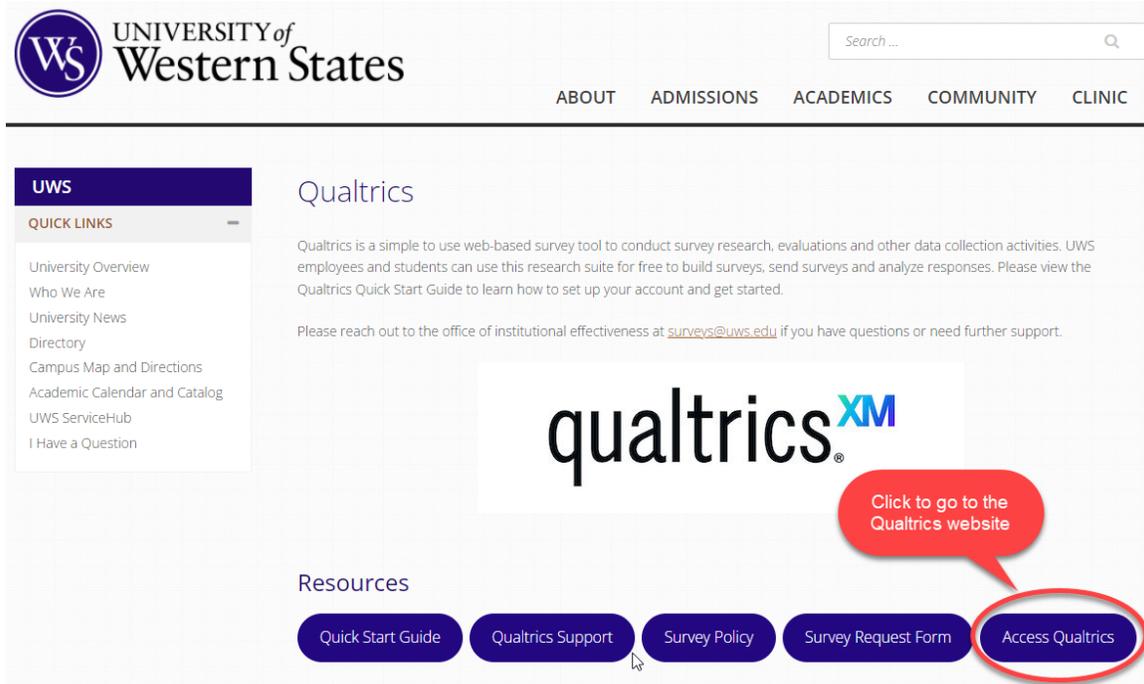


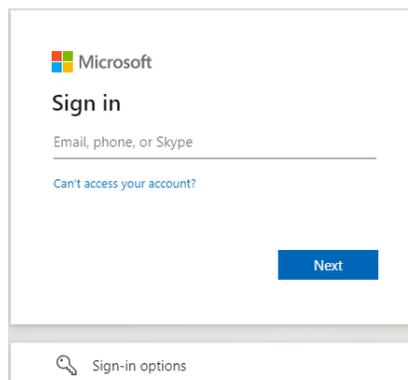
Accessing Your Account

1. Select “Qualtrics” from [Inside UWS](#) to visit the Qualtrics page of the website (below). From here, you can access a variety of resources, including a link to Qualtrics. Additionally, you can navigate directly to Qualtrics via <https://westernstates.qualtrics.com/>.



