

QUALTRICS FOR RESEARCH SUBJECT RECRUITMENT

THE NORTH CAROLINA TRANSLATIONAL & CLINICAL SCIENCES INSTITUTE

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THE ODUM INSTITUTE

FOR RESEARCH IN SOCIAL SCIENCE

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TOPIC OVERVIEW

Participant Quotas

Screening Questions

Flagging Responses

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Keeping Responses Anonymous

Survey Distribution Methods

Additional Tips & Tricks

PARTICIPANT QUOTAS

Quota options allow you to set parameters and specify actions taken when quotas are met

The screenshot displays the configuration for a 'Demographics Quota' within a 'Default Quota Group'. The quota count is shown as '0/1000' with a 'Set Count' link. The conditions for incrementing the quota are: 'If Question Q6 What is your gender? Female is Selected'. A dropdown menu is open for the action 'When the quota has been met, then:', with 'End Current Survey' selected. A red arrow points to this dropdown menu with the text: 'Click on this drop down menu to change the Quota Action'.

Quotas > Default Quota Group > Demographics Quota

0/1000 [Set Count](#) Demographic...

Increment the quota when a response is submitted that meets the following conditions:

If Question Q6 What is your gender? Female is Selected

When the quota has been met, then: End Current Survey

- ✓ End Current Survey
- Prevent All New Survey Sessions
- Do Not Display a Question...
- Do Not Display a Block...
- Trigger Web Service
- None (For Skip Logic or Survey Flow)

Click on this drop down menu to change the Quota Action

PARTICIPANT QUOTAS

Simple Logic Quota: Outlines a set of conditions for incrementing quota

Increment the quota when a response is submitted that meets the following conditions:

Question	Gender Please cho...ou self-identify:	Male	Is Selected	-	+	
And	Question	Q6 Please choose your race:	White	Is Selected	-	+

When the quota has been met, then: [Customize](#) Note: The survey will only end for respondents that meet the quota condition

PARTICIPANT QUOTAS

Cross Logic Quota: Uses percentages to define how respondents are distributed

Add your logic sets below. Each logic set uses percentages to define how respondents are distributed in your bucket. The quota count will be incremented if a respondent qualifies in each logic set, and if they will not exceed the percent quota.

50% Question Gender Please choose your gender to which you self-identify: Male Is Selected - +

And

20% Question Q6 Please choose your race: White Is Selected - +

[Add Logic Set](#)

When the quota has been met, then: End Current Survey Customize Note: The survey will only end for respondents that meet the quota condition

Current Respondent Distribution

	Desired Percent	Current Counts
And Please choose to gender to which you self-identify: Male Is Selected	10%	0 / 10

PARTICIPANT QUOTAS

Cross Logic Quota: Use logic sets to create groups of conditions to create a distribution table

Add your logic sets below. Each logic set uses percentages to define how respondents are distributed in your bucket. The quota count will be incremented if a respondent qualifies in each logic set, and if they will not exceed the percent quota.

50% Question Q6 What is your gender? Male Is Selected - +

50% Question Q6 What is your gender? Female Is Selected - +

And

20% Question Q7 What is your age? Under 18 Is Selected - +

20% Question Q7 What is your age? 18-25 Is Selected - +

20% Question Q7 What is your age? 26-35 Is Selected - +

20% Question Q7 What is your age? 36-45 Is Selected - +

10% Question Q7 What is your age? 46-55 Is Selected - +

10% Question Q7 What is your age? 56+ Is Selected - +

And

15% Question Q10 What is your current marital status? Single, never married Is Selected - +

15% Question Q10 What is your current marital status? Married without children Is Selected - +

15% Question Q10 What is your current marital status? Married with children Is Selected - +

15% Question Q10 What is your current marital status? Divorced Is Selected - +

15% Question Q10 What is your current marital status? Separated Is Selected - +

15% Question Q10 What is your current marital status? Widowed Is Selected - +

10% Question Q10 What is your current marital status? Living w/ partner Is Selected - +

[Add Logic Set](#)

Quotas > Default Quota Group > New Quota

			Current Respondent Distribution	
			Desired Percent	Current Counts
0/1000	Coupon Quota			
0/1000	New Quota			
What is your age? Under 18 Is Selected	What is your current marital status? Single, never married Is Selected		1.13%	0 / 11
	What is your current marital status? Married without children Is Selected		1.13%	0 / 11
	What is your current marital status? Married with children Is Selected		1.13%	0 / 11
	What is your current marital status? Divorced		1.13%	0 / 11

