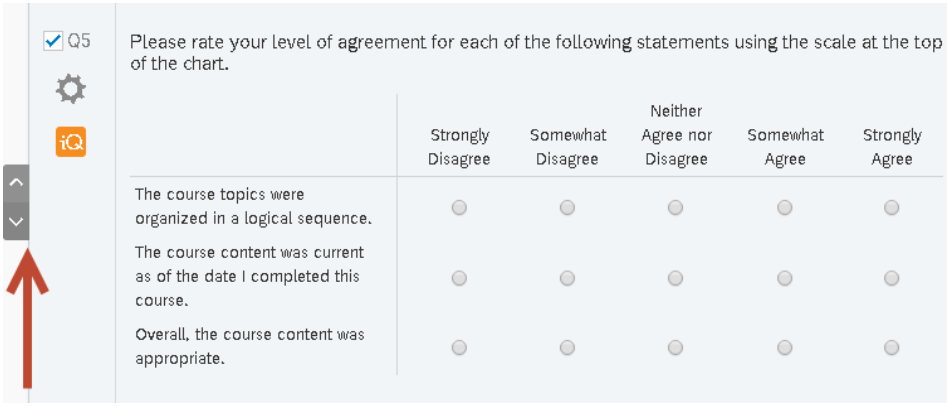


Moving Questions

To move a question, click the question you want to move and click the "Move Question" link to the bottom right of the question. Then move your mouse to the place in the survey you want the question to be and then click in the survey where you would like the question to be placed.

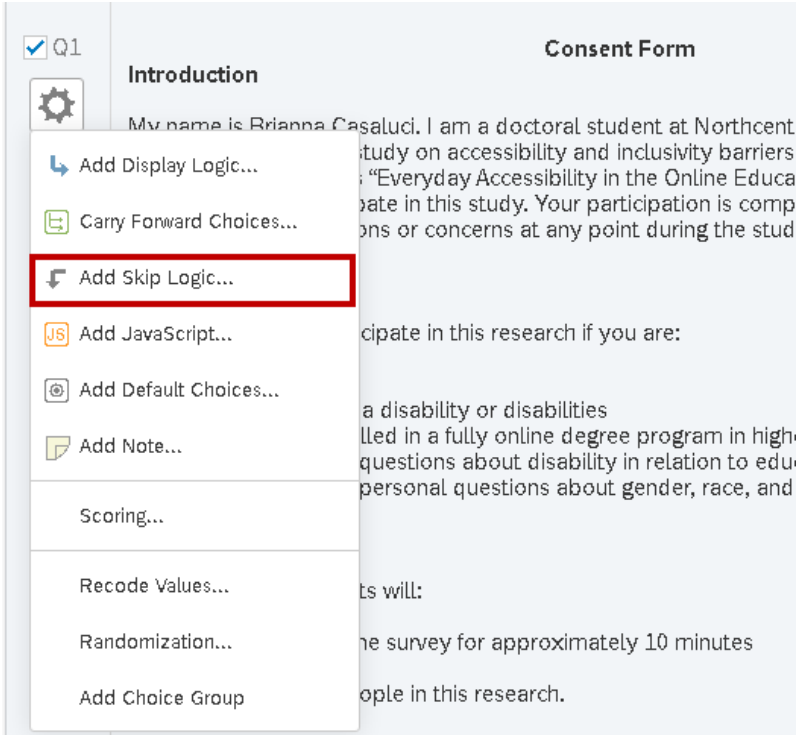


Alternatively, clicking the up or down arrows next to each question will allow you to rearrange the order of your questions.



Adding Skip Logic

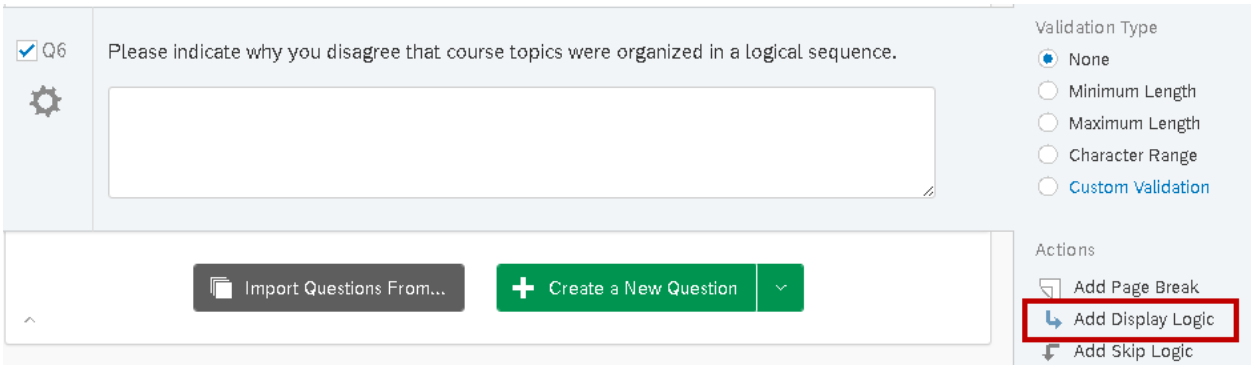
Skip Logic allows you to send respondents to a future point in the survey based on how they answer a question. For instance, if a respondent indicates that they don't agree to your survey's consent letter, they could immediately be skipped to the end of the survey. To do this, click the gear icon located at the top of the question and select "Add Skip Logic".



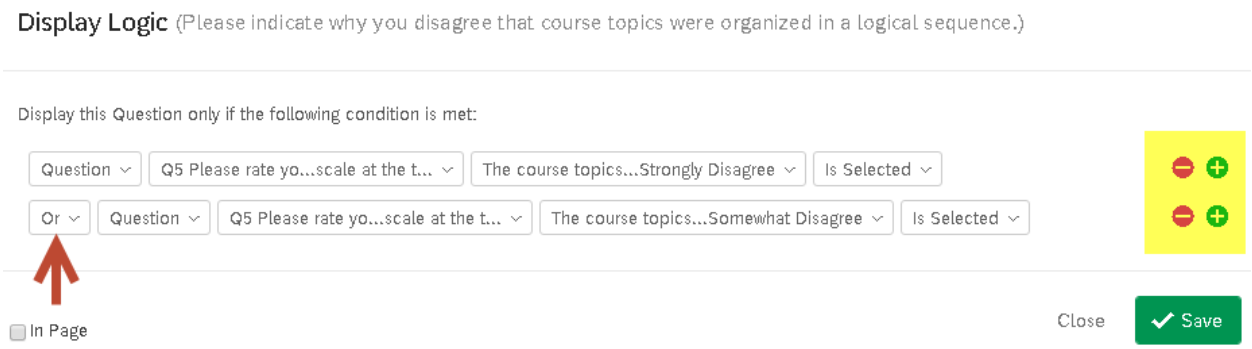
At the bottom of the question, you'll find that a condition was added. Here is where we indicate that when the Condition "No, I don't agree" is selected, the survey will terminate.

Adding Display Logic

Adding display logic to an answer choice is a good way to gather additional information about a choice a respondent has selected. For example, we may want a respondent to elaborate about why they "strongly disagree" or "disagree" with a particular item. In this example, we only want to display the question below if a respondent disagrees with the previous question. Click the question you would like displayed when certain conditions are met and select "Add Display Logic" to the right of the question.



Here we have indicated that when the respondent selects "Strongly Disagree" **OR** "Somewhat Disagree" to question 5, then we will display question 6 (above). Conditions can be added or removed by clicking the plus (+) and minus (–) buttons to the right of each condition.

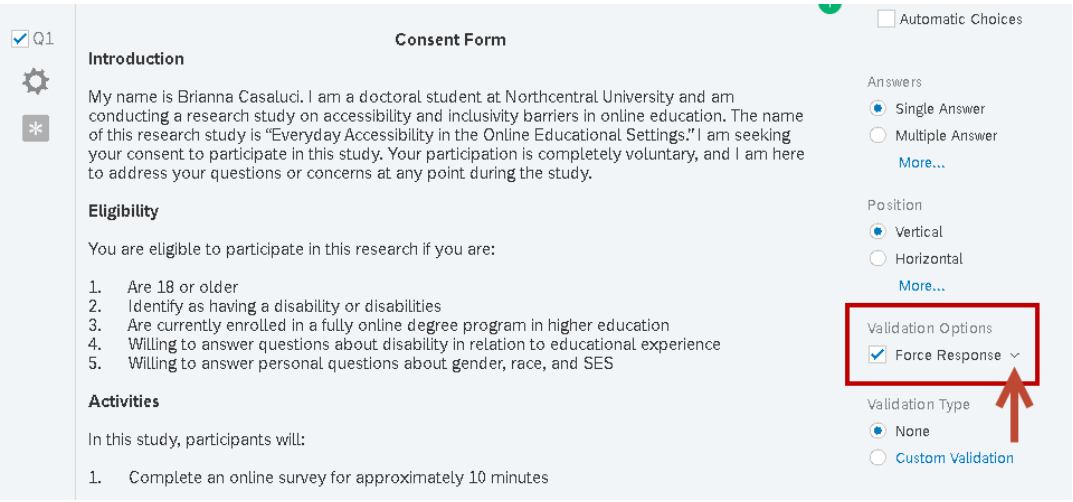


Question Validations

There are four main types of question validations available: Force Response, Request Response, Content Type Validation, and Custom Validation. Validation options vary with each question type and can be viewed in the question menu bar to the right when a question is selected.

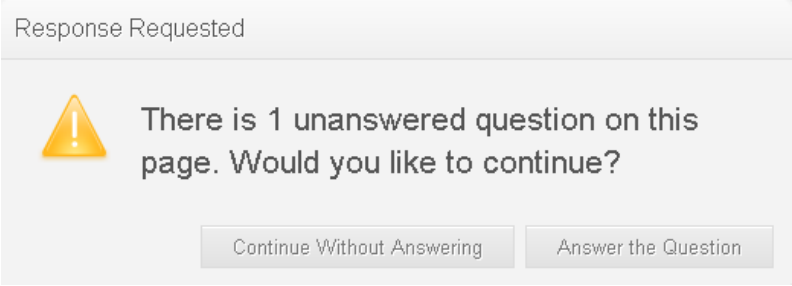
Forced Responses

Due to the sensitive nature of most research surveys, forced responses are rarely used except in the case of a consent letter. To force a respondent to answer a question, select the question you want to force the response and check the "Force Response" box under "Validation Options".



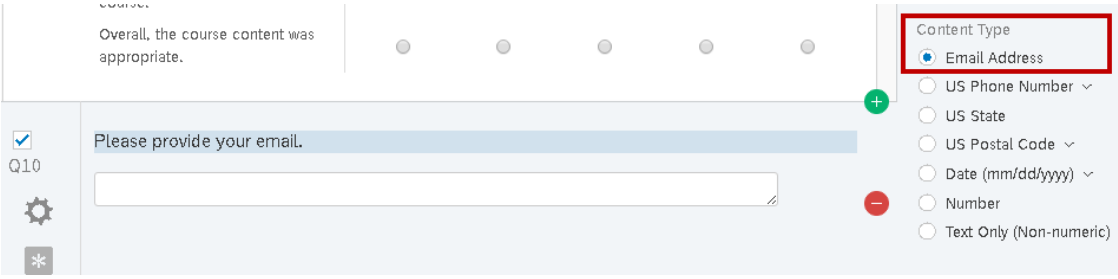
Requested Response

The "Requested Response" option prompts the respondent to answer any missed survey questions (shown below). Select the question you would like to request a response, click the down arrow to the right of "Force Response", and check the box for "Request Response". Note: Request Response is unavailable for multiple questions at the same time like a Matrix question.



Content Type Validation and Custom Validations

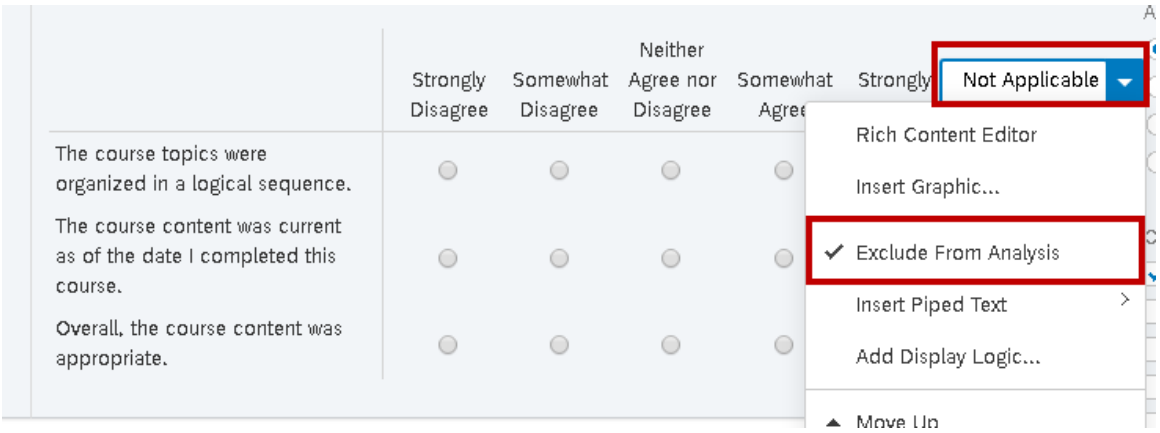
Content Type Validation is available for Single Line Text Entry Fields. Data validation ensures that a respondent's text follows a specific format such as a basic email address [user@domain.top-level domain] or that a date format has been entered correctly.



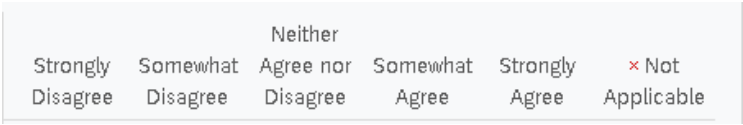
Custom validation on the other hand allows you to specify that certain criteria be met before a respondent can get past a question. [More information about Content Type Validations and Custom Validations can] be found on Qualtrics' website.

Exclude Data from Analysis

Excluding results from analysis ensures that particular answer choices are not used in reports. To use this function, click the down arrow next to the text of the answer choice to be excluded and select "Exclude from Analysis".

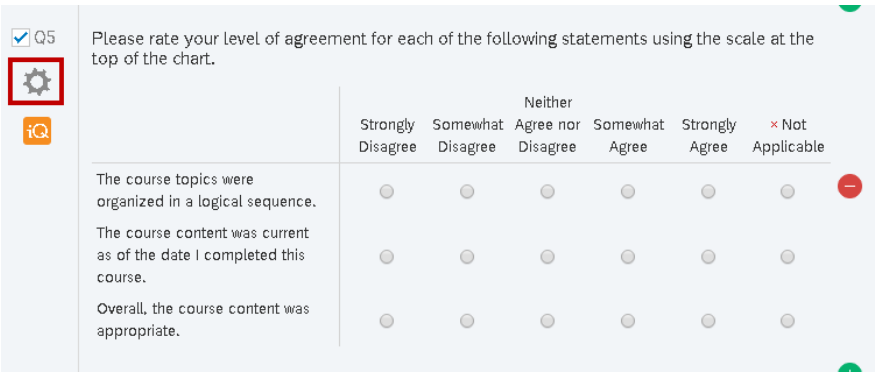


The red "X" displayed in front of the answer choice confirms that this answer choice will be excluded in the analysis from the Qualtrics reports.

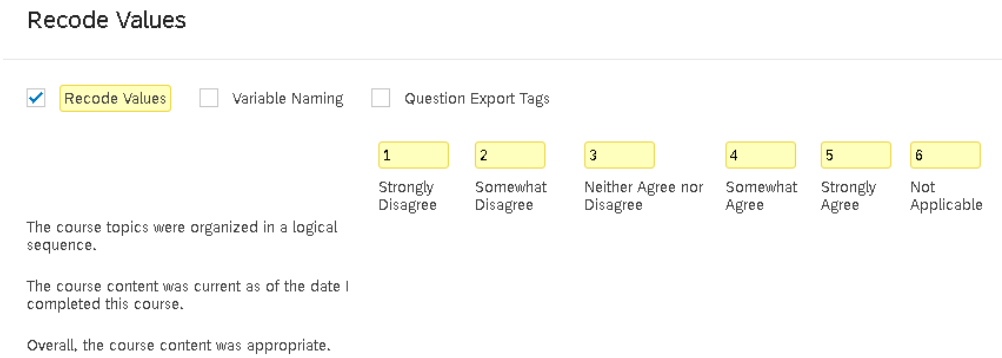


Recoding Values

When a question is created, a recode value and variable name are automatically assigned to each answer choice. Recode values are used in reports, statistic tables, and data export files. Coding is often used with scaling type questions such as a Matrix Likert question or "true/false" questions. By default, the first answer choice will have a recode value of 1, the second choice 2, and so on. Click the gear icon in the upper left of the question you would like to code or view the code and select "Recode Values".