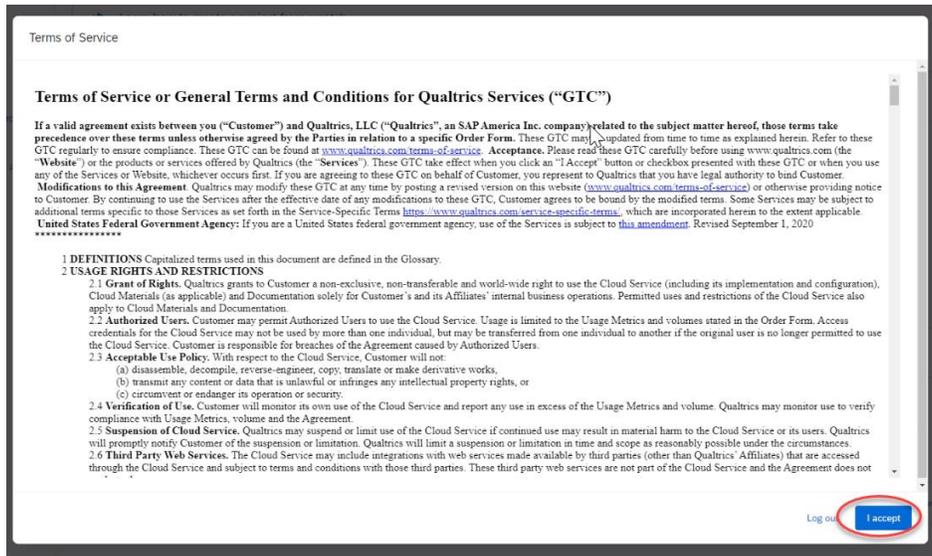
The screenshot shows the University of Western States website. At the top left is the UWS logo and name. A search bar is at the top right. A navigation menu includes ABOUT, ADMISSIONS, ACADEMICS, COMMUNITY, and CLINIC. A sidebar on the left lists quick links such as University Overview, Who We Are, University News, Directory, Campus Map and Directions, Academic Calendar and Catalog, UWS ServiceHub, and I Have a Question. The main content area is titled 'Qualtrics' and contains text describing the tool and contact information. Below this is the 'qualtrics XM' logo. At the bottom, a 'Resources' section contains five buttons: 'Quick Start Guide', 'Qualtrics Support', 'Survey Policy', 'Survey Request Form', and 'Access Qualtrics'. A red callout bubble with the text 'Click to go to the Qualtrics website' points to the 'Access Qualtrics' button, which is also circled in red.

2. If you already have a free Qualtrics account using your UWS email account, please reach out to surveys@uws.edu for assistance. If this is your first time using Qualtrics, login using your full UWS email and password (including two-step verification). As such, you will be unable to update the password in the future from the “Account Settings” menu.

