Qualtrics Quick-Start Guide

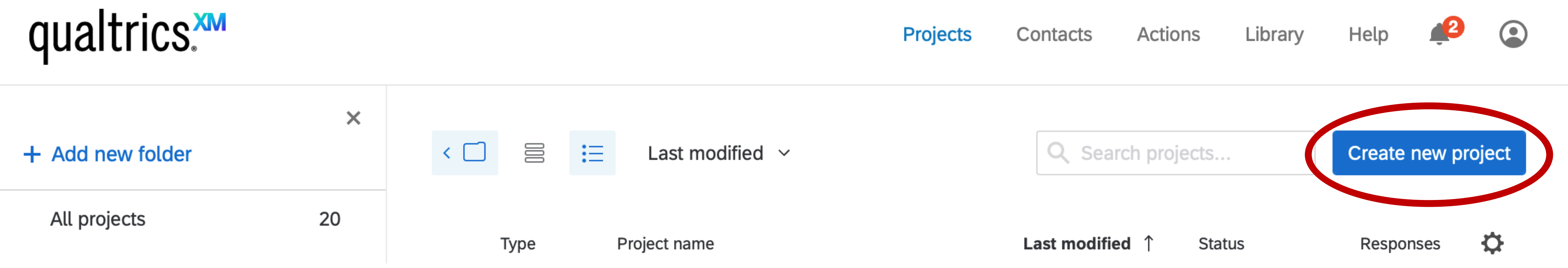
Creating and running a survey study: The basics

What is Qualtrics?

- Qualtrics is Western University's survey platform of choice. It allows researchers (or anyone interested in collecting data) to efficiently design and distribute a survey to participants
- This slideshow is designed to be a basic introduction to the platform and some of its features
- This is not a comprehensive guide, though detailed information on all features can be found here: https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/

Creating a project

- Navigate to https://mysurveys.uwo.ca/
  - You will need your UWO login and password (same as logging into Student Center, OWL, etc.)
- Follow these instructions for creating your project https://www.qualtrics.com/support/survey-platform/my-projects/creating-a-project/
  - You will likely need to select a “blank survey” project

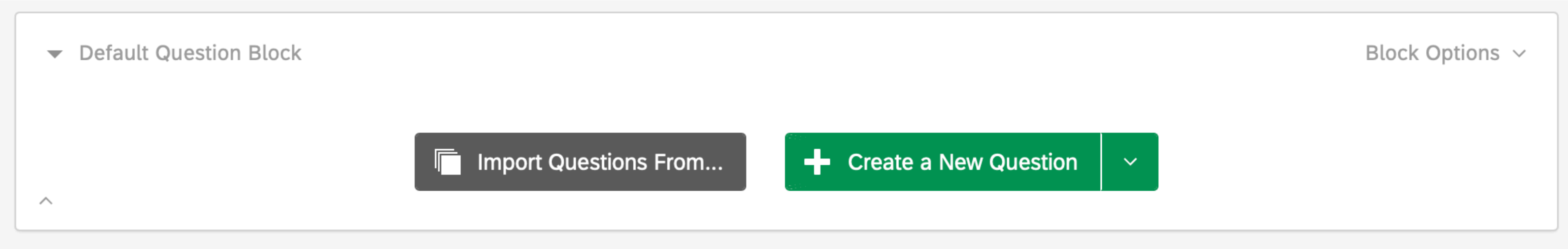


First place to start

- When running a survey-based study, all research ethics components must be present just like an in-person study. For example…
  - Letter of Information (LOI)
  - Consent indication
  - Debriefing information, if required (e.g. if deception is used)
- We will go through these components and see how they can be created via Qualtrics
- You will need to submit your survey alongside your REB application for approval before distributing to participants
- Forms and info: https://huronatwestern.ca/student-life-campus/beyond-classroom/research-huron/reb

