NEBRASKA ACADEMY FOR
METHODOLOGY, ANALYTICS & PSYCHOMETRICS

Qualtrics Testing Protocol

Finalized October 9, 2025

This document was prepared by MAP Academy faculty and graduate students to provide researchers with best practices for preparing and distributing online surveys in Qualtrics. Although not an official Qualtrics resource, it offers guidance to ensure rigorous data collection and ensure data integrity. ***The development of this resource was made possible by funding from the University of Nebraska – Nebraska Research Initiative.***

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Advice on Separation of Tasks

This protocol outlines the process for testing a Qualtrics survey to ensure its functionality and accuracy before distributing the survey to the public. Generally, tasks can be grouped in the following key areas:

- **Grammar and Language**
  - Review all survey instructions and questions for spelling, grammar, clarity, and consistency with measures table/codebook
- **Survey Flow**
  - Check the order of questions, between blocks and question behaviors (e.g., branch logic, display logic, and skip logic)
- **Exported Dataset**
  - Confirm the variable names, labels, and values in the exported SPSS file match the measures table/codebook

Front-end vs. Back-end

To make the testing process more manageable, we've organized the tasks into two categories:

- **Front-end** is the part of the survey that affects what a participant experiences or sees. This includes look and feel of the survey, response options given, skip and display logic, branching, piped-in text, etc.
- **Back-end** is the part of the survey or data that only affects what we see in the exported dataset as researchers, but that participants cannot see. This includes shortened variable names and labels that will affect how responses export in SPSS, recoded values, etc.

Access Requirements for Front- and Back-end Testing

- The front-end can all be checked by anyone taking the survey as a participant as long as they have access to a link to the survey. The checker will need to take the survey several times to ensure that all questions are displayed correctly and match the codebook or measures table, there are no spelling or grammar errors, and mechanisms like skip logic, validation, and block order are all in working order.
- The back-end can be checked by anyone who has access to either a test dataset or the survey editor itself. There are two ways to obtain a test dataset — either by downloading data that has been entered during the front-end testing phase, or by having Qualtrics generate a test dataset for download. Ideally, checking the downloaded dataset against the survey in Qualtrics is the most efficient way to complete back-end testing, so if you do not have access to the survey in Qualtrics, ask the PI to grant you access.

Defining Roles: MAP team vs. Study team

Prior to starting Qualtrics survey testing, you need to define roles and responsibilities between MAP Academy and the study team. Oftentimes, the study team will create the survey in Qualtrics and then engage with MAP Academy to assist with front- or back-end testing, or both. Typically, MAP Academy will always complete back-end testing, but it depends on the PI/study team whether MAP also assists with front-end testing.

It's also necessary to clarify with the PI/study team whether they would like MAP to simply identify issues for the study team to resolve, or correct issues as they are identified. Either way, it's imperative to track issues and their resolution in the templates provided in the checklists below.

Front-end Checklist:

Make sure to track any discrepancies/issues in a separate document to bring to the PI/study team for further instructions (see Qualtrics testing Discrepancy Tracker Template for an example). We recommend that you take the survey as if you were a participant. It is good practice to run through the survey several times selecting different options each time to increase the likelihood of catching errors. It is also good practice to go through this checklist, identify and correct errors, and then run through this checklist again in case there are things you missed the first time, and to ensure that the errors were addressed correctly.

Tasks	Checked by Initials and Date	Status of Resolution *e.g., waiting on instructions from PI, resolved by XX, complete, etc.*
Are the survey's instructions clear and understandable at an 8th grade reading level? » Consider the respondent- if children/adolescents are taking the survey, avoid complex sentences and use short, concise sentences. Survey instructions should always include a brief overview of what the survey is asking about and how long the survey should take. Example: "This survey will ask you about your study habits. This survey will take approximately 20 minutes to complete."		
Are all the questions in the measures table/codebook also in the Qualtrics survey? ○ If not, catalog missing questions in the tracking template.		
Do all the questions and their instructions in the Qualtrics survey match **verbatim** the measures table/codebook as far as the spelling, wording, and punctuation of items? ○ If not, catalog discrepancies in the tracking template.		
Do the survey questions, instructions, etc. fit on the screen in a way that is easy to read? » Do you have to scroll left and right to see all of the response options in a way that is inconvenient or impossible? » If the survey will be likely taken on tablets (e.g., in schools) or phones, be sure to check the mobile version using the preview function to ensure that items are displaying correctly and in an easy to read format (for example, a survey question with multiple response options may display correctly on a computer, but when displayed on a tablet or phone a		

respondent would need to scroll left/right to see all response options).		
If applicable, is any piped text appearing correctly? » Try typing in apostrophes, spaces, or other punctuation to test this rigorously. » Are there any questions that piped text could be added to in order to increase understandability?		
If the survey is supposed to link you to another webpage or survey at a certain point, does the link work properly? » For example, if there is one survey that is being used for informed consent, and after completing the consent form the survey is supposed to redirect the respondent to the actual survey, does that link/redirect work?		
Are there questions in the measures table/codebook that have required responses? If so, are response requirements working appropriately? » Does the participant receive a notification if they didn't answer a required question? Are there questions that should have required responses that don't? ○ For example, if males/females get different questions, gender should be a required response so that branch logic can be programmed correctly.		
If a question response requires a certain type of entry, like an email address, can you enter something else, like random characters (validation)? Similarly, if a question allows for multiple selection of items (e.g., "select all that apply"), does the question allow you to select multiple responses?		
If you made changes to the survey, be sure to publish the survey so that the changes are saved. Make sure to review the Publishing a Survey guidance on what data may be deleted when making changes to an active survey (a survey that is currently collecting data).		
Advanced Front-end Testing Tasks		
Does the survey flow and any branch logic work correctly? » Are the items, measures, and/or sections showing up in the correct order according to the measures table/codebook? » Are the items and measures showing up correctly based on the set conditions in the measures table/codebook and in the survey flow? ○ For instance, if the survey flow was set up in an effort to have a question appear before another, does that work properly when you take or preview the survey? If there was a branch logic, is that		

working according to what was described in the measures table?		
Are the number of questions per page manageable and not overwhelming to a respondent? » For example, you want to make sure that respondents are not presented with too many questions per page such that they have to scroll down multiple times to answer all the questions. Try to have all questions that relate to one another (e.g., all questions about depression) appear on one page. You can manually set page breaks so that questions are presented in small groups.		
If applicable, does the survey randomization work? » Are the questions showing up in a randomized order when you take the survey multiple times? » Check for this both within blocks and across survey blocks, as applicable (for instance, if both questions within the blocks and the blocks themselves are meant to be randomized)		

Back-End Checklist:

Track any discrepancies/issues in a separate document to bring to the PI/study team for further instructions (see Qualtrics testing Discrepancy Tracker Template).

Tasks	Checked by Initials and Date	Status of Resolution *e.g., waiting on instructions from PI, resolved by XX, complete, etc.*
Are all of the variable names exporting correctly? » Check the variable names in the dataset against the measures table/codebook. If there are discrepancies between the variable names in the dataset and codebook, track the discrepancies in the tracker template and confirm with the study team who is responsible for fixing (MAP or study team). ○ In some cases, there may not be variable names included in the Qualtrics survey, and variables are exported as "Q1", "Q2", etc. If this is the case, ask study PIs if they have a variable naming schema. If not, suggest implementing the CYFS variable naming protocol. » To rename variables in Qualtrics so they export to SPSS, review Regular Variable Names in this protocol. ***Please note:** MAP Academy recommends keeping variable names to 8 characters or less so that they can be used in a variety of statistical software programs.*		
Do the values and value labels for each item match the measures table/codebook? » For example, if a scale asks for ratings of 1 (strongly disagree) to 5 (strongly agree), are those values properly coded in SPSS? If not, review Variable Values in this protocol for how to recode values in Qualtrics. ○ Are there values that could be improved for interpretability? For example, Qualtrics will automatically code years as 2025 = 1, 2024 = 2, etc. However, it is easier to interpret the year ***as is*** in a dataset, so you'll need to recode those items in Qualtrics so year exports as 2025 instead of "1".		
Are the variable labels easily read in the downloaded dataset? Review shortened versions in this protocol for examples and instructions on how to remedy if not.		
If you made changes to the survey, be sure to publish the survey so that the changes are saved. Make sure to review the Publishing a Survey guidance on what data may be deleted when making changes to an active survey (a survey that is currently collecting data).		

Glossary of Terms and Definitions

Testing and Dataset Terms

Back-end	The parts of the survey or data that only affect what we see in the dataset as researchers, but that participants cannot see. For instance, shortened variable labels that will affect how responses export in SPSS, variable names, recoded values, etc.
Front-end	The parts of the survey that affect what a participant experiences or sees. This includes block randomization, look and feel, response options given, skip and display logics, piped-in text, etc.
Codebook (or Measure Table)	These words are slightly different but are often used interchangeably. You can find information about what questions should be asked in the survey, how variables should be named and what their labels should be, at what time points surveys should be administered, how the variables should be scored later, etc. here. Measure tables are typically created before a project is finished as instructions for creating surveys, etc., while the codebook is usually meant to be a guide to the data for once the project is finished and data have been scored.
Variable Name	This is how the variable is identified and is exported in the leftmost column in SPSS (or across the top row in a csv/Excel format). If the project does not have a predetermined variable naming convention, suggest implementing the CYFS_Universal Variable Naming Suggestions_9-07-18.xlsx to the PI/study team.
Variable Label	This is how the variable is described in SPSS. It often consists of the question that was asked of a participant. For example, the variable name may be “y1grade” and the variable label would be “what is your current grade in school?”
Variable Value	Variable values are the numbers associated with a particular response. For instance, for a scale that ranges from strongly agree to strongly disagree, the variable values might be: **1** = strongly disagree **2** = disagree **3** = neither agree nor disagree **4** = agree **5** = strongly agree
Value Label	The value label is the qualitative (text) associated with a particular response. For instance, for a scale that ranges from strongly agree to strongly disagree, the value labels would be: 1 = **strongly disagree** 2 = **disagree** 3 = **neither agree nor disagree**

	4 = **agree** 5 = **strongly agree**
Downloaded Dataset	The dataset that you see in SPSS, R, Stata, etc. This is what is downloaded from Qualtrics, and this file is what is used to complete the back-end checking.

Qualtrics Terms

Survey Editor	The window where Qualtrics allows you to edit different aspects of the survey. You have to be granted access by the survey owner to view this part of the survey.
Instructions	These will usually appear as a block without an actual question item, to preface a measure or set of measures for participants. They might say something like "the following questions will ask you about XYZ, please ABC while you answer them." These don't export with the dataset into the back-end. The only exception is for matrix-table question types, where one set of instructions applies to all of the questions and does export with them. *See shortened variable labels section for more information.*
Question Block	Blocks are used to group and organize questions in your survey. For example, creating a block each for demographics, informed consent, and different measures. These could also be called just blocks or survey blocks. Blocks are not the same as pages, however, as one block can have multiple pages. *See Question Block section for more information.*
Page and Page Breaks	The actual window/page that a participant sees. There can be multiple pages in a survey or block. A page can have any number of questions on it, and may or may not have requirements in order to proceed to the next. *See Response Requirements and Page Breaks for more information.*
Display Logic	These are used to customize surveys to each respondent. When a question only applies to a specific respondent, you can set display logic on the question so that it shows conditionally based on previous answers. *See Display Logic section for more information.*
Skip Logic	Skip logic is a tool we can use to skip respondents over a single question, to the end of a block, or even to the end of a survey based on their responses. *See Skip Logic section for more information.*

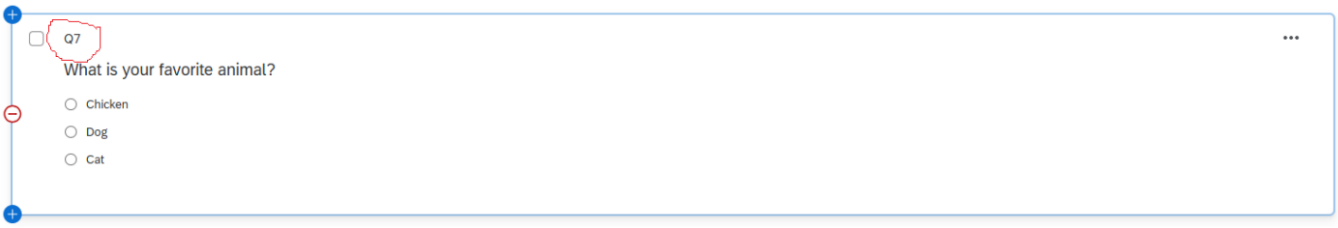
Piped Text	Piped text is a line of code that allows you to customize the question and response options and to dynamically insert previous answers or embedded data. *See Piped Text section for more information.*
Randomization	Randomization allows you to randomize question order or entire question blocks as necessary. *See Randomization section for more information.*
Branch Logic	These are used to direct respondents to different sections/pathways in the survey based on their responses or embedded data. *See Branch Logic section for more information.*
Preview Function	Qualtrics provides an option to test surveys without taking them as if you were an actual participant (which would typically be through a link to the survey, and your response would be actually recorded). The preview function does not record your response, and you can place bookmarks and more. *See Preview section for more information.*
Validation	Qualtrics allows you to limit the types of responses respondents can enter on certain questions. For example, if a question asks for an email address, you can set validation so that only an email address can be entered into that field. *See Validation section for more information.*
Response requirement	Qualtrics allows you to request or require responses on certain questions. For example, if there are questions that you absolutely need a response for (e.g., gender, ag you can set responses to be required so that a respondent cannot continue in the survey until they have answered the question. Alternatively, if you set a requested response, a respondent will get an alert that they didn't answer a question, but they will be able to proceed in the survey without providing a response. *See Response Requirements section for more information.*
Survey Flow	Survey flow allows you to customize the order in which participants respond in the survey. There are various survey flow elements you can utilize that creates a personalized survey flow for respondents. *See Survey Flow section for more information.*

In-Depth Instructions

Visual aids and additional instructions for fixing discrepancies, plus tips on using Qualtrics.

