# Qualtrics Sample Survey – Student Survey Project

We are going to use a template Qualtrics survey to help us check in with students regarding COVID-19. First, you will need to save and upload the prescribed Qualtrics Survey. The **COVID-19 Pulse Survey** can be accessed through the QR located at the end of this document. Once you have saved the survey on your computer, follow the instructions below to import the survey into your Qualtrics account:

1. Log into your Qualtrics Account
2. Click on the blue "Create a New Project" on the bottom left hand corner
3. Under the "From Scratch" category click on "Survey" button and hit the blue "Get started" button on the right-hand side
4. Title the project **COVID-19 Pulse Survey**
5. Under the "How do you want to start your survey" hit "Import a QSF file"
6. Click "choose file" and choose the **COVID-19 Pulse Survey** you saved earlier and click the blue button "Create Project"
7. You should see a survey with 13 questions that ends with Q5

Distributing A Survey

You have been appointed the project manager for this Qualtrics survey project, to create and distribute the survey. In this role, you need to distribute the survey to collect data. (Note. Your survey must be published before you can distribute your survey. Clicking the blue "publish" button on the top left activates your survey.

1. On the top left, hit the button with three lines and then click on "Contacts"
2. Click on the green "Create Contact List" button
3. Name it "Test COVID Survey Contact List" and don't worry about the folder.
4. Click "Add Manually" and add in your own email address, first name, and last name (remember, punctuation matters here).
5. Navigate back to your **COVID-19 Pulse Survey** and go to the Distributions tab
6. Click on Compose Email
7. Fill/Adjust the following information:
    a. To: (select your "Test COVID Survey Contact List" from your library)
    b. From:
    c. From Name:
    d. Reply to Email
    e. When:
    f. Subject:
8. Within the message body, please include the following information:
9. Piped Text First Name
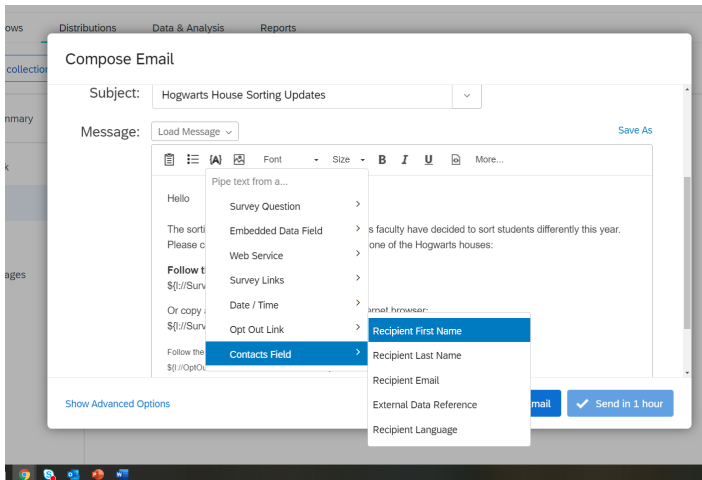
10. Message about the purpose of the survey
11. We are going to create an in-line question to boost survey responses:
    a. Including a survey question in your email message can enhance your survey invitation. When your participants receive the email, they'll be able to click an answer to your inline question right from the body of the email. Clicking on an answer will immediately launch the survey in another tab, with their chosen answer already selected for them.
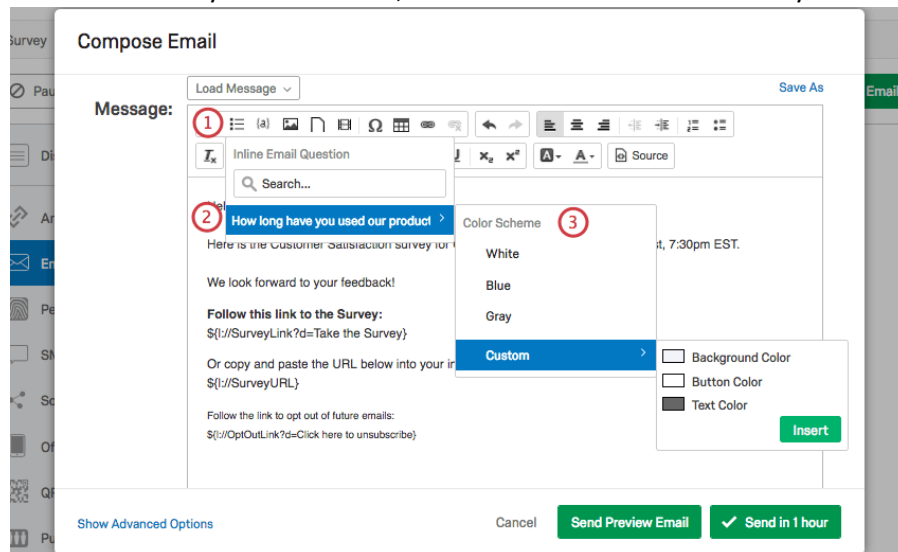
12. Once you are satisfied with the email message and subject, you can click "send."

Track Responses (taken from Qualtrics Support)

Each time an email distribution is scheduled to be sent, it is recorded as a separate distribution block in the Emails section. Within each distribution block, you'll find relevant information about the status of the distributed emails and surveys.