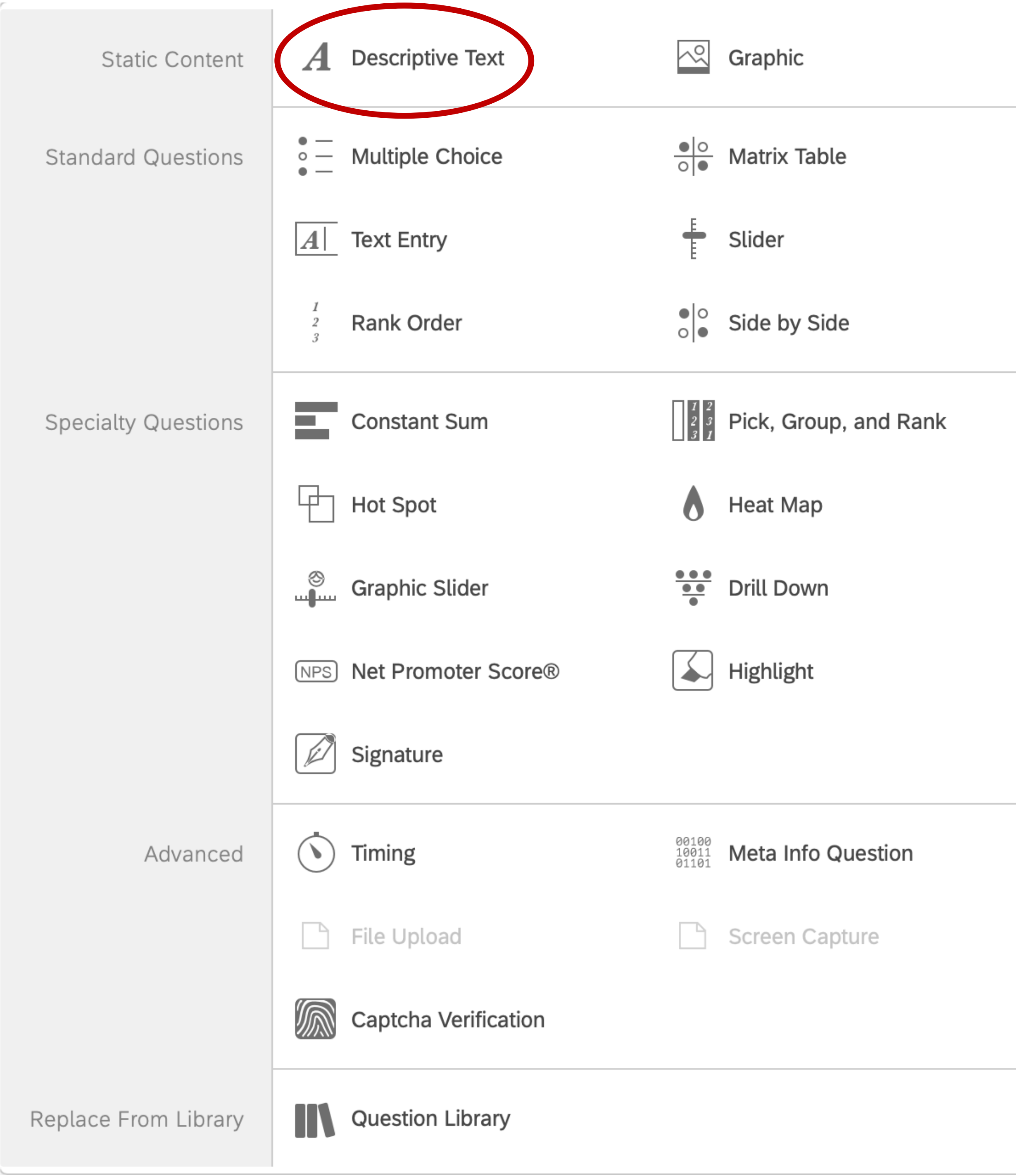
Blocks and questions

- Blocks are a way to group and organize the questions/items displayed to your participants
- Questions are the items within a survey block
- After constructing your LOI in accordance with REB policies, you can implement it as a “block” in your survey.
- Qualtrics will already have a blank, default block for you to start with
  - Select “create a new question”



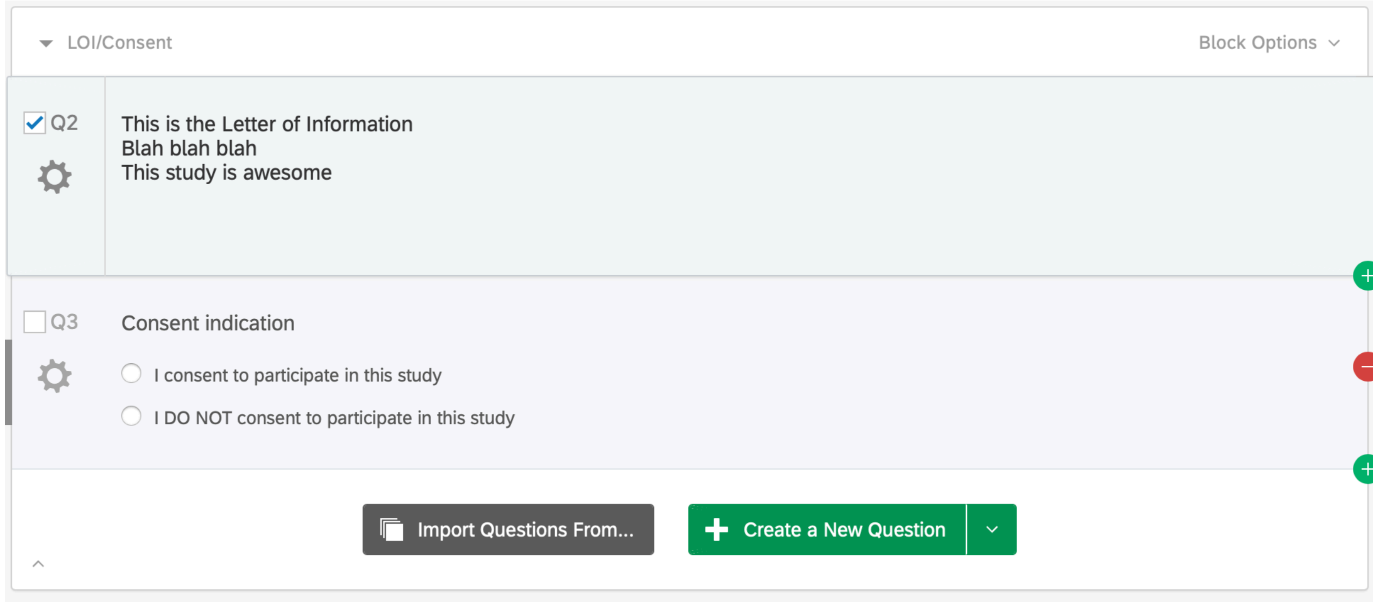
Letter of Information

- When you click to add a question, you will be able to select from many question types
- Thankfully, the commonly used types are intuitively named. For an LOI/consent form, you might select “descriptive text”
  - You can copy paste your LOI into the text field created by adding a descriptive text section



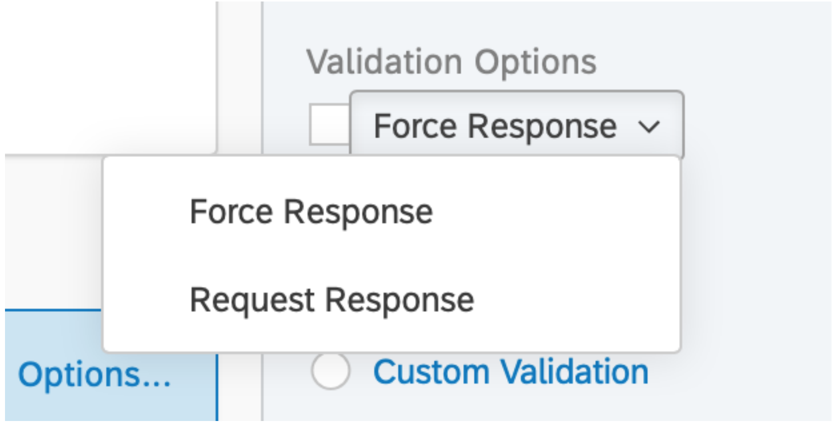
Consent indication

- There are several ways of providing consent in a survey. For example…
  - Active consent: participant checks a box/presses a button labelled “I consent/do not consent to participate in this study”
  - Tacit consent: you clearly indicate to participants that by continuing with the survey, they are consenting to participate.



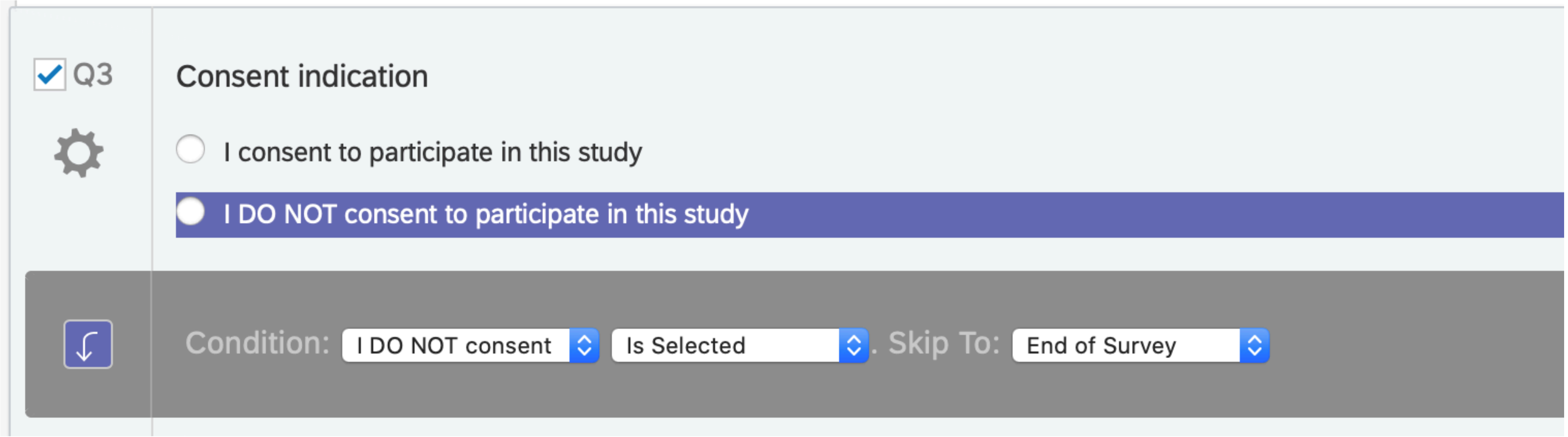
Consent indication

- For consent indication, you may want to check out the question options that appear in the sidebar when you select a question
- For active consent, select “force response”
- Participants will be unable to proceed until they select an option
  - Note: this is the only question you can make participants answer
  - Do not collect personally-identifiable information from participants



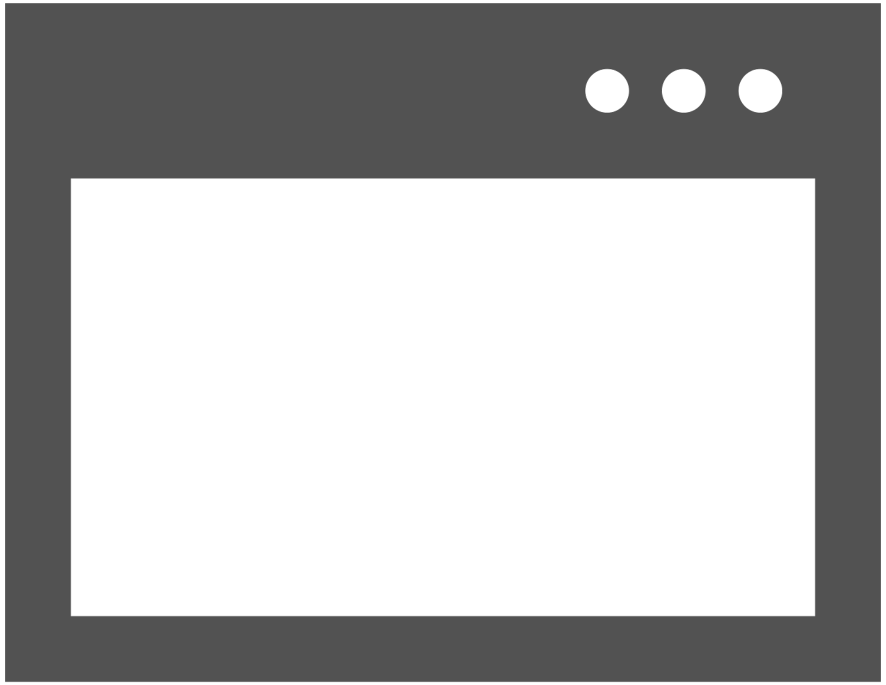
What if they do not consent?

- You can use “skip logic” in the question tools sidebar to specify conditions under which a participant will be skipped to the end of a block, the whole survey, etc. It might look like this:



Right to withdraw

- A participant may exercise their right to withdraw from a study at any time simply by closing the survey, the browser window, tab, etc.



Adding study questions

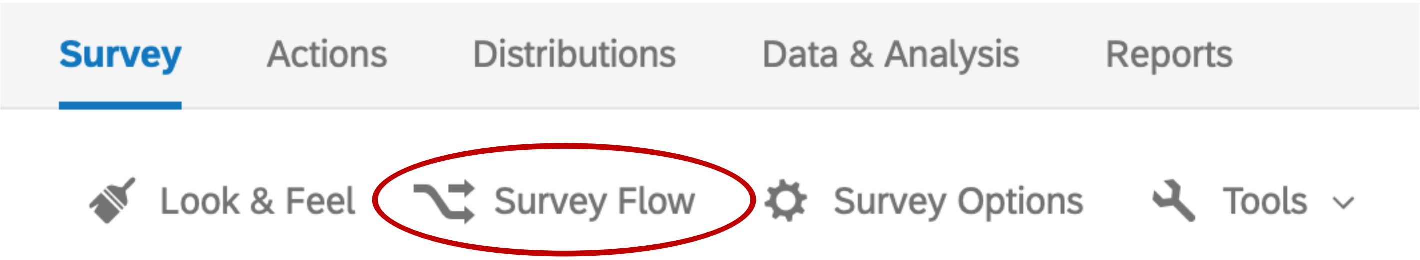
- Adding questions you want to ask participants is done much the same way as adding a question or block for your LOI and consent page
- For most use cases, question types in the “standard” section are completely fine
- Often, a question type can be implemented in several ways
  - For example, a rating question (e.g. scale) can be done using a multiple-choice selection or clicking and dragging a slider
- Test out different options and see what you like best
  - When you select a question, you can preview it to see what it will look like for your participants

Validation and timing

- Question validation allows you to do things such as
  - Forcing/requesting a response to a question
  - Ensuring the correct content is inputted by the participant (for example, you might be asking for a whole digit number between 1 and 10)
  - NOTE: when you use validation, participants may not be able to skip the question
- Timing allows you to do things such as
  - Limiting the amount of time a participant can spend on a question
  - Recording the amount of time a participant spends on a question
- These tools are located in the sidebar that appears when you select a particular question within a block

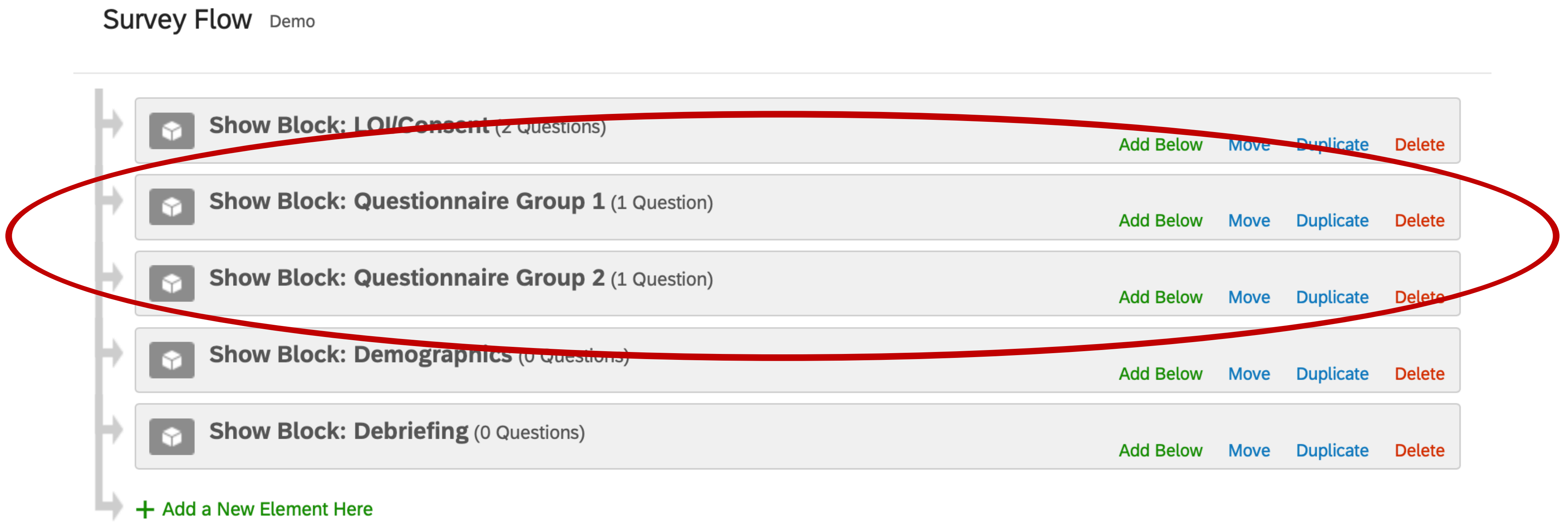
Survey flow

- Survey flow is exactly what it sounds like: how do the components of your survey flow? In what order?
- You can find this information and edit by clicking the “survey flow” tab at the top of the page



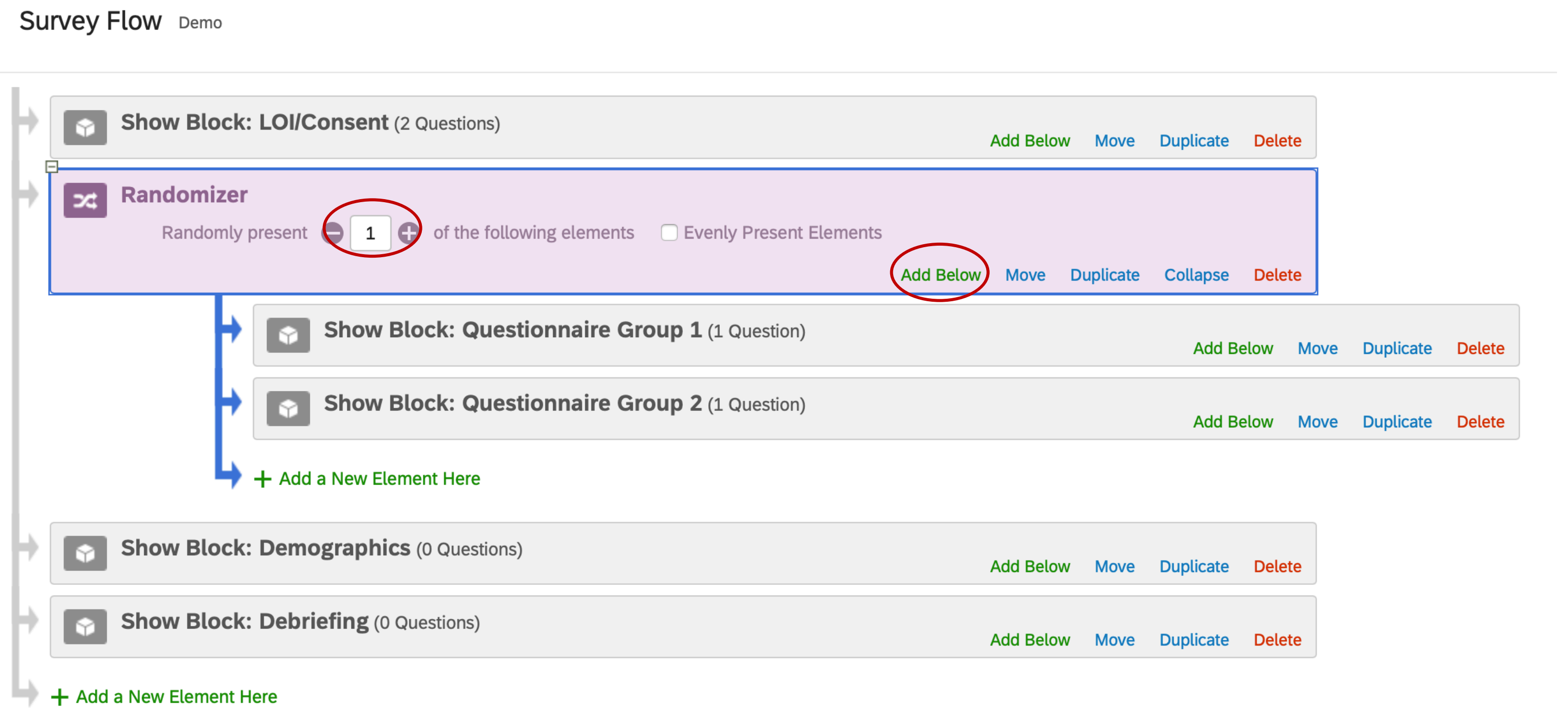
Survey flow example

- Let's suppose we are running a study with two conditions, which must be randomly assigned
  - Without editing your survey flow, it might look like this: two blocks, one for each condition, in consecutive order



Survey flow example

- That’s no good – we want participants to only complete one of the questionnaires, for group 1 *or* group 2, but not both
  - Here’s what the survey flow looks like after adding a “randomizer” below our LOI block to present only one of the elements
  - We can check “evenly present elements” to keep group sizes as equal as possible



Survey flow example

- Now, participants will be randomly presented with one block, therefore assigned randomly to group 1 or group 2
- All other blocks remain the same, viewed by everyone
- Note: for skipping through non-consenting participants, use the skip logic function described previously
- All content editing is done from the main page, not from within the survey flow page
  - The survey flow page is mostly just for directing participants through content you have already created
  - You can drag blocks around in the survey flow to rearrange as you wish

Debriefing

- Your debriefing form, in whatever form necessary based on your study, can be added in the same way as your LOI (e.g. a descriptive text question)
- Don’t forget to thank your participants for their time

Useful Qualtrics tabs

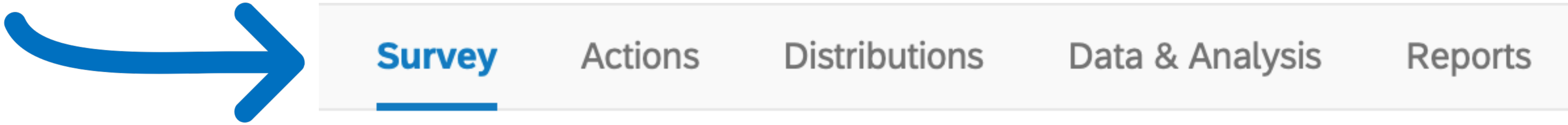
These are located at the top left of the page

Survey: Here, you can make edits to the survey content itself

Distributions: Manage how and when your survey is distributed to participants

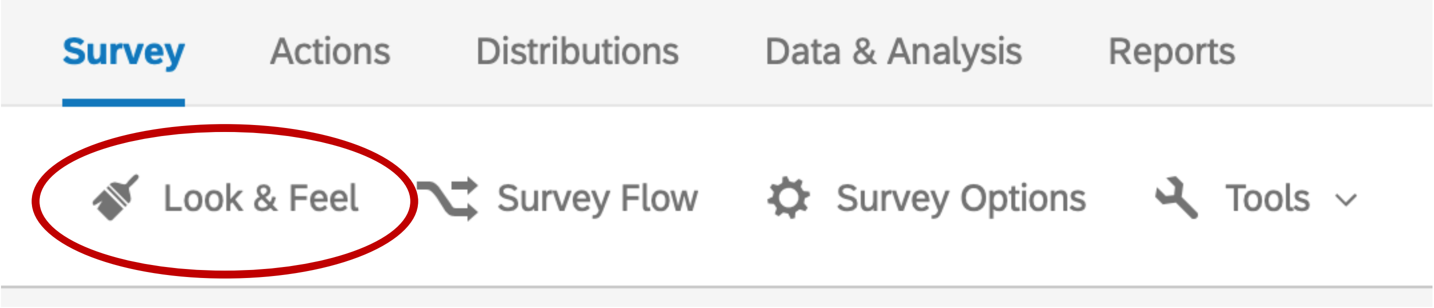
Data and analysis: Download and manage your survey data

Reports: A quick and easy way to glance at some descriptive statistics about your survey responses

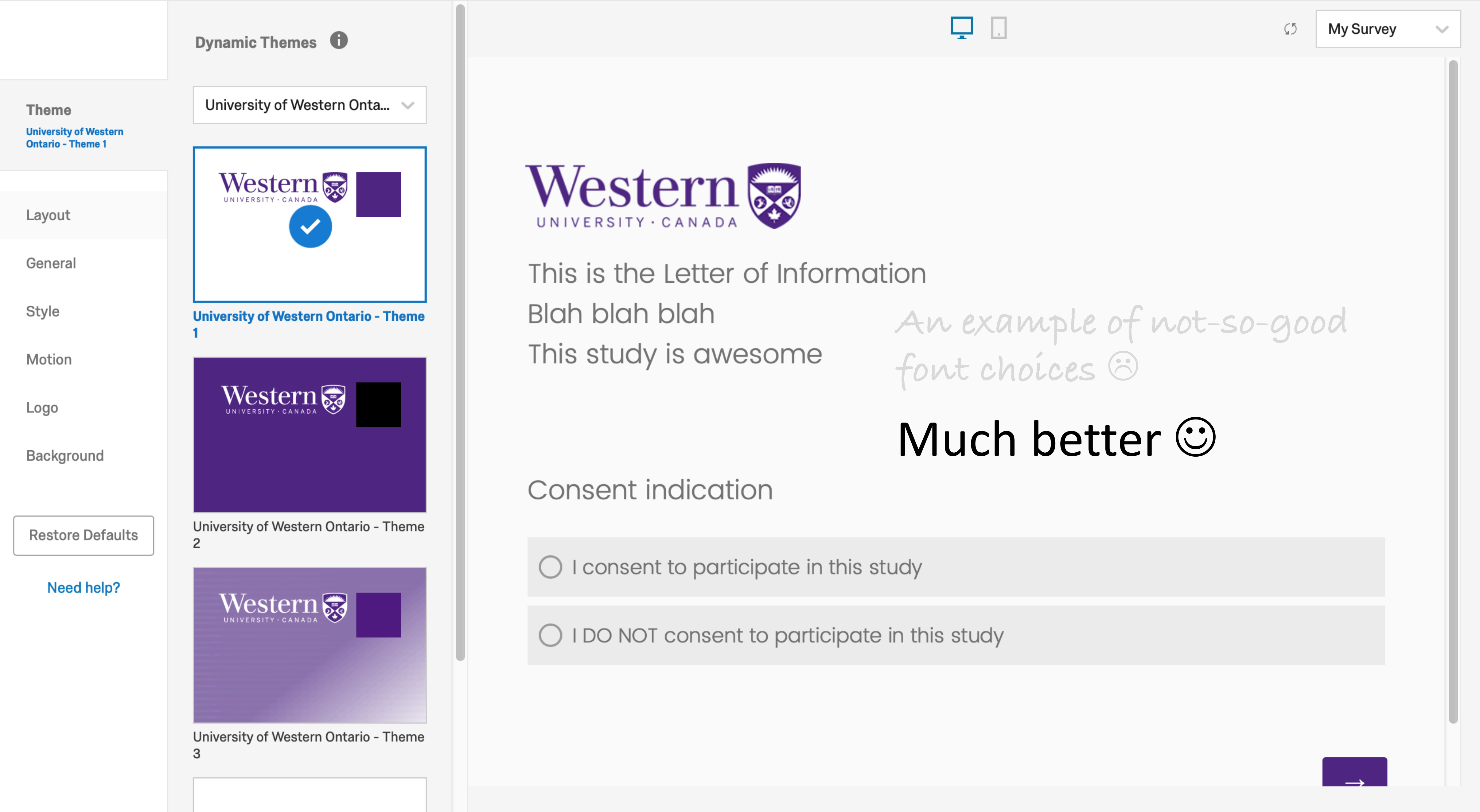


Look and feel

- Once you have finished creating the content of your survey, you can navigate to the “look and feel” subsection of the “survey” tab
- Here, you can change how your survey looks and preview changes in real time
  - Some good ideas might be larger and darker text for readability, a good font, institutional affiliation logo, a progress bar, etc

