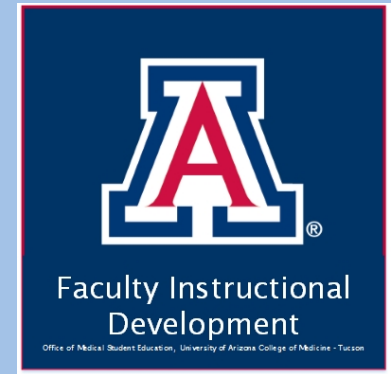


Karen Spear Ellinwood, PhD, JD, EdS
Director, Faculty Instructional Development

Getting Started with
QUALTRICS

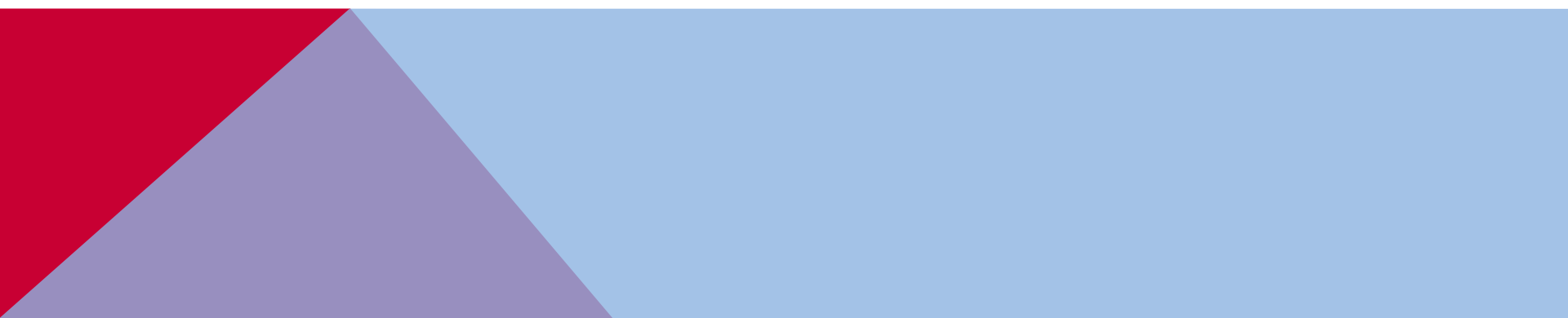
A TWT Guide



College of Medicine
Tucson

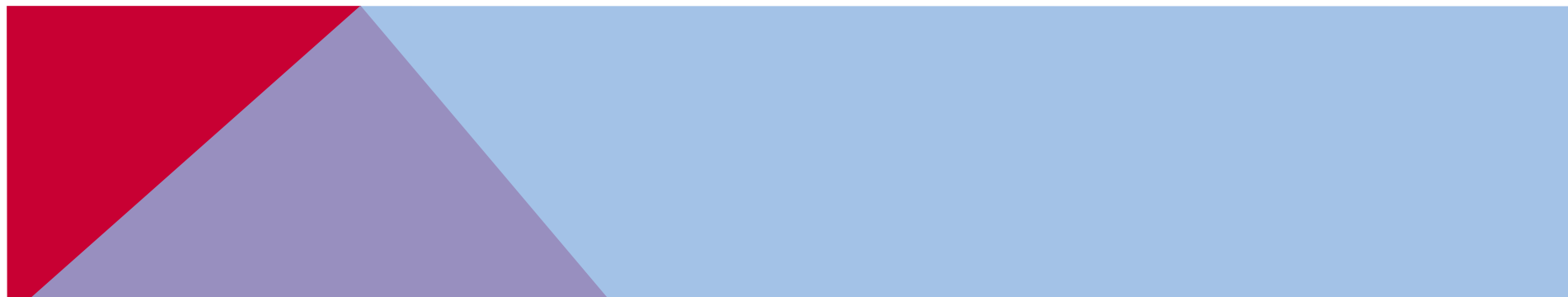
Integrating Technology in Teaching

Before using technology for teaching or to enhance students' learning experience, **ask yourself...**

- What do I want or need to accomplish?
 - HOW could technology help me to accomplish it?
 - Is this the right technology?
 - Does this technology have a high learning curve for instructors? for learners? for staff?
 - If I don't know how to use this technology, where would I go to learn?
 - How should I teach my students to use it?
- 

What is QUALTRICS and how can I use it?