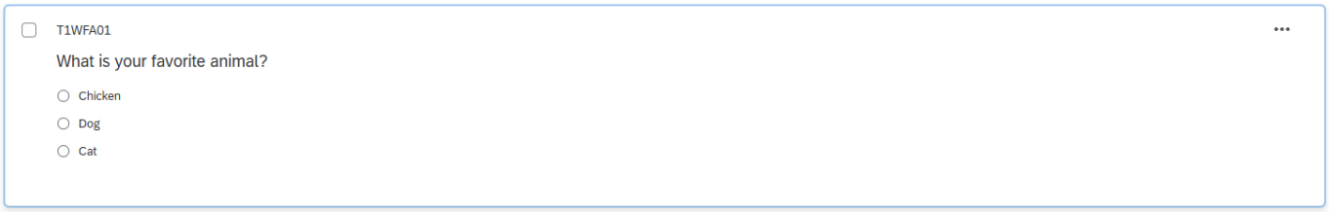
Regular Variable Names

In Qualtrics, unless if a variable name is input, it will give variable names like “Q7” that give us no information about the item.



To rename a variable like this, click the circled area for the question. This will make it so that you can type in a different name:

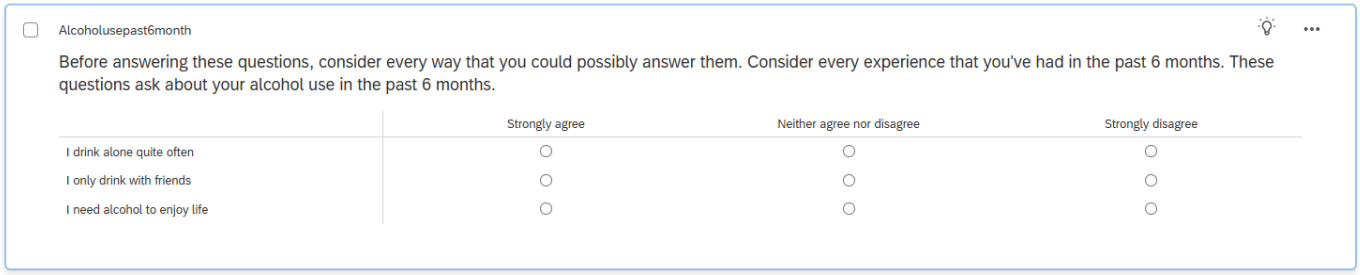
Now your variable is renamed, meaning that it will export in your dataset with a name that tells you more about it.



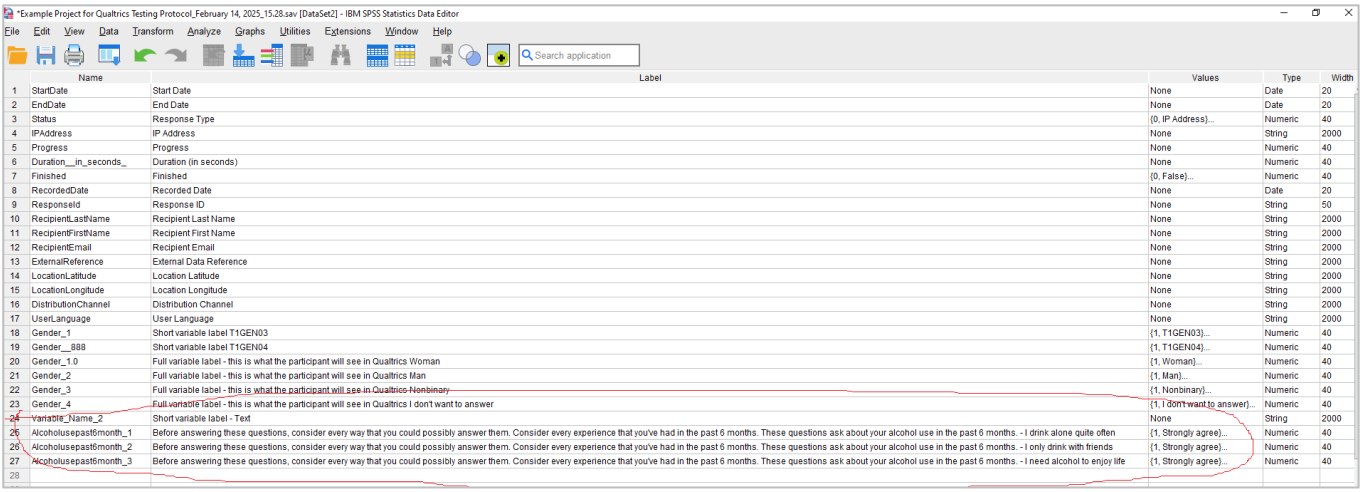
See the next section about hidden variable names for illustrations of what variable names look like in SPSS datasets for added context. For help in determining variable names, see CYFS_Universal Variable Naming Suggestions_9-07-18.xlsx for more information on our naming conventions, if the project you are working on does not have its own or if feedback on their names is requested.

Hidden Variable Names

In Qualtrics, some item types make it harder to see all of the variable names, where they seem "hidden." It takes some time to learn what parts of a question will export as their own item, and in what way, so it can be tricky to identify these at first! An example is a matrix question, like this:

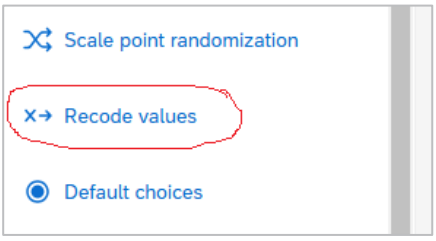


This might seem like it's only one item, but it actually exports like this in SPSS, with a separate variable for each question in the matrix.

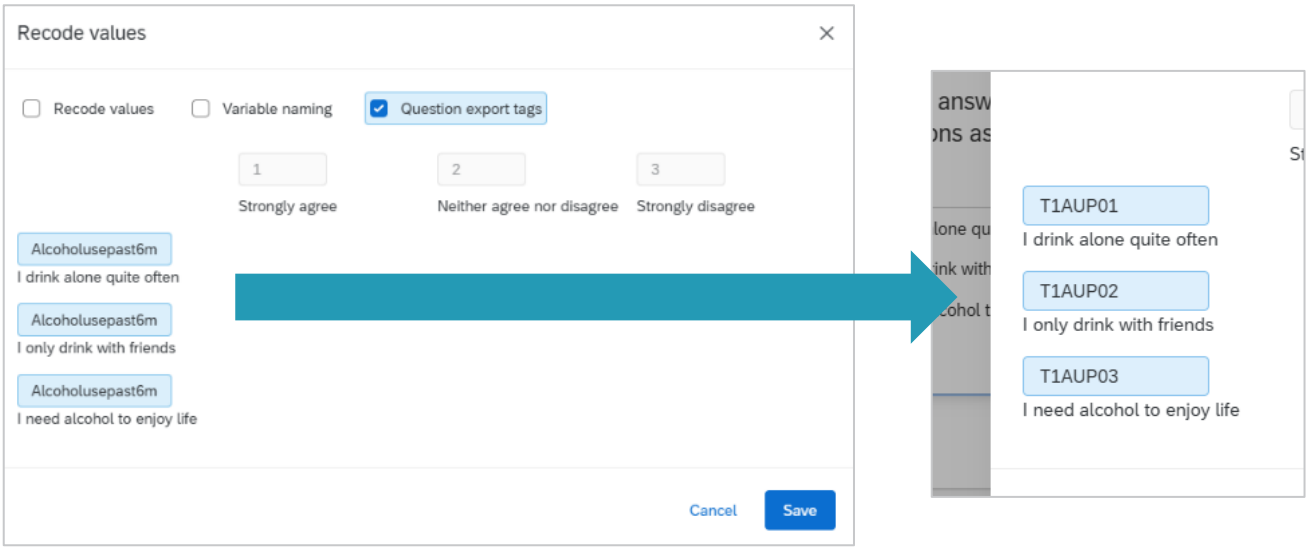


	Name	Label	Values	Type	Width
1	StartDate	Start Date	None	Date	20
2	EndDate	End Date	None	Date	20
3	Status	Response Type	{0, IP Address}...	Numeric	40
4	IPAddress	IP Address	None	String	2000
5	Progress	Progress	None	Numeric	40
6	Duration__in_seconds_	Duration (in seconds)	None	Numeric	40
7	Finished	Finished	{0, False}...	Numeric	40
8	RecordedDate	Recorded Date	None	Date	20
9	ResponseId	Response ID	None	String	50
10	RecipientLastName	Recipient Last Name	None	String	2000
11	RecipientFirstName	Recipient First Name	None	String	2000
12	RecipientEmail	Recipient Email	None	String	2000
13	ExternalReference	External Data Reference	None	String	2000
14	LocationLatitude	Location Latitude	None	String	2000
15	LocationLongitude	Location Longitude	None	String	2000
16	DistributionChannel	Distribution Channel	None	String	2000
17	UserLanguage	User Language	None	String	2000
18	Gender_1	Short variable label T1GEN03	{1, T1GEN03}...	Numeric	40
19	Gender__888	Short variable label T1GEN04	{1, T1GEN04}...	Numeric	40
20	Gender_1.0	Full variable label - this is what the participant will see in Qualtrics Woman	{1, Woman}...	Numeric	40
21	Gender_2	Full variable label - this is what the participant will see in Qualtrics Man	{1, Man}...	Numeric	40
22	Gender_3	Full variable label - this is what the participant will see in Qualtrics Nonbinary	{1, Nonbinary}...	Numeric	40
23	Gender_4	Full variable label - this is what the participant will see in Qualtrics I don't want to answer	{1, I don't want to answer}...	Numeric	40
24	Variable_Name_2	Short variable label - Text	None	String	2000
25	Alcoholusepast6month_1	Before answering these questions, consider every way that you could possibly answer them. Consider every experience that you've had in the past 6 months. These questions ask about your alcohol use in the past 6 months. - I drink alone quite often	{1, Strongly agree}...	Numeric	40
26	Alcoholusepast6month_2	Before answering these questions, consider every way that you could possibly answer them. Consider every experience that you've had in the past 6 months. These questions ask about your alcohol use in the past 6 months. - I only drink with friends	{1, Strongly agree}...	Numeric	40
27	Alcoholusepast6month_3	Before answering these questions, consider every way that you could possibly answer them. Consider every experience that you've had in the past 6 months. These questions ask about your alcohol use in the past 6 months. - I need alcohol to enjoy life	{1, Strongly agree}...	Numeric	40
28					

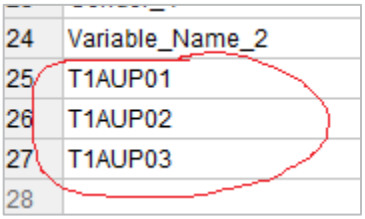
To make it easier to tell what each of these questions are, we need to rename the variables in Qualtrics so that we don't have to clean them on the back-end in SPSS. To do this, click the matrix question until the outside is highlighted blue, like in the first screenshot. Then, scroll down in the menu on the left of the screen in Qualtrics and click "Recode values." This will show a menu like on the right:



To rename the variables, here we will need to click “Question export tags.” In some other cases, you will use the “Variable naming” tab, it just depends on what question type you are editing. Then you will need to fill in the variable names that are in your measures table/codebook. If they aren’t already noted in there, you might need to consult on how you should name them.