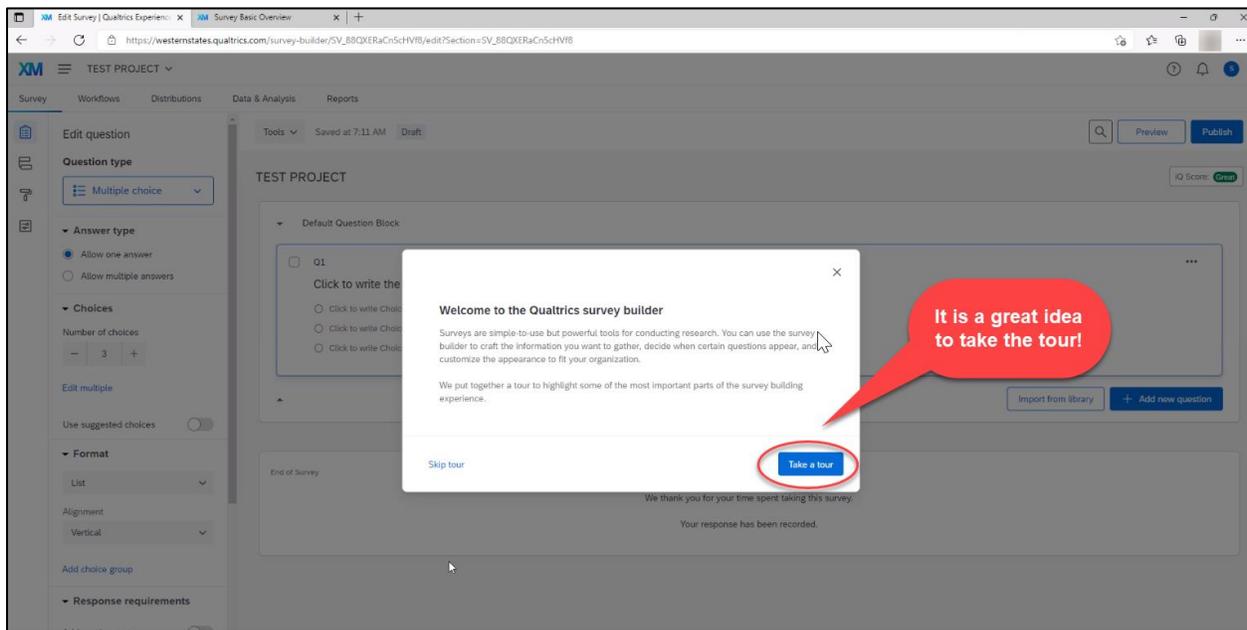


The screenshot shows a Microsoft sign-in page. It features the Microsoft logo at the top left, followed by the text 'Sign in'. Below this is a text input field labeled 'Email, phone, or Skype'. Underneath the input field is a blue link that says 'Can't access your account?'. At the bottom right of the sign-in area is a blue button labeled 'Next'. At the very bottom of the page, there is a section titled 'Sign-in options' with a magnifying glass icon.

3. Prior to account set-up, Qualtrics will request that you review and accept their terms of service.



4. Once you are in the Qualtrics site a pop-up will offer you a tour of key Qualtrics features.



Starting a New Project

1. If appropriate, obtain [IRB approval](#) for your survey/project.
2. If you have not done so already, please review [Policy 1010 – University Surveys](#) and complete the [Survey Request Form](#), if appropriate. This form will allow you to request a timeframe for your survey, ask for help accessing distribution emails/email lists (if necessary), or request assistance from the institutional effectiveness team to refine your draft survey items.

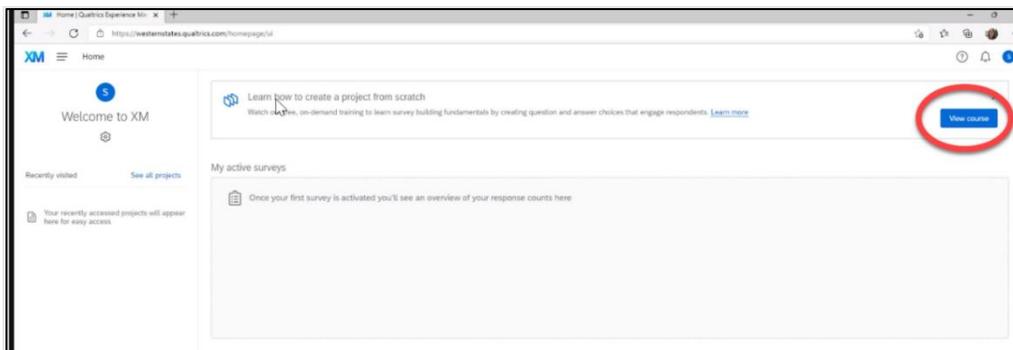
Examples of surveys exempt from the policy (and do not need to complete the request form) include:

- evaluations by event participants (such as trainings, gatherings, etc.)
- classroom/audience responses (i.e., non-research, classroom activities)
- opinions or feedback of a small group (e.g., meal preference or scheduling for a department)

