Before getting started

Divide into groups based on level of experience with Qualtrics

Log in to your Qualtrics account

Create a new project

Step One: Add Questions

Assignment: Add three survey questions. Question One should be a multiple-choice question that reads: "How many times have you attended the NAE4HA conference?". Then provide ten response options including "1, 2, 3, 4, 5, 6, 7, 8, 9, 10 or more. Add in a second question that reads "I plan to attend NAE4HA next year." Then provide three answer choices. One that reads "yes", one that reads "no", and one that reads "maybe". Add a third open ended question that reads: "please explain why you do not plan to attend next year." Once you have added these three questions, add in any additional questions you would like to ask.

Hot Tip! – Section questions into "blocks" based on a logical organizational pattern. This will keep your survey manageable and helps with functionality.
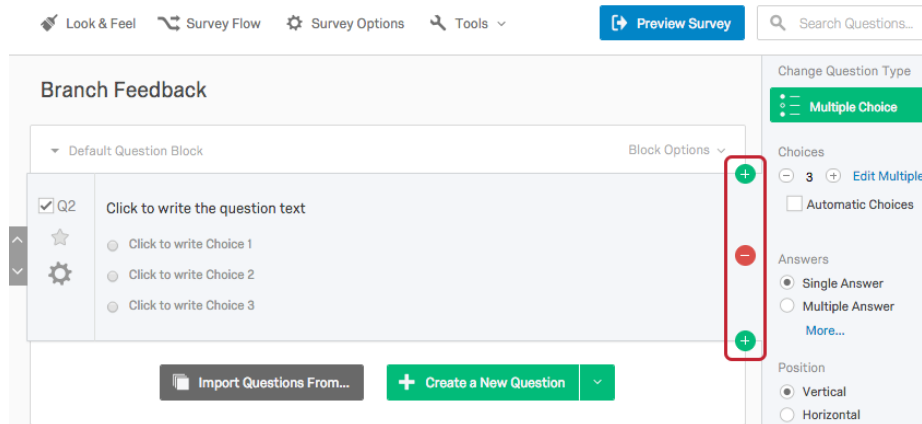
Add Questions

To add a question to a survey, click Create a New Question.

To add another question, hover over an existing question and click the Green Plus buttons (either above or below the existing question). Click the Red Minus sign to delete a question.

Note: You can recover deleted questions from the Trash at the bottom of the survey.

Edit Question Text

Click in the Question Text or Answer Choice text boxes to enter or edit your text.
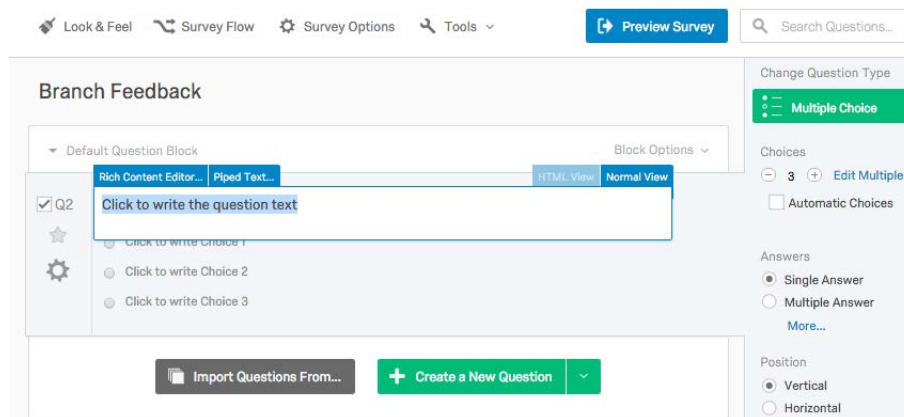
Change Question Type

When you first click Create a New Question, Multiple Choice questions are inserted by default.

To change question type go to the Editing Pane (on the right of your question). Click Change Question Type. Pick any new question type.