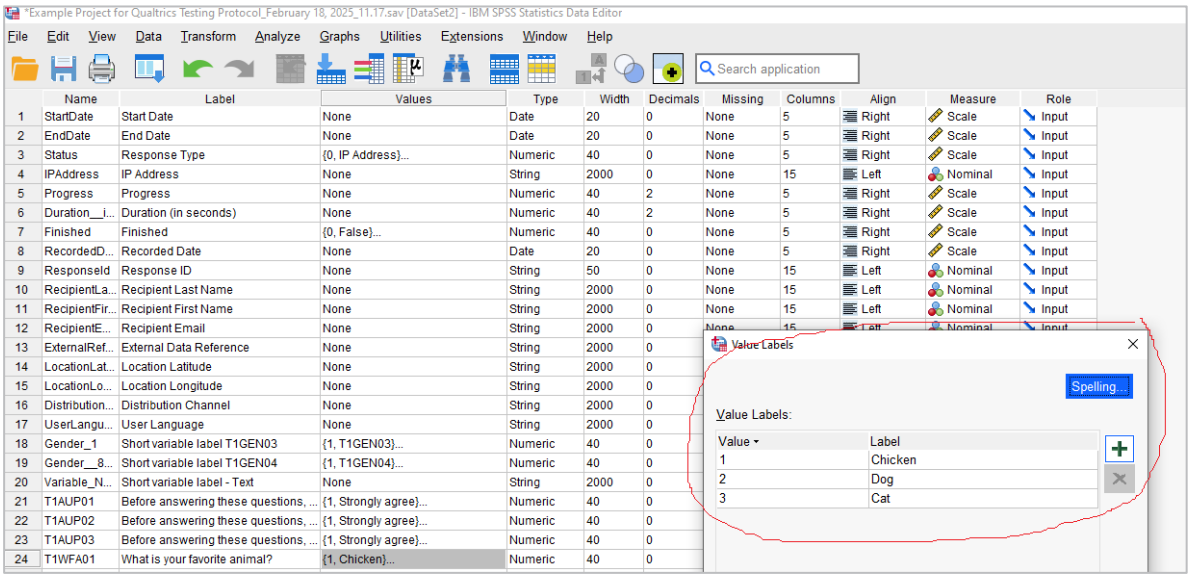


Don’t forget to hit “save”, and now your variables are renamed! They will appear the same in Qualtrics for your participants, but in SPSS they will now appear in the way that you renamed them when you export.

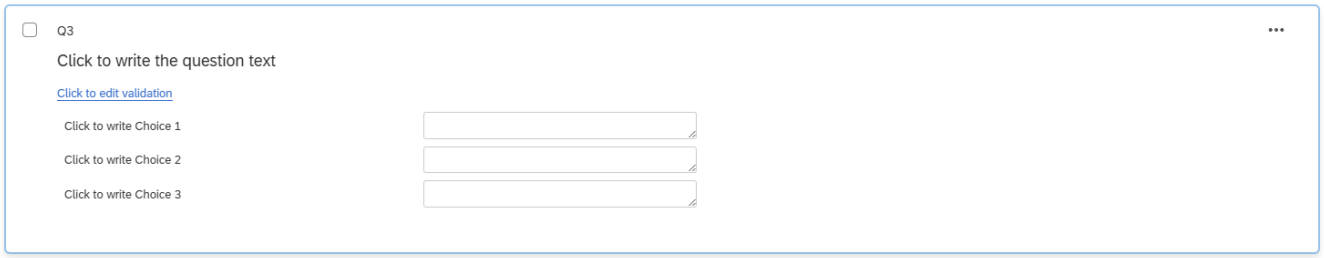


Variable Values

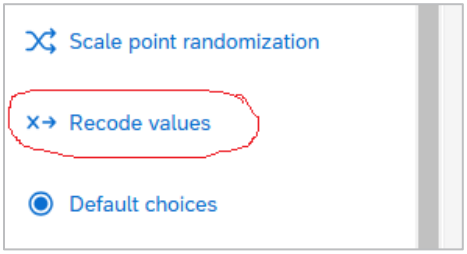
Qualtrics automatically assigns values to items in Qualtrics, which may or may not match up to what is specified in a project’s measures table/codebook. It is wise to always check these values, since deleting or adding options in the survey creation process can create issues later on. For instance, this question’s responses were automatically assigned 1-3 as its values by Qualtrics, but let’s say that the study leads want it to be 0-2:

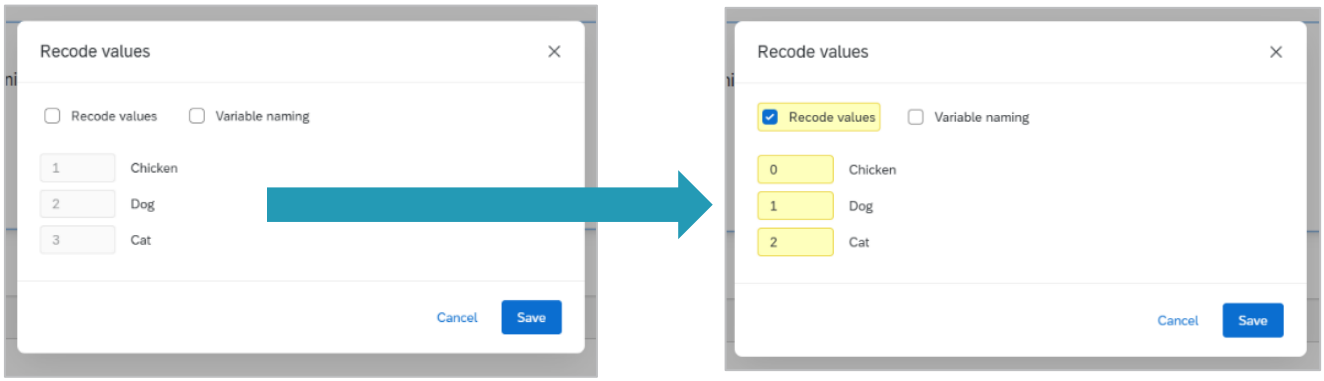


First, you'll want to click the question so that the box is highlighted in a blue outline like this:

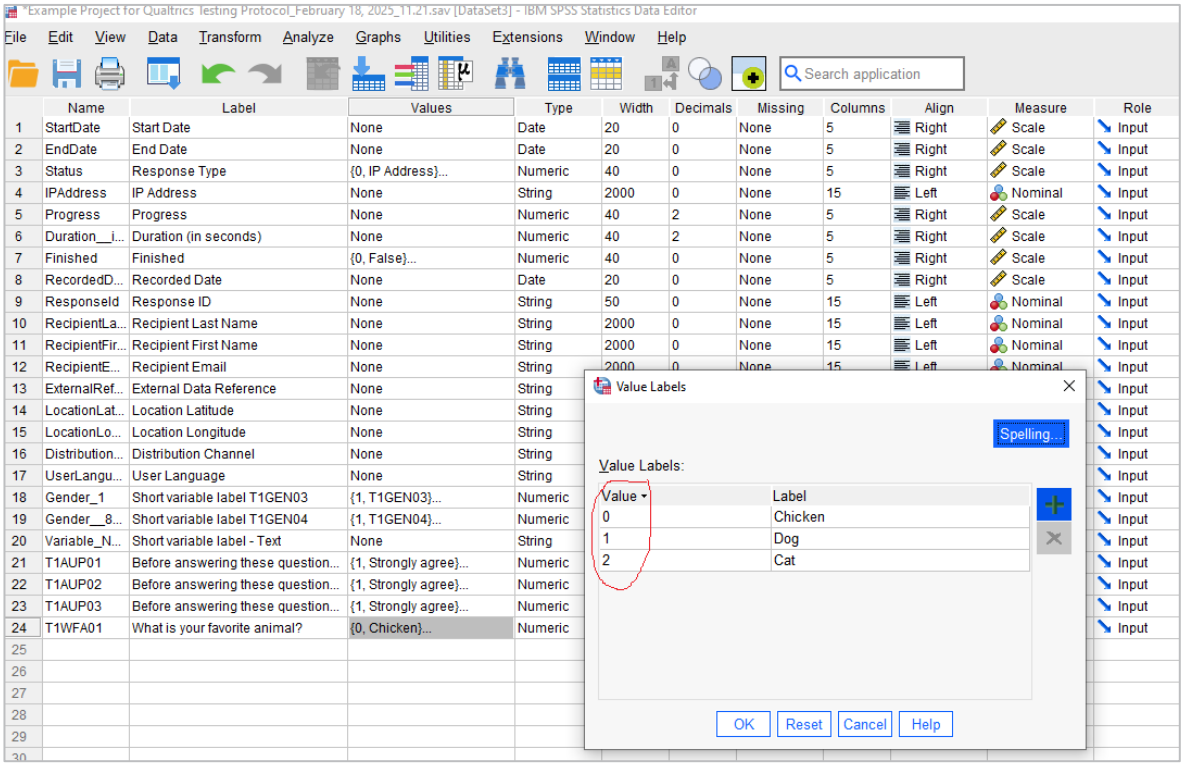


Now scroll down the menu on the left and click "recode values", which will bring you to a new menu. Here, click the "recode values" checkbox to change the values to whatever you need them to be:

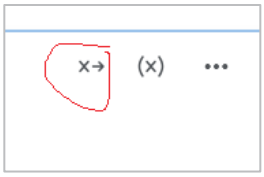




Hit "save," and now your values will appear appropriately in your next saved dataset.



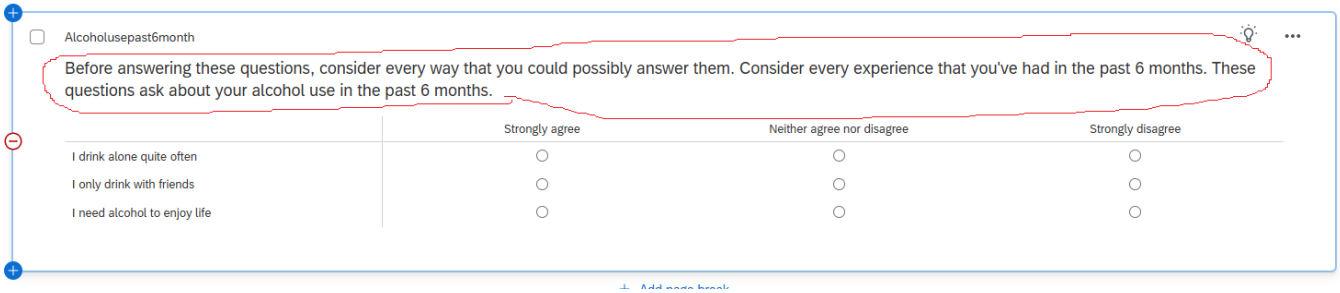
To tell whether a question's values have been recoded at all, you can look to see if this symbol is in the top right of its box:

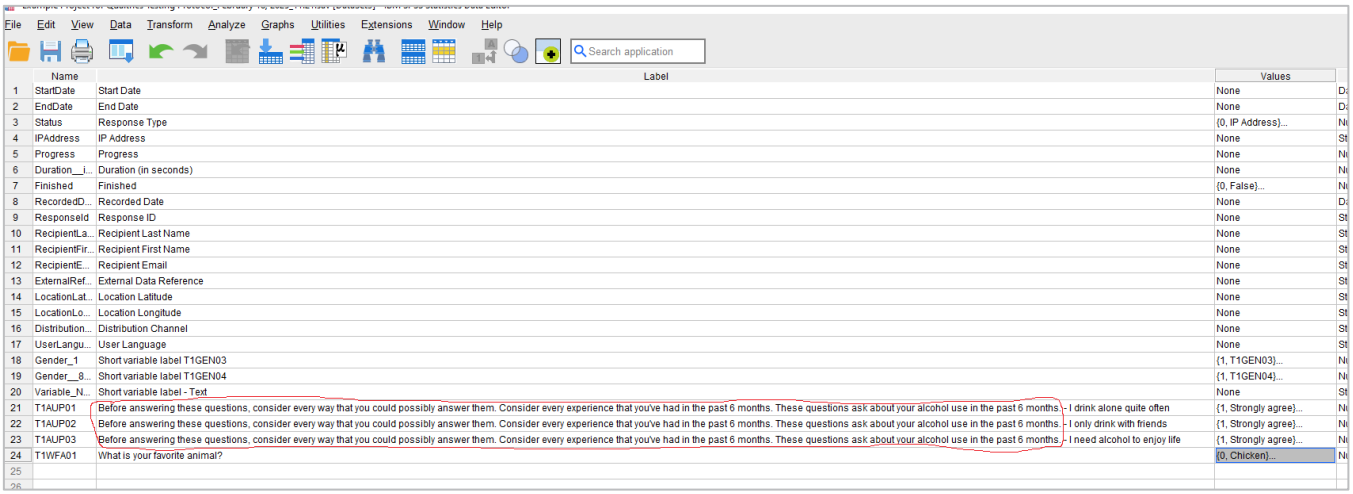


You can also click that symbol to more easily access the menu where you can edit and view its values.