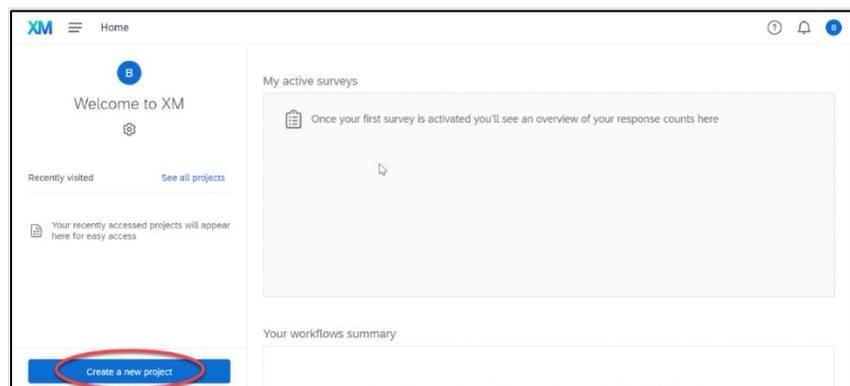
Prior to submitting your request form, be sure to review the surveys@uws.edu Outlook calendar. Institutional surveys (e.g., annual student feedback, course evaluations, etc.) receive scheduling priority over those from outside agencies or other internal stakeholders (e.g., faculty or students conducting research, department-specific inquiries, etc.). The office of institutional effectiveness may deny a request, or offer alternative scheduling options, to prevent over-surveying a specific population.

Please reach out to the office of institutional effectiveness if you have additional questions regarding your survey and Policy 1010 (email surveys@uws.edu).

3. This is the main welcome screen you will see once logged into Qualtrics. If you are new to this platform, consider viewing the course on how to create a new survey from scratch.



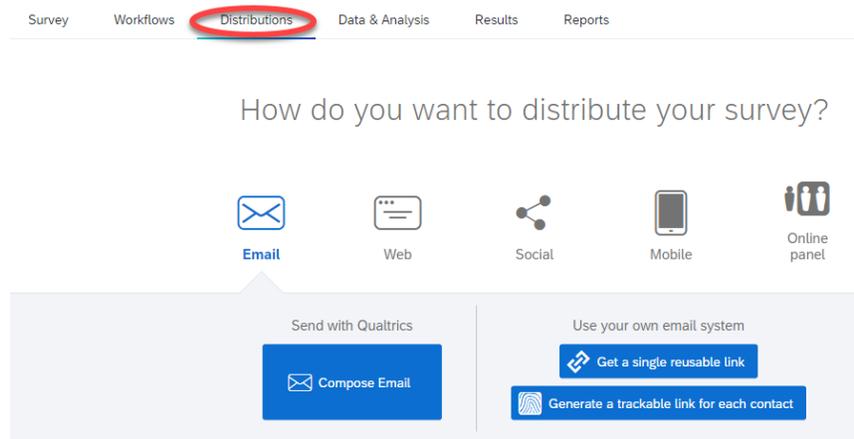
4. You can also start a new project from scratch using the “Create a new project” icon in the bottom left-hand corner of the screen.



5. Please see the *Key Qualtrics Resource Guides* section towards the end of this document for additional support building your survey project.

Survey Approval Process

1. If you have not done so already, review [Policy 1010 – University Surveys](#) and complete the [Survey Request Form](#), if applicable. Please note that it may take up to 10 business days for the survey request form to be approved by the office of institutional effectiveness.
2. When your survey is ready for distribution, navigate to the Distributions menu at the top of the screen. Select your desired distribution strategy. See the *Developing Distribution Emails* section of this guide for additional information regarding distribution strategies.



3. Select an approver from the drop-down menu and add any notes. For most UWS faculty and staff members, select the default “Survey Administrator” approver. Dissertation students will select their dissertation chair from the list. Additionally, you can add any notes that might be helpful for the approver.