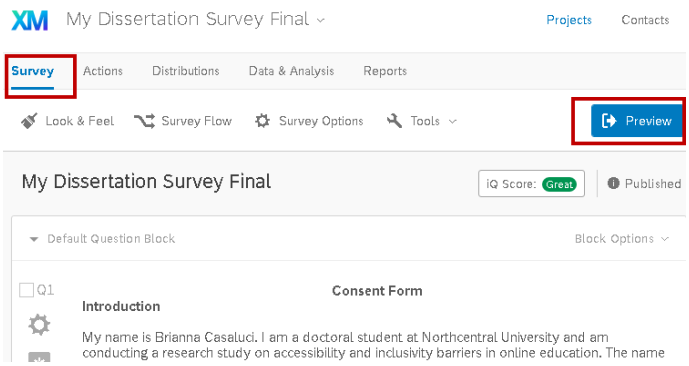
Upon viewing the Recode Values screen, the data are coded appropriately for statistical analysis.



When you delete an answer choice to add another, or rearrange answer choices, the recode values do not automatically update, so the Recode Values screen will allow you to renumber the values for each answer choice. You can always recode the answer choices at any time without hurting the resulting data. You can also recode variable names in the same manner by clicking the "Variable Name" box at the top of the Recode Values screen to edit the names as desired. Note: do not deselect the checkboxes once you have recoded or renamed your values or variables as it will reset everything to their original default values or names. You can change these coded values and names at any time during the survey or after you have collected your data without invalidating your results. Any changes you make will be immediately reflected in your raw data set and in the Reports tab. Question Export Tags is also an option if you need to apply a custom export tag to each question to shorten long answer choices in the raw data file and help you distinguish the column titles for each statement in the Exported Data file. Note: When you change the Export Tags in a Matrix Table or Side by Side, the export columns will not include the question number unless you have added an export tag.

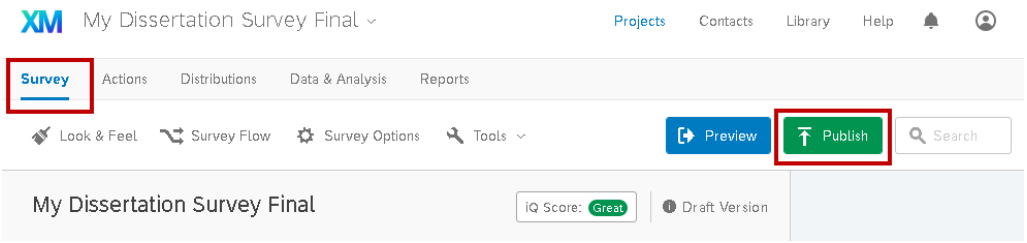
Previewing a Survey

Previewing your survey is a great way to test your survey before it is sent to participants. Click the "Preview" button located at the top of the survey.



Publishing a Survey

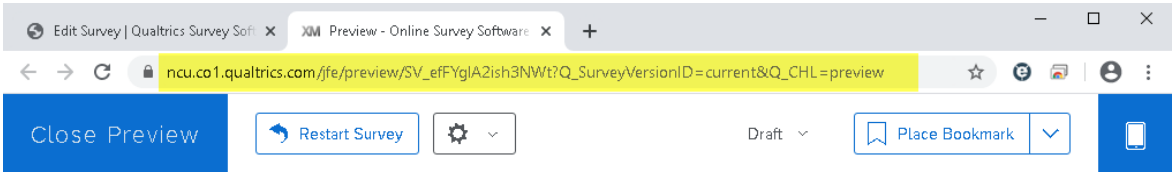
One you set and verified the appropriate settings for your survey through the Look & Feel, Survey Flow, Survey Options, and Tools menus, and have thoroughly tested your survey for overall flow and functionality, you can activate your survey by clicking "Publish".



If changes to the survey are needed after the survey is published, but before response are collected, you must republish the survey after changes are made. Please see Distributions for distributing your survey.

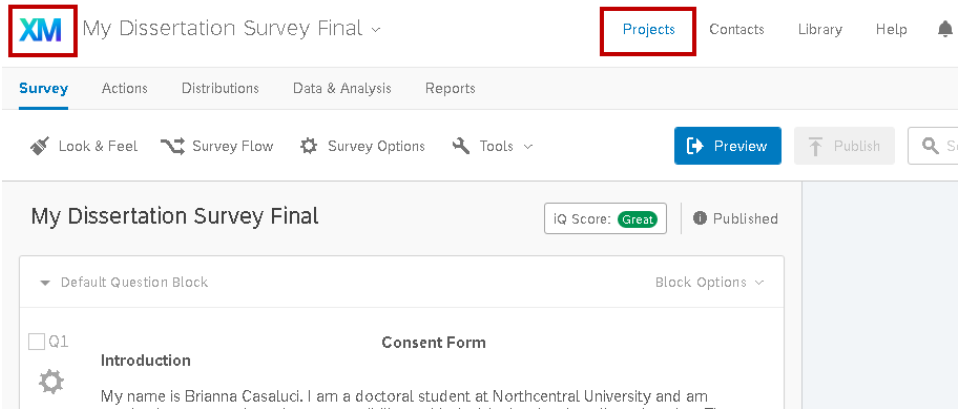
Testing Your Survey

You can test your survey through the "Preview Survey" and "Anonymous" links; however, it is recommended that you test your survey using the "Preview Survey" link since any test responses will be flagged in the results for easy identification and deletion. By previewing your survey as previously described, you can copy and paste the URL to send to others for testing.

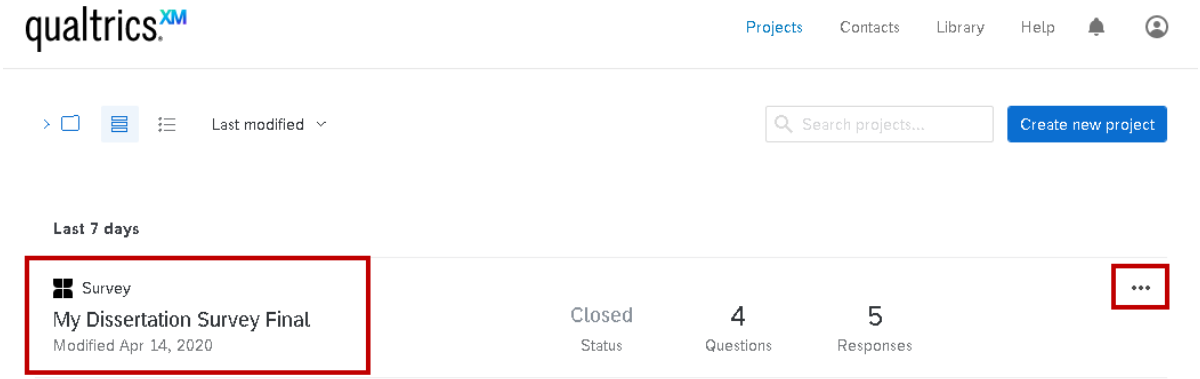


Projects Page

Once you have created your survey, you will see the "Projects" tab in the upper right corner of your account that when clicked, will list the surveys (AKA Projects) that you have created. Alternatively, you can click the XM icon in the upper left of your account to access the main homepage of your Qualtrics account to view your surveys (AKA Projects).



Upon logging into your account, you will see the surveys you have created listed on your homepage. To the right of every survey, you will see three little dots that when clicked open shortcuts that will quickly direct you to a specific location. Many of these options are available when editing your survey, but may come in handy when you need to copy, delete, or collaborate a survey.



Some of the main menu options you will use include the following:

Close: There are a couple options for closing a survey. Choose whether to close all active survey sessions (stop people from finishing surveys they started) or to allow all active survey sessions to be finished (allow people in the middle of a survey to finish within the partial completion timeframe (see also Partial Completion).

Collaborate: Please see Collaborating Surveys.

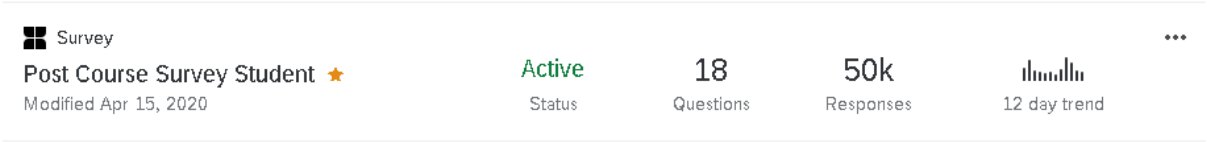
Reveal in Folder: This option will open a file folder system to the left of your survey list where you can organize and sort your surveys by creating folders and drag/drop surveys into specific folders. Any surveys not in a folder will be listed in the "Uncategorized" folder. The "Shared with me" folder allows you to view any surveys (projects) that have been shared to your account.

Rename Project: Please see Renaming a Survey.

Copy Project: Enables you to copy a survey. When a copy is made, it becomes a separate survey with its own survey link. Survey data is not copied along with the survey.

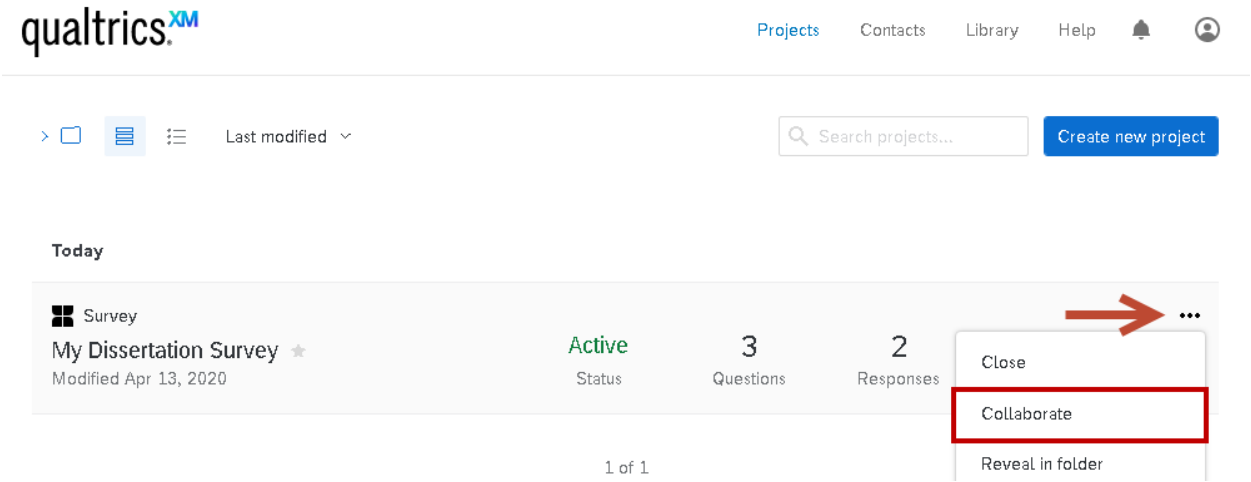
Delete Project: Displays a dialog box to confirm deletion. All data is deleted with the survey so make sure you really want to do this.

Each survey in the list on your homepage provides the current status of your survey (new, active, or closed), the number of questions in your survey, and the total number of responses. You can also view a survey's response collection trend over the past 12 days.

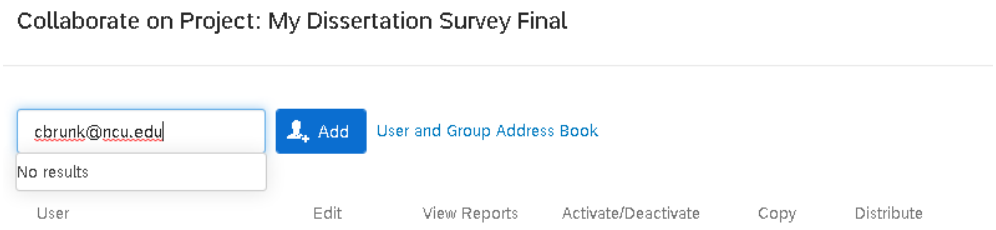


Collaborating Surveys

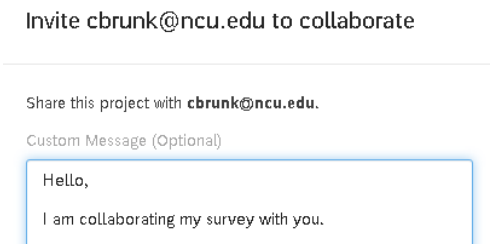
The collaborating surveys option enables you to give permission to and share a survey with another Qualtrics user, so they can view your survey and provide feedback prior to launching your survey (see also Testing Your Survey). If there is not an existing user account for the person you want to collaborate with, the tool will send an email to the address you type and provides instructions via email for creating a trial Qualtrics account. To collaborate a survey, click the ellipses located to the right of your survey name and select "Collaborate".



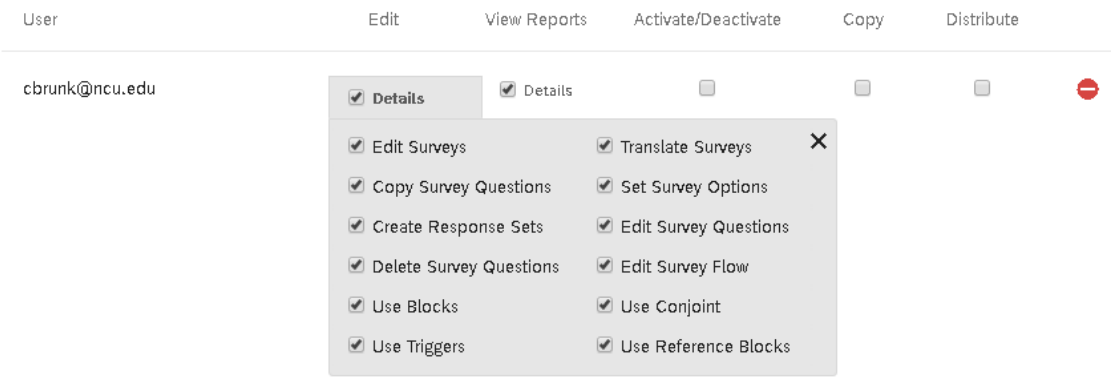
Enter the email address of the person you wish to share your survey and click “Add”.



Enter an optional message that will be sent to the email you added.

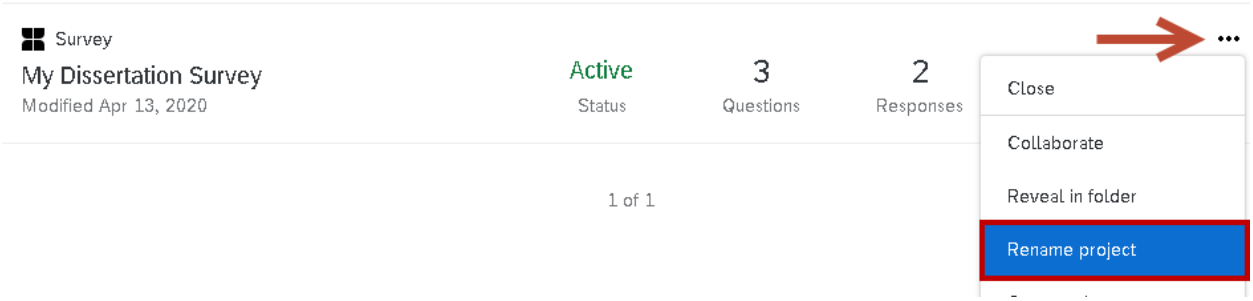


Once you have added the user, the user will display in the collaborate table and you can specify the user’s access and permissions to your survey. Qualtrics sends an email to the person you shared your survey with and provides them with instructions for creating a trial Qualtrics account (if applicable) along with providing a collaboration code to access your survey from their account. In the “Edit” and “View Reports” sections, you can allow all permissions to your survey by selecting the main checkbox under “Details” and “View Reports”. Click the “Details” link to expand and set more specific permissions.