SCREENING QUESTIONS

Skip or display question(s) based on participants' responses

- **Skip logic** (skip question(s) if criteria is met)
- **Display logic** (only display question(s) if criteria is met)

The image shows two overlapping screenshots of a survey editor interface. The top-left screenshot shows a question titled "How old are you?" with two radio button options: "Under 13" and "13-17". A gear icon (settings) is highlighted with a red box, and a dropdown menu is open, with "Add Skip Logic..." also highlighted by a red box. The bottom-right screenshot shows the same question, but with a skip logic rule added at the bottom: "If Under 13 Is Selected Then Skip To In what state do you". The "Under 13" and "Is Selected" parts of this rule are highlighted with a red box. The interface includes various settings panels on the right, such as "Change Question Type" (set to Multiple Choice), "Choices" (7), "Answers" (Single Answer selected), and "Position" (Vertical selected).

SCREENING QUESTIONS

Screen out participants based on question responses

The image shows a screenshot of a survey logic builder interface. It features two 'Then Branch If' conditions, each leading to an 'End of Survey' action.

Top Condition:

- Then Branch If:**
- If** Approximately how many studies underwent full IRB review in the year 2016? **None** Is Selected [Edit Condition](#)
- Or** What percentage of the studies reviewed by your IRB in the past year included or involved pregnan... **None involved pregnant women** Is Selected [Edit Condition](#)
- Or** Of the studies reviewed in the past year that involved pregnant women, approximately what percent... **None were federally funded** Is Selected [Edit Condition](#)
- Or** What year did you last serve as an administrator of an IRB? **Text Response** Is Displayed [Edit Condition](#)
- Buttons: [Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

Action: **End of Survey** [Move](#) [Duplicate](#) [Customize](#) [Delete](#)

[+ Add a New Element Here](#)

Bottom Condition:

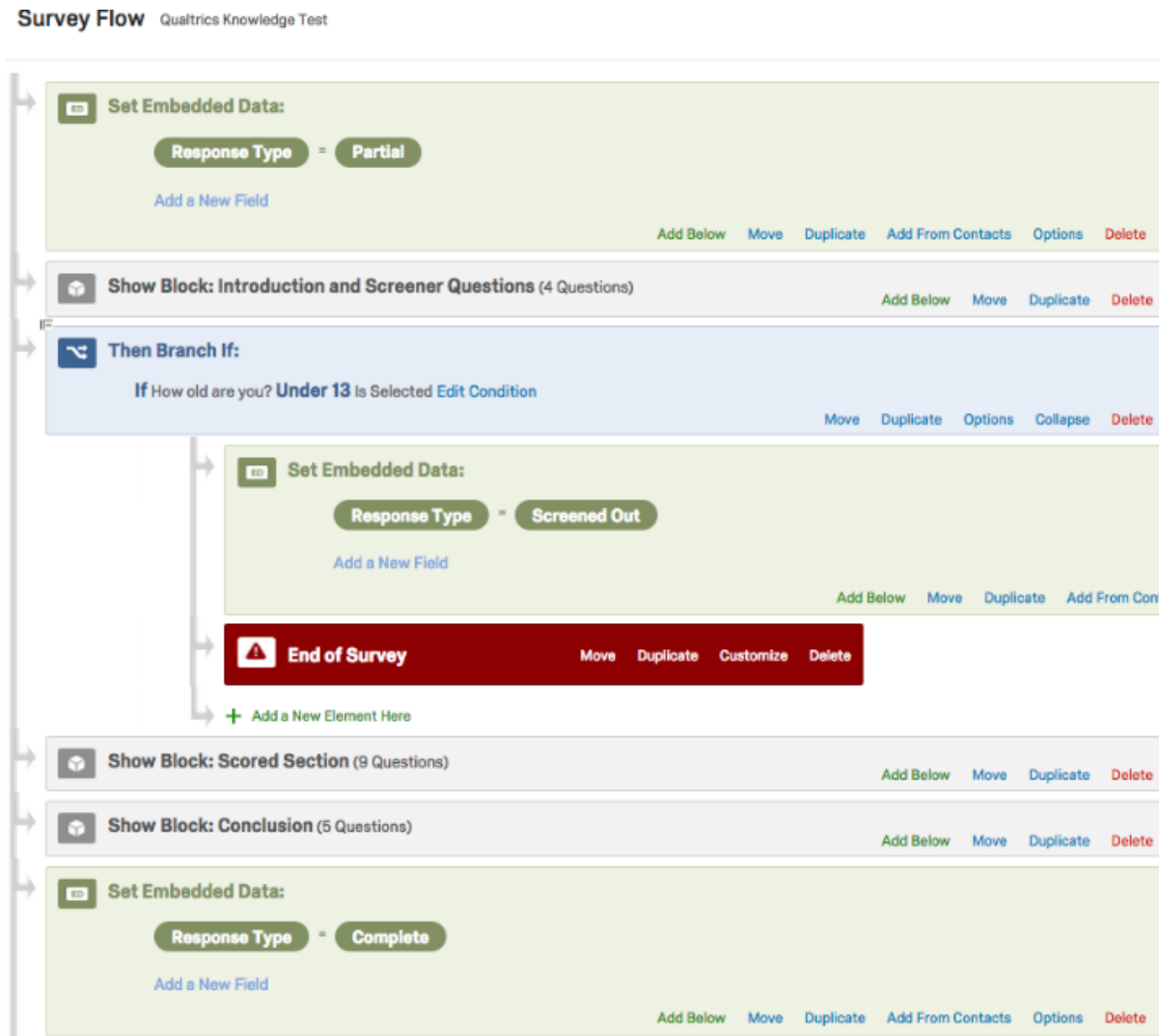
- Then Branch If:**
- If**
- If** Are you currently an: (choose all that apply) **None of these** Is Selected [Edit Condition](#)
- Or** Are you currently an: (choose all that apply) **Former IRB senior or primary administrator** Is Selected [Edit Condition](#)
- And**
- If** Are you currently an: (choose all that apply) **IRB member** Is Not Selected [Edit Condition](#)
- And** Are you currently an: (choose all that apply) **Senior or primary IRB administrator** Is Not Selected [Edit Condition](#)
- And** Are you currently an: (choose all that apply) **IRB chair** Is Not Selected [Edit Condition](#)
- And** Are you currently an: (choose all that apply) **Former IRB member or chair** Is Not Selected [Edit Condition](#)
- Buttons: [Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