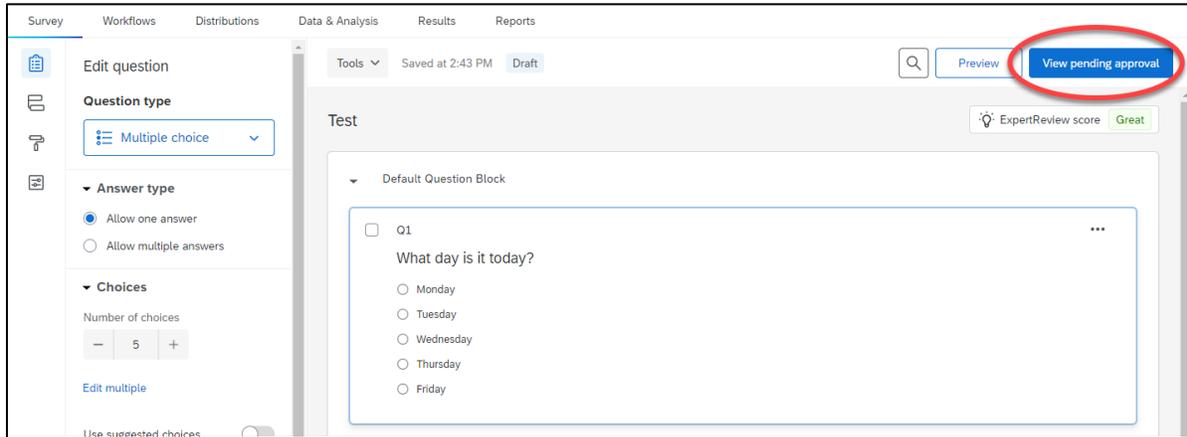
The screenshot shows a 'Request approval' form. At the top, it says 'Request approval'. Below that is a dropdown menu labeled 'Select approver *'. Underneath is a text area labeled 'Approval notes' with a red instruction: 'Include a brief description regarding the nature of your survey if it falls outside of Policy 1010'. At the bottom right of the form are two buttons: 'Close' and 'Request approval'.

If your survey meets requirements set forth by Policy 1010, and requires formal approval, it will be denied if you have not already requested and received formal approval through the survey request form process. If your survey is exempt from Policy 1010 and does not require formal approval (via the Survey Request Form), include a brief description of the nature of your survey in the Qualtrics approval notes section.

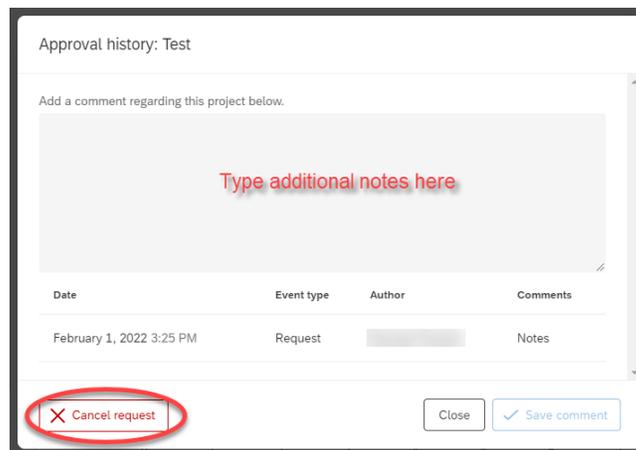
Please note that it may take up to 5 business days for Qualtrics approval (this approval is separate from the formal survey request approval process).

Surveys only require Qualtrics approval the first time they are published. After approval, survey owners can modify and republish without further Qualtrics approval.

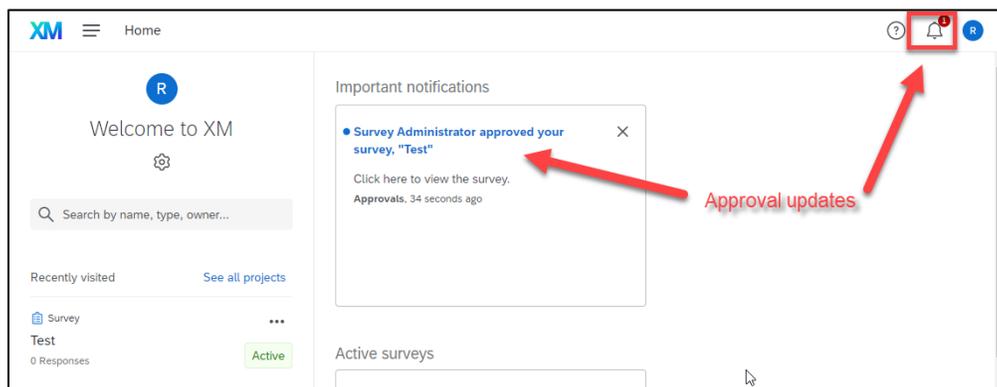
4. You can view pending approvals by selecting the button at the top right of the screen from your project menu.