- Qualtrics is a *site-licensed, web-based survey* software.
 - *UA site-licensed software* is either free or low cost for Faculty, staff and students. Qualtrics is FREE!
 - *Web-based* means there is no program or app to download. Login with your UA NetID.
 - Qualtrics is a survey tool. You may create surveys that can be distributed anonymously or using the Qualtrics e-mail tool. You can post a link to a website as well. You can create many types of questions, including:
 - **Single best & multiple answer multiple choice items**
 - **Rank/Order items**
 - **Scaled items**
 - **Open-ended text items**
 - Qualtrics may be used for graded and formative assessments, in addition to its more obvious uses in research or education studies.



LESSONS LEARNED*

- **Selecting question types** - Consider the type of data do you want? Which question type will achieve this?
- **Combining question types** – Are the instructions adequate to highlight for respondents that this is a different question type or different answer choice range?
- **Which display will work best with the potential respondents?** One item per page or all items on one page?
- **Survey navigation options** – Are navigation options clear or confusing?
- **Ensuring respondents know when they are submitting the survey** – Do you need to signal that they have come to the end of the survey? Do you want to include a back button as a last chance to change answers before submitting? If you have to use the NEXT button as your “Submit” button, should you include a CAPTCHA item to signal they have come to the conclusion of the survey?

* "Lessons Learned" contributed by:

Diane Poskus, M.A.

Program Manager, Years 3&4

Cat Dutcher, M.Ed.

Former Program Manager, Years 1 & 2

A word about Human Subjects Protection in Research or Studies

Anonymous vs Identified Respondents?

- Is this a study under the purview of Human Subjects Protection Policy at the UA?
- Whether or not it is under HSPP, please consider the nature of the questions.
- Do the survey ask about sensitive information?
- Should collect identified or anonymous data?
- Have you taken adequate safeguards?
- Do you need to file IRB project application for full review, exemption or is this a non-research project?
- Can you share the data? If so, how can it be shared?

IRB Application –
the Basics

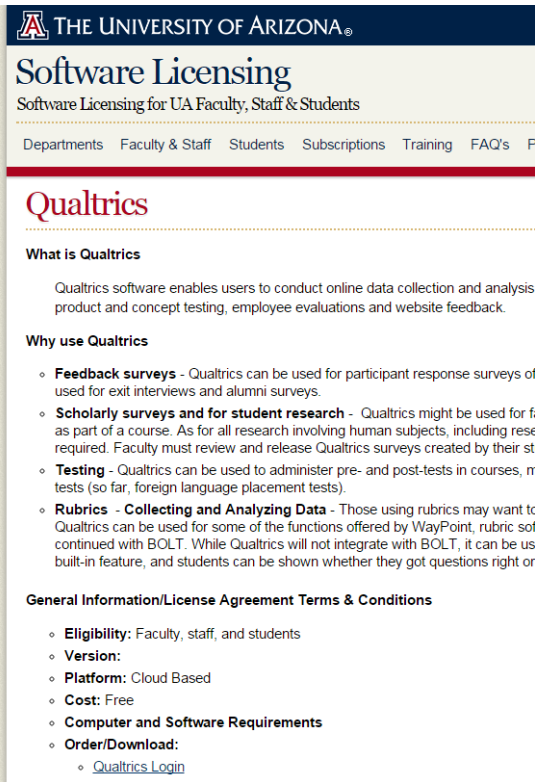
GETTING STARTED



THE UNIVERSITY
OF ARIZONA

Let's get started!

HOW TO ACCESS QUALTRICS*



THE UNIVERSITY OF ARIZONA®

Software Licensing

Software Licensing for UA Faculty, Staff & Students

Departments Faculty & Staff Students Subscriptions Training FAQ's P

Qualtrics

What is Qualtrics

Qualtrics software enables users to conduct online data collection and analysis product and concept testing, employee evaluations and website feedback.