Note: The Editing Pane automatically customizes its options to match the newly selected question type.
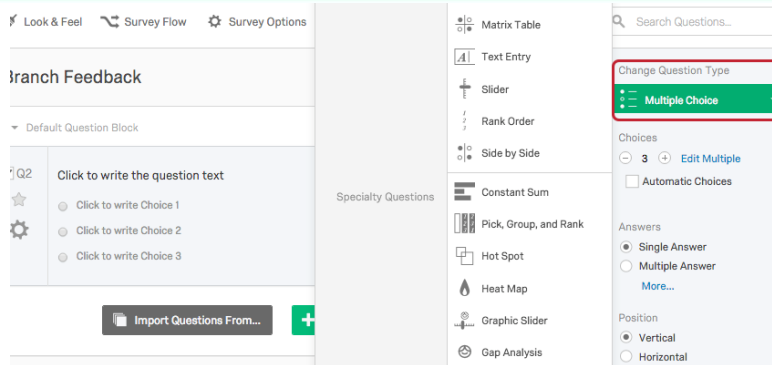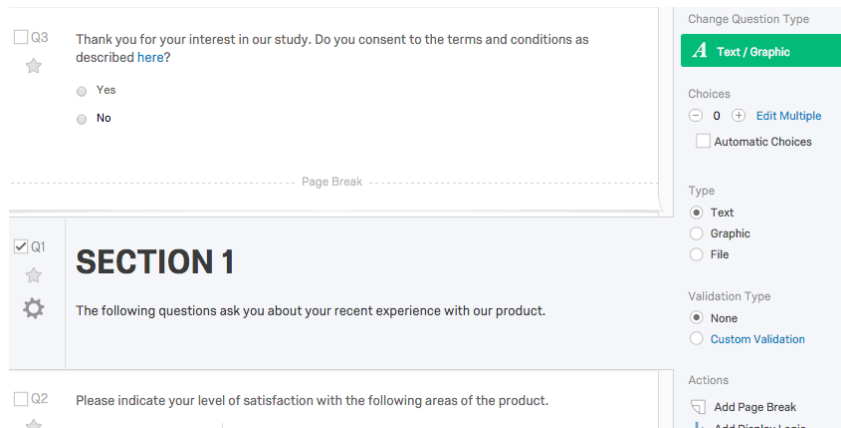
Multiple Choice

Multiple Choice is the most common question type, which allows respondents to choose from a list of choices. They are very flexible. You can:
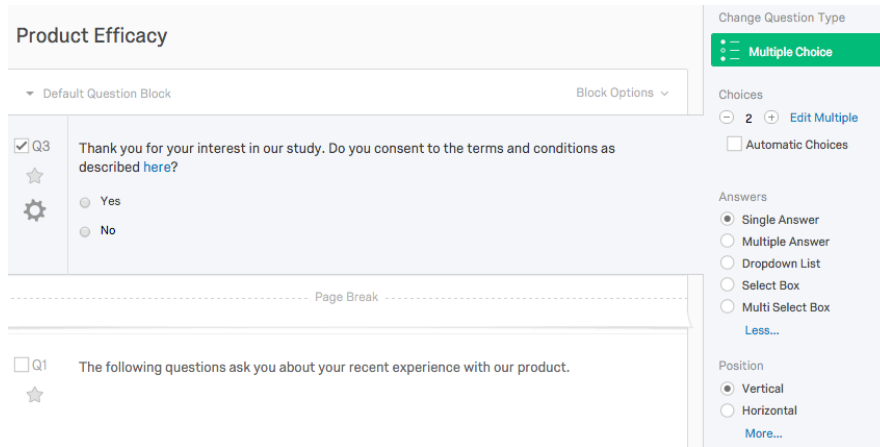
Descriptive Text & Graphic

Descriptive Text and Graphic questions don't have answer choice options. Only text and graphics are displayed. They are often used for introductions or instructions.

Text Entry

Text Entry questions allow open-ended text feedback. Change the size of your text box from *Text Type* in the **Editing Pane**. Under **Validation Type**, set character limits to restrict response length.


Step Two: Add Survey Logic

Assignment: Add skip logic to Q1. Set the skip logic so that it reads: IF Q1 answer choice "1" is selected, send participant to the end of the survey. Next, add display logic to question three. Set it so that Q3 only displays IF question two response is "no".

Hot Tip: Often, IRB consent forms precede surveys, and ask participants if they agree to participate. Use Skip Logic to filter out participants who do not agree to participate and send them to the end-of the survey.