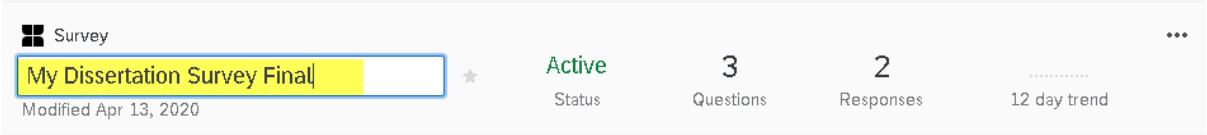


Renaming Surveys (AKA Projects)

If you have created a survey but would like to change the name, from your main homepage, click the ellipses located to the right of your survey name and select “Rename Project”.

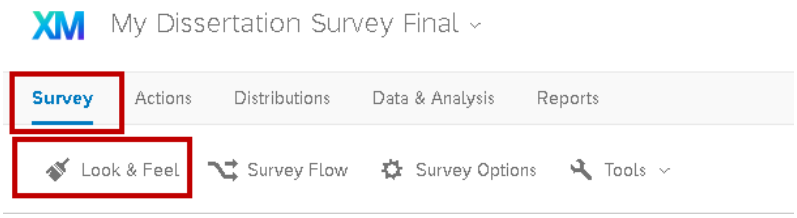


Type the new name of your survey in the text box and hit the enter key.

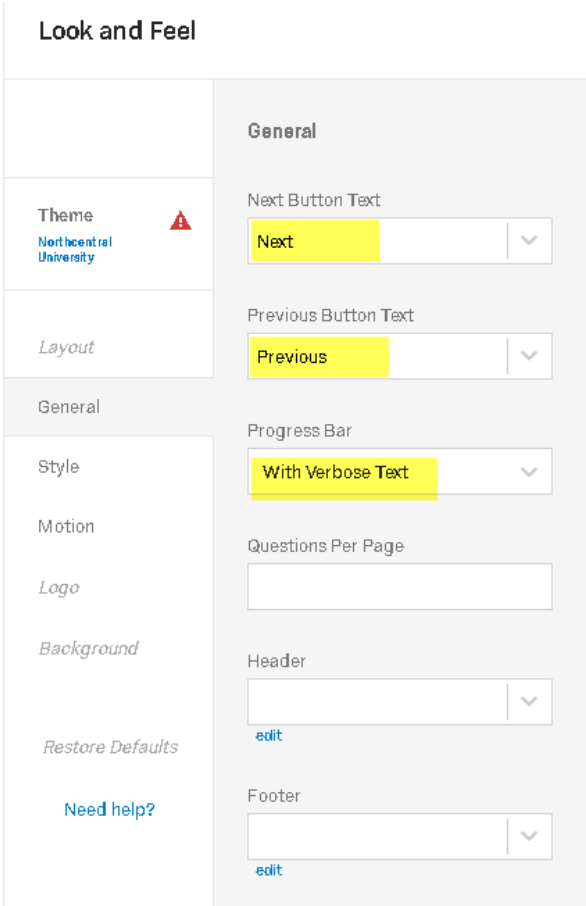


Look and Feel Menu

Look & Feel options allow you to make changes to how your survey looks to respondents when they take your survey. We will walk through the major settings you may need to adjust within Look and Feel.



Within the "Survey" tab at the top of your survey, click the "Look & Feel" menu to access related options.



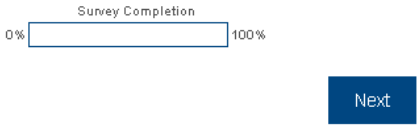
Under "General" in the left navigation bar, we will change the "Next" and "Back" buttons from arrows to text and select "With Verbose Text" under the Progress Bar. The "Questions Per Page" field is typically left blank because you can add your own page breaks when creating your survey. You also do not need to concern yourself with Header or Footer sections as they are already pre-programmed for you and

branded with the NCU logo. There are no other options outside of those just described that should be altered within the Look and Feel menu.

The "Next" and "Back" buttons along with the progress bar add a bit of personalization for the person taking the survey, which you can view in the Survey Preview function. Progress Bar options are as follows.

- ***None*** – default setting no progress bar will display
- ***With Text*** – Displays a bar with "0%" and "100%" on either side
- ***Without Text*** – Displays a bar without "0%", "100%" or other text
- ***With Verbose Text*** – Displays "Survey Completion" above the progress bar along with "0%" and "100%" on either side

Below is an example of the settings we just made showing the progress bar and "Next" button at the bottom of the first page of the survey.

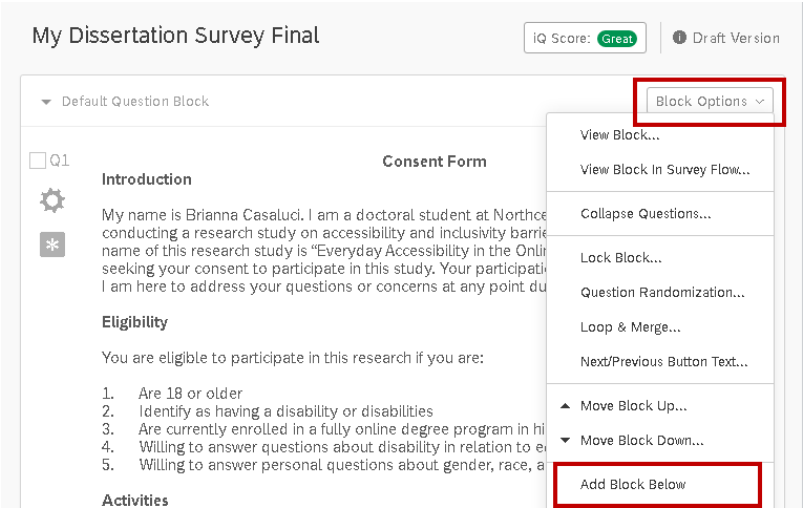


Survey Flow Menu

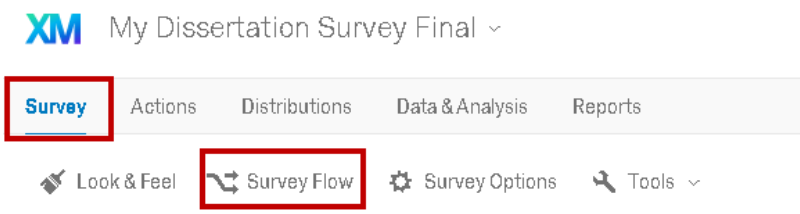
Survey flow options are not needed by everyone, but could be used in cases of larger, more complicated surveys, where the flow of questions is based on certain conditions being met. Not only can you customize the flow of questions presented to the respondent through the use of blocks and conditions, but you can also tie variables from the contact list to respondent results (see Creating a Contact List).

Question Blocks and Branching

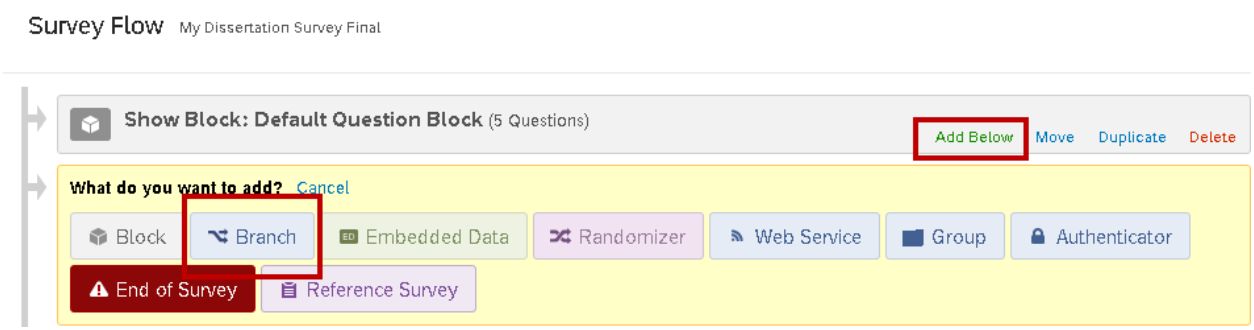
Question blocks are used to categorize questions. For example, Block 1 might be an introduction, Blocks 2 -5 might be categorizations of questions specific to a topic or treatment, and Block 6 might be demographic questions. Adding blocks to your survey allows you to decide the customized path to send a respondent or ensure certain conditions are met before blocks of questions are answered. By default, all surveys have one question block. To create additional blocks, click the "Block Options" menu at the top of your survey and select "Add Block Below".



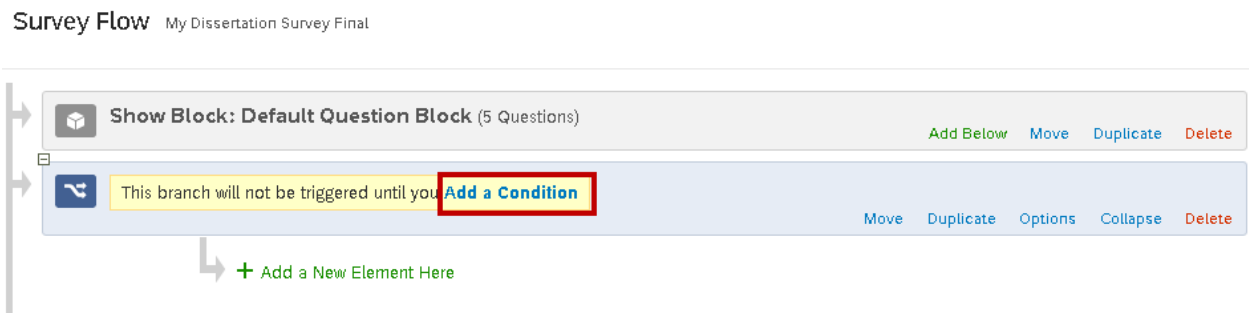
Once you have created a new block in your survey, you can move questions into the block or create new ones as described in Creating a Survey. By clicking "Survey Flow", we can view the blocks we created in our survey and customize the branching or blocks that will be displayed when certain conditions are met.



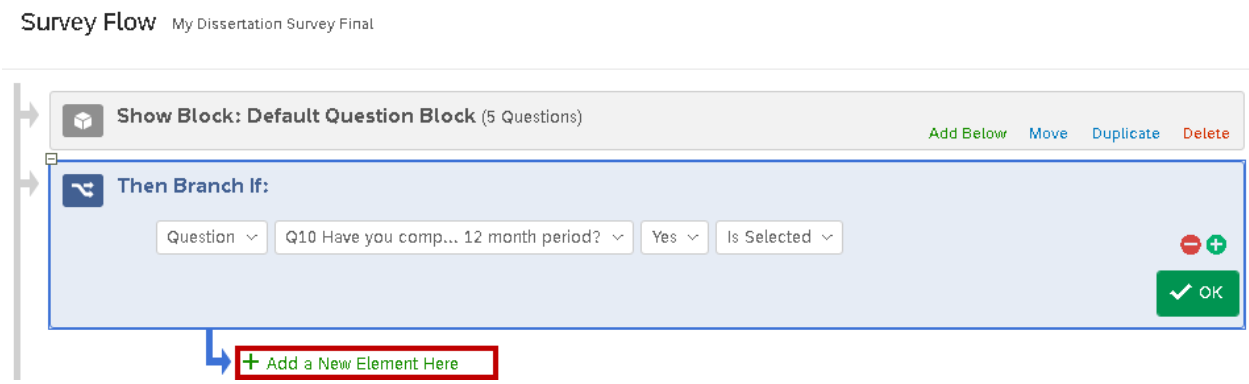
To customize the branching logic (to show certain blocks only to those who meet a specific condition), click the "Add Below" link within the block of questions that you want to define a specific condition and click "Branch".



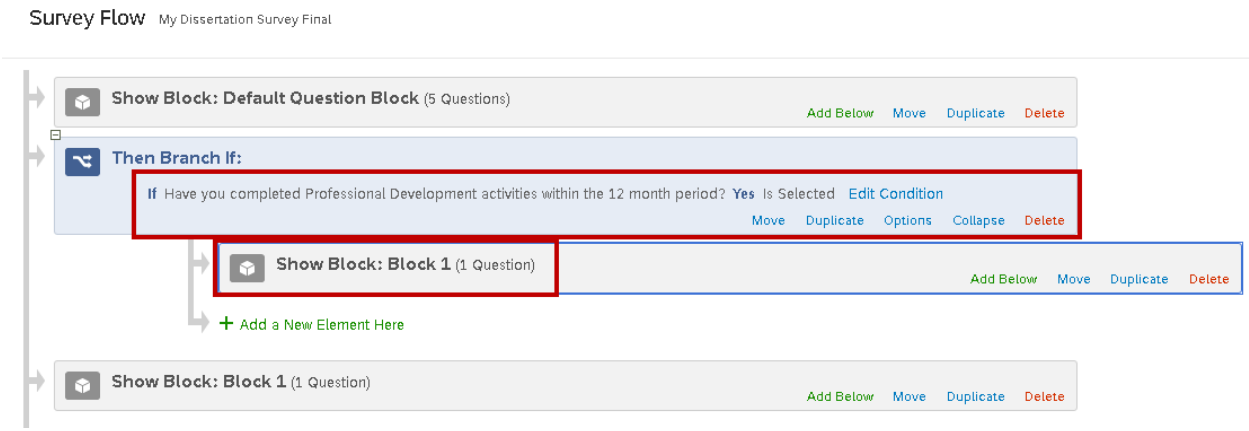
In this example, we are adding a condition to the questions listed in the "Default Question Block" for when a respondent selects a particular answer choice for a question within that block. This is similar to adding display or skip logic to an individual survey question as described in Adding Display Logic and Adding Skip Logic, but the branch would be applied to a block of questions, rather than an individual survey question.



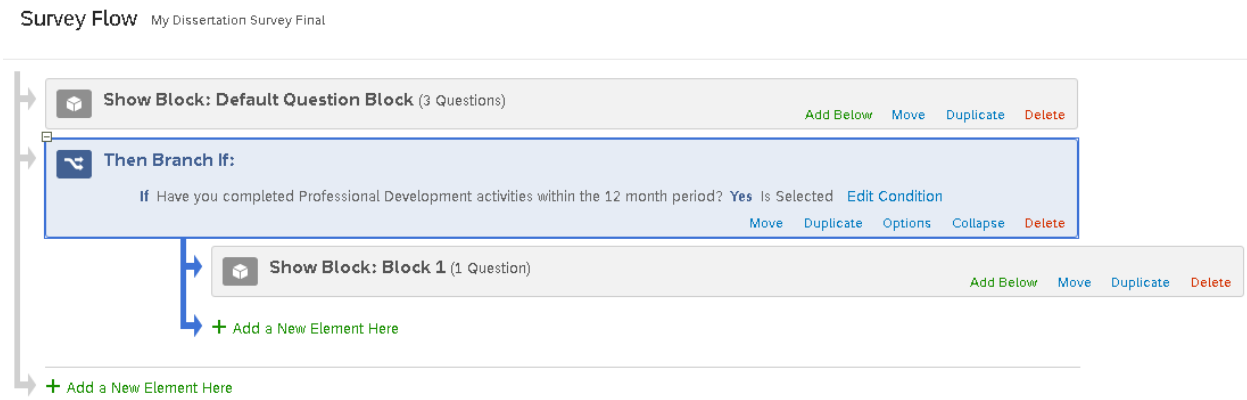
Our condition in this example will be when a respondent selects "Yes" to Question 10 in the "Default Question Block". Upon meeting that condition, we will branch the respondent to a specific set of questions in "Block 1".



By clicking "Add a New Element Here" within the Branch for the "Default Question Block", we can specify which Block of questions to display when the condition is met.