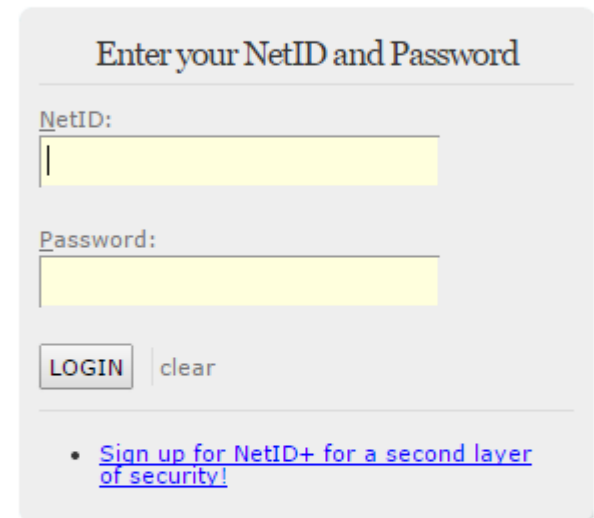
Why use Qualtrics

- **Feedback surveys** - Qualtrics can be used for participant response surveys of used for exit interviews and alumni surveys.
- **Scholarly surveys and for student research** - Qualtrics might be used for fi as part of a course. As for all research involving human subjects, including rese required. Faculty must review and release Qualtrics surveys created by their st
- **Testing** - Qualtrics can be used to administer pre- and post-tests in courses, m tests (so far, foreign language placement tests).
- **Rubrics - Collecting and Analyzing Data** - Those using rubrics may want to Qualtrics can be used for some of the functions offered by WayPoint, rubric sof continued with BOLT. While Qualtrics will not integrate with BOLT, it can be us built-in feature, and students can be shown whether they got questions right or

General Information/License Agreement Terms & Conditions

- **Eligibility:** Faculty, staff, and students
- **Version:**
- **Platform:** Cloud Based
- **Cost:** Free
- **Computer and Software Requirements**
- **Order/Download:**
 - [Qualtrics Login](#)

1. Go to <http://softwarelicense.arizona.edu/qualtrics>
2. Click on Qualtrics Login link (scroll down the page)
3. When the Web Auth login opens, login with your UA Net ID
4. Qualtrics will open in that window.

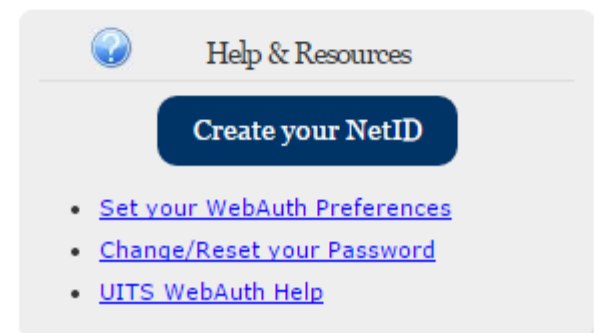


Enter your NetID and Password

NetID:

Password:

- [Sign up for NetID+ for a second layer of security!](#)



[?](#) Help & Resources

[Create your NetID](#)

- [Set your WebAuth Preferences](#)
- [Change/Reset your Password](#)
- [UITS WebAuth Help](#)

*If you get a message about "Migration" of your account, clear your browser cache (history) or open a new browser and go to this address. It should take you to the WebAuth screen to login.

CREATE YOUR SURVEY

The screenshot shows the Qualtrics dashboard interface. At the top, there is a blue navigation bar with the text 'My Projects' on the left and 'Projects', 'Contacts', 'Library', and 'Help & Feedback' on the right. Below the navigation bar, there is a search bar with the text 'Search Projects...' and a green button with a white plus sign and the text '+ Create Project'. This button is circled in red. On the left side, there is a sidebar with a 'Folders' button and a list of project categories: 'All Projects' (56), 'Shared with Me' (6), 'Uncategorized' (11), 'AOTS' (8), 'ED-Shadowing' (2), and 'FID' (6). The main content area is titled 'Uncategorized' and shows a list of projects. The first project is 'Course Feedback' with a status of 'Active' and 0 responses. The second project is 'Course Feedback RAE & Med Ed iTunes U' with a status of 'Active' and 1 response. A '12 Day Trend' chart is visible next to the second project. A 'View Reports' button is present for each project.

- The look and feel of Qualtrics has changed. The language is a bit different. For example, surveys are called "projects".
- To create a new survey, on your Dashboard, click on the button that says, "+ Create Project".
- This will open a new survey.
- You may then select the Question Type.