Shortened Variable Labels

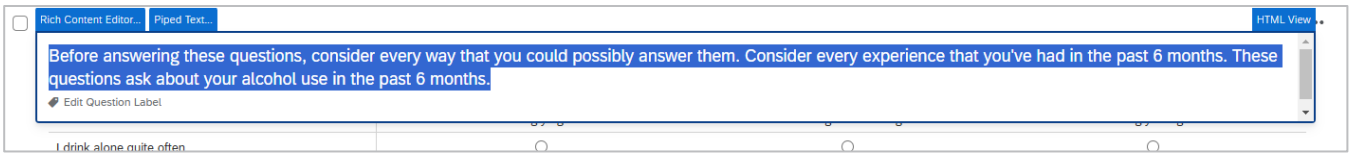
Many of the variable labels that we use are long so that we can provide sufficient instructions for participants, but these can make it difficult to tell what a question was about on the back-end. For instance, this matrix question has multiple sentences of instructions that then get exported into the dataset on every single item:



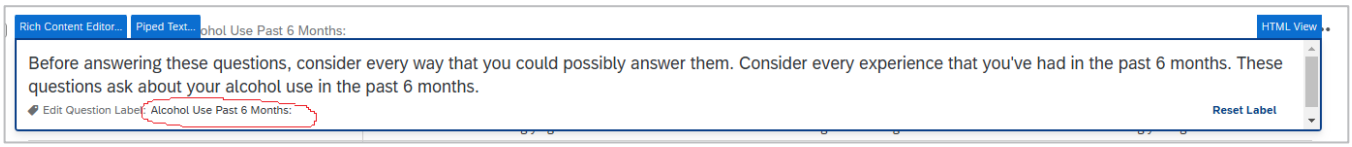


	Name	Label	Values
1	StartDate	Start Date	None
2	EndDate	End Date	None
3	Status	Response Type	{0, IP Address}...
4	IPAddress	IP Address	None
5	Progress	Progress	None
6	Duration__i...	Duration (in seconds)	None
7	Finished	Finished	{0, False}...
8	RecordedD...	Recorded Date	None
9	ResponseId	Response ID	None
10	RecipientLa...	Recipient Last Name	None
11	RecipientFir...	Recipient First Name	None
12	RecipientE...	Recipient Email	None
13	ExternalRef...	External Data Reference	None
14	LocationLat...	Location Latitude	None
15	LocationLo...	Location Longitude	None
16	Distribution...	Distribution Channel	None
17	UserLangu...	User Language	None
18	Gender_1	Short variable label T1GEN03	{1, T1GEN03}...
19	Gender__8...	Short variable label T1GEN04	{1, T1GEN04}...
20	Variable_N...	Short variable label - Text	None
21	T1AUP01	Before answering these questions, consider every way that you could possibly answer them. Consider every experience that you've had in the past 6 months. These questions ask about your alcohol use in the past 6 months. - I drink alone quite often	{1, Strongly agree}...
22	T1AUP02	Before answering these questions, consider every way that you could possibly answer them. Consider every experience that you've had in the past 6 months. These questions ask about your alcohol use in the past 6 months. - I only drink with friends	{1, Strongly agree}...
23	T1AUP03	Before answering these questions, consider every way that you could possibly answer them. Consider every experience that you've had in the past 6 months. These questions ask about your alcohol use in the past 6 months. - I need alcohol to enjoy life	{1, Strongly agree}...
24	T1WFA01	What is your favorite animal?	{0, Chicken}...
25			
26			

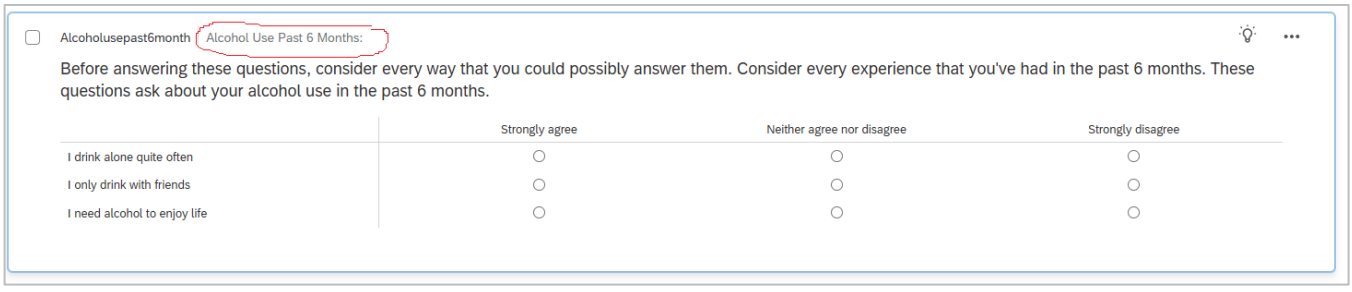
To create a shortened version of these labels that will be exported with the dataset, but still leave the long version for participants to see, we need to first click the label in Qualtrics by clicking on the text.



Then, type in your shortened version under “Edit question label,” and then click anywhere to save your changes.



Now the label is considerably shortened in your dataset, making it easier to see the actual item-level text!

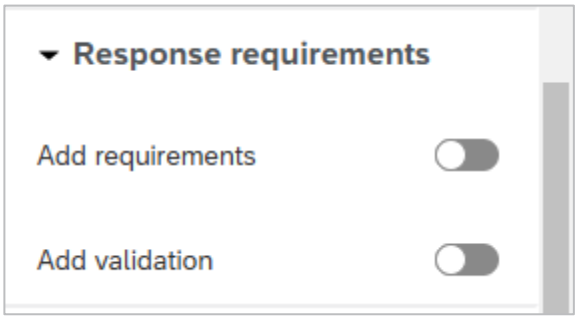


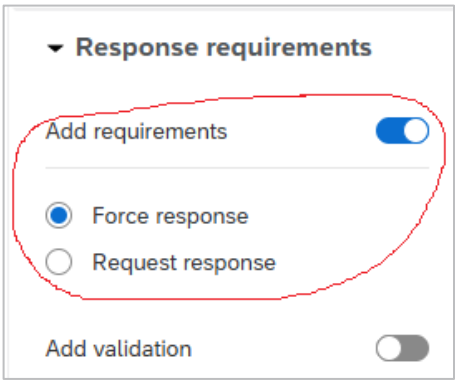
	T1AUP01	Alcohol Use Past 6 Months: - I drink alone quite often	{1, Str
	T1AUP02	Alcohol Use Past 6 Months: - I only drink with friends	{1, Str
	T1AUP03	Alcohol Use Past 6 Months: - I need alcohol to enjoy life	{1, Str

For help in determining what labels to shorten and how much, when in doubt consult with your supervisor. In general, though, labels that repeat for matrix questions or others that export as multiple questions, where the label is made up of instructions for the participant, are those that should be shortened the most. If a label only applies to a single question that exports as a singular item, leave as much intact as you can, only shortening when it is difficult to see the most relevant text in SPSS. Prioritize information that would be helpful in determining what a question was asking about, time point, and other information that would be helpful for using the data.

Response Requirements

In Qualtrics, if you want to prevent participants from skipping questions, you can either add a "Force response" or "Request response" requirement. Force response will not allow users to continue to the next page/submit their survey without filling out a question, while request response will give participants a pop-up to ask if they are sure if they want to not answer before continuing. Importantly, request response still allows participants to not answer after the initial pop-up. To check if there already are either of these requirements for a question, select the question's box to where it has a blue outline, and then scroll to the "Response requirements" section in the left-hand menu.



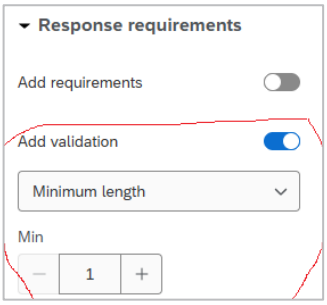


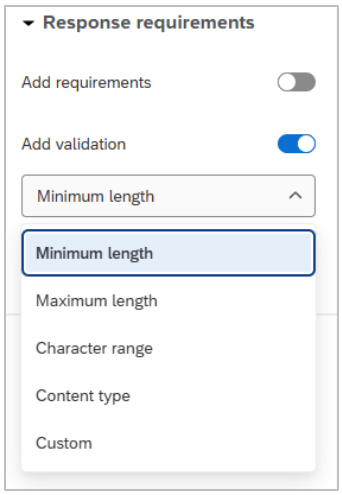
Toggling on "Add requirements" will allow you to select whether to force or request a response for that question. If "Add requirements" isn't toggled (like the photo on the left), it means that participants will be able to proceed in the survey without answering the question, and they won't receive a pop-up or be stopped.

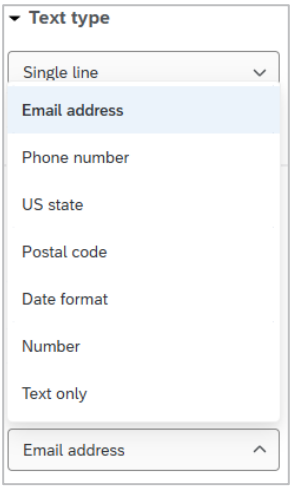
Validation

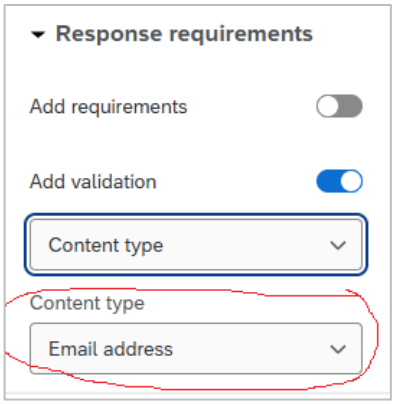
Questions that are not multiple choice often benefit from having validation requirements, meaning that they are automatically evaluated as to whether they make sense. Items that ask for dates, numbers, phone numbers, addresses, email addresses, states, or text can all have validation placed on them. This can help to prevent participants entering nonsensical information which can make data cleaning more difficult later on, it can also force participants to pay closer attention to what they are entering, and it keeps formatting more consistent for ease of use of the data on the back end.

To add validation for a question, click the question box so that the outline is blue, then scroll down on the left menu to the “Response requirements” section. Click “Add validation”, then in the drop-down menu select the type of validation you want to require.





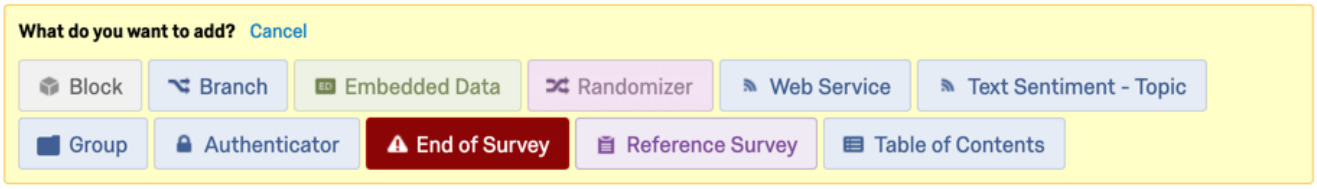




If you are creating a custom validation requirement, you can use the character length, “custom”, or character range options here. Otherwise, you can click the “content type” option and subsequent drop-down to validate for email addresses, phone numbers, and more that Qualtrics has already created specific validation schemes for.

Survey Flow Example

Survey flow allows you to customize the order in which participants respond in the survey. There are various survey flow elements you can utilize such as creating personalized survey flow for respondents, setting up key variables, randomizing blocks of questions, or terminating the survey based on participant's responses. Below are the elements you can add in your survey.

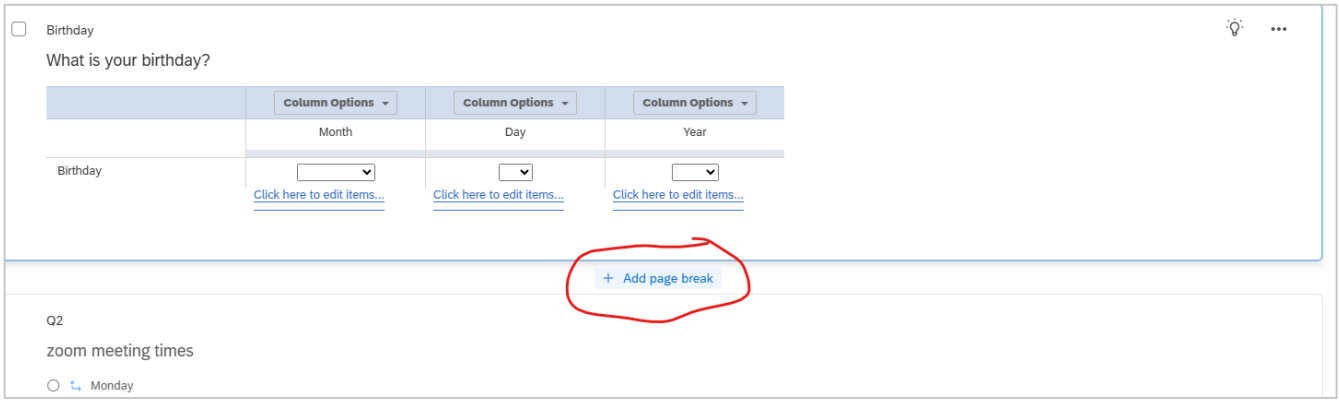


Question Blocks Example

Question blocks are used to group and organize questions in your survey. For example, creating a block for informed consent, a block for demographic questions, and a block for PHQ-9 questions.