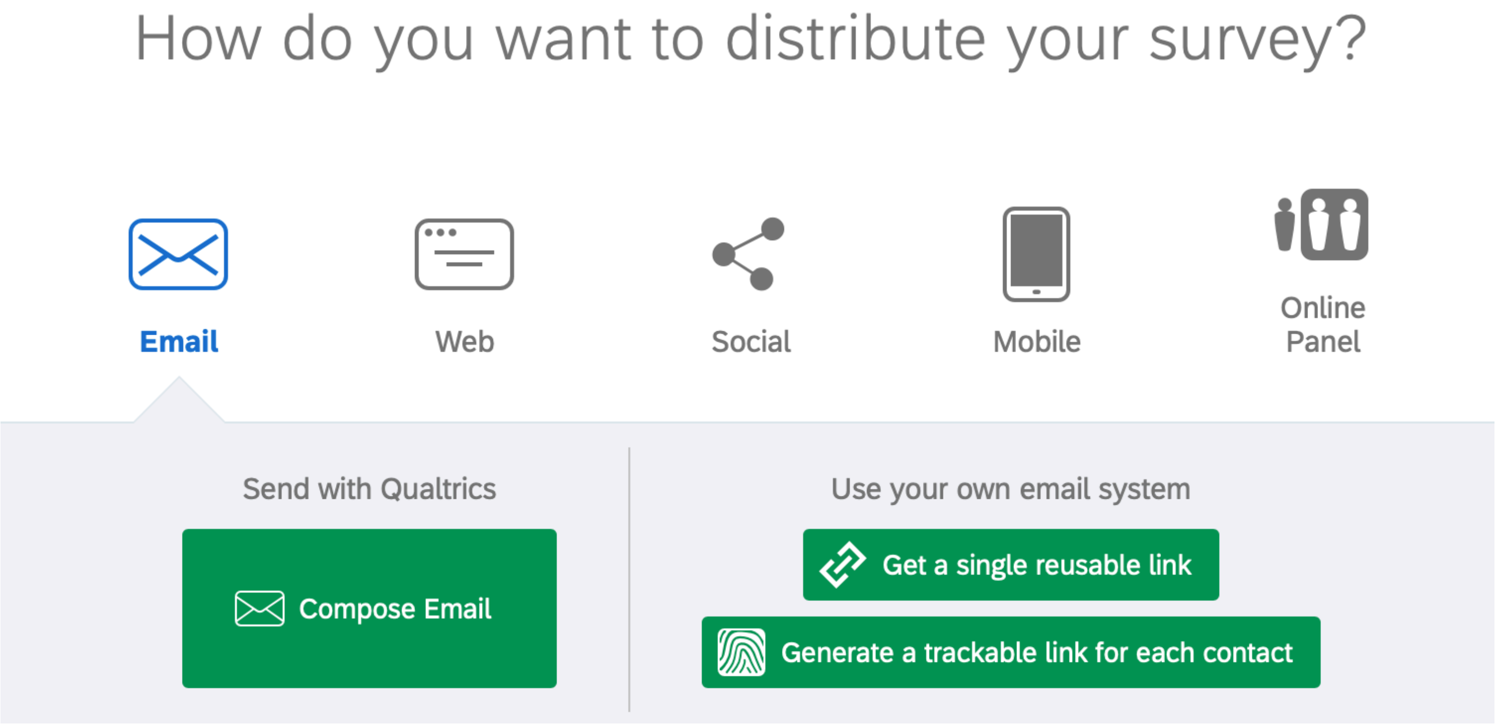


Look and Feel



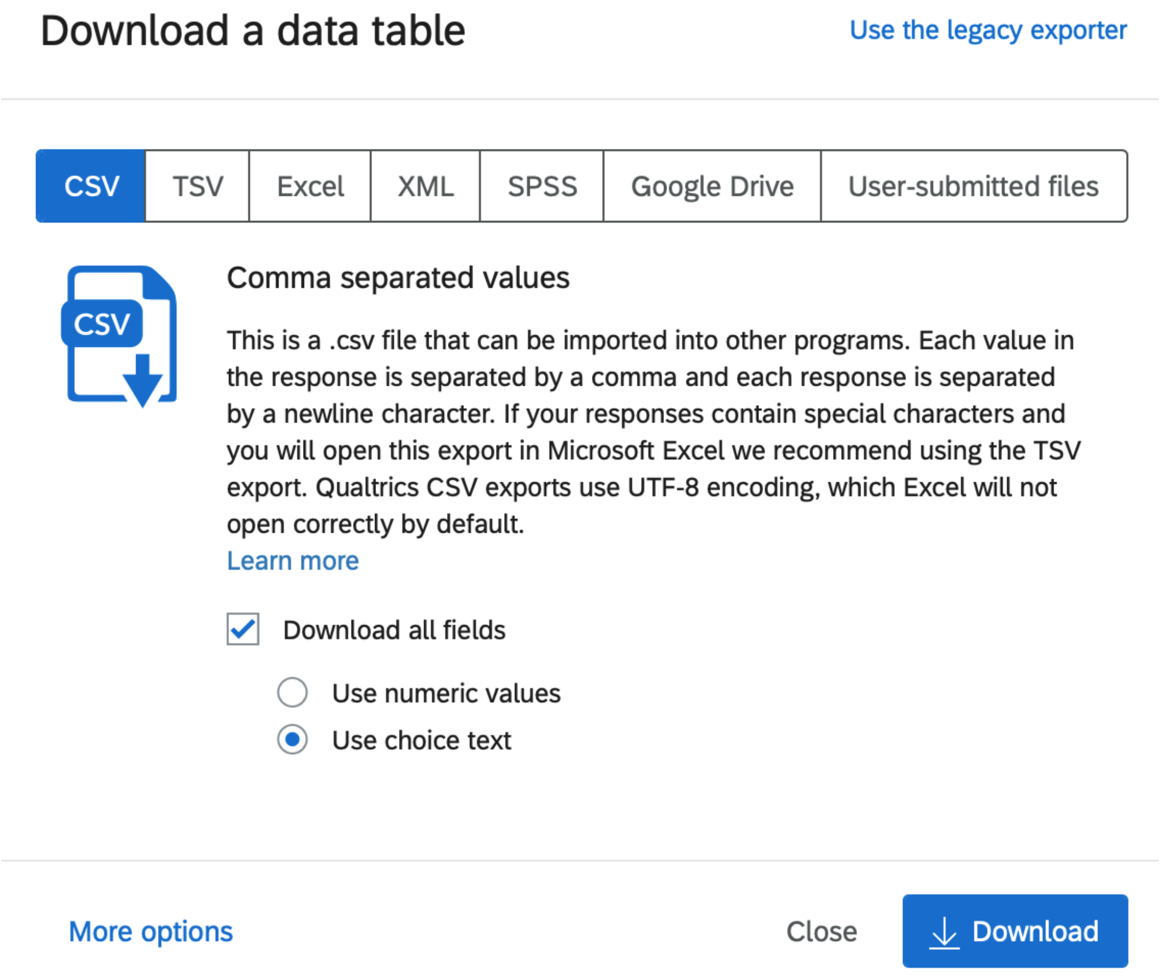
Activating and distributing your survey

- Make sure you click the green "publish" button to ensure your changes are reflected in the survey seen by your participants
  - You must "publish" after every change to update the participant-facing version!
- You will see several options to choose from in the "distributions" tab



Downloading your data

- When you have finished running your study, navigate to the “data and analysis” tab
- Select the data export format that works best for you
- Note the “more options” menu if you require extra info, such as question viewing order



This sums up the basic features of Qualtrics and should be enough to get you started on a simple survey. There are many more functions and advanced features, and if your study or research design requires them, please consult the official feature guide.