Action: **End of Survey** [Move](#) [Duplicate](#) [Customize](#) [Delete](#)

[+ Add a New Element Here](#)

FLAGGING RESPONSES

Screen out participants based on question responses



HANDLING SCREENED-OUT RESPONSES

- Default message
- Custom message
- Redirect to a URL (e.g. study website)
- Do not record survey response (**Warning:** These responses are not saved and **cannot** be retrieved later)

Customize End Of Survey

- Override Survey Options
 - Default end of survey message.
 - Custom end of survey message...
 - Redirect to single response report.
 - Redirect to a URL ...
- Send additional thank you email from the library...
- Do not increment quota counts.
- Show Response Summary.
- Do NOT record any personal information and remove panel association (not recommended).
- Flag Response As
- Do NOT record survey response (not recommended).
- Screen-out Response [Show Screen-out Counts](#)

Do you need to have participants enter identifying information in order to receive compensation, enter a raffle, etc. while **keeping responses anonymous?**

- Screened-out participants will not be directed to new survey



ANONYMOUS RESPONSES & RAFFLES

Survey Options

Survey Experience

- Back Button.** Enable respondents to change their responses.
- Save and Continue.** Allow respondents to save and continue later.
- Show Question Numbers.** Great for previews. For participants, try a [Progress Bar](#) instead.
- Use Custom Survey Validation Messages...**

Survey Language: The language the survey is written in.

Survey Title: This text will appear in the browser as the window or tab title.

Meta Description: Search engines and social media services use this description.

Survey Protection

- Open Access.** Allow anyone to take this survey.
- By Invitation Only.** Prevent people from taking the survey using an anonymous survey link.

Password Protection. This password must be entered to take this survey:

Prevent Ballot Box Stuffing. Keep people from taking this survey more than once.

HTTP Referrer Verification. The user must come from this URL to take the survey:

Prevent Indexing. A tag will be added to the survey to prevent search engines from indexing it.

Secure Participants' Files. Files uploaded as responses can only be viewed by users with permission to view responses.

Survey Expiration. The survey will only be available for a specified date range.

Survey Termination

- Default end of survey message.**
- Custom end of survey message...**

Redirect to single response report.

Redirect to a full URL, ex. "http://www.qualtrics.com":

Send additional thank you email from a library... When distributed via the Survey Mailer.

Anonymize Response. Do NOT record any personal information and remove contact association (not recommended).

Inactive Surveys

- Default inactive survey message.**
- Custom inactive survey message...**

Partial Completion

responses in progress after respondent's

Please note, the recipient cannot continue taking the survey once their data is recorded or deleted.