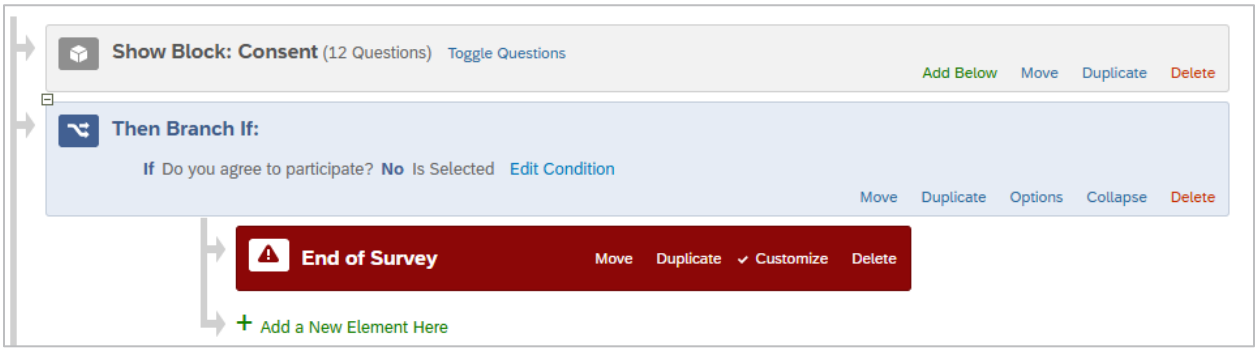
Page Breaks

Similarly, you can manually set page breaks so that not all questions are displayed on one webpage that requires respondents to scroll down multiple times to view and respond to all questions. To manually set page breaks, click on the "Add Page Break" button in between the two questions where you want a page break.



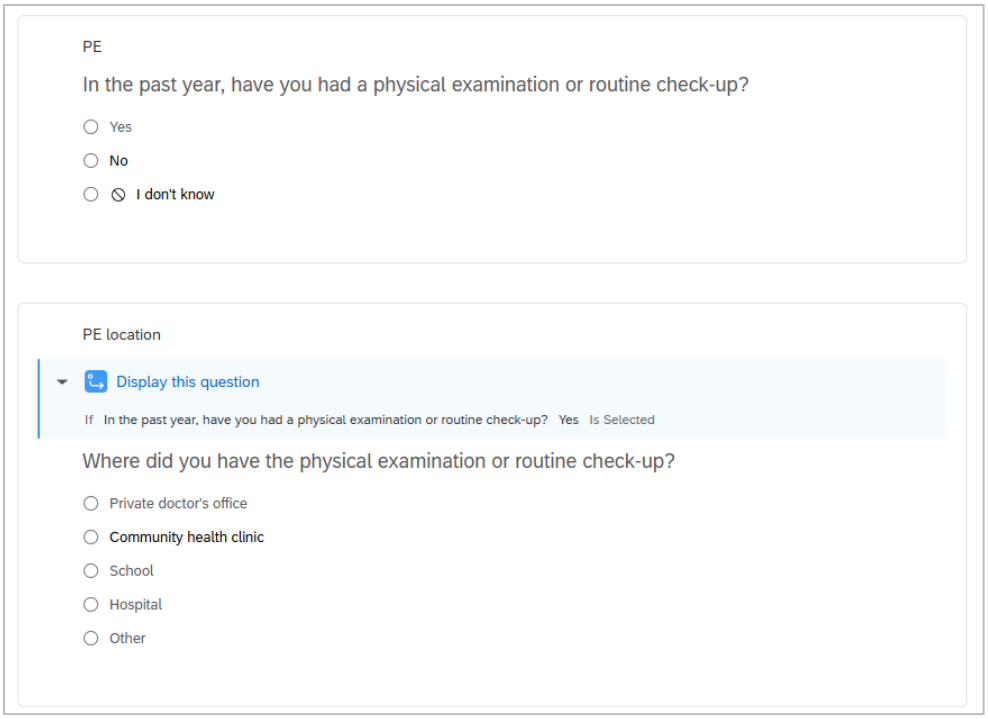
Branch Logic

Branch logic can be used to direct respondents to different sections based on their responses or embedded data. For example, you can use the branch logic to terminate the survey if the participant responds that they do not agree to participate.



Display Logic

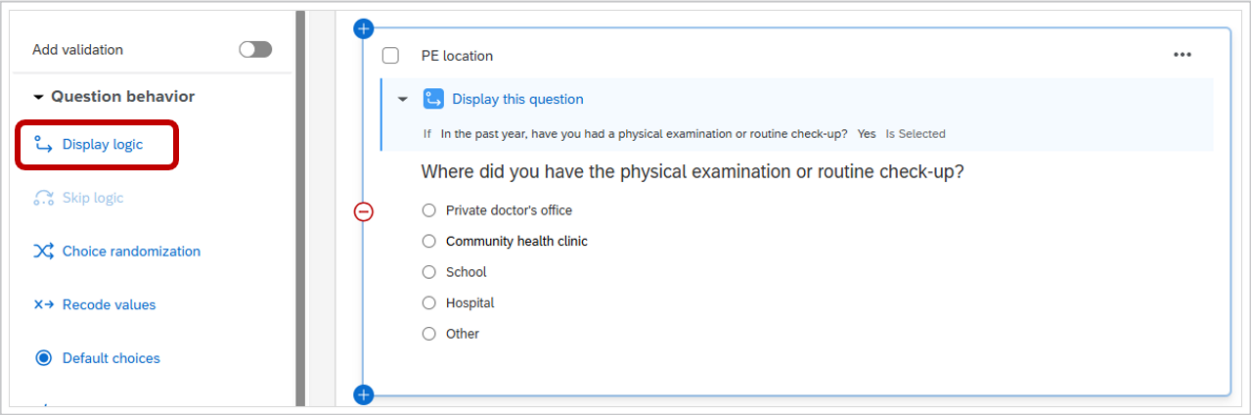
Display logic is similar to skip logic, but it provides a bit more customization. When you add a display logic, you'll see a popup that allows you to set the conditions for whether or not the question is shown.



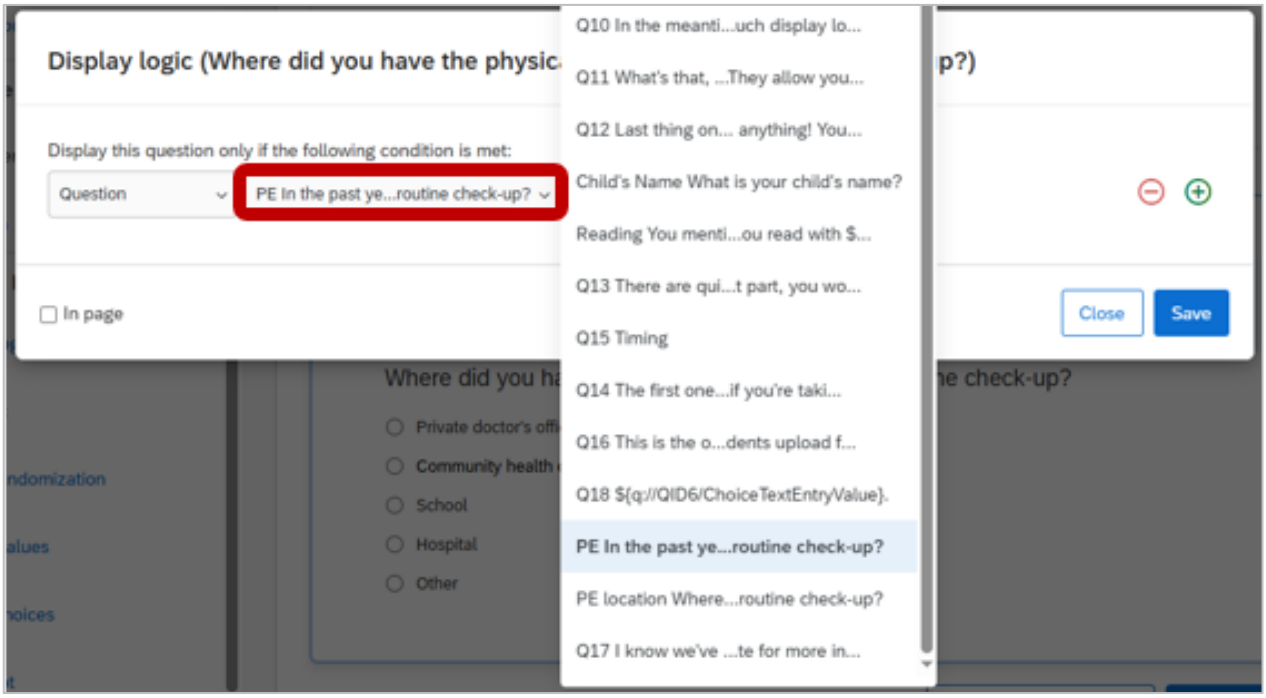
***Note.** Make sure that the question you are applying the display logic to is located after the question you are using to set the conditions.*

How to set up a display logic:

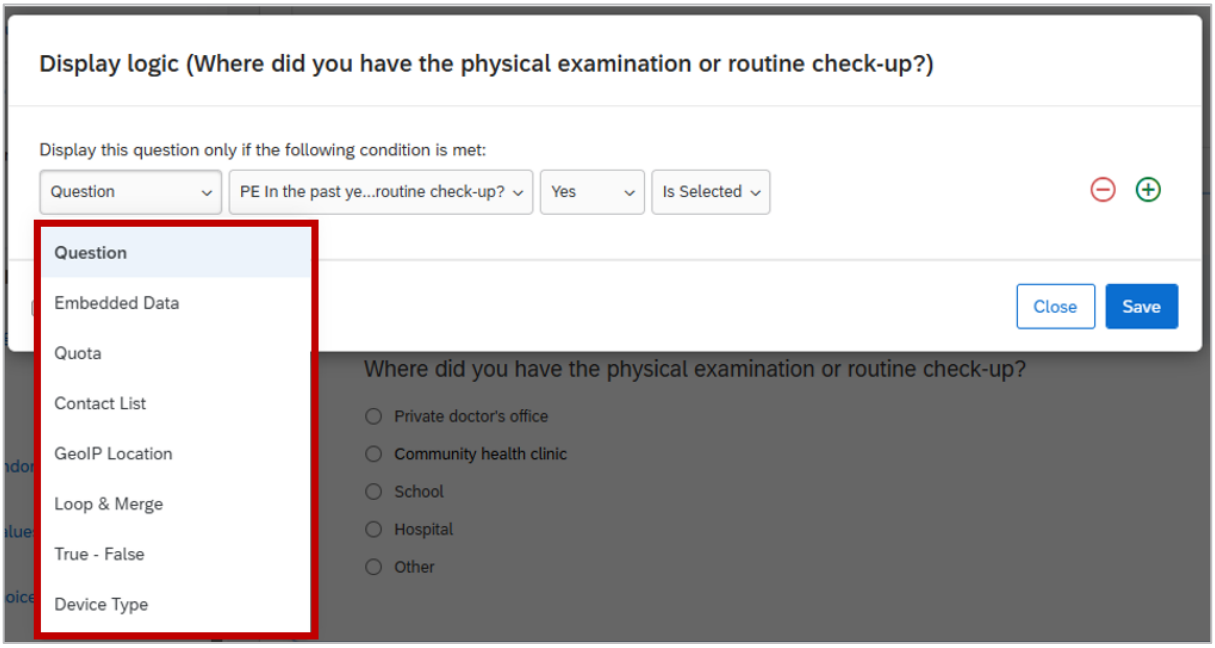
1. First click on the question you would like to add a display logic to.
2. Click on “Display logic” under “Question behavior”.