Qualtrics Question Types

Help with Formatting Questions

Draft an introduction or preliminary survey Instructions

Multiple Choice

Open-ended questions

To identify preferences or biases

Visual Analog Scales

CAPTCHA Technology

Ask respondents to upload files

Static Content

 Descriptive Text




Standard Questions

 Multiple Choice

 Matrix Table

 Text Entry


 Slider

 Rank Order

 Side by Side

Specialty Questions


 Constant Sum

 Pick, Group, and Rank

 Hot Spot

 Heat Map

 Graphic Slider

 Gap Analysis

 Drill Down

 Net Promoter Score®

Advanced

 Timing

 Meta Info Question

 File Upload

Use Captcha Item to Submit Survey


 Captcha Verification

EDIT YOUR SURVEY

- Click the My Projects tab.
- Select the survey you want to edit!
- Add and edit items
- Modify selection choices

The screenshot shows the Qualtrics survey editor interface. At the top, there is a blue header with 'My Projects > test'. Below this is a navigation bar with tabs for 'Survey', 'Distributions', 'Data & Analysis', and 'Reports'. Underneath, there are icons for 'Look & Feel', 'Survey Flow', 'Survey Options', and 'Tools'. The main content area is titled 'test' and shows a survey question titled 'Your Experience with Qualtrics'. The question is 'Q1.1 I took the following workshops on Qualtrics:'. There is a gear icon for editing the question. The question has three radio button options: 'SOS Qualtrics workshop in 2014', 'SOS Qualtrics workshop in 2015', and 'SOS Qualtrics Part 1 in January 2016'. There is a small image of two people in a workshop. To the right of each option is a radio button labeled 'Click to write Choice 16', 'Click to write Choice 17', and 'Click to write Choice 18' respectively.

My Projects > test ▾

 Survey

 **Distributions**

 Data & Analysis

 Reports

DISTRIBUTE YOUR SURVEY
What can you do with Qualtrics?

DISTRIBUTE ANONYMOUS LINK OR EMAIL SURVEY

- For **ANONYMOUS** data
 - Launch survey and email or post the link to a website or other social media so ANYONE can take the survey. Unless you ask for participants' identifying information, survey responses will be anonymous.

Your Anonymous Survey Link:

https://uarizona.co1.qualtrics.com/SE/?SID=SV_0c66lvBSRXrYu0d

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our [Survey Mailer](#)

The screenshot shows the Qualtrics interface for a project named 'test'. The 'Distributions' tab is active, and the 'Anonymous Link' option is highlighted with a red circle. Other distribution options include Emails, Personal Links, Social Media, Offline App, QR Code, and Purchase Respondents. To the right, there is a 'Recent Responses' chart showing a line graph with a y-axis labeled 'Responses' and an x-axis with dates from Aug 30 to Sep 3. Below the chart is the label 'All Responses'.

DISTRIBUTE USING QUALTRICS SURVEY MAILER

Research Questions

Name of Survey

To:

Please Select...

Select a "Panel" (list) of emails you've already created OR create a panel by clicking here

When:

Send in 1 hour

Schedule when to send or send now

Message:

Qualtrics will automatically input your email and name per your UA Net ID

From Address no-reply@email.arizona.edu

From Name Karen C Spear-Ellinwood

Reply-To Email kse@email.arizona.edu

Subject

Message Health:

N/A

Load a Saved Message

Save Save As...

{a} [Image] [Table] [Link] [List] [Source]

I Font Size **B I U** x_2 x^2 **A** **A**

|

Follow this link to the Survey:
\${!://SurveyLink?d=Take the Survey}

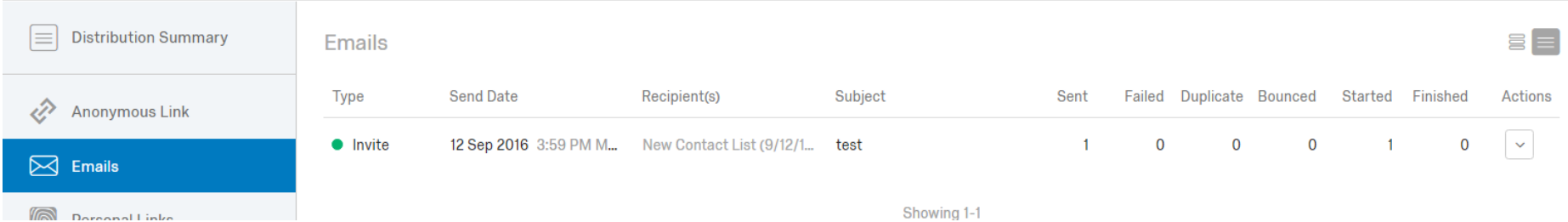
Or copy and paste the URL below into your internet browser:
\${!://SurveyURL}

Follow the link to opt out of future emails:
\${!://OptOutLink?d=Click here to unsubscribe}

Qualtrics will automatically load the survey link with basic survey message. You can add your own message here and use special formatting toolbars, if desired.

