I originally developed this guide for my students and found that I have been giving it to as many colleagues as students, so I decided to post it on our department web page. Please feel free to use and distribute this document as you see fit.

Background – Qualtrics (Qualtrics Inc., Provo, UT) is a private company to which RU pays for service. The primary service is an online questionnaire development, delivery, and management system. This service meets the standards for security required by CFR 45.46 (Federal Guidelines for Human Research) and by VITA (Virginia Information Technology Agency). Specifically, the data is stored in a secure manner by Qualtrics and when the questionnaire is being completed and transmitted it is encrypted.

Qualtrics can be used for data collection (regardless of whether it takes place in the lab or outside of the lab).

This guide will make frequent references to SONA, which is an online research participant pool management system to which the psychology department subscribes. This program allows students to sign-up for studies and it will automatically send them to the appropriate Qualtrics study. If you are not using SONA, just ignore these references.

I. Overview of data collection strategy:

1. Participant sign up:
   Students will first register with SONA (another service to which the psychology department subscribes) wherein they will find your study. When they sign up for your study they will be given a password which they will need to access your survey and they will be directed to your Qualtrics survey.

2. Password-
   To ensure only invited participants complete our survey, participants will be given the password when they sign up for the study in SONA. They will have to enter the password before the Qualtrics survey will begin. If you are not using SONA, you may include your password in an invitation email you send potential participants.

3. Consent Form- Block 1
   - Qualtrics arranges questions into blocks. You could put the entire survey in a single block or you can separate it into multiple blocks. Typically, you will want to use separate blocks for each part of your study (e.g., each task or measure). This becomes especially helpful if you want to randomize the order in which certain elements of your study are presented, randomly assign people to condition, and/or randomize the order of items within measures. If you put everything in one block and randomized it, then all the items from different questionnaires will be mixed together in a random order.
   - The first Block will typically be your consent form. Moreover, you should set it up so that if participants click Yes, then they proceed to the next block of questions. If they click NO, it should jump them to the debriefing form (Your End of Survey Message) and they can exit back to SONA from there. You will also want to use response validation that forces them to answer the question before they can move on (this will make the IRB folks happy). You will want to be sure to have big and bold instructions to print the consent form before they are asked to click Yes or NO. The consent form should be retained for their records (typically an
IRB requirement) and can serve as proof of participation in case there is a problem with assignment of participation points for studies offering course credit or extra credit.

4. Questionnaires:
   - Each questionnaire can be developed in its own block and then randomized within blocks. This way each participant will get a different order of questions items and you can rule out any item order effects. In addition, you can randomize the blocks so that they get the questionnaires in different orders. In either case, you must carefully consider whether this is appropriate for your study.
   - Randomization can also be used to set up random assignment to condition if you are using an experimental design.

5. Demographics:
   - The last Block should consist of the demographic items. Demographics should go last as they are typically the least important and this is the point where people are often the least motivated. Although, some researchers prefer to give the demographics first to help participants get used to the response format.

6. End of Survey Message/Debriefing:
   - Once participants complete the last block of questions, Qualtrics will take them to your end-of-survey message, which can be your debriefing/study description form. Again, you need big and bold directions encouraging students to print the debriefing form as proof of participation in case there is a problem with assignment of participation points.

7. Exit back to SONA
   - You should add a link to the bottom of the debriefing that will send participants back to the SONA login page.

II. Accessing your Quatrics Account
   - Anyone can set up free Qualtrics account, but the functionality of these free accounts is limited. The full version is available to the general public for a fee.
   - As a student or faculty member at RU, the University has paid for you have to have access to the full version of Qualtrics.
   - Accessing the account you have is quite easy as it has been linked you Radford University account already. [http://radford.qualtrics.com/](http://radford.qualtrics.com/) You will use your RU username (e.g. jdoe32) and password.
III. Using Qualtrics

- Once logged in you start on the All Projects Page.

All Projects – has a list of all the surveys you have created, status indicators for which ones are active, the number of responses, and a drop down list of **Actions** for each survey [including: Activate survey, Collaborate (where you can collaborate with team members), Rename Project, Copy Project, Edit Survey, Preview Survey, Distribute Survey, and Data and Analysis]. You can sort your projects based on name, most recently modified, and other criteria.

IV. Create a new Project.

- Click **Create Project** (upper right). You can either create a new blank survey project, you can make copy of an existing project or from an exported backup file that you have made of your project (this is handy if you moving from one institution to another), or use one of the template offered.
- Most of the time you will use a Blank Survey Project
- In the Blank Project window, give your new project a name
- The folder information is optional. You can add and rename folders using the Manage Folders option on the My Projects page.
- Click **Create Project** to continue.
1. Blocks.
   - You will initially have a single block with one multiple choice question. You may want to start by adding the number of blocks you intend to use in your study. At the very least, you will want one for consent, one for each questionnaire, and one for demographics.
   - ADDING BLOCKS
     - The **Add Block Below** option is located on the **Block Options** drop-down menu (A).
     - As you create each block, you may want to name it appropriately by clicking on the block title (marked B in the figure above) and then typing the name you want. You do not have to worry about SPSS naming conventions with these block titles as they will not be transferred to SPSS.