5. From the pending approval pop-up menu, you can add additional notes to the approver or cancel an active request.



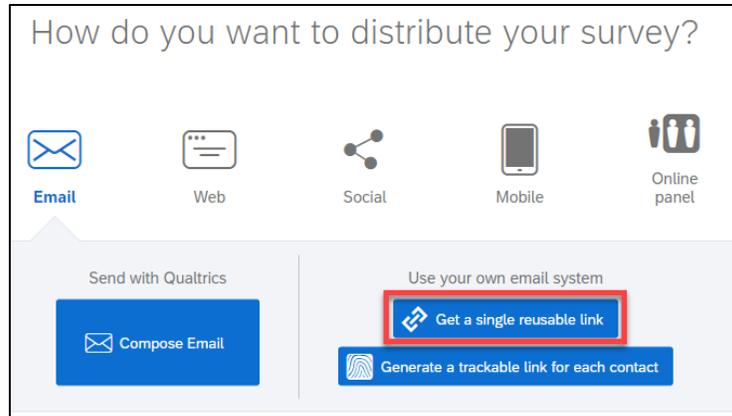
6. You will receive an email notification once your survey has been approved. Additionally, notifications about the approval process will appear on your main dashboard.



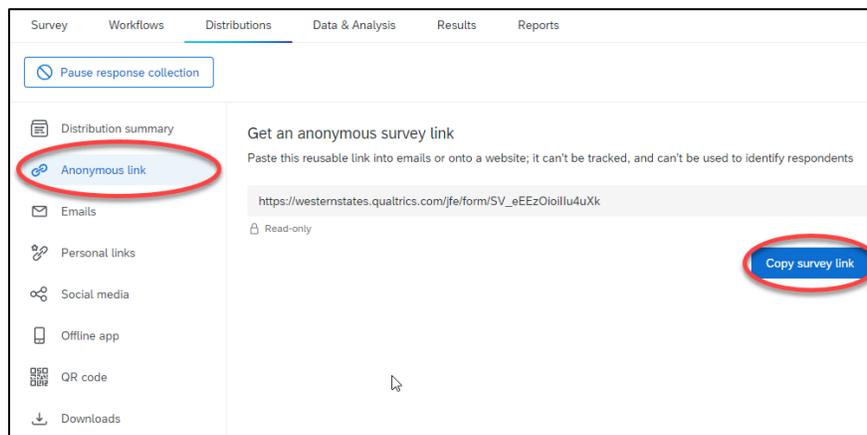
Survey Distribution

There are pros and cons of the three main strategies for distributing surveys:

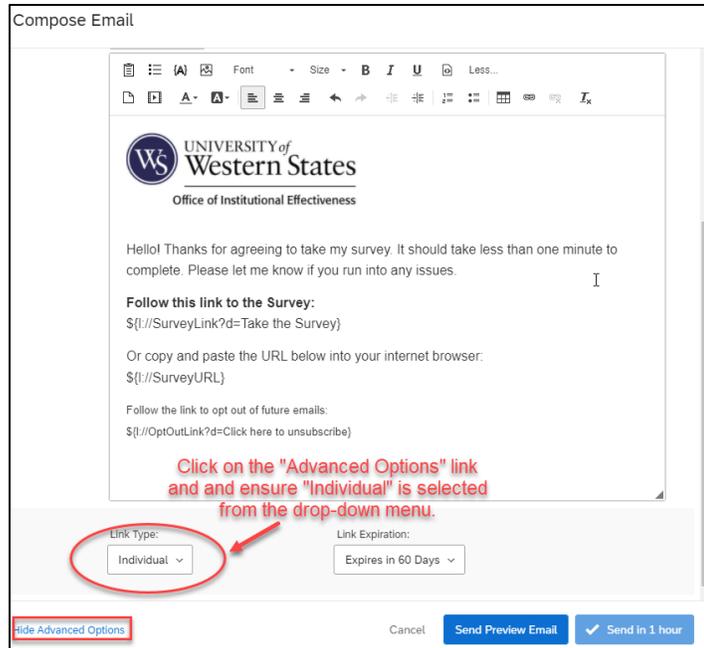
- 1. Anonymous-link:** perhaps the easiest way to send your survey is to utilize an anonymous link. This allows ANYONE who has received the link to take the survey. Links can be emailed (from any email account), posted to social media, etc. There are a few disadvantages to this strategy. First, individuals can take the same survey multiple times, leading to poor data quality. Second, since you don't know who did or did not take the survey, reminders cannot target only non-responders. Lastly, respondents must enter all data at the time of submission. They cannot return later to complete the survey or modify their responses.



