QUALTRICS FOR RESEARCH
SUBJECT RECRUITMENT

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TOPIC OVERVIEW

- Participant Quotas
- Screening Questions
- Flagging Responses
- Handling Responses
- 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.
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 choose a self-identify:
- Male
- Is Selected
- And
- Question
- Q5: Please choose your race:
- White
- Is Selected

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

*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.
PARTICIPANT QUOTAS

Cross Logic Quota: Use logic sets to create groups of conditions to create a distribution table.
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)
SCREENING QUESTIONS
Screen out participants based on question responses
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)
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
*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
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 collection 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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