Close

Save

DISTRIBUTING SURVEYS



Anonymous link

Email distribution*

Personal links*

Social media sites

Qualtrics Offline App

QR codes

Purchase respondents



*These options collect participant information

DISTRIBUTING SURVEYS

Anonymous links are reusable and do not collect any identifying information, but a few things to be aware of:

- Decide under “Survey Options” if you want to allow participants to save and continue later
- Select “Prevent Ballot Box Stuffing” to keep people from taking survey multiple times

Links can be shortened via Bitly.com,
www.go.unc.edu,
or customized on Qualtrics

Anonymous Survey Link

A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.

https://unc.az1.qualtrics.com/jfe/form/SV_004T6d10MnaiNU1

Link Text

HTML

```
<a target=_blank href=https://unc.az1.qualtrics.com/jfe/form/SV_004T6d10MnaiNU1
```

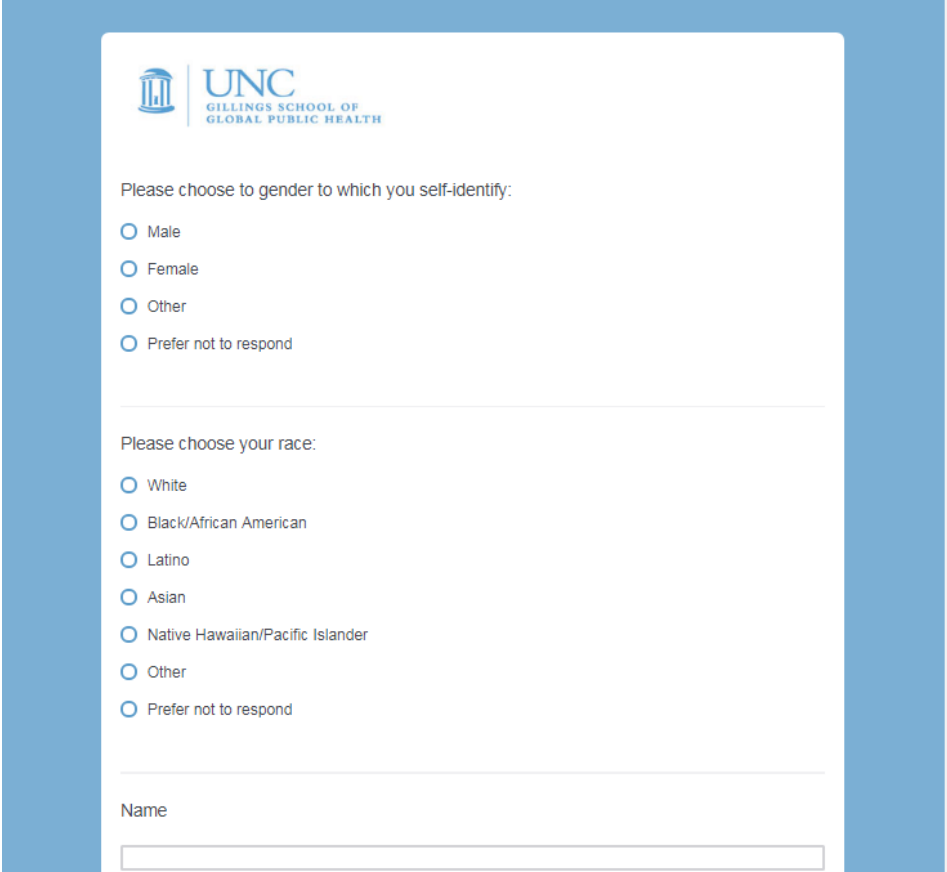
www.myhealthstudy.com

OTHER DISTRIBUTION METHODS

- **Social media** allows you to share survey on various platforms (Twitter, Facebook, Reddit, LinkedIn, Google+, Pinterest)
 - Only records social media site participant came from
- **Qualtrics Offline App** can be used without an internet connection on tablets and smartphones, but does have some limited functionality
 - Great for use in the field
- Can generate a **QR code** to be printed and placed in various locations
- **Purchase respondents:** can pay Qualtrics to find specific participant panels for you
 - Starts at \$5 per response with a 100 response minimum

TIPS & TRICKS

- **Collaboration:** surveys can be shared to give others ability to access
- **Themes** are available and modifiable
- Qualtrics is **HIPAA-compliant**
- Can easily **randomize** blocks of questions, individual questions, and response options
- **Force response** and **request response** can be used to encourage participants to answer
- Useful question types:
 - Signature
 - File upload
 - Captcha verification
 - Carry forward
 - Timing



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Please choose to gender to which you self-identify:

Male

Female

Other

Prefer not to respond

Please choose your race:

White

Black/African American

Latino

Asian

Native Hawaiian/Pacific Islander

Other

Prefer not to respond

Name

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