Use Qualtrics to distribute surveys by EMAIL

- 1. Create email list
- 2. Distribute to list
- 3. Monitor who has started or completed surveys.
- 4. Monitor for bounced emails.



The screenshot shows the Qualtrics interface for email distribution. On the left is a sidebar with navigation options: 'Distribution Summary', 'Anonymous Link', 'Emails' (highlighted in blue), and 'Personal Link'. The main area is titled 'Emails' and contains a table with the following data:

Type	Send Date	Recipient(s)	Subject	Sent	Failed	Duplicate	Bounced	Started	Finished	Actions
● Invite	12 Sep 2016 3:59 PM M...	New Contact List (9/12/1...	test	1	0	0	0	1	0	▼

Below the table, it says 'Showing 1-1'.

VIEW & ANALYZE RESULTS

What can you do with Qualtrics?

VIEWING INDIVIDUAL RESPONSES

The screenshot shows the Qualtrics interface. At the top, there is a blue header with 'My Projects > test'. Below this is a navigation bar with icons for 'Survey', 'Distributions', 'Data & Analysis' (circled in red), and 'Reports'. Underneath, there are sub-menus for 'Data', 'Text', and 'Cross Tabs'. Below the navigation is a section for 'Add Filter' and 'With Selected'. At the bottom, there is a table with columns for 'Recorded Date', 'Q2.7 - Anything else you want to say about the Qualtrics workshop or Qualtrics?', 'Q1.1 - I took the following workshops on Qualtrics:', and 'Q1.2 - Please indicate how often you used Qualtrics BEFORE attending an SOS Qualtr...'. The table shows a single row with a checkbox, the date 'Feb 4, 2016 4:32 PM', and the response 'Most of the time'.

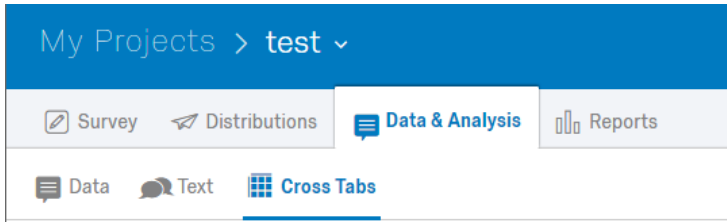
<input type="checkbox"/>	Recorded Date	Q2.7 - Anything else you want to say about the Qualtrics workshop or Qualtrics?	Q1.1 - I took the following workshops on Qualtrics:	Q1.2 - Please indicate how often you used Qualtrics BEFORE attending an SOS Qualtr...
<input type="checkbox"/>	Feb 4, 2016 4:32 PM			Most of the time

Check the box to the left of a respondent's survey results and then select the ACTION you would like to perform.

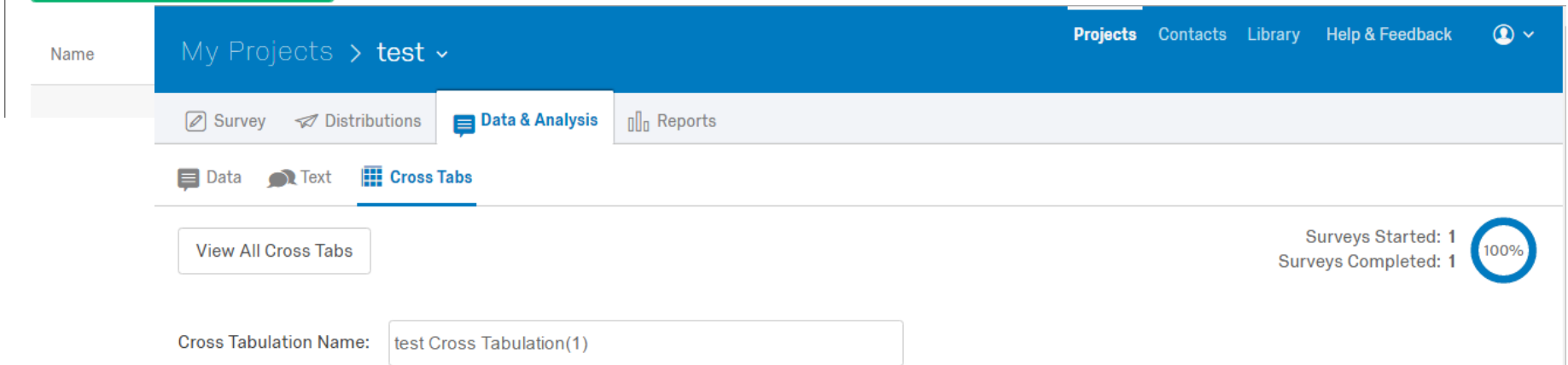
Sort by date survey was submitted.