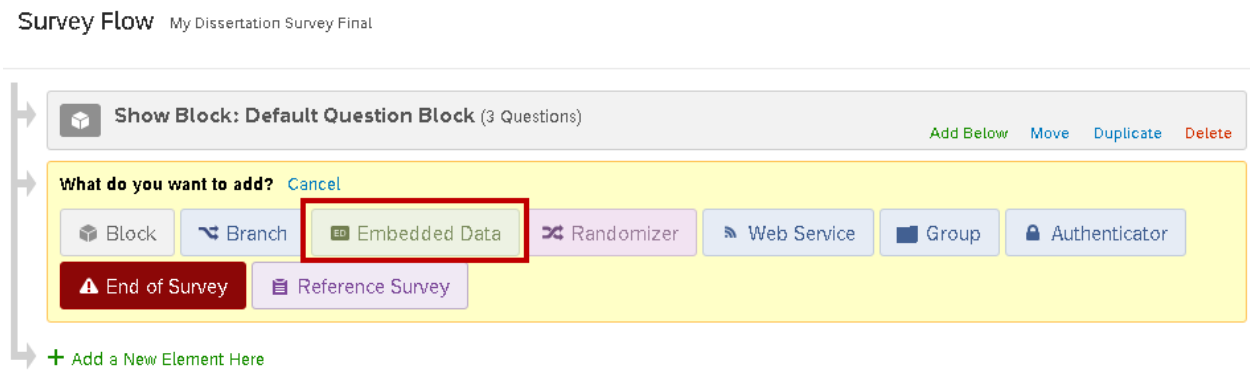


Above you can see Block 1 is listed twice, once within the condition and once at the global level. Delete Block 1 at the global level so that it is only displayed when the condition is met (shown below).

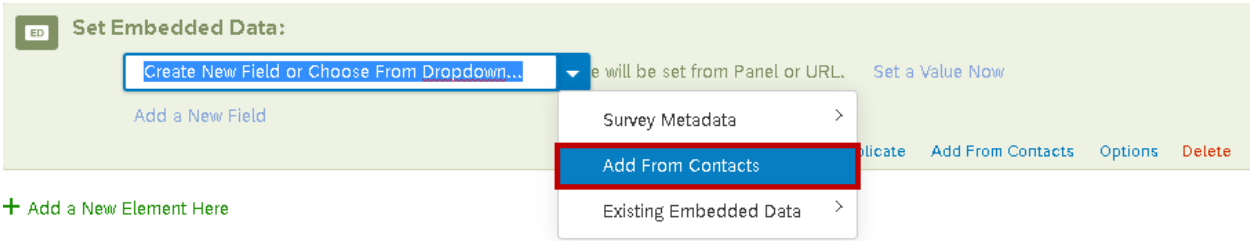


Embedded Data

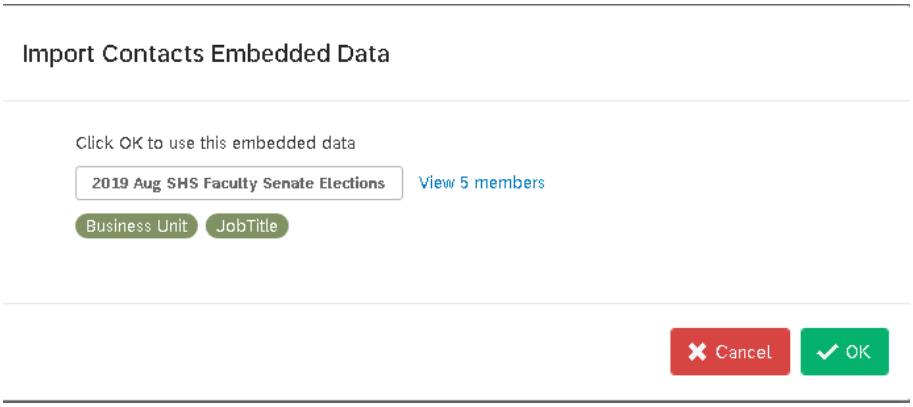
Embedded data is usually information about the respondent from a contact list that is attached to the respondent's responses (see Creating a Contact List). To embed data variables from the contact list to your survey, click the "Embedded Data" button in the Survey Flow.



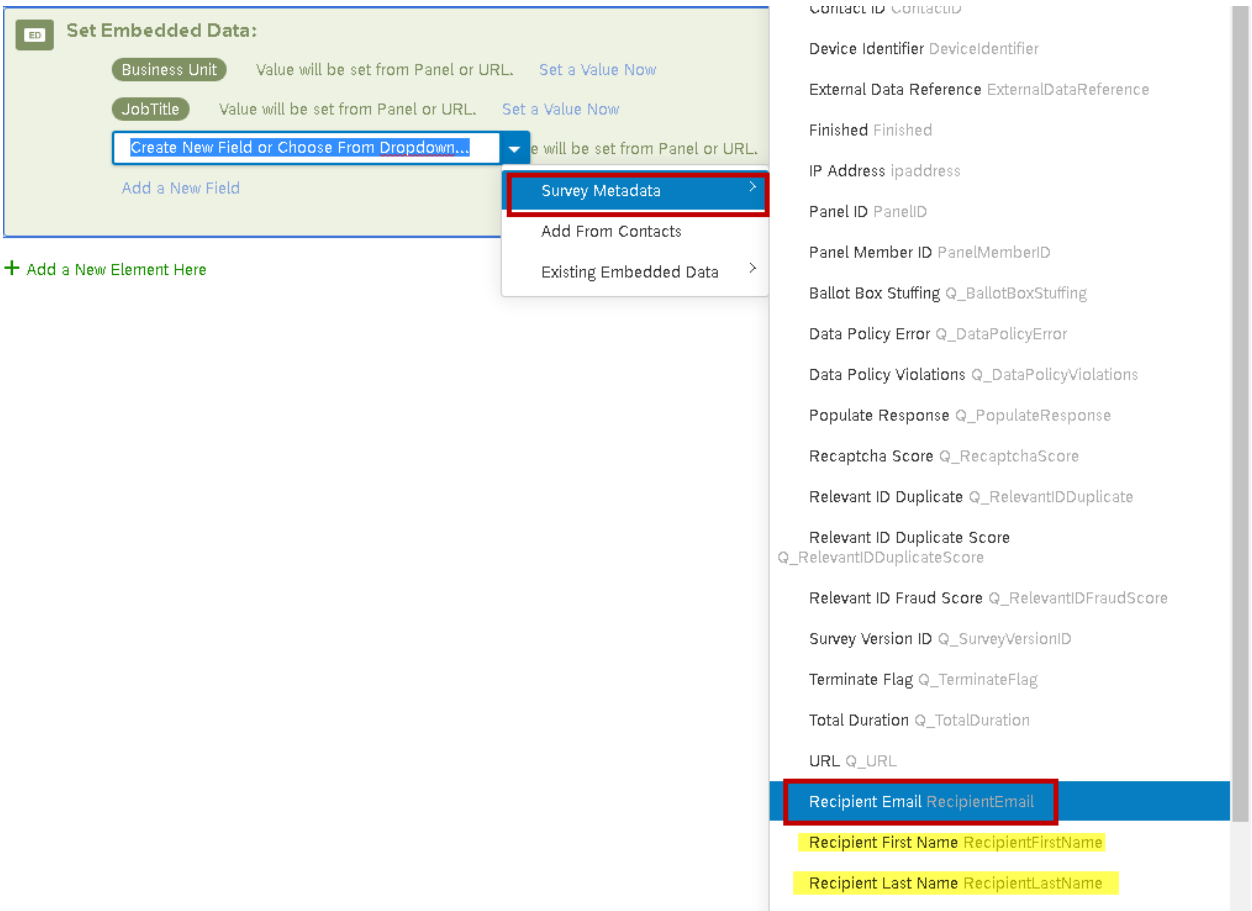
Select "Add From Contacts" as shown below.



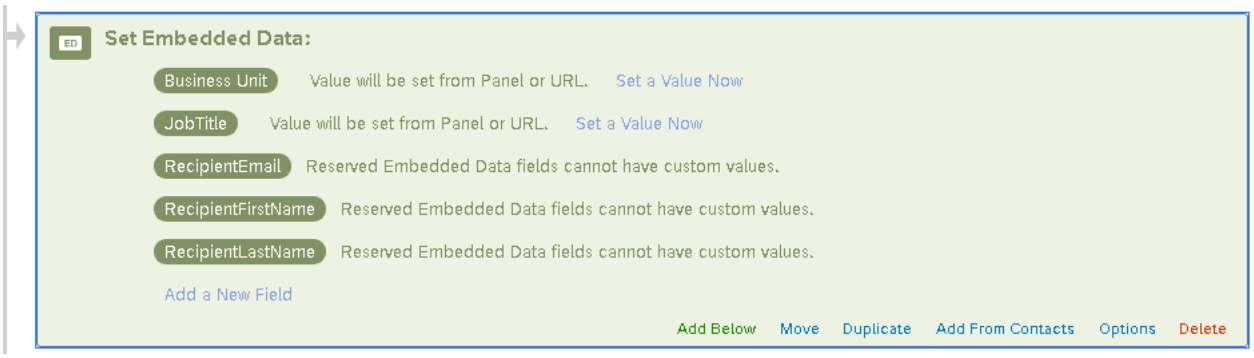
Select the name of the contact list stored in your account and add each of the variables from your list that you wish to be tied to survey responses (see also Creating a Contact List). Variables might include demographic information, age, occupation, etc.



The email address of your respondent as well as first and last name can also be tied to survey responses.

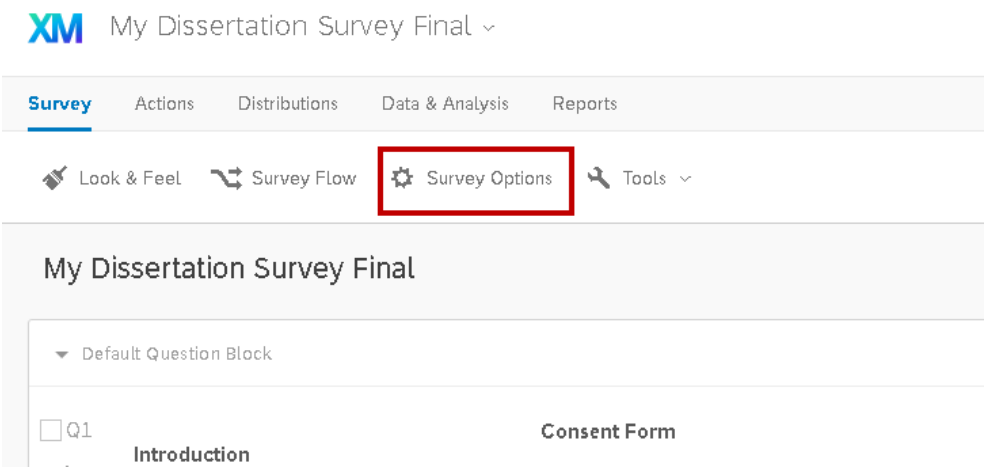


These variables from your contact list will now display in your reporting and/or as part of your survey results. See also Exporting Survey Data.



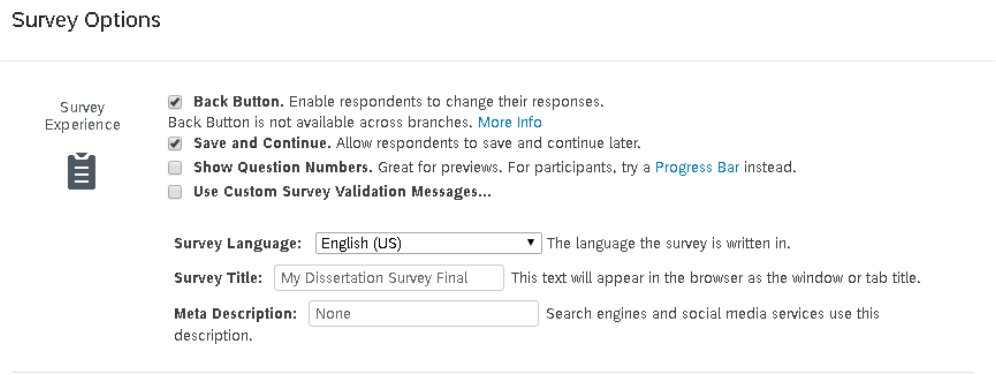
Survey Options Menu

The Survey Options Menu is divided into five areas: Survey Experience, Survey Protection, Survey Termination, Inactive Surveys, and Partial Completion.



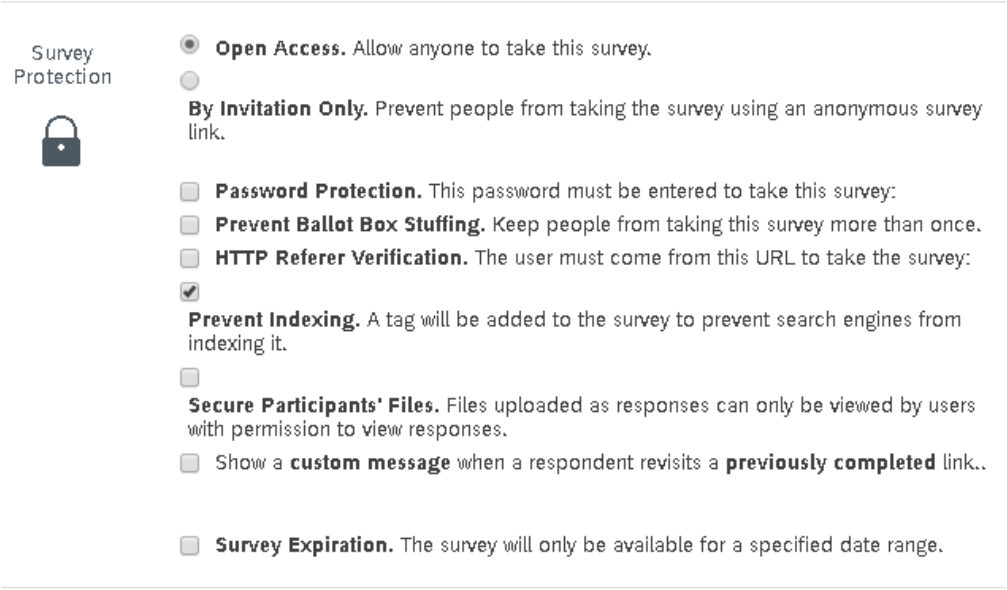
Survey Experience

- The Back Button box allows respondents to go back to previous pages in the survey when checked.
- Save and Continue uses a cookie stored on the respondent's browser and allows them to exit the survey and return at a later time where they left off.
- Survey Language is the language the survey was written. It's best practice to ensure that the language set is the language your survey was initially written.
- Survey Title appears in the browser tab when the respondent clicks the survey.
- Meta Description is used to describe the content of the link. It's used to display a description below the title of a link in certain platforms like Facebook. It's a good idea to verify how a certain social media platform uses the description fields so that you can label it appropriately.



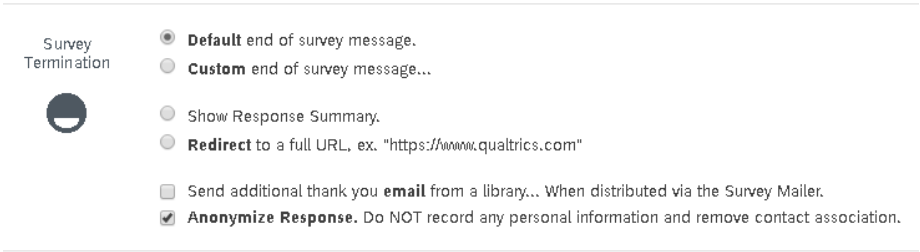
Survey Protection

- Open Access allows anyone to take the survey (anonymous survey link).
- By Invitation Only allows only certain people from your contact list to complete the survey. Use this option in conjunction with Creating a Contact List.
- Prevent Ballot Box Stuffing prevents people from taking your survey more than once from the same computer and browser.
- Prevent Indexing keeps search engines from finding your survey and presenting it in their search results.
- Survey Expiration limits the period in which your survey is available. It is recommended that you not set an expiration date for when the survey will terminate, but rather close the survey when you are ready to do so.