3. Using the pop-up, choose the question you would like to use to determine whether the DL question should be displayed.

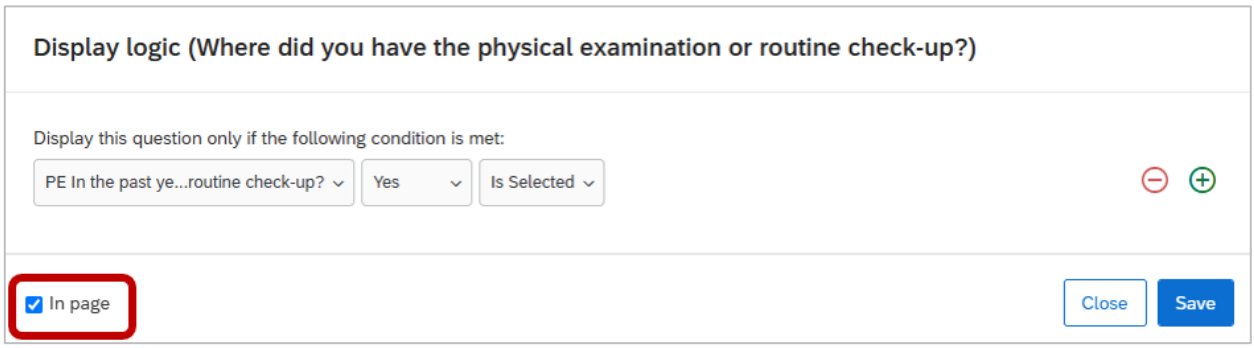


- You can set the display logic on a variety of things aside from a question as seen above. Here are the options:



  - **Embedded Data:** Use any information you have stored about the respondent to set display conditions. For example, only display a question to those who have an embedded data field for Age, equal to 25. See logic based on embedded data.
  - **Quota:** Once a Quota has been created, set a condition based on whether or not the quota has been met.
  - **Contact List**: Base the condition on information already stored in a contact list field, such as first name, last name, or email.
  - **GeoIP Location:** Automatically use the IP address of the survey participant to estimate their location and set a condition based on Postal code, City, State/Region, Country Name, Country Code, and Location from map.
  - **Loop & Merge:** After a loop and merge block has been created, set the conditions within the loop and merge based on the current loop.
  - **True – False:** Create a condition that always evaluates to true (meaning the question will always display) or false (meaning the question will never display). This is particularly useful when building and testing your survey.
  - **Device Type:** Base the condition on what type of mobile device is or is not being used, including Mobile (any mobile device), Blackberry, Android, iPhone, iPod, Opera Mobile, Palm, Windows Mobile, and Other Mobile (any mobile device that is not listed here).

4. ***(Optional)*** If you would like both questions (the one that determines if your second question is shown and the second question) to be on the same page, select the “In Page” checkbox. For example, you could add follow ups like “Why?” or “Why not?”.

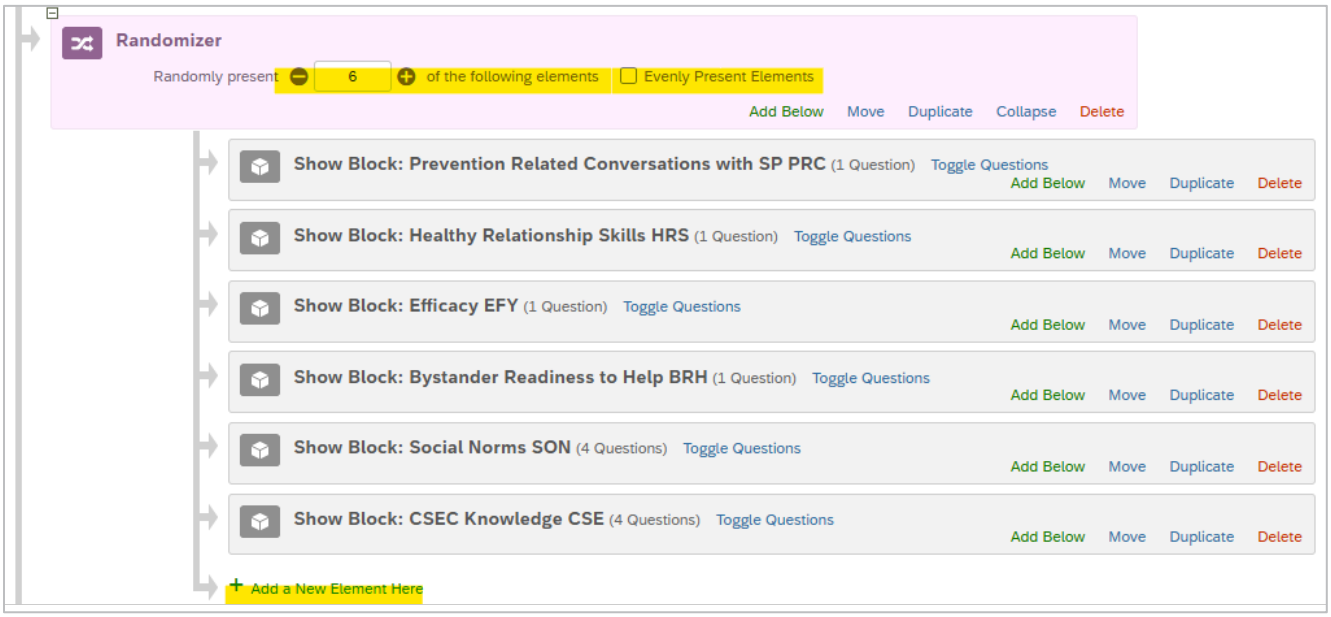


Skip Logic

Skip logic is a tool we can use to skip respondents over a single question, to the end of a block, or even to the end of a survey. This is especially useful for informed consents – if the participants disagree to participate or don’t give consent, you can send them to the end of the survey.

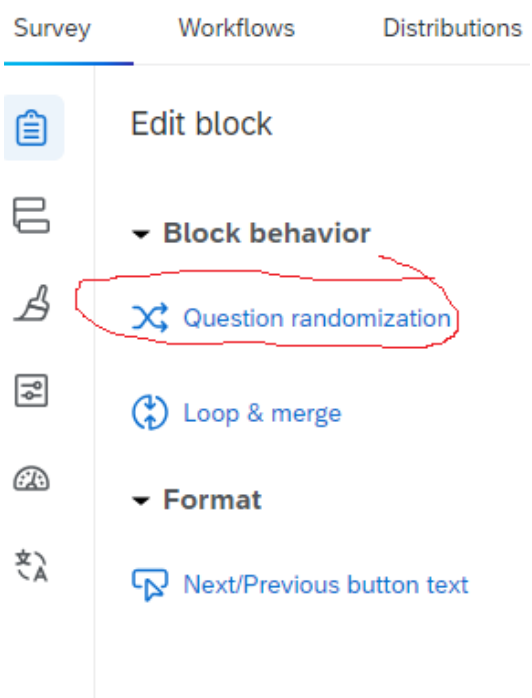
Randomization of Blocks

Randomization can refer to having blocks or questions within those blocks appearing in a random order. In order to randomize blocks, the blocks that you want to randomize need to be nested under the randomizer (see below screenshot). Always make sure to check the randomization settings to ensure accurate data collection (see the highlighted areas in the screenshot below).

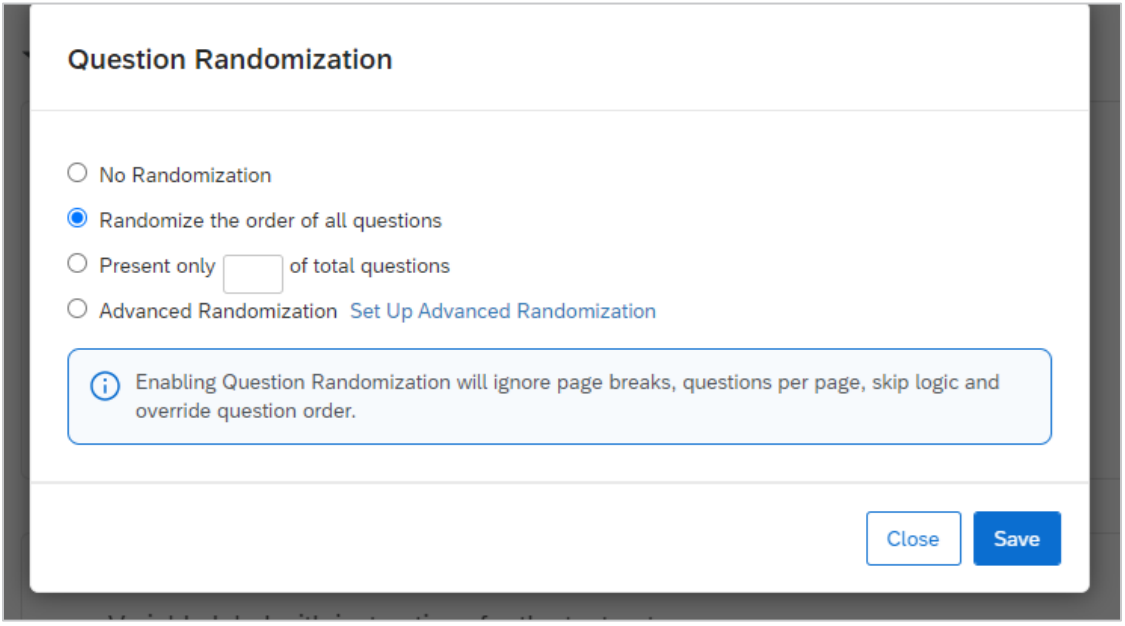


Randomization Within Blocks

Randomizing the order of questions within a block can help to account for biases associated with recency and more. To randomize the order of questions in a block, in the “Survey” tab of Qualtrics click your block. Then, under “Block behavior,” click “Question randomization”



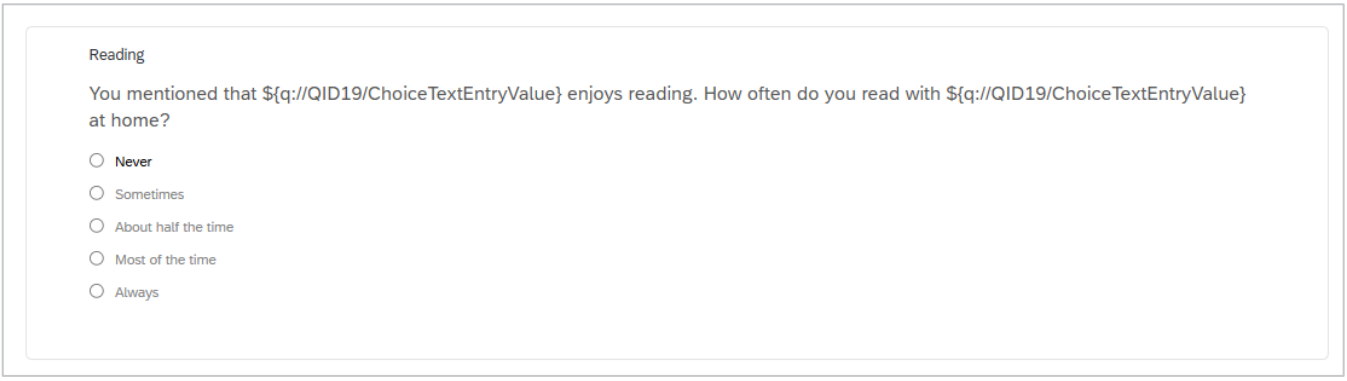
Then, you can click whatever options that you may desire in order to decide how you would like your randomization to occur, and click “Save”



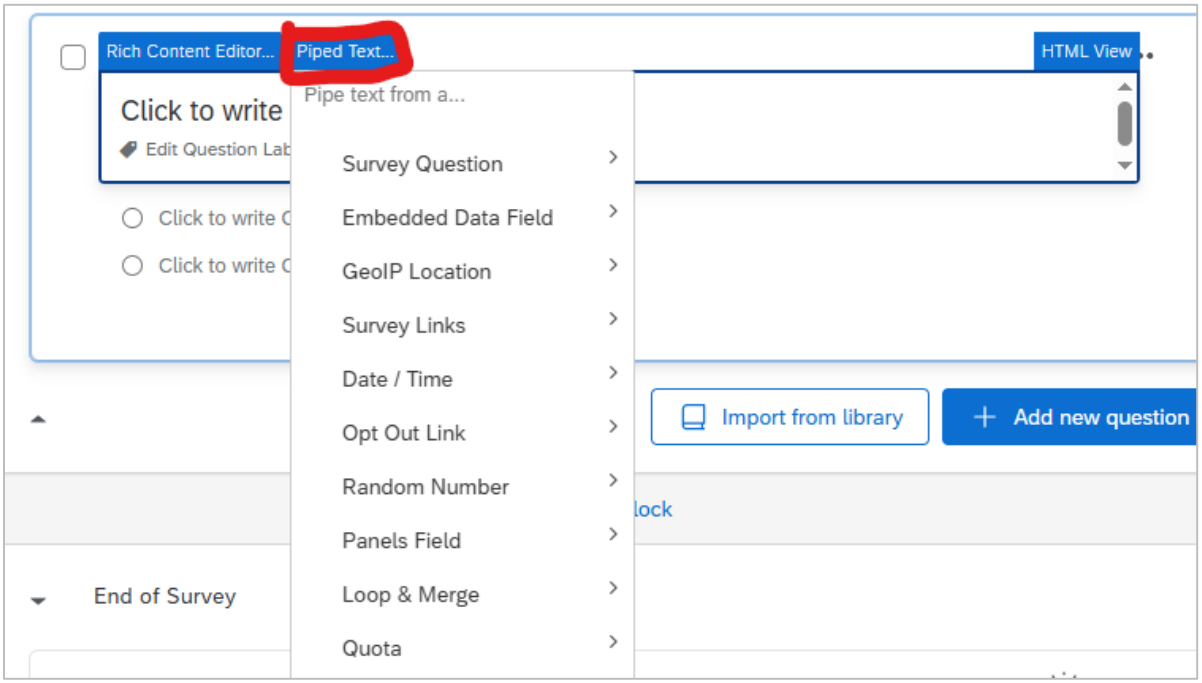
Piped Text

Piped text is used when we want a response from a participant to show up as part of other aspects of a survey. For instance, in a parent survey asking about their child’s development, a parent might type in their child’s name, and, in the following question, the child’s name will appear.