View individual responses to surveys.

Data & Analysis: CROSS TAB ANALYSIS



1. On the Data & Analysis tab, click Cross Tabs on the menu.
2. Then click + Create a new Cross Tabulation.
3. Then select the items for your banner (columns) and stub (rows).
4. This allows you to view ALL data according to how items were answered.
5. This is different from filtering because filtering shows ONLY the data that responded to items in the way you specified in selecting the Operator and Operand.



<input type="checkbox"/> Banner (Column)	<input type="checkbox"/> Stub (Row)	
Your Experience with Qualtrics		
<input type="checkbox"/>	<input type="checkbox"/>	I took the following workshops on Qualtrics:
<input type="checkbox"/>	<input type="checkbox"/>	Please indicate how often you used Qualtrics BEFORE attending an SOS Qualtrics workshop.
<input type="checkbox"/>	<input type="checkbox"/>	Please indicate the reasons you used Qualtrics BEFORE attending an SOS Qualtrics workshop.
<input type="checkbox"/>	<input type="checkbox"/>	Please indicate the kinds of support you've had so far in learning how to use Qualtrics.
<input type="checkbox"/>	<input type="checkbox"/>	How challenging did you find it to use Qualtrics before you attended an SOS workshop?

GENERATE & VIEW REPORTS or DOWNLOAD DATA

My Projects > Pimping Study [Clerkship Directors] A... Projects Contacts Library Help & Feedback

Survey Distributions Data & Analysis **Reports**

Results Printed Reports

Report: **Default Report** Add Filter Report Options

Search Questions + Create Custom Page

- Q1 - Please indicate the years of experience you have in teaching medical students.
- Q2 - Please indicate your department
- Q3 - Please indicate your age range.
- Q4 - Please indicate your gender

Q1 - Please indicate the years of experience you have in teaching medical students. Page Options

Experience Range	Percentage
5 - 10 years	50%
11-15 years	50%

Data Source
Q1 - Please indicate the years of experience you have in teaching medical studen...

Title
 Default - Click to edit

Visualization

Large labels

- Category name
- Percent
- Response count

Generate Reports

1

My Projects > Pimping Study [Clerkship Director]

Survey Distributions Data & Analysis Reports

Results Printed Reports

Report: Default Report Add Filter

The DEFAULT report provides a table and visualization (graphic) of the responses for each item. You may change the visualizations item by item or "globally" (for the all items at once) by choosing "Report Options", then clicking "Global Options".

2

Title

Default - Click to edit

Visualization

Large labels

Category name
Percent
Response count

Small labels

Category name
Percent
Response count

Color Palette

Reverse Colors

Legend Values

Less than 5 years

Include hidden groups in percents

Yes

3

Global Options

Default Metric

Choices Count

Default Decimal Places

2

Default Color Palette

Reverse Colors

Fonts and Spacing

Normal

Show full question text in page titles

Include question numbers

Q1 - Example visualization using the global options for the Results...

Visualization Title

Group	Series 1	Series 2
Group 1	30.00	50.00
Group 2	20.00	10.00
Group 3	40.00	20.00

Cancel Save Settings

Filter Results

1 Click "Add Filter"

My Projects > Pimping Study [Clerkship Directors] A... ▾

Survey Distributions Data & Analysis Reports

Results Printed Reports

Report: Default Report ▾ Add Filter ▾

2 Then select the question or meta data by which you would like to view the results.

Results Printed Reports

Report: Default Report ▾ Filtering by Q1 - Please indicate the years of experie... ▾ Select Operator ▾ Select Operand ▾ - +

3

My Projects > Pimping Study [Clerkship Directors] A... ▾

Survey Distributions Data & Analysis Reports

Results Printed Reports

Report: Default Report ▾ Filtering by Q1 - Please indicate the years of experie... ▾ Is ▾ Select Operand ▾ - +

Select the "Operator" - View results by respondents who chose or did not choose a particular answer.