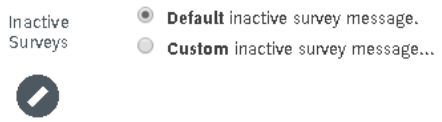
Survey Termination & Anonymization

- Default end of survey message reads: “We thank you for your time spent taking this survey. Your response has been recorded.”
- A Custom end of survey message can be created by selecting the radio button for that option and creating a custom end of survey message.
- Anonymize Response scrubs a response of identifying information before saving the data. This includes removal of the respondent’s IP address and location data. Important Note - If this setting was turned on before a response was collected, that respondent’s identifying information will never be retrievable. If this setting was turned on after a response was collected, the respondent’s identifying information will be retrievable.



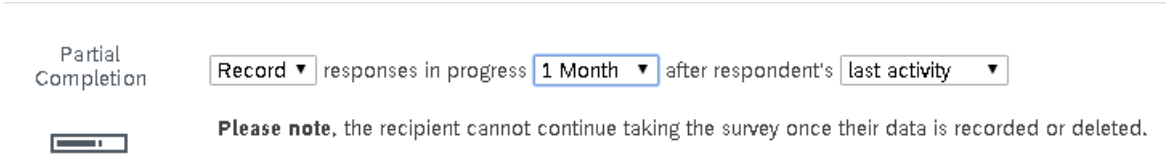
Inactive Surveys

When someone attempts to take a survey that has been deactivated (i.e., when your survey is no longer collecting responses), the following default message is displayed: "Thank you for your time, unfortunately this survey has been closed."



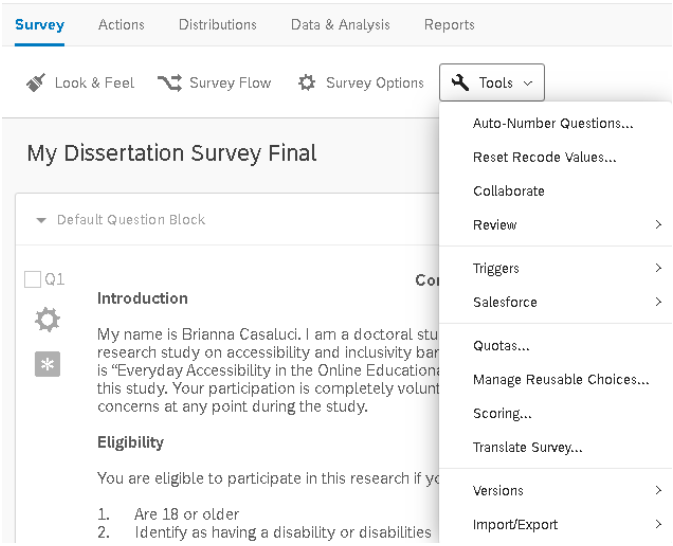
Partial Completion

- Regardless of a Survey Expiration Date, *once a participant starts a survey*, they have a certain time (you set) to complete the survey (1-week, 1-month, etc.). Partial completion is usually one week by default.
- Responses are only saved as the respondent progresses to the next page of the survey. If you only have a one-page survey, no responses would be saved. Either add page breaks between questions or have the respondent complete the survey in one sitting.
- Responses are only recorded as complete when the respondent has clicked "Next" on the last page of the survey and must receive the message "We thank you for your time spent completing this survey. Your response has been recorded." Otherwise, they will receive any reminder emails you send to complete the survey.
- It is recommended that you pad the max time for when any partial responses should be recorded to ensure that respondents can access the survey while it is still active.
- Once you deactivate the survey, you can close and record any partial responses regardless of the time period you set.



Tools Menu

The tools menu has options for auto-numbering questions, collaborating your survey, spell-check, analyzing your survey for mobile compatibility and logic, versioning, and Import/Export options.



Auto-Numbering Questions

Every question has a number, or export tag. As you move questions around and insert questions in between existing questions, the question numbers will be out of order. Rather than edit the export tags manually (unless you have a very specific type of numbering you would like to use), click the "Auto-Number Questions" option and the system will renumber the questions in order automatically. See also hiding question numbers from respondents in Survey Options.

Collaborating a Survey

The Collaboration feature allows you to give permissions to and share a survey with another Qualtrics user. See also Collaborating Surveys.

Spell-check

The Spell-check tool is found within the Tools Tab under the "Review" menu. Spell-check will scan question and answer choices for misspellings.

Check Survey Accessibility

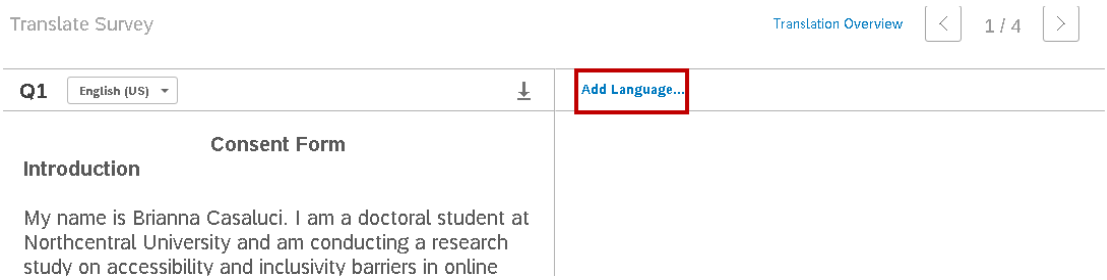
The Check Survey Accessibility tool is found within the Tools Tab under the "Review" menu. This tool checks to see if your survey meets accessibility standards for respondents who use screen readers and provide recommendations for fixing questions that are inaccessible.

Analyze Survey

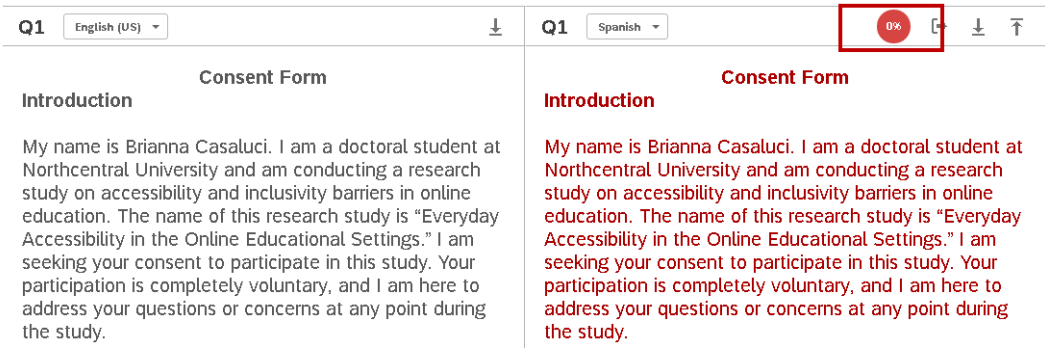
The Analyze Survey tool is found within the Tools tab under the "Review" menu. This tool will check your survey for mobile compatibility, validate display logic, check the overall quality of the survey, and make suggestions as to how to improve your survey before you distribute it.

Translate Survey

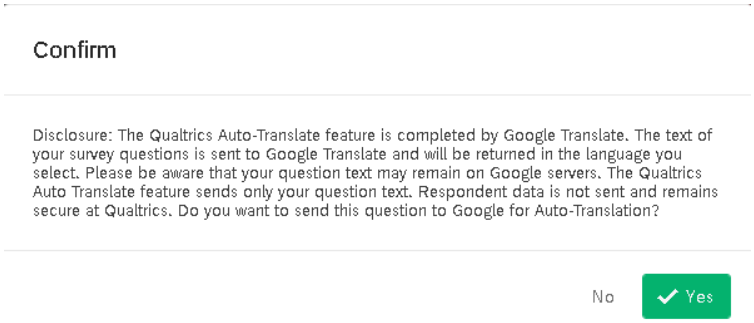
Near the bottom of the Tools menu, there is an option to translate your survey. Once clicked, the translation editor will divide the survey into two screens. In the left screen, you can view the survey in the language it was originally written. The right screen will display the translated version of the text. The first time you open Translate Survey, the right half of the screen will be blank. Click the "Add Language" link and select a language you would like to translate your survey.



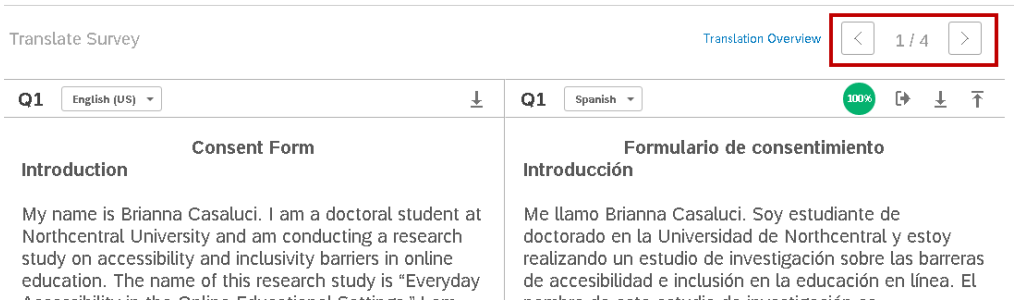
Then click percent complete in the upper right to translate your text. This tells you the percent of the text that was translated.



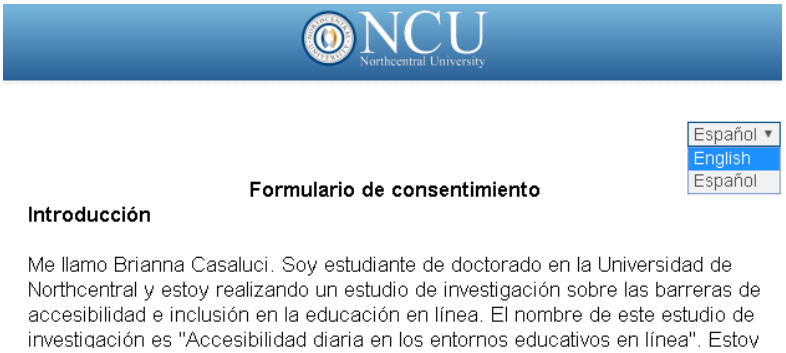
You will receive the following confirmation message prior to translating your survey.



To continue translating the rest of your survey, use the navigation arrows in the upper right and repeat the previous step by clicking the red percent complete icon to translate the text for each question. Clicking directly within the translation pane allows you to edit the translated text.



The participant taking the survey can then select their language from the drop-down list. It is best practice to ensure that the language set in your Survey Options is the language your survey is initially written. If your Survey Options language is set to English, but you write your survey in Spanish, respondents will have to choose English from the language dropdown menu to view the survey in Spanish.



View Version History

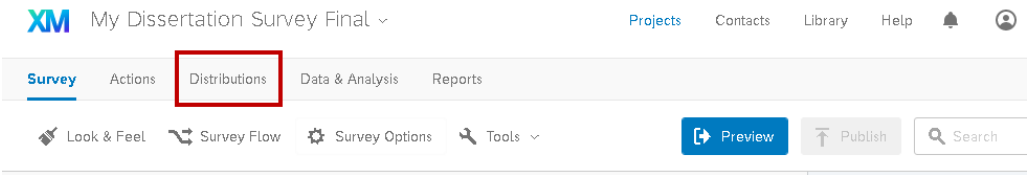
At the bottom of the Tools menu, you will see options for viewing changes made to your survey. There is also the option of restoring your survey to a previous version.

Import/Export

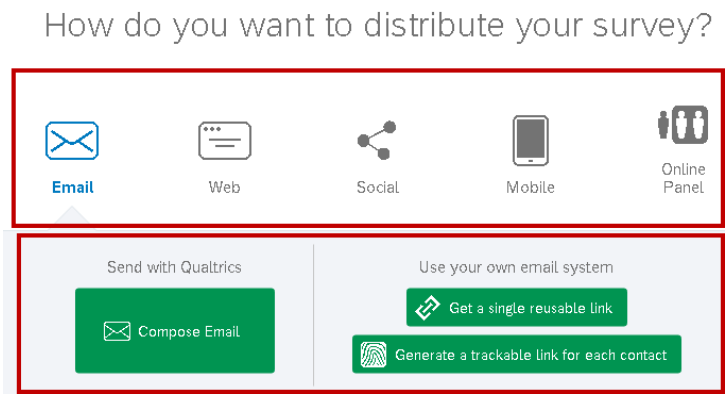
At the bottom of the Tools menu, you will see options for importing a survey from another account, exporting a survey to Word, and printing your survey.

Distributions

The Distributions tab allows you to activate a new survey, start collecting responses, use the Qualtrics mailer, and monitor your response collections. To start collecting responses, click the Distributions tab.



Alternatively, you can Publish your Survey by clicking the "Publish" button at the top of the Survey tab. Note: it is important that you verify that the appropriate settings for your survey have been set through the Look & Feel, Survey Flow, Survey Options, and Tools menus, and that you have thoroughly tested your survey for overall flow and functionality before distributing your survey. Upon opening the Distributions tab, you will need to select how you want to distribute your survey and by what means.

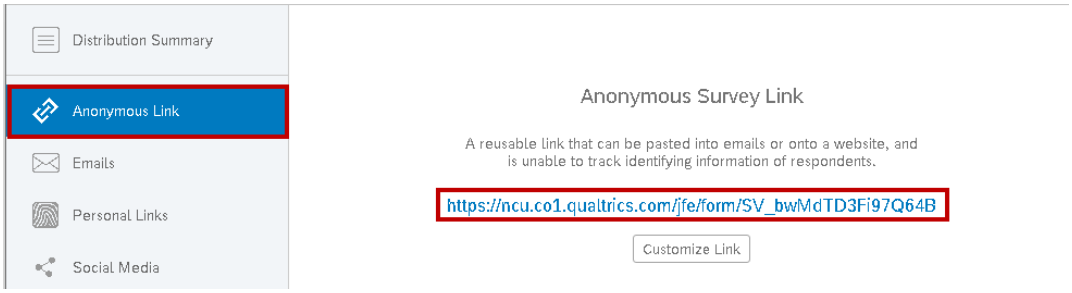


Email Distributions

Email distributions can use either the Qualtrics mailer or your own email system to send survey invitations. If you choose the Qualtrics mailer, you can send unique individual links to members in your contact list (see Creating a Contact List). Individual links record identifying respondent information that you can use in reports or as Embedded Data. Using the Qualtrics mailer allows you to keep track of emails sent, emails that failed, and emails that bounced. Additionally, you can schedule reminder emails, view the number of surveys that started/finish, and download the distribution history. To schedule an email after Creating a Contact List, view Composing an Email.

Anonymous Survey Link

Typically, the anonymous survey link is emailed from your own email system. **The anonymous survey link does not record identifying respondent information if "Anonymize Responses" in Survey Options is enabled**. Note this must be done before the survey is distributed so that the IP Address and Geo Location is irretrievable once the response is collected. To generate an anonymous survey link, click the green "Get a Single Reusable Link" button (shown above). If your survey is already published, click "Anonymous Link" from the left navigation bar within the Distributions tab. There is no limit to the number of times a respondent can use an anonymous survey link, but you can prevent multiple responses from the same computer and browser in Survey Options.



Web Distributions

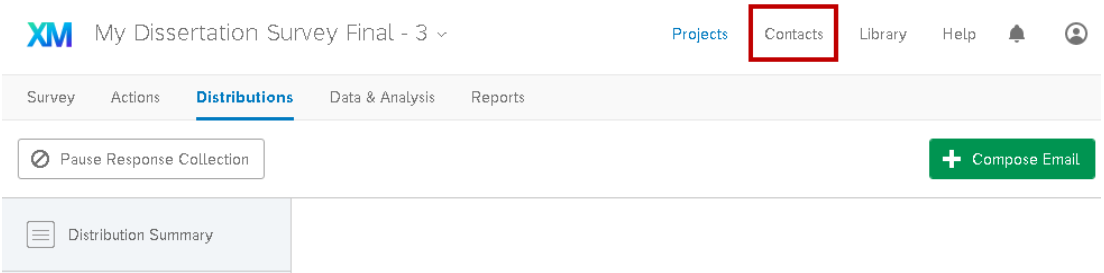
Through web distributions you can copy and paste an Anonymous Survey Link into email messages or social media sites. Again, **the anonymous survey link does not record identifying respondent information if "Anonymize Responses" in Survey Options is enabled**. Interaction with social media sites requires the use of Survey Title and Meta Description, which are set in Survey Options. The referring social media site will be recorded in each response as Embedded Data. Therefore, you will need to add an Embedded Data element in your survey flow and name it Q_SocialSource.