1. **Email to Contact List**: The individual or contact list your distribution was sent to and the total number of contacts in the distribution.
   a. Qtip: In this example, the contact list has the date it was created in the name. This is unrelated to the date the distribution was sent / scheduled for.
2. **Sent On / Scheduled For:** The date and time the distribution was sent. If the distribution has not yet been sent, the scheduled time will be listed in blue. The timezone will match the one set for your account.
3. **Emails Sent:** The current number of emails delivered out of the total distribution.
   a. Attention: Occasionally, the distribution will show a larger number of Emails Sent than what shows up in the downloaded email history. This will happen when members of the contact list that were originally recipients have been deleted. Deleted contacts will not appear in the download, but deleting contacts has no effect on the Emails Sent statistic.
4. **Emails Failed:** The number of emails that did not leave our servers. The most common cause of a failed email is an incorrectly formatted email address, such as a missing @. This number does not include bouncebacks.
5. **Surveys Started:** The number of surveys where the recipient has at least clicked on the link. This includes the number of people who have submitted the survey.
6. **Surveys Finished**: The number of surveys sent out in the distribution that have been submitted.
7. **Emails Bounced**: The number of emails that were rejected by the recipient server.
   a. Qtip: There are two types of bounces: hard bounces and soft bounces. Hard bounces are emails that can't be delivered due to a permanent reason. This could include the email address not existing, the recipient server not accepting emails, or the domain not being a real email domain. Soft bounces are emails that can't be delivered due to temporary

reasons. The recipient email inbox could be full, the email could be too large, or the recipient email server could be temporarily down. Qualtrics automatically retries sending soft bounces after a period of time.

8. **Duplicate Emails**: The number of duplicate emails prevented from sending. Duplicate emails are emails with the exact same message and recipient as another email that went out. For example, if your contact list has the same email address on it multiple times, this will be seen as a duplicate, and to prevent your entire distribution from being flagged as spam, the Qualtrics mailer will not send these out. See the Editing Contacts in a List page for help consolidating duplicates in your contact list.

9. **Complaints**: The number of notifications Qualtrics servers receive from the email provider when a recipient clicks 'Report Spam' (or equivalent) for a Qualtrics originated email. See the Avoid Being Marked as Spam page for more details.

Reminder and Thank you Emails (taken from Qualtrics Support)

After you've invited respondents to take your survey, Qualtrics allows you to send special emails reminding these respondents to finish, or thanking them for finishing. The system will recognize who's finished for you, so you don't have to worry about setting up a special contact list! *Note: Reminder and thank you emails can only be sent to distributions using the individual link! (Individual links are generally the default for emailed surveys.)*

TO SEND A REMINDER EMAIL

1. Expand the appropriate distribution block by clicking on the plus sign in the top left corner.
2. Click Schedule Reminder underneath the distribution block.
3. Schedule the time of your distribution in the When dropdown (by default, your mailing will be sent one hour from when you schedule the mailing, but you can choose from a range of common times or schedule a custom time).
4. Include a message in the body.
5. Click send.

TO SEND A THANK YOU EMAIL

1. Expand the appropriate distribution block by clicking on the plus sign in the top left corner.
2. Click Schedule Thank You Message.
3. Schedule the time of your distribution in the When dropdown (by default, your mailing will be sent one hour from when you schedule the mailing, but you can choose from a range of common times or schedule a custom time).
4. Enter a subject for the email.
5. Create an email message.
6. Click Send.

Additional Tools/Features when Distributing a Survey

Anonymous Link

Social Media

Personal Links

QR Code

Set a password for your survey

1. Navigate to the "Survey Options" tab on the left-hand navigation bar
2. Under "Security" turn on password protection

Ensure respondents cannot take the survey more than once via the anonymous link

1. Under the "Security" tab, turn on "Prevent multiple submissions"

Allow respondents to leave your survey and then re-enter where they left off when they click on the survey link again.

1. Under the "Responses" tab, turn on "Allow respondents to finish later"

Adding in Workflows

Let's say you would like to send a follow up email to students who take you survey. Within your survey, navigate to the "Workflows" tab on the top right.

1. Click the "Create a workflow" blue button
2. Click "Started by an event" and the "Get started" blue button on the lower right-hand corner
3. Specify the event type by clicking, "Survey response"
4. Click "Newly created responses" and then "Finish"
5. Next, click the plus icon below your newly created workflow and then click "Task"
6. You will see a variety of options, click "Email"
7. From here you can customize the email that will be sent when a new survey response is submitted. Please add in the following:
   a. To: Embedded Data Field – RecipientEmail
   b. From: Your email and name
   c. Subject: Thank you for taking this survey!
   d. Message: Customize to your desire
8. Then click "Save"

Let's say you like to be notified when a student responds that they there is something limiting their ability to participate in the course. You can create specific conditions that trigger an event.

1. Click the "Create a workflow" blue button
2. Click "Started by an event" and the "Get started" blue button on the lower right-hand corner
3. Specify the event type by clicking, "Survey response"
4. Click "Newly created responses" and then "Finish"
5. Next, click the plus icon below your newly created workflow and then click "Task"
6. You will see a variety of options, click "Email"
7. From here you can customize the email that will be sent when a new survey response is submitted. Please add in the following:
   a. To: YOUR EMAIL (i.e. kstone@uttyler.edu)
   b. From: Your email and name
   c. Subject: Learning Impediment Notification

d.   Message: You have a new survey response that indicates a student is experiencing difficulty participating in the course.
8. Then click "Save"
9. Hit the plus sign and then click "Condition"
10. Hit "Any of the following are true", select "Q2 Is there anything that is limiting your ability to participate…?", select "Yes", and select "is selected"
11. Click "done editing"

Check your Work
- Preview the survey to check for display logic and overall flow
- Check for typos and spelling mistakes.
- Review your workflow tab to ensure your workflows have been saved.
- Test your survey to ensure workflows work

To access the files used in today's workshop: