

Qualtrics survey administration tips

Building surveys

- Make sure that all questions have response categories that will apply to everyone.
 - For example, if you ask a respondent to “select all that apply” from a list it is helpful to have the final response be something like “None of the above”
 - If the question requires an answer (not recommended) this is especially important
 - Including an option for None helps clarify whether the respondent saw and intended to answer the question or not
- Make sure that response categories like age ranges don’t overlap, or are “mutually exclusive” – i.e., that a respondent can logically only select one of the choices.
 - Bad: Under 10 / 10-20 / 20-30/ etc.
 - Good: 10 or under / 11-20 / 21-30 etc.
- Text entry (open-ended) questions:
 - In general, minimize the number of these as they are time-intensive to analyze
 - It is good practice to include a general question such as “Please use this space to comment on any other aspect of {topic} you feel will be useful.”
 - You can choose different sized boxes for text entries – I usually prefer the multi-line box
- The final page of the survey should not have any real questions on it. It should include text thanking them for completing the survey and contact info if they have any questions. It should also make it clear that they can review and change their answers until they hit the Next/Continue/Submit button. Putting this question in a separate Block allows you to change the Next button to read SUBMIT.
- Have someone who is not familiar with the topic preview the survey both in writing and online.

Contact List

- Save contact list as a .csv file
- File headers should match Qualtrics format:

FirstName	LastName	PrimaryEmail	ExternalDataReference	EmbeddedDataA	EmbeddedDataB
John	Doe	John_Doe@email.com			

Survey options – make sure and check ALL the Survey Options!

- Back button – you usually want this enabled
- Save and continue – ditto
- Show question numbers – useful when having people review the survey but I omit them when live because all “items”, including display text, are numbered
- Survey Title – this is what will show on the tab in a browser – helpful to make meaningful
- Open access – choose this only if anyone can take it multiple times
- By invitation only – usual choice, always choose this if you are using unique links
- Prevent Ballot Box Stuffing – usually select this
- Prevent Indexing – select
- Survey expiration – ALWAYS choose an end date far beyond what you actually expect
- Redirect to a full URL – I try to enter a Barnard web page that is relevant to the survey or sender

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- Send additional thank you – this will send an email when the respondent gets through the entire survey, which can sometimes be problematic. You can, alternatively, send a thank you to all respondents through the Qualtrics mailer after you have closed the survey.
- Anonymize response – do not choose this without consultation with others and only if absolutely necessary. It is impossible to resend a student her unique link in this situation.
- Partial completion – make sure this is set to a long period of time – people who open the survey but do not enter any data can be dropped from the panel if they hit this deadline

Survey Flow – you can add embedded (imported) data fields to be exported with survey results

Look and Feel

- Change the text for the Next and Back Button from arrows to include Next (or Submit and Continue) and Back
- Choose the skin – the plain Barnard skin works better on mobile devices
- Advanced options lets you put in a header and/or footer
 - Header appears above the blue Barnard skin - a survey title is useful here

Tools

- Auto number questions is useful after you have inserted, deleted, or moved questions.
- View revision history – I have never used this but this could be helpful if you accidentally lose something. Remember that deleted questions are in a “trashcan” at the bottom of the survey until you permanently delete them.
- Print survey – creates a pdf of the survey
- Export survey to Word – creates a Word document, which can be edited, but the question banks are awkwardly formatted
- Export survey - will create a .qsf file that can be imported by others into Qualtrics

Sending email invitations and reminders

- **Always** include yourself, possibly at two email addresses, in your panel so that you will receive all email invitations and reminders. (Don't click through the entire survey or you won't get reminders.)
- **Always** send a preview email to yourself and test all the links in the survey and hit reply to make sure any replies will go to the correct address.
- **Always** send an invitation just to yourself (choose one of your emails from the panel) to make sure that all merges are working properly. Click on all the links again.
- **Always** schedule the invitation, even if to wait only 10 minutes after you hit Send (or Schedule). If you realize at the last second that there is a problem, you can cancel the distribution.
- For reminders you don't have the option to choose one person from the panel, but **always** send a test/preview email to yourself.
- Distributions can be scheduled to start automatically at any time (choose the Custom option). Doing this in advance during a quiet time can help prevent errors and provide enough time for testing.

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- Check your distribution shortly after all emails have been sent to see if there are any bounces – probably due to a misspelled email address
- Vary the subject headings and the content of invitations and reminders and keep them as concise as possible. Reminders in particular should be brief.
- Always include information in the invitation and in the text at the top of the survey about whether the survey is anonymous or confidential
- Avoid using the words “reminder” or “survey” in your emails.
- If possible, vary the sender of reminders.