Online Panels

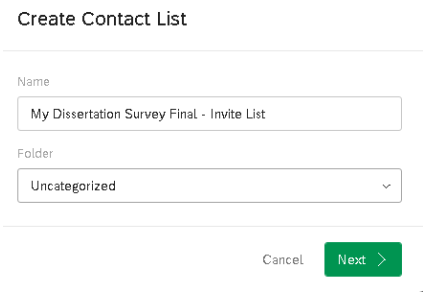
This feature is available to those who have purchased a panel from Qualtrics. Northcentral University does not cover the costs associated with purchasing a panel or targeted populations. To inquire the costs associated with purchasing a panel and panel integration processes for your study, please contact Qualtrics at 1-800-340-9194. If you plan to manage your own contact list for your study (free of charge), you can Create a Contact List or use your own email system to email an Anonymous Survey Link.

Creating a Contact List

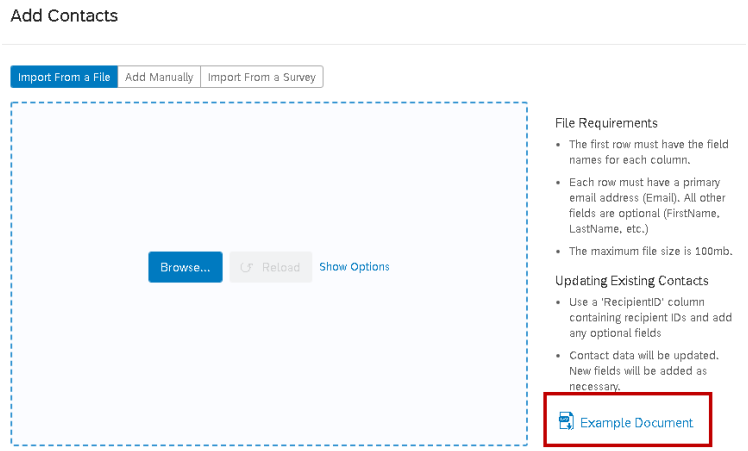
Contact lists are used to distribute individual and trackable survey links to your survey. Contact Lists are used in conjunction with the Qualtrics mailer located in the Distribution tab. When creating a contact list, you might add other variables like gender, state, occupation, and job title for each contact. These variables then become embedded data, which can be tied to individual survey responses. There is no need to add these variables as questions in your survey because they are stored in your contact list. By adding these variables as an Embedded Data element and to Data & Analysis, these variables are tied to individual survey responses and used in reports and exported file data. To create a contact list, click the Contacts tab at the top of the page and then click "Create Contact List".



Assign your contact list to a folder (if no folder is assigned, your list will be placed in the default "Uncategorized" folder) and click "Next".



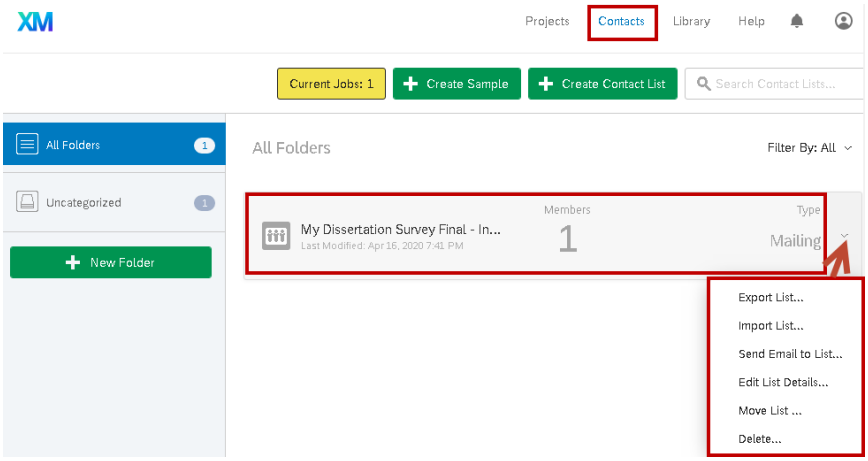
Download the "Example Document" link for how the .CSV file should be created. Make certain that you have a column labeled "Email" and complete other desired fields you want tied to your survey results. The order of columns does not matter, but spelling, spacing, and capitalization does matter.



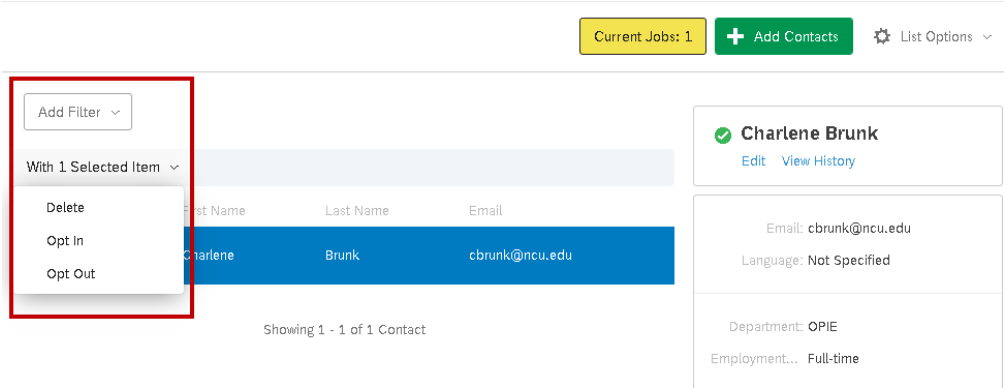
Each contact must have an entry in the "Email" column, with one row for each contact. Save the file as a CSV (Comma Separated Values) with UTF-8 encoding or as a TSV (Tab Separated Values). The maximum file size for a contact list is 100 MB. Import the CSV or TSV file to Qualtrics and verify that the fields in the preview screen of your contact list is correct and properly organized before clicking "Add Contacts".

To email survey invites to your contacts, click on the Distributions tab within the Survey itself. Navigating back to the survey form the Contacts tab can be little tricky. Click the XM icon in the upper left of the Contacts page or by click the Projects tab to access your survey and the Distributions tab.

Click the down arrow next to the contact list if you need to rename the list, delete the list, or export the list to a CSV or TSV. Note that the "Send Email to List" option *does not contain a link to the survey*. Emailing survey invites to your contact list is sent from the Distributions tab. The "Send Email to List" option is only used to send a precursor message to your contacts as a heads up prior to emailing the invite or to send a thank you message. To edit or add to the contact list, click the title of the contact list.

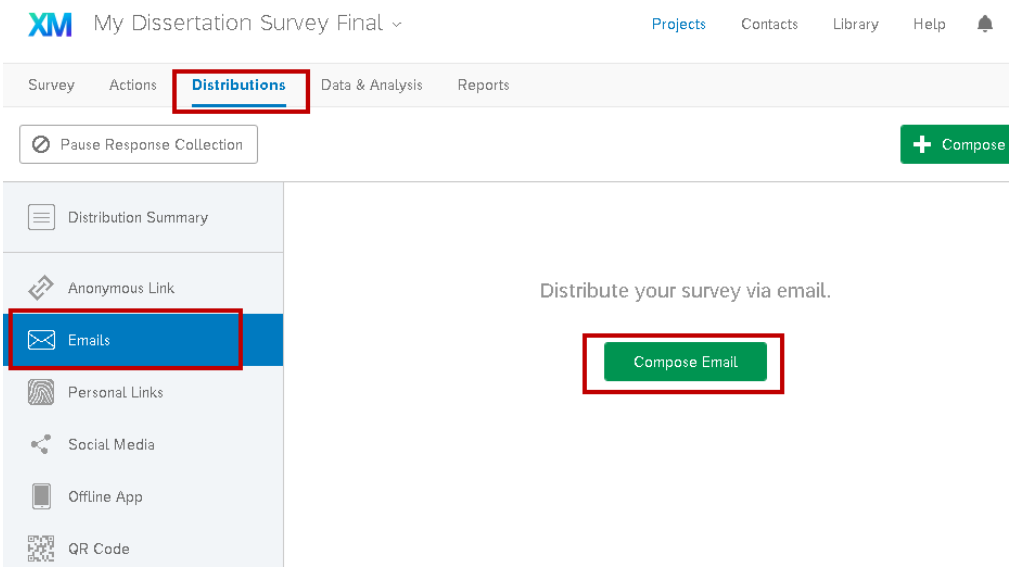


If you need to delete a contact from your list or opt-out a contact from your survey, check the box next to the name of the contact and then click the down arrow under “Add Filter” and select an option.

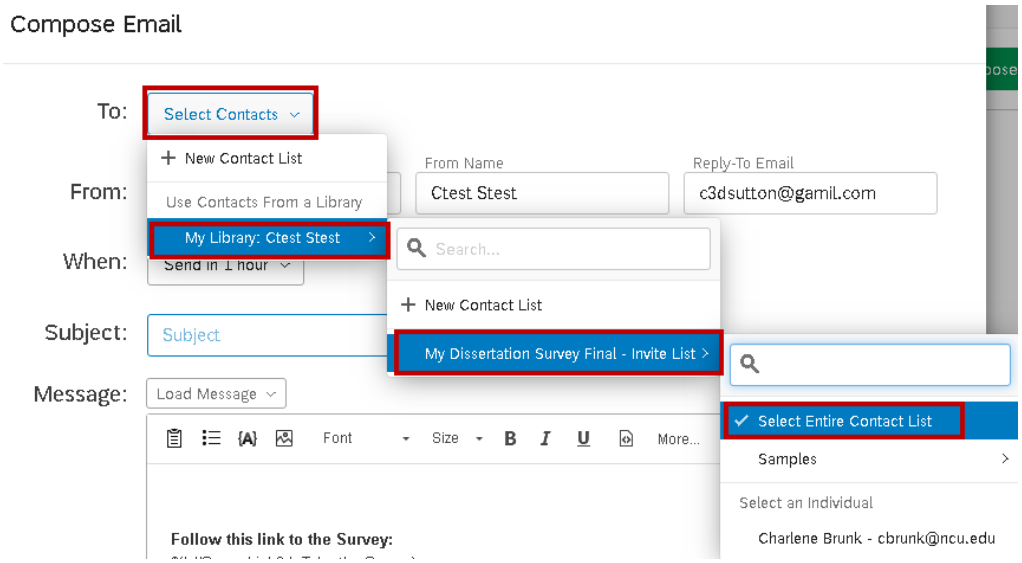


Composing an Email

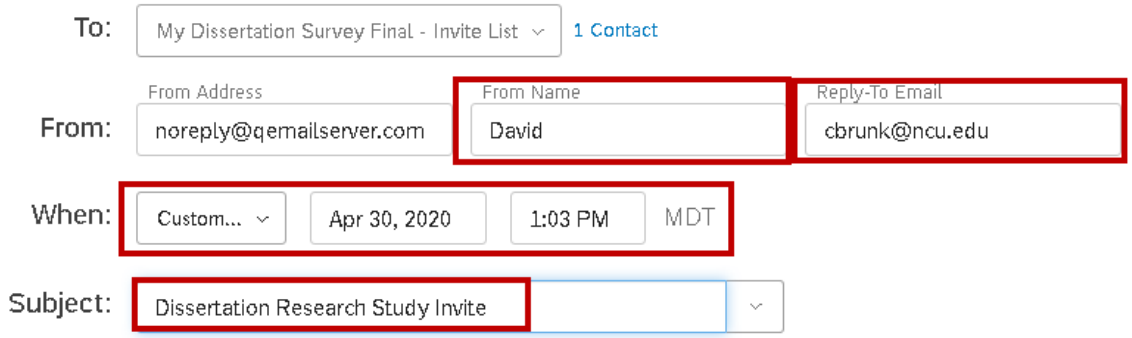
After uploading your Contact List, you will be able to distribute your survey via the Qualtrics mailer. The Qualtrics mailer will email individual, trackable, survey links to those in the Contact List. While you do have the option to enter email addresses manually within the Qualtrics mailer, it is recommended that the Contact List is created ahead of time. To get started, navigate to the Distributions tab, click the Emails link in the left navigation bar, and click the Compose Email button.



In the "To" field, click Select Contacts, chose the library where your contacts are located, and click "Select Entire Contact List".

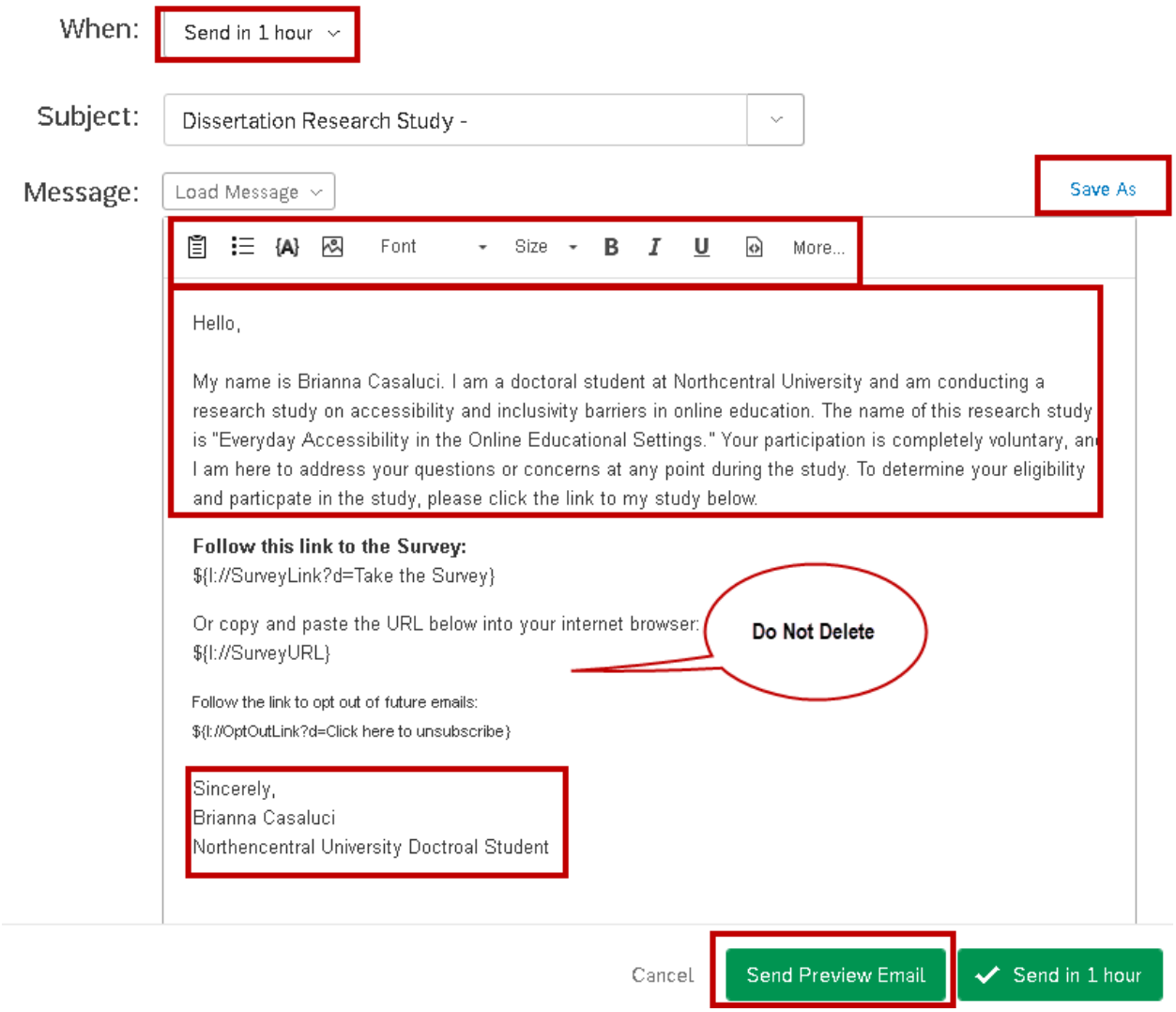


From Address, From Name, and Reply-To Email will be populated by default. You can change the From Name to anything you would like, and the Reply-To Email to an NCU email address. Click the button within the "When" field to schedule when to send the invite and type the subject of the email.