Skip Logic

Skip Logic jumps respondents to a future point of a survey based on a previous response. For example, if a respondent answers "No" on a consent question, you can skip them to an exit message and end their survey. To add Skip Logic:

1. Select your question.
2. Click **Add Skip Logic** under **Actions** in the Editing Pane.
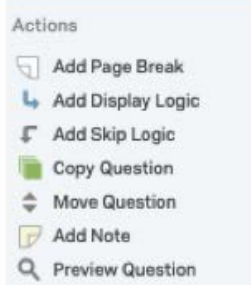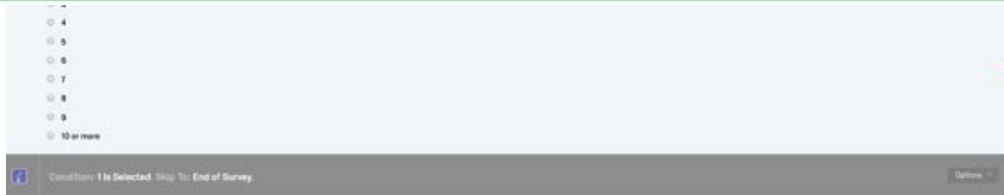
The Skip Logic editor box appears at the bottom of the question. Next, specify exactly where the respondents will be skipped. You can skip to:

- Subsequent questions within a block
- The end of the current block
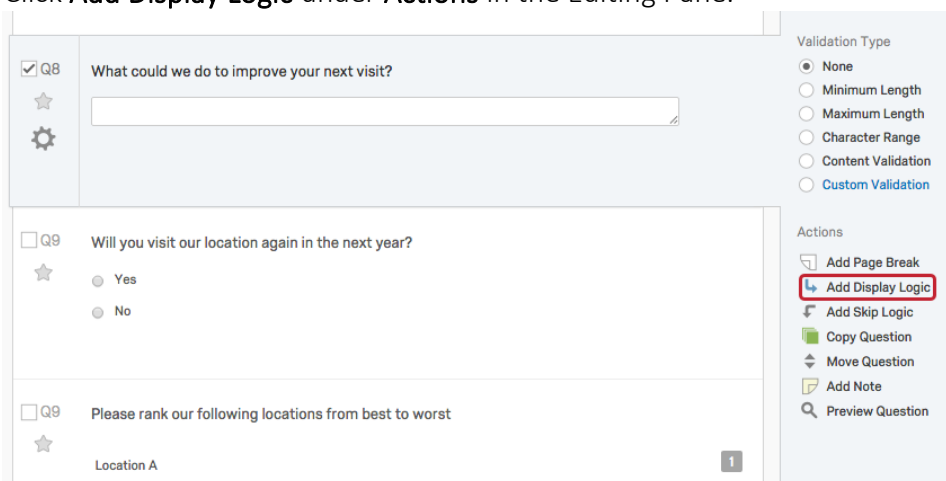- The end of the survey

Click **Done**

Display Logic
Display Logic shows or hides questions based on specified conditions.
Display Logic conditions are based on previously collected information such as answer selections, contact list information, or Embedded Data.

Select the question. Click **Add Display Logic** under **Actions** in the Editing Pane.

In the Display Logic window, add the conditions to be met before a respondent can see the question.

Change how your conditions are linked by toggling the **And** dropdown. In this case, the statements are linked by **Or if**.

Step Three: Add Piped text to a custom end of survey message

Assignment: Create a custom end of survey message that includes piped text. This custom end of survey message should read "Thank you for taking our survey, and for attending NAE4HA the past {A} (insert piped text response from Q1) years. We appreciate your time and support."

*Hot Tip: Use custom end of survey messages to direct participants back to a host website where they can find more information about you, your team, and/or programs available.*

End of survey messages

Qualtrics provides a default end of survey message that will be displayed to participants. Having a custom end of survey message allows survey designers present messages specific to their interests and goals.