With piped text, you can customize the question and response options to dynamically insert previous answers or embedded data. This is how the piped text will display in the back-end:

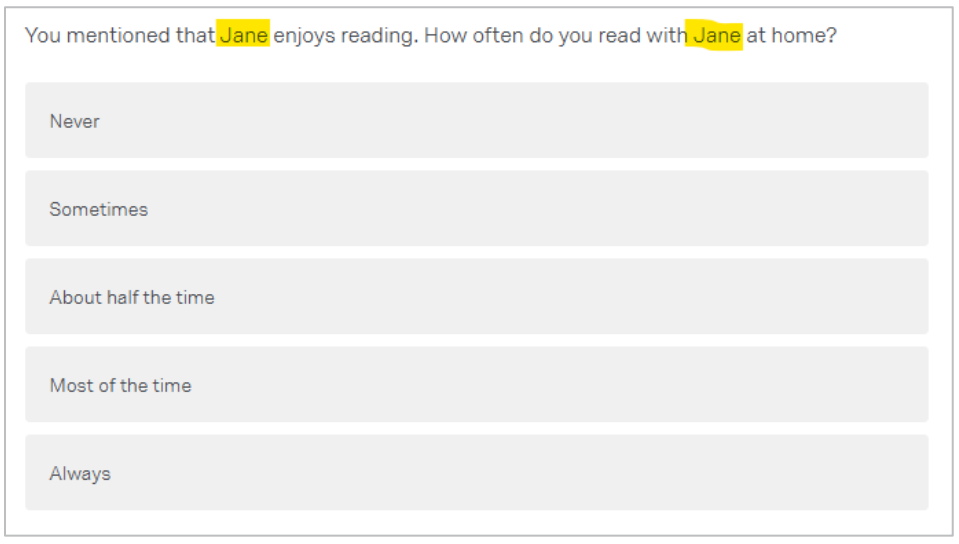


Using the “Piped Text…” menu as seen in the screenshot below, you can pull specific information (e.g., survey questions and responses, embedded data, time, etc.) to be displayed to the respondent.



- For example, in a parent survey asking about their child's development. The parent types in the child's name, and, in the following question, the child's name will appear.

When you preview the survey, the respondents will see this:

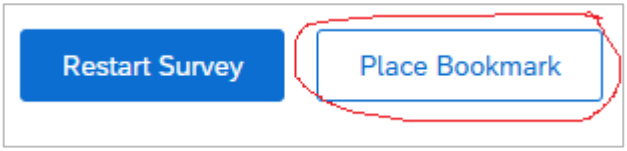


***Note.** A question must be submitted by the respondent using the next button before piped text works. If you pipe in the selected answer from one question to another, there must be a page break in between the two questions for the piped text to load*

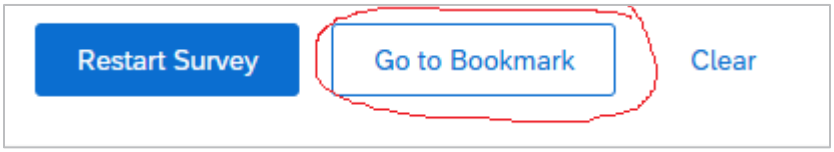
Bookmarks in the "Preview" Function

The "Preview" function of Qualtrics allows you to take the survey as a participant would, but with more capability to skip around and without creating any test data. This function exists for easier and quicker testing of different survey aspects than taking a survey manually. When you're using the "Preview" function in Qualtrics, you can check certain things more quickly than you can when you're taking the survey as a participant. This is because the "Place Bookmark" button makes it so that you can start over your survey from a mid-point that you select, rather than having to start over from the beginning every time.

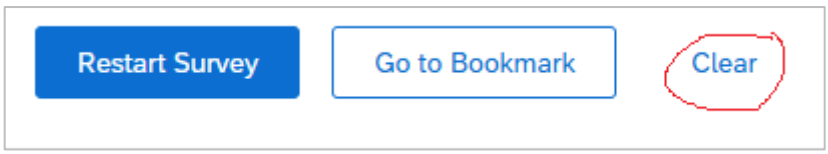
For instance, if you wanted to test a couple of different branches of decisions that you could make after selecting certain response options for a question on the third page of a survey, you could place a bookmark there so that you don't have to fill out your beginning pages all over again. First, you would select "Place Bookmark" in the top left of your preview screen on the page that you will want to come back to.



Now take the survey as you would like. Once you're finished testing whatever choices you wanted to try the first time, you can click "Go to Bookmark" to reset back to that bookmarked page and try again. You won't have to set a new bookmark if you don't want to, unless if you ever want a new starting point, so you could test many different decisions in this same way multiple times.



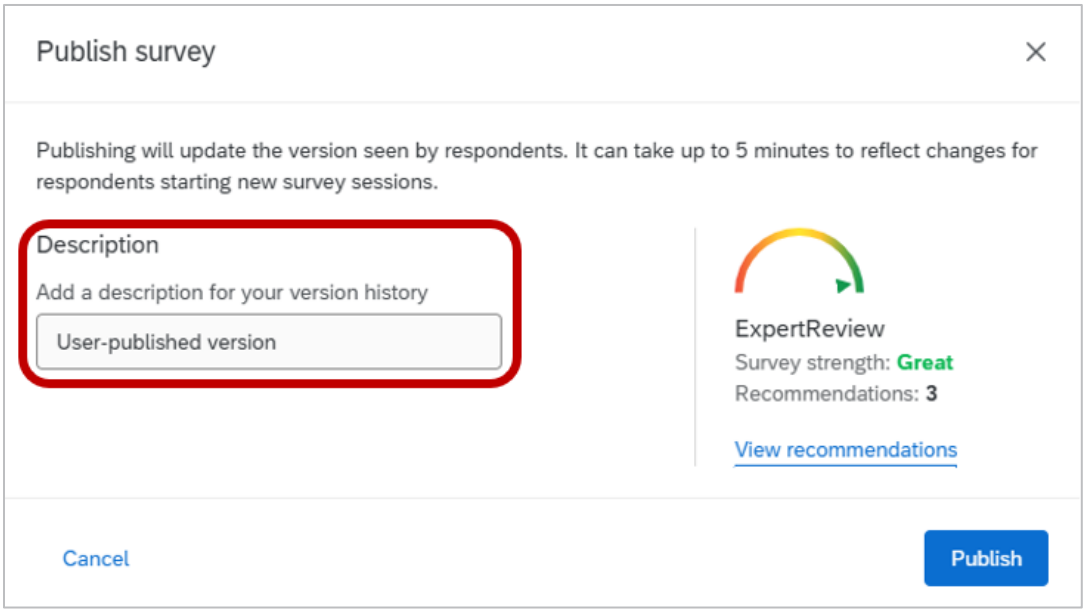
If you want to create a new bookmarked spot, simply hit "Clear" and hit "Place Bookmark" again.



Publishing a Survey

If this is a new survey, the first time you publish the survey will also activate the survey. If you're editing the survey after it has been published, the changes will be saved in Qualtrics, but these changes will not show in the front-end until you publish the survey. For more information, please see the next section on publishing changes to an active survey.

Every time you publish a survey, a pop-up will ask you to add a description for the version you are about to publish:



***Note.** We highly recommend adding specific descriptions for the version history in case you need to undo any changes you've made or restore a previous version.*

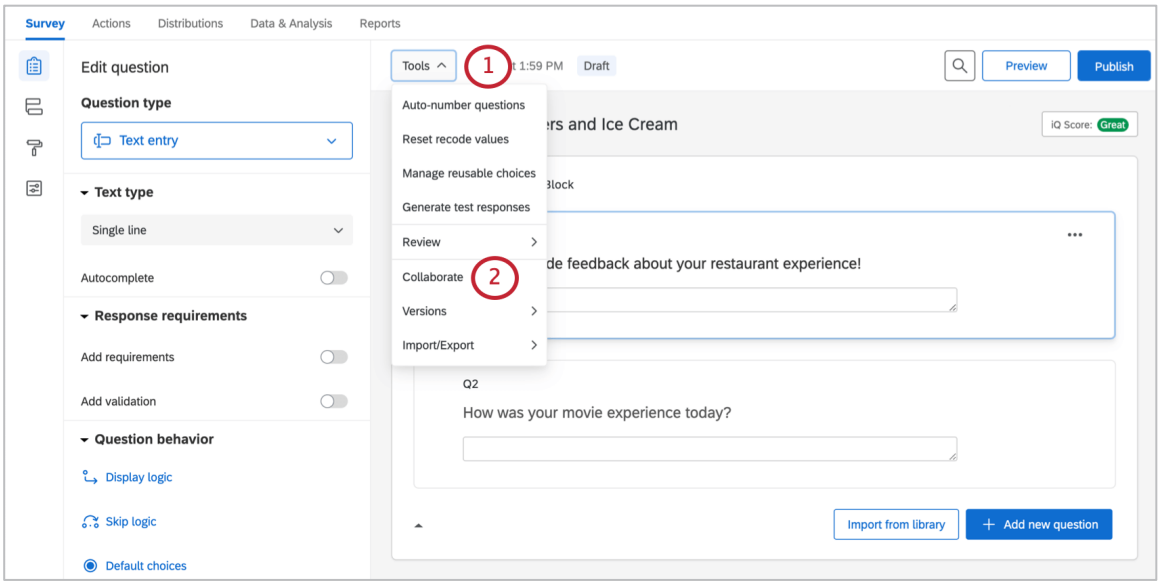
Publishing Changes to an Active Survey

- **Changes that *will not delete* previously collected data**
  - Superficial text edits (e.g., fixing a typo or changing the font)
  - Adding questions anywhere in the survey
  - Adding choices to the end of a list of choices
  - Rearranging the order of questions or of blocks in the survey flow
  - Editing, adding, and removing recode values
  - Editing, adding, and removing scoring
  - Adding and removing branch logic, display logic, and skip logic
  - Edits to the look and feel
- **Changes that *will delete or alter* previously collected data**
  - Any edits to an existing drop down question's answer choices

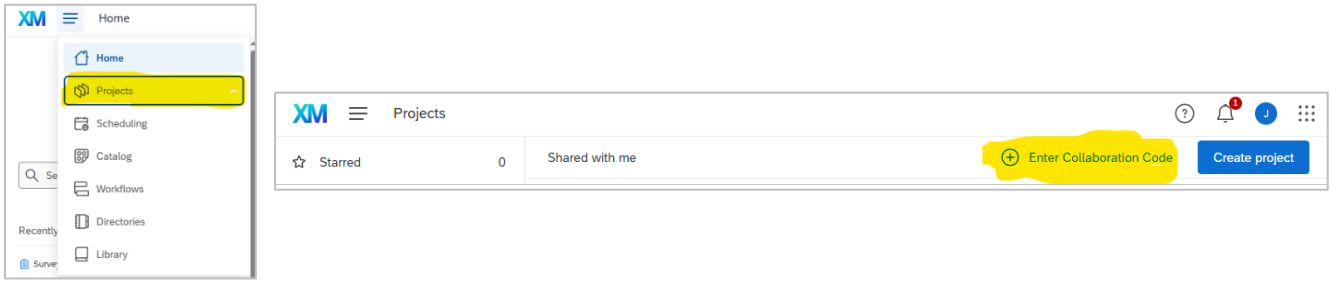
- Changing the question type or question variation (e.g., changing from a multiple-choice question to a slider question, or changing from a Likert matrix table to a bipolar matrix table)
- Enabling or disabling “Autocomplete” for text entry questions
- Modifying the response requirements or validation of a question
- Rearranging answer choices with Copy & Paste
  - Use “Move Up” and “Move Down” in the choice menu instead
- Deleting questions or answer options
  - Deleting a question or answer also deletes all response data associated with that question or answer
  - It’s recommended to always hide rather than delete questions for this reason

***Note.** Your changes will always be automatically saved in Qualtrics. Publishing the survey will allow the respondents to see those saved changes.*

- **Collaboration**
  - Only the survey owner can add collaborators to the survey
  - When collaborating *within your organization* (e.g., people with UNL emails), you can add their name or email address directly to the survey

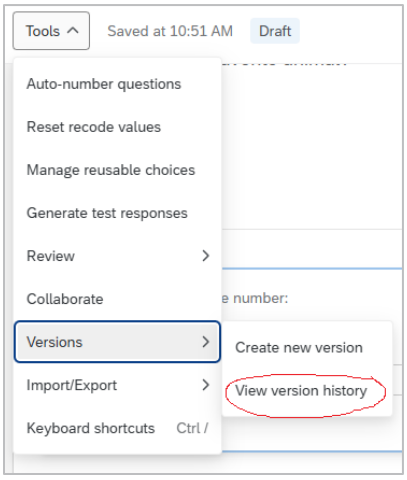


  - When collaborating with *users from outside your organization*, you’ll follow the same steps as above to add the new user. The new user will receive an email with a link of the invitation and collaboration code. In Qualtrics, click Projects → Enter Collaboration Code → copy/paste code from email.