Q1 - Please indicate the years of experience yo... ▾ Is ▾ Select Operand ▾ - +

Search Questions

+ Create Custom Page

Q1 - Please indicate the years of

1 - Less than 5 years

2 - 5 - 10 years

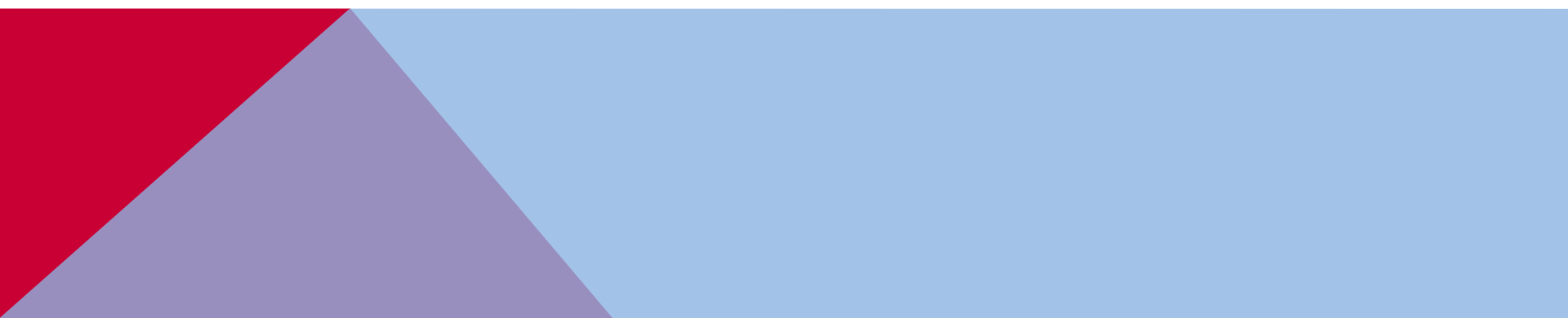
3 - 11-15 years

4 - 16-20 years

5 - More than 20 years

Select the "Operand" - Select the specific answer choice for your filter.

Why **FILTER** REPORTS?

- **Session Evaluations:** You might want to know how everyone who said they had lots of teaching experience answered a feedback survey on an instructional development session.
 - **Teaching:** If your survey asked your students about their STEM background, you might want to know how STEM students performed on foundational and advanced items as compared with students who did not have a STEM background. Or, you might want to know whether students who were incorrect on advanced questions performed on the foundational knowledge items.
 - **Research:** You might want to see if there is any difference among respondents depending upon their answers to items you anticipated would be important distinctions among respondents.
- 

PRACTICE!

Create a survey with at least one of following types of questions:

- Multiple choice*
- Ranking item
- Visual analog scale
- Text - open-ended question
- **Distribute** the survey to the SOS Group
- **Respond** to everyone else's survey
- Practice **Viewing & Analyzing** Results and Creating **Reports**

The screenshot displays the Qualtrics survey editor interface. It features a central question editor area with two questions, Q1.3 and Q1.4. Q1.3 is a multiple-choice question asking for reasons for using Qualtrics before a workshop, with options like 'Determining votes on teaching awards', 'Evaluations after workshops or other events', 'Research', and 'Other'. Q1.4 is a Likert scale question asking for support in learning how to use Qualtrics, with options from 'Strongly agree' to 'Strongly disagree'. To the right, a 'Change Question Type' panel is visible, showing 'Multiple Choice' selected. Below this, there are settings for 'Automatic Choices' (checked), 'Position' (set to 'Vertical'), and 'Validation Type' (set to 'None').

*Qualtrics offers a set of "Automatic Responses" for multiple choice items that contain validated agreement and other scales!



BEFORE LAUNCHING YOUR SURVEY, PLEASE CONSIDER THESE ISSUES

IRB issues - Does the data need to remain...

- Anonymous? Anonymous data does NOT contain respondent names, emails or other unique identifiers?
- Confidential? Confidential data means you know who the respondents are but promise to maintain the confidentiality of their participation in the survey or study.

Do you need to set Time limits for

- Respondents to take the survey (duration)
- Survey administration (how long is survey open)
- [Qualtrics Feature: *Survey Options*]

Survey display features

- Do you prefer 1 question per page? 1 block of questions per page?
- Would you like to add a header with Survey title or a footer with the IRB #, etc?
- [Qualtrics Feature: *Look & Feel*]



SURVEY OPTIONS

Select options for HOW respondents will interact with your survey.