Go into the survey options button at the top of the survey, and click on load saved messages under "my library" and click on new message. Create a new custom survey message. Save.
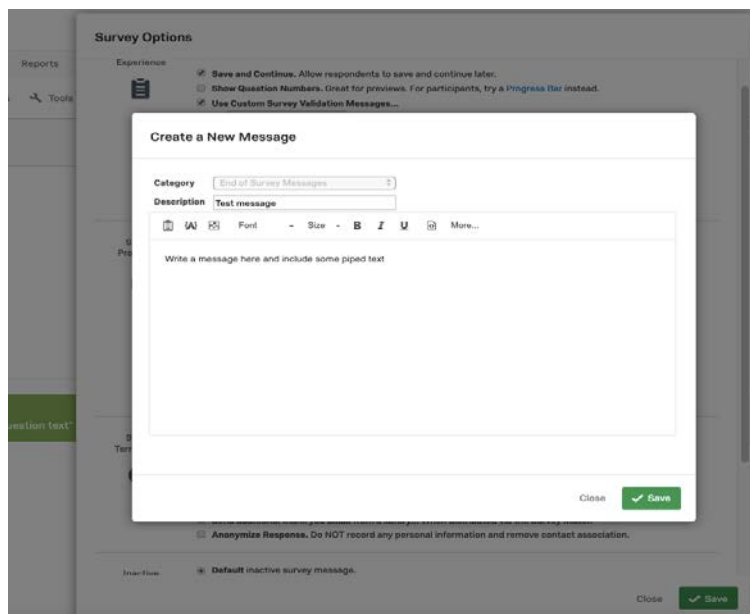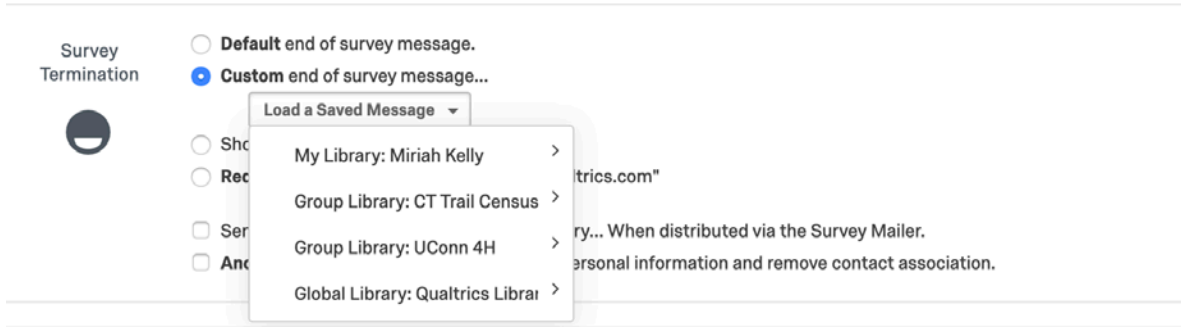
Piped text

Adding piped text is great for customization. You can pipe in text from a contact list, embedded data, answers from previous questions etc.

To add in piped text {A} from answers to a previous question. Choose the option "selected choices". Save.
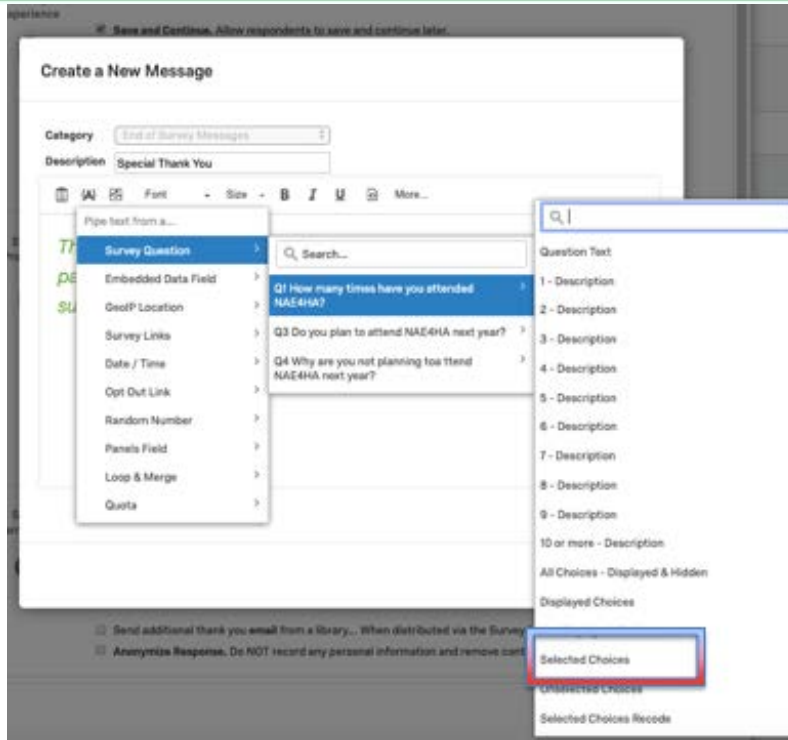
<u>Step Four: Distribute your survey</u>

Assignment: Go to the distribution tab on the upper left hand corner, and copy the anonymous link. Using your preferred email platform, send the anonymous link to yourself. Complete the survey.

Hot Tip: Use a url shortener to create a customized link to your anonymous survey.

Under the distributions tab, go to the anonymous link option. Copy the link and paste it in your email message. You can also create a QR code from this tab, as well.

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://uconn.co1.qualtrics.com/jfe/form/SV_aaELW0D4U1bQFIH

Customize Link