***Note.** Qualtrics does not sync on demand, meaning if there are multiple people editing the survey at the same time, the edits might not be saved properly.*

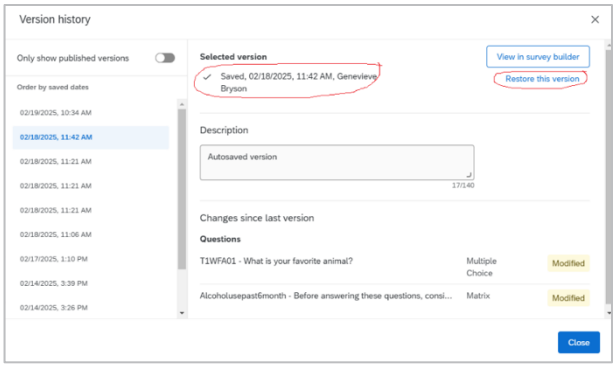
Undoing a Change Made in Qualtrics

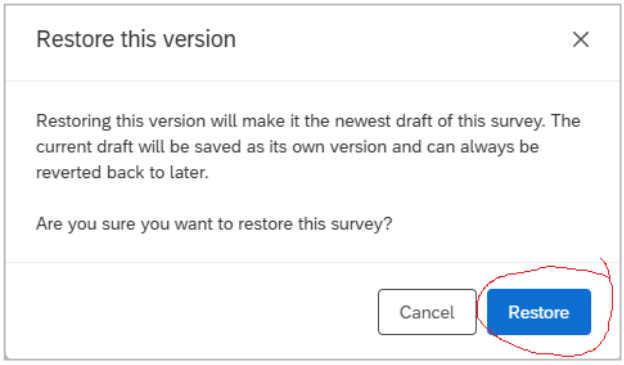


If you accidentally change a section in Qualtrics that you didn't mean to, or you know that you changed something, but you aren't sure what, unfortunately Qualtrics doesn't have an "undo" or "back arrow" option. Luckily, they do have a "version history" option! To use this, click "Tools" at the top left of your survey editor.

Now click "Versions," then "View version history," and select the version that you want to return to.

You can see who last saved each version in this window, which can make it easier to tell when you first started editing, and you can see what changes were made. Select the version that was saved before your mistaken change, and click "Restore this version," then "Restore."

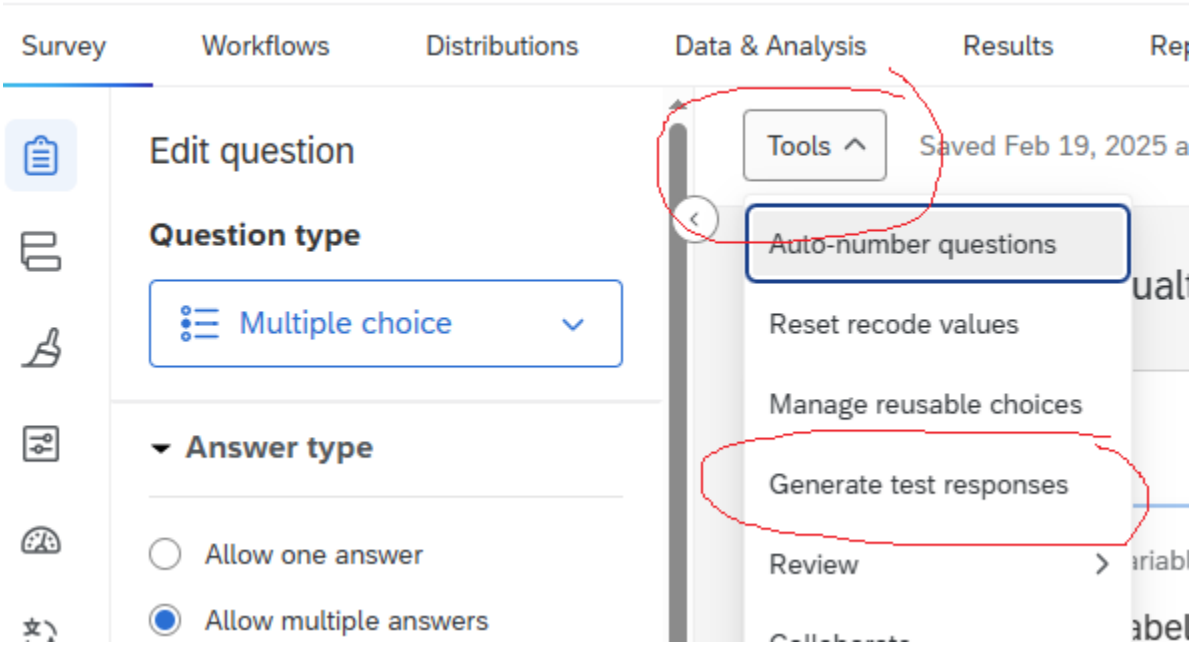




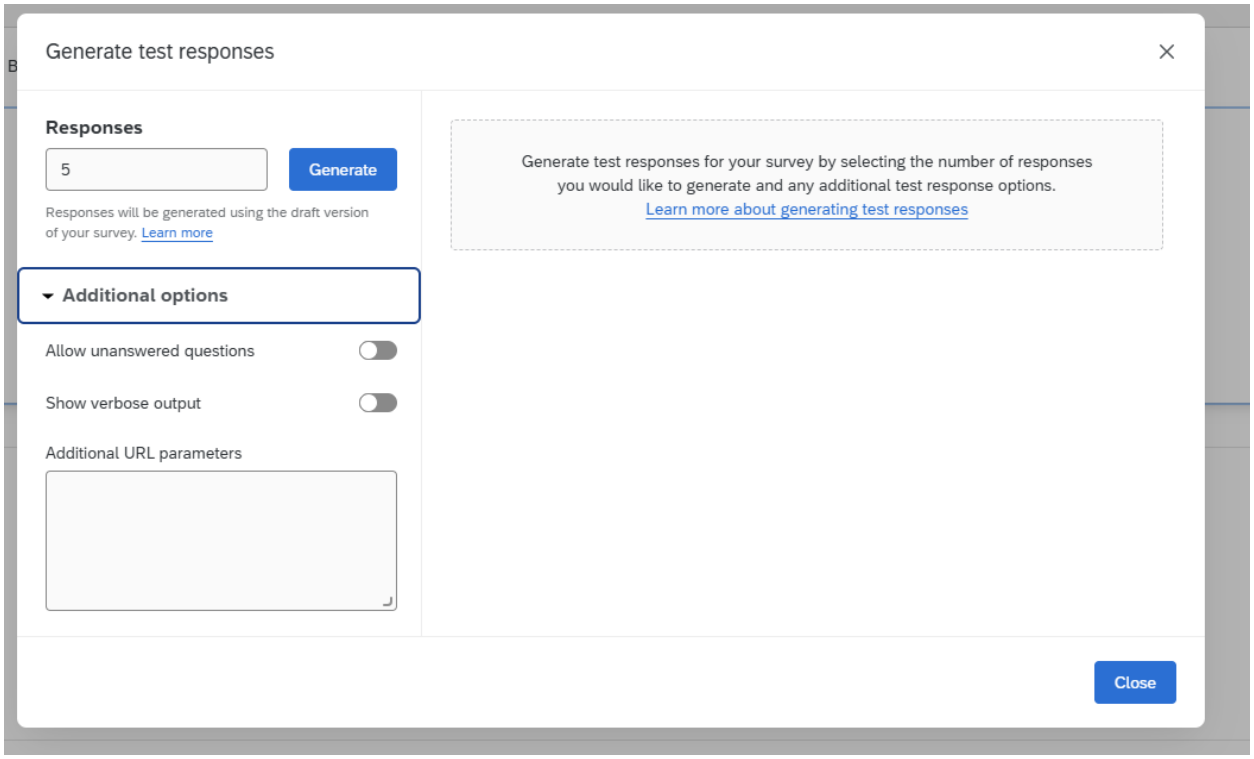
Your survey will now be just like it was before your change!

Creating a Test Dataset

When you are creating and testing a survey, at times it is easier to identify issues and patterns, and to see how data will actually appear in the back end, if you have data to work with. An easy and quick way to do this is to create a randomly generated test dataset through Qualtrics.



To do this, in the “Survey” tab of Qualtrics click “Tools,” then “Generate test responses.”

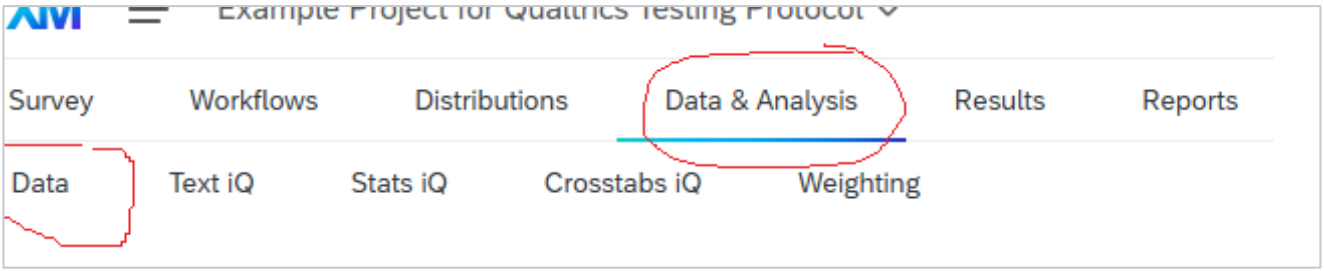


Then type in how many test responses that you would like and select the various options that you would like for your test dataset. If you want to simulate a sample that may be unruly, in order to see how your survey handles it, it can be helpful to select “Allow unanswered questions” and “Show verbose output”. When you’re done selecting all of your options, you can select “Generate,” and you will now have test data as if 5 participants, in this example, have taken your survey.

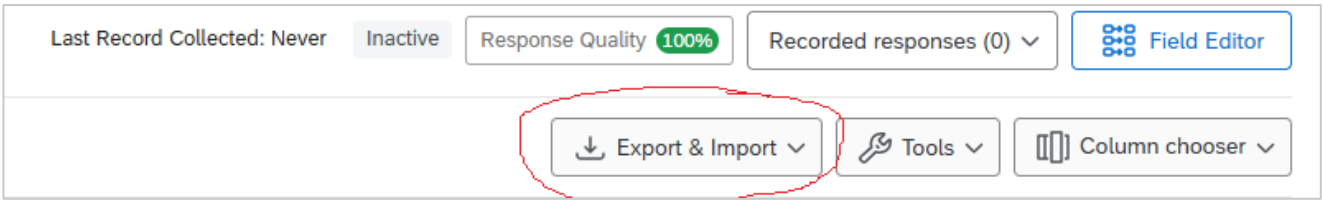
Downloading a Dataset from Qualtrics

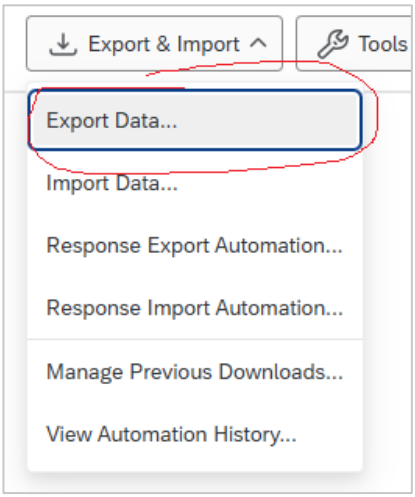
In order to check the back-end of your dataset, first you need to have the dataset downloaded in order to take a look at it. You can download your dataset at any point, before or after you’ve given the survey to any participants or testers, to see what your variables, values, etc. look like and make sure that everything looks correct.

To download your dataset, you’ll want to navigate to the “Data & Analysis” tab



Then, on the “Data” tab in this section, click “Export & Import”, then “Export Data…”





Now you can choose any of the provided formats to download your data, from Excel to SPSS and more. We typically download data in the SPSS format, with “Download all fields” selected. Then you can hit “Download”, and your file is downloaded!