2. Create Items/Questions.
   - Click Create a New Question (C), unless you have questions you created in other studies that you want to copy.
   - You can also click the little green pluses that appear on the question when you hover over it. See D in the figure above.
   - Delete questions by clicking the red minus.
Choose a Question Type: With a few notable exceptions, the Multiple Choice format will be the way to go. Other formats are available by clicking the question type menu (marked A in the figure above)
- Text Entry for open-ended questions like Age, GPA, and Other Ethnicity.
- Descriptive Text is good for adding directions to a questionnaire.
- I strongly recommend that you DO NOT use the matrix table – there is an option there for so called “Likert scales”, which makes it easy to create a questionnaire, but you lose control over the manner in which individual items are named and thus how they are assigned variable names in SPSS.

- Select the Multiple Choice Options you want
  - Number of responses (B)
  - Answer type (C) – forced choice radio buttons (single answer), check all that apply radio buttons (multiple answer), etc.
  - Position – Horizontal or Vertical
    - Most of the time, you will want to use the horizontal layout so that it takes up less space on the screen and we can get more items on each page.
  - Label Position – Above or Below
  - Validation (D) – None or Forced Response
    - You will need to use the forced response for the Consent block, but after that you cannot use it, since your consent form probably says that participants do not have to answer every question if they do not want to.

- Name the Question (E) – If you click on the question name (upper left corner of the question box) you can rename each question. Qualtrics will use names like Q1, Q2, Q3 etc., which can make your SPSS file confusing to work with. It is best if you give your questions names that are more meaningful. You should follow SPSS naming conventions: no spaces, cannot start with a number, no special characters, but you can
use underscore. What you type here needs to be readable by SPSS. Also, you should use as short a name as possible for these (8 characters or less). When you work with the data in SPSS syntax you will rue your decision to use long variable names. Qualtrix will label your variables (the long variable label that SPSS uses) based on the question content, which is actually a nice feature.

- **Label the response options (F)** – You will need to type in your response options. E.g., Strongly Disagree, Disagree, Somewhat Disagree, Neither Agree nor Disagree, Somewhat Agree, Agree, Strongly Agree. Qualtrix may automatically suggest some of these for you, but you need to check very carefully to make sure it is providing exactly what you want. Also, these labels will be imported directly into SPSS as value labels for ALL of your variables. This can be a little confusing, since you really only need value labels when you are working with group data (like ethnicity or gender). This does not cause any real problems for SPSS, so you can delete them or ignore them once you get your data into SPSS.

- **Copy Questions (G)** - Once you type in the response format for the first question, you can then copy that item repeatedly, with the Copy Question action and just change the question stem for each item. You do not need to keep typing the response format over and over.

3. **The Consent form**
- In block one, we have one question. The body of the question is the text of the consent form and we have selected two response choices, a single answer format, aligned horizontally, with the Validation option requiring a response (Force Response - C).
- We have also used the Add Skip Logic… option (B) from the Advanced Question Options drop down menu (A). If participants say no, then it kicks them to the debriefing at the end of the survey.
4. Questionnaire Blocks
- Here, we have a questionnaire about how much people like Cheezy Poofs that we have named Cheezy Poofs Liking Inventory.
- Each item is a multiple choice, single answer, and horizontal without verification.
- We wrote the first question and entered the scale point labels by hand. We copied the first question 3 more times, so all we had to do was change the question stem. The copy question option is on the right hand side under the Action options.
- Notice too that we have renamed each question: CPL01, CPL02, CPL03, & CPL04. These will be the variable names that SPSS uses.

5. Randomization of Items within a Questionnaire
- From the Block Options drop-down menu, select the Question Randomization… option.
- Select Advanced Randomization.
- In the Advanced Randomization window, you will need to select all of the desired items listed in the Fixed Display Order field and move them to the Randomized Questions field.