- Select to display a "Back button"
- Display question numbers
- Limit to 1 response per person (*Prevent Ballot Box Stuffing*)
- Allow respondents to save incomplete surveys for completing later
- Create custom messages
- Set time limits to complete the survey

The screenshot shows the 'Survey Options' configuration page in Qualtrics. The page is titled 'My Projects > test' and has a navigation bar with 'Survey', 'Distributions', 'Data & Analysis', and 'Reports'. Below the navigation bar are icons for 'Look & Feel', 'Survey Flow', 'Survey Options' (circled in red), and 'Tools'. The main content area is divided into several sections:

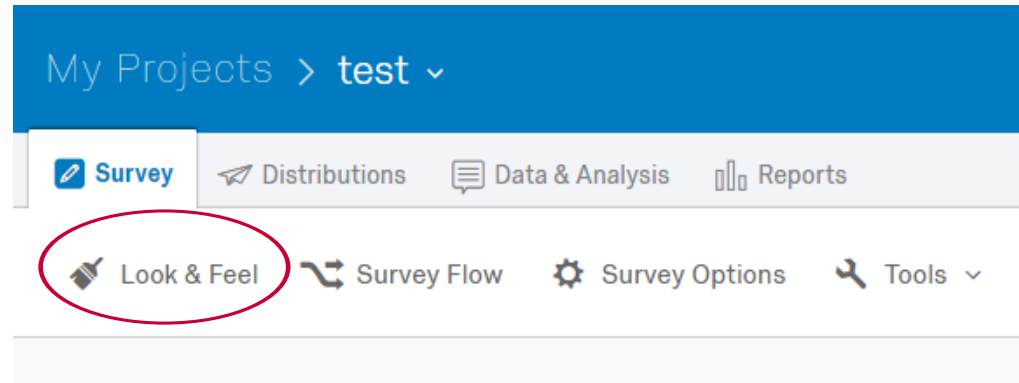
- General Settings:** Includes checkboxes for 'Show Question Numbers' and 'Use Custom Survey Validation Messages...'. It also features a 'Survey Language' dropdown set to 'English', a 'Survey Title' field with the value 'Online Survey Software | Qualtrics', and a 'Meta Description' field with the value 'Qualtrics sophisticated online survey'.
- Survey Protection:** Includes a padlock icon and radio buttons for 'Open Access' (selected) and 'By Invitation Only'. It also has checkboxes for 'Password Protection', 'Prevent Ballot Box Stuffing', 'HTTP Referrer Verification', 'Prevent Indexing' (checked), and 'Survey Expiration'.
- Survey Termination:** Includes a 'Thank You' sticky note icon and radio buttons for 'Default end of survey message' (selected) and 'Custom end of survey message...'. It also has checkboxes for 'Redirect to single response report', 'Redirect to a full URL, ex. "http://www.qualtrics.com":', 'Send additional thank you email from a library...', and 'Anonymize Response'.
- Inactive Surveys:** Includes a 'no' icon and radio buttons for 'Default inactive survey message' (selected) and 'Custom inactive survey message...'.
- Partial Completion:** Includes a progress bar icon and a text field for 'How long to wait before partially completed responses are closed and data is recorded.' Below this is a 'Please note' warning: 'the recipient cannot continue taking the survey once their data is recorded.'

At the bottom right, there are two buttons: 'Cancel' and 'Save Changes'.

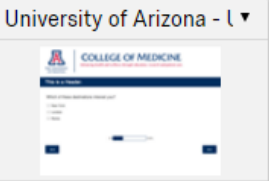
Choose the LOOK & FEEL!

Select options for how to display:

- Page transitions
- Next and back buttons
- Active questions
- Number of questions per page
- The overall look of the survey (Select the template for UA College of Medicine!)



University of Arizona - L ▾



College of Medicine

General

Fonts

Colors

Advanced

Next Button Text: >>

Back Button Text: <<

Progress Bar: With Verbose Text ▾

Page Transition: None ▾

Questions per Page:

Highlight Questions

Question Separator



COLLEGE OF MEDICINE

Advancing health and wellness through education, research and patient care.

SOS Survey: Workshop & Facilitator Evaluation

Q1.1. I took the following workshops on Qualtrics:



Get Started Today!

You can start using the Qualtrics survey tool today!

Remember, Qualtrics has numerous video tutorials and guides online to help you create, edit and distribute effective surveys.

Click the hyperlinks below to view the official Qualtrics Tutorials.

Getting Started w/Qualtrics - Basics

- o Create a survey
- o Create specific questions
- o Question Types
- o Collaborating with Others
(setting permissions regarding access to data, analysis, etc.)

Distributing Surveys

- o Activating a survey
- o Anonymous survey link