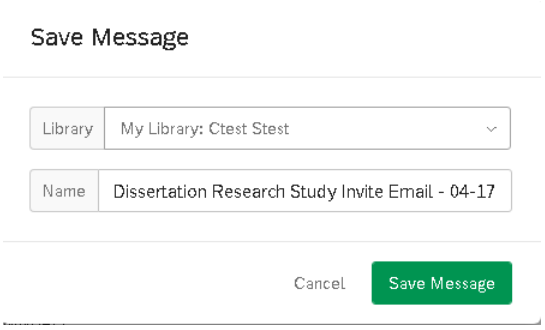


Type an email invitation message into the Rich Content Editor, or click “Load Message” in the message field to insert a previously saved email invitation from your Library (this is especially useful if you need to translate your email message since you can do that in your Library).

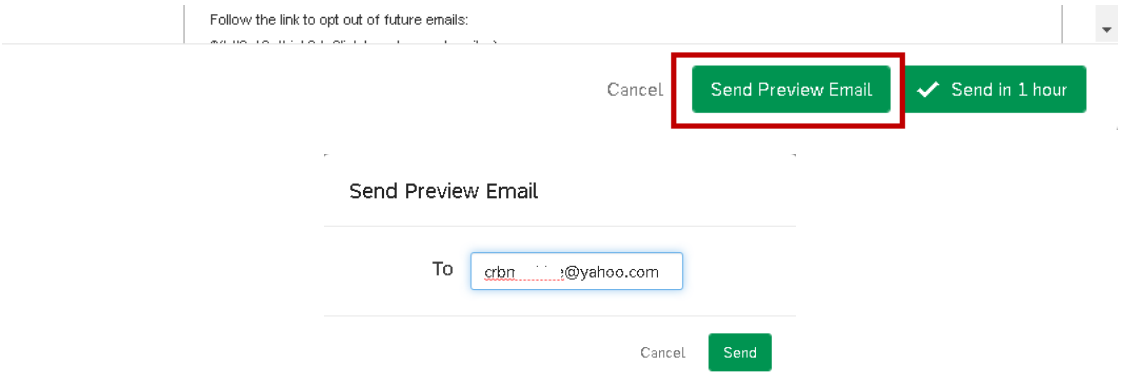
The email invitation message should be typed before the link to the survey details in the body of the message, which will automatically be generated by Qualtrics after the invite is sent. Do not delete or alter the auto-populated middle section of text in the text-editor window. Directly after the pre-coded section for “Follow this link to the survey”, type your closing. Adjustments to font size and type are made by using the text-editor options at the top of the text-editor window. When you finish typing and formatting the text, click the “Save As” link at the top of the text-editor window.



Save your invite message with a name of your choosing to your Library. This will come in handy when creating reminder messages to complete the survey. The message will be saved in the Library tab of your Qualtrics account.

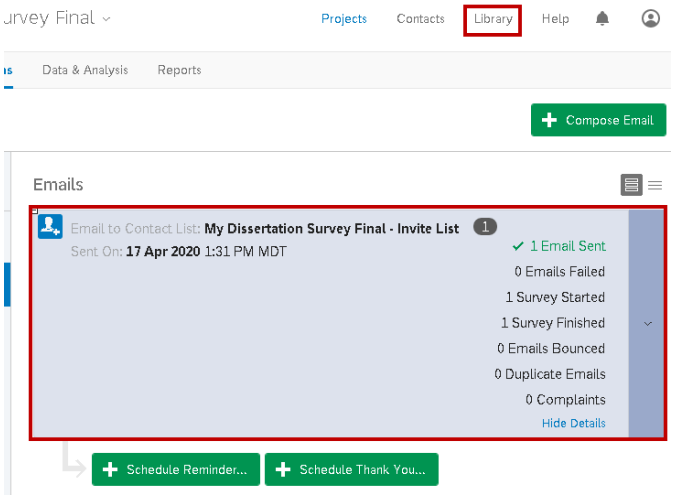


At the bottom of the compose email screen, you can send a preview of the survey to yourself to ensure everything is correct and get a feel for what the message will look like to those in your Contact List.

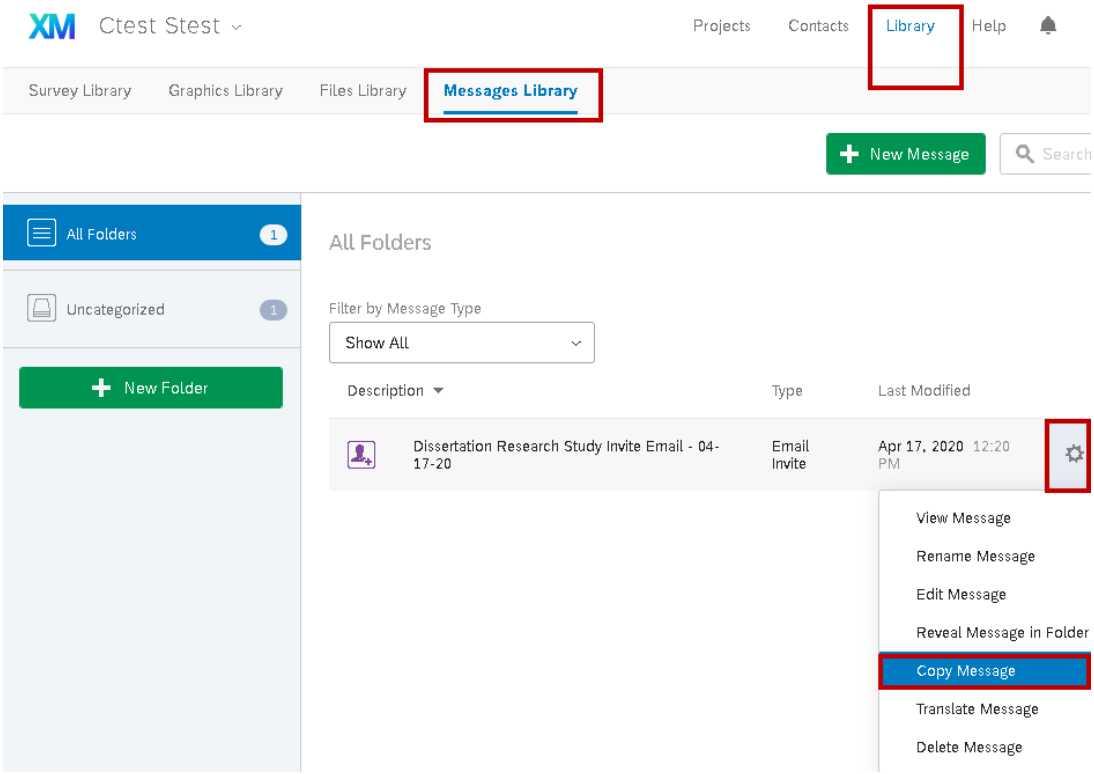


Reminder Emails

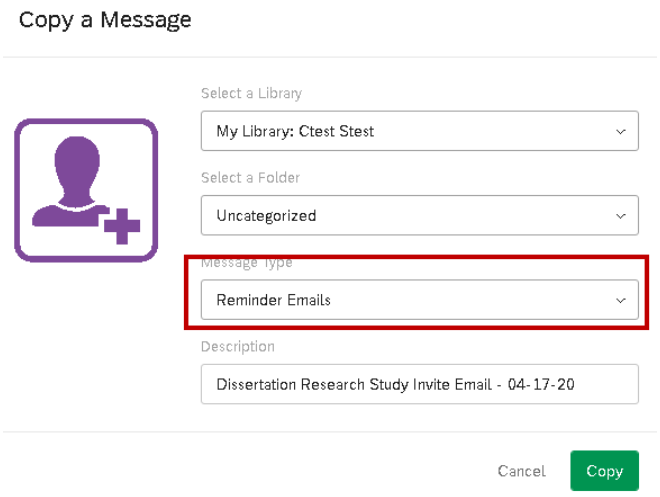
Once the invite email is sent, you can verify how many emails were sent, started, finished, bounced, and failed. To schedule a reminder message, click the Library tab at the top of the page.



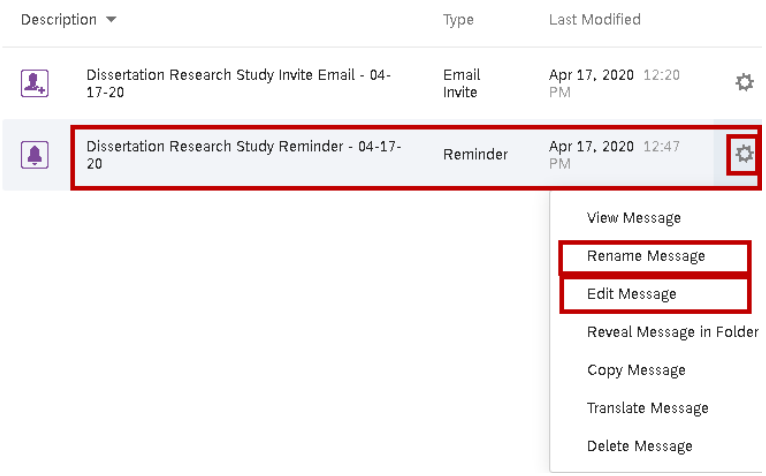
In the Library tab, navigate to the Messages Library where the initial invite message is stored. By clicking the gear icon next to the Invite Email, we can copy the invite to create a reminder email message.



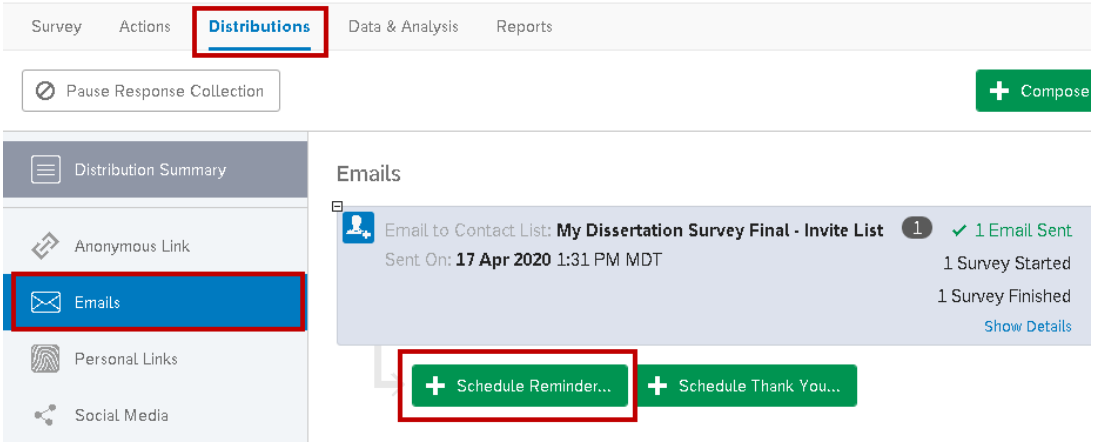
Under Message Type, select “Reminder Emails” from the drop-down list and click “Copy“.



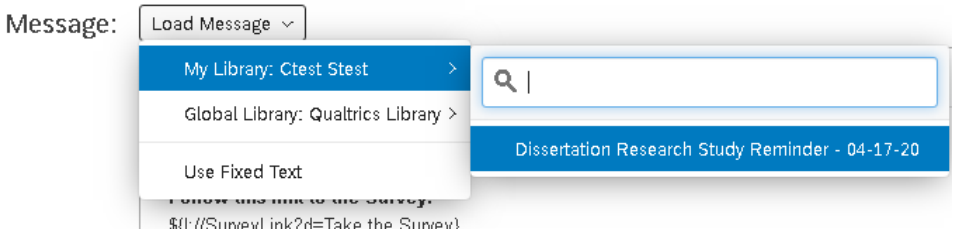
If you would like to edit the reminder email, click the gear icon next to the reminder email and click “Edit Message”. You may want to also rename the reminder from “Invite” to “Reminder”.



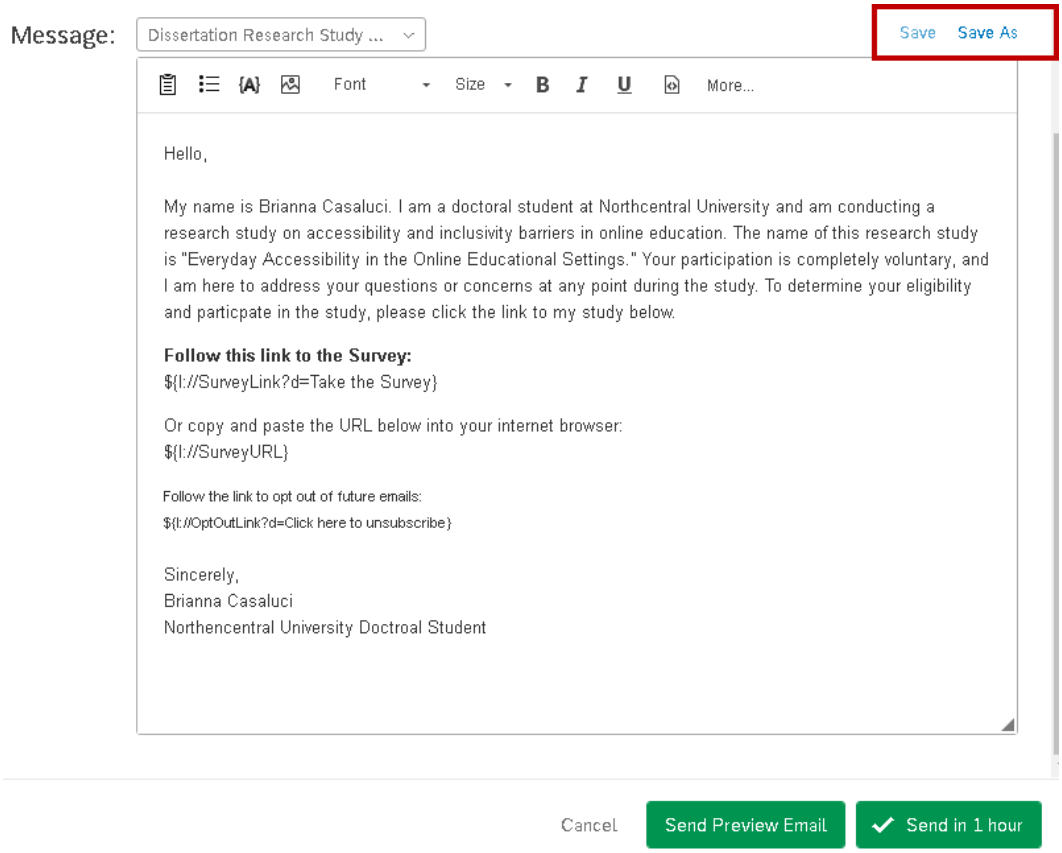
To send the reminder, click the Projects tab or XM icon in the upper left of your page to locate and open your survey. Click the Distributions tab, the Emails link in the left navigation bar, and click “Schedule Reminder”.



Edit the From Name, Reply-To Email, When, and Subject fields appropriately. Under “Load Message”, navigate to your library and select the reminder email.



Once the reminder email populates in the window, you can send or adjust the text. If the text is changed, you can either Save the message or Save As a new message.