- If you have included any items in this block to serve as your directions for that measure/task, then you will want to be sure you leave items associated with directions in the Fixed Display Order field.
6. Demographics Block
- Gender/Sex is just a 3 option multiple choice question.
- For Age, in this example we have used the Text Entry question type for age. You could use the multiple choice format with 17, 18, 19, 20, 21, 22, 23, and other. The “other” response would require and additional open ended question like what we did with ethnicity below. This will complicate data analysis later, so you should probably just use the text entry format. When you use text entry for numerical data, SPSS will treat it as text (String Data) and you will need to convert it to numerical data in SPSS in order to run most statistical tests.
- Ethnicity will require a combination of multiple choice and text entry formats. The initial question is just single answer multiple choice. Then we have use the Add Display Logic option to two subsequent questions that address the Other Ethnicity and Multi-Ethnic responses. It is set up so that if you say Other Ethnicity, then you will be asked “You indicated other ethnicity. What is your ethnicity?” Alternatively, if you check Multiethnic status then you will be asked “You indicated multi-ethnic background. What is your ethnicity?”
- To use the Add Display Logic option, we first created the items ethoth and ethmult. Then for each, we used the Advanced Questions Options drop-down menu (it looks like a little gear just below the question name) to select the Add Display Logic option. Then just filled in the question and response we wanted this item be contingent upon.

7. Randomizing Block Order: in the Survey Flow window, you can use the +Add a New Element Here option to insert a randomizer that will present any blocks inserted here in random order. Make sure that you leave the demographics out of this section as it needs to always go last.
a. To set up your debriefing page, select the Study Options form the tool bar at the top of the Qualtrix page.

- Survey Termination – allows you to set your debriefing as the text for the final page
- Select the End of survey message from library… option list your library and select the New Message option.
- In the Create a New Message window, name your message and then paste the text of your Debriefing from the IRB proposal.
- At the end of your debriefing include a message in very large letters asking participants to print this page so they have our contact info and they have proof of participation if there is a problem with the SONA points.
- Also add a hyperlink back to the SONA login page like this one – Return to SONA.

b. Other Options
- Anonymize Response – This will keep your data from recording IP addresses of participants. RU IRB prefers that you use this option if you are intending to collect anonymous data.
- Survey Experience – Turn off the back button option. You probably don’t want participants going back and forth on the questionnaires – especially if you are doing experimental manipulations.
- Survey Protection – Enable the password protection and establish your password. You should probably use a single word that is easy to remember because it will be presented in SONA and participants have to remember it and be able to enter it. We often use “radford” as our password. It is easy to remember when participants go from SONA to Qualtrics.
- Partial Completion – not shown in the figure above. Set the time limit to 4 hours.

9. Preview your study – you can see what your questionnaire looks like and see how the data comes out by using the **Preview Survey** option on the survey toolbar. This is exactly how it will look for your participants.

   ![Preview Survey](image)

   It will allow you to catch any mistakes before you launch your survey. However, this data does get added to your data file so you may want to use an identifier when you answer open ended questions (e.g., the AGE question), such as xxxxx, so you know it is only practice data and you can easily toss it out later.

V. Launching the Survey

- Before launching your survey you should check all of the responses using the preview option. First go through and click on all the 1s from start to finish. Start the survey again and do all of the 2s. Repeat this process until you have taken the survey and clicked all of the possible options. Then export the data to SPSS (see below) and make sure the output is correct.
- When you are sure your study is ready to go you can generate the URL (web link) for your survey by clicking the **Get a single reusable link** option on the **Distributions** tab. This will generate a secure (https://) link that you can then post on SONA, email to your participants, or distribute in some other manner. NOTE: Qualtrics typically leaves the “s” out of the https:// url. You should add the s when you are distributing it to folks.
VI. Exporting Data

- You can view the results in Qualtrics, but it is really clunky.
- The best method is to download it as an SPSS file.
- Select the Data & Analysis tab and then click the Export & Import button and choose Export Data....

-In the Download Data Table window, select SPSS.
- Click Download and you should be good to go. Open it in SPSS and look at all your beautiful data.

A COUPLE OF NOTES:
- Be very conscious of how you are naming the SPSS files you import. They need to be named clearly so you can keep your test data (used during development) and your final data separate (e.g. Data-form-test.sav, Data-form-final.sav).
- Check out the More Options. Here you can turn off the option the downloads your spss data file in a Zip folder. It is not necessary and adds unnecessary steps to opening files.
- You can also select the Export viewing order data for randomized surveys. This will be very helpful in creating a variable that represents either random assignment to condition or random assignment to order in which the surveys were completed.

VII. Final Comments
There are obviously many things you can do with Qualtrics. This guide really just covers the basics for a simple survey. You can also do much more complicated things with Qualtrics. You can include timers on responses that will record how long it takes for participants to respond, limit the time they have to respond, or make sure that they don’t respond until a certain time limit has passed for a given item. You can include video, pictures, and audio in your survey. You can even use it to measure very gross reaction times. One thing to keep in mind though is that, when you use Qualtrics, you are at the mercy of the internet and network. Things happen and Quatrics can get kind of glitchy on occasion. The more complex you make your study, the more likely it is that these little hiccups can affect your data.