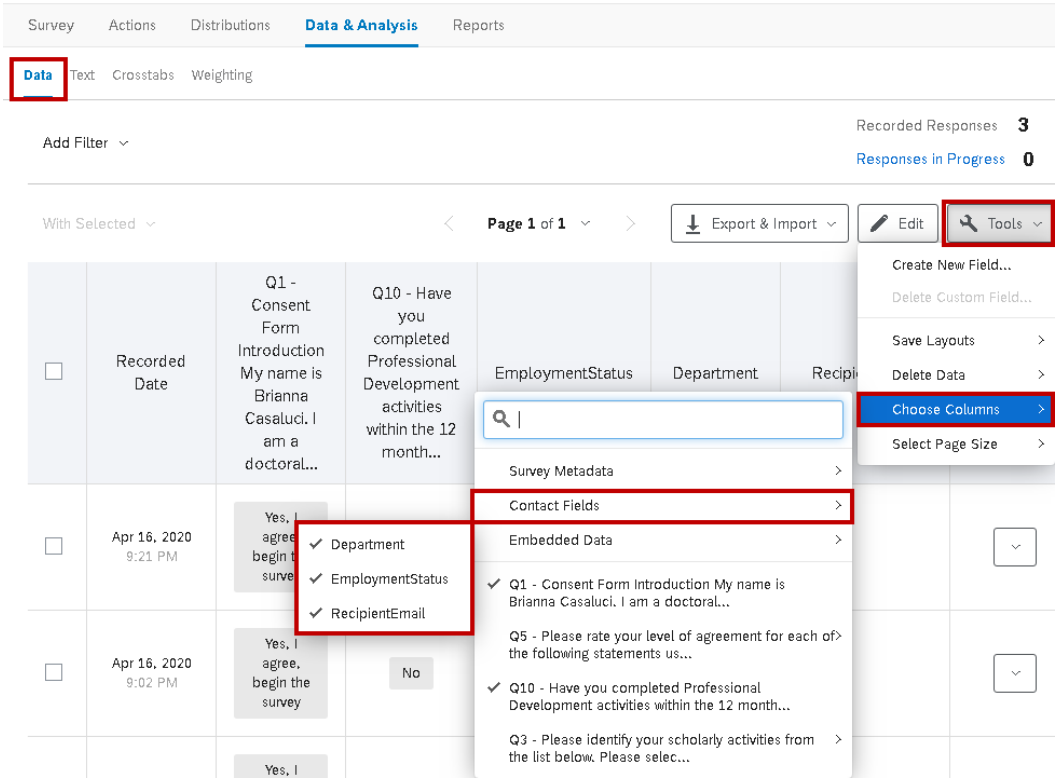


Data and Analysis

Functions within the Data & Analysis tab are quite extensive. More advanced data and analysis options can be viewed on Qualtrics' web page.

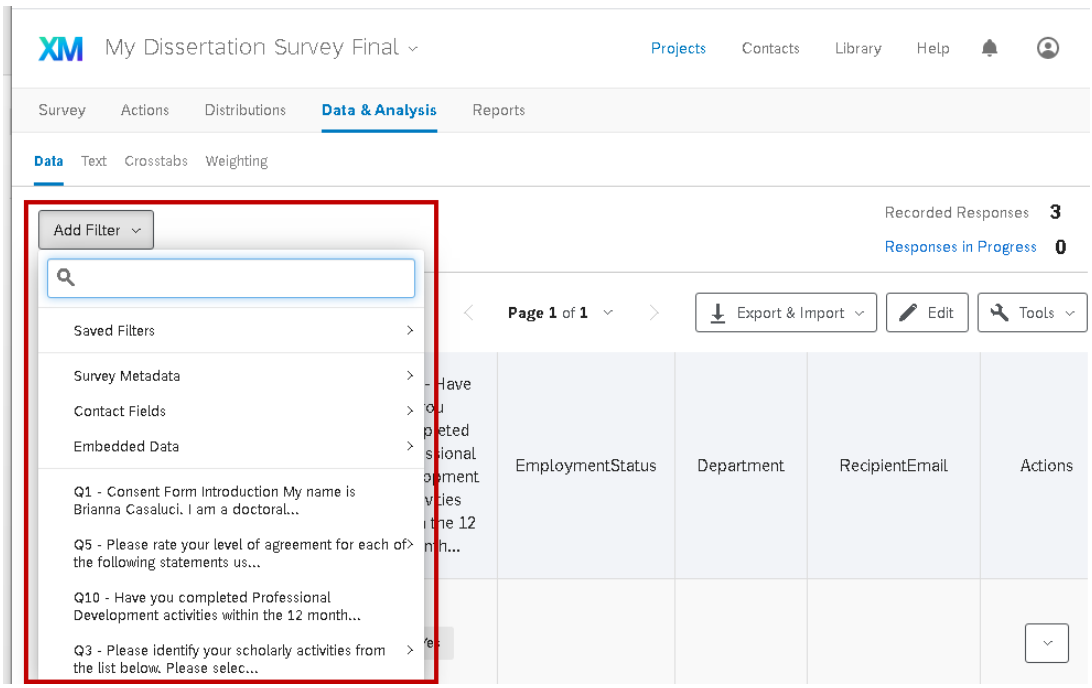
Tools

Under the Tools menu, you can add survey metadata, contact field variables, and embedded data fields to display with respondent results.



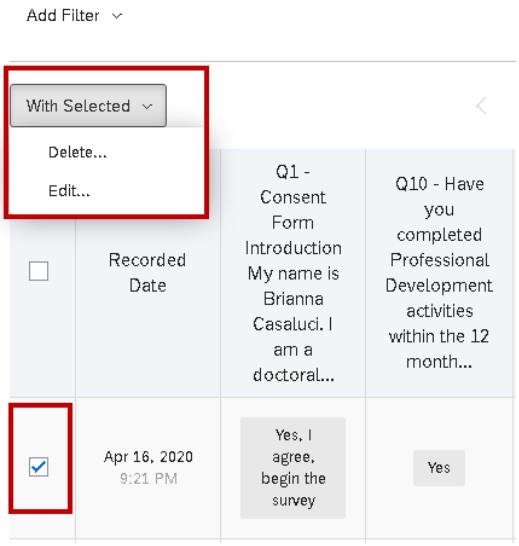
Filters

The Add Filter function allows you to filter your response list data by specific variables like survey metadata, contact field variables, embedded data fields, and survey questions.



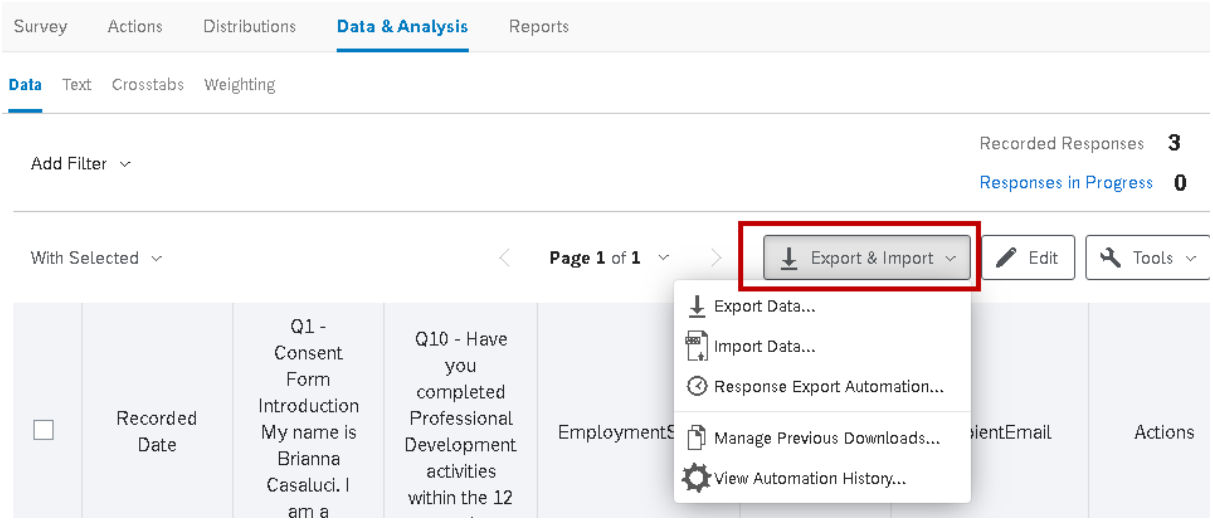
Delete & Editing Responses

If you need to delete or edit a particular response, check the box next to the row of data you want to edit and click Delete or Edit.



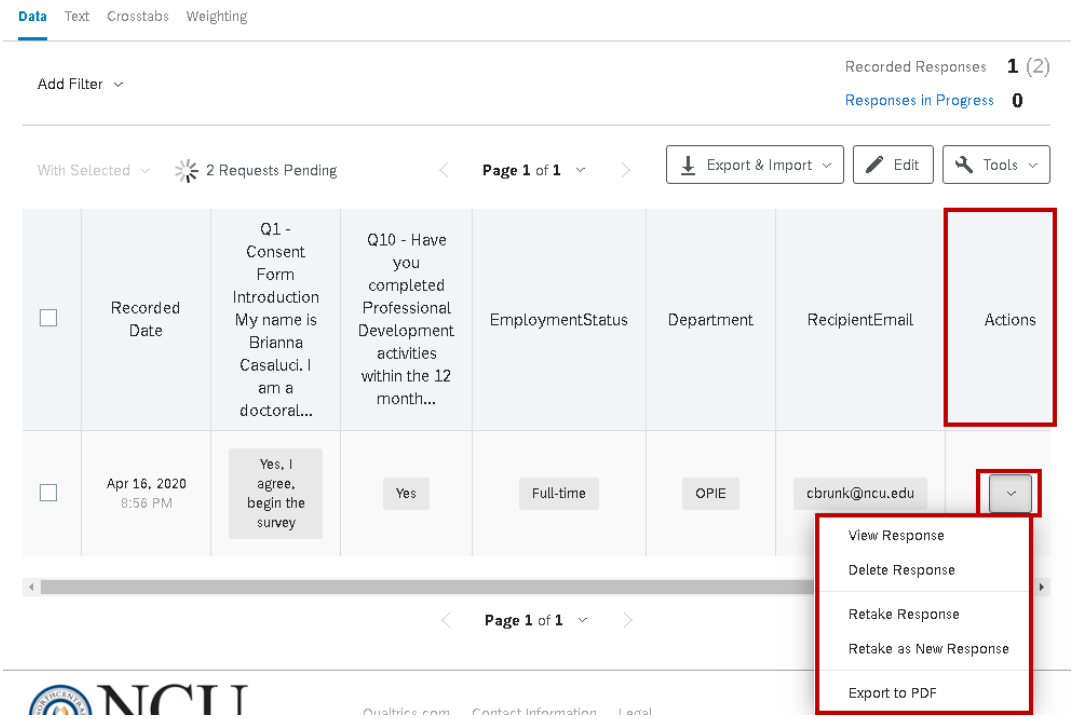
Export & Import

The Export & Import function allows you to export your survey data in various formats to include CSV, TSV, Excel, XML, SPSS, and Google Drive. Other functions include importing responses and managing previous downloads.



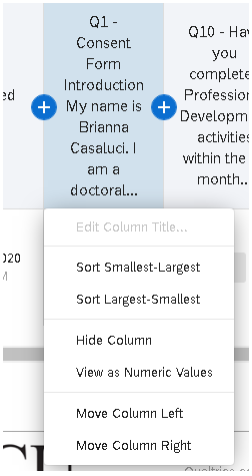
Viewing & Editing Responses

Use the Actions dropdown menu to view/delete individual responses or retaking a response. Retake survey links allow a respondent to go back and edit their response once it has been recorded.



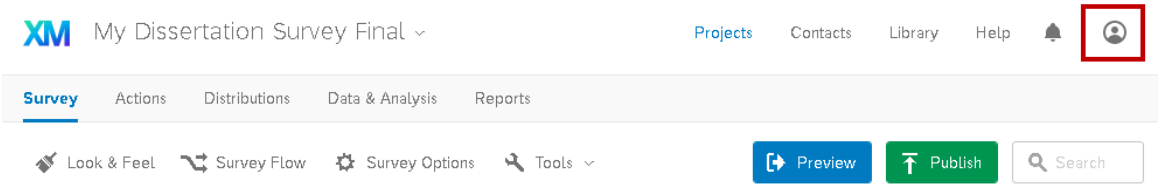
Sorting Data & Columns

Click a column header to sort, hide, or move columns. “View as Number Values” lets you view the coded values assigned to an answer choice.

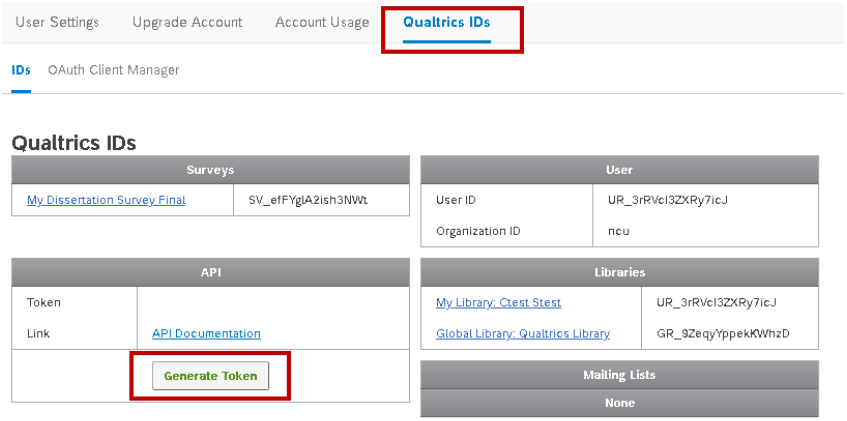


NVivo and Qualtrics

You can import completed responses from your survey into your NVivo project. Please note that not all Qualtrics account allow you to log into Qualtrics from NVivo using a Qualtrics API token. To determine your level of access to an API token, click Account Settings in the upper right of your Qualtrics account and then select the “Qualtrics IDs” tab.



If you have access to the Qualtrics API, you will be able to generate a token from within your Qualtrics account. If you do not see the Generate Token button, please contact oair@ncu.edu so that we can enable this permission for your account.



Note: If authentication into Qualtrics from NVivo fails, you will have to download the data from Qualtrics as a .csv file and then import the data into NVivo. Northcentral University's support team does not offer any assistance or consultations with API integrations that may require additional programming or knowledge to implement. Feel free to reach out to NVivo or Qualtrics for additional support.

Appendix A: Consent Letter (example)

Introduction

My name is Brianna Casaluci. I am a doctoral student at Northcentral University and am conducting a research study on accessibility and inclusivity barriers in online education. The name of this research study is "Everyday Accessibility in the Online Educational Settings." I am seeking your consent to participate in this study. Your participation is completely voluntary, and I am here to address your questions or concerns at any point during the study.

Eligibility

You are eligible to participate in this research if you are:

1. Are 18 or older
2. Identify as having a disability or disabilities
3. Are currently enrolled in a fully online degree program in higher education
4. Willing to answer questions about disability in relation to educational experience
5. Willing to answer personal questions about gender, race, and SES

Activities

In this study, participants will:

1. Complete an online survey for approximately 10 minutes

I hope to include 50 people in this research.

Risks

There are no foreseeable risks or discomforts associated with this study. You can skip any question you do not wish to answer or stop participation at any time.

Benefits

If you participate, there are no direct benefits to you. This research may increase knowledge regarding the ways in which universities and instructors can increase accessibility in fully online environments, based on the experiences and needs of disabled students.

Privacy and Confidentiality

In this study, certain identifying/private information may be collected. Any information you provide will be kept confidential to the extent allowable by law. To keep your information confidential, I will not ask for your name, institution, or any other identifying information.

The people who will have access to your information are the researcher and my dissertation chair Dr. Heather Miller. The Institutional Review Board may also review my research and view your information.

I will secure your information with these steps: Locking the computer file with a password and using encryption on my computer.

Even with this effort, there is a chance that your identifying/private information may be accidentally released.

I will securely store your data for 3 years. Then, I will delete electronic data and destroy paper data.

How the Results Will Be Used

The results of this research will be presented in my dissertation for my doctoral degree. The results may also be shared in conference presentations or a scholarly publication. No participant will be identified in the results.

Contact Information

If you have questions, you can contact me at: b.casaluci26@o365.ncu.edu.

My dissertation chair's name is Dr. Heather Miller. She works at Northcentral University and is supervising me on the research. You can contact her at hmiller@ncu.edu.

If you contact us, your information will not be linked to your responses if your study is otherwise anonymous.

If you have questions about your rights in the research or if a problem or injury has occurred during your participation, please contact the NCU Institutional Review Board at irb@ncu.edu or 1-888-327-2877 ext 8014.

Voluntary Participation

If you decide not to participate, or if you stop participation after you start, there will be no penalty to you: you will not lose any benefit to which you are otherwise entitled.

Consent

If you consent to participate in this research, please select the "I agree" below.

- ○ Yes, I agree, begin the survey
- ○ No, I don't agree, I do not wish to participate