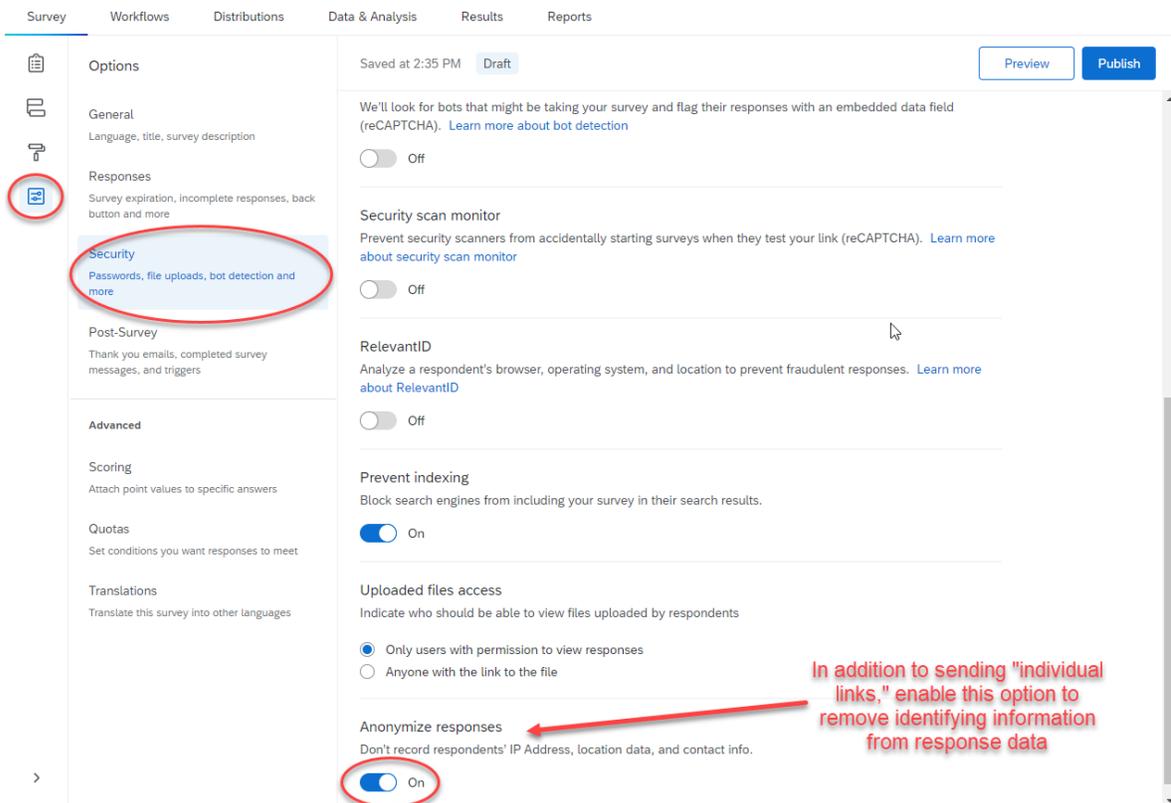
Copy the survey link and paste into your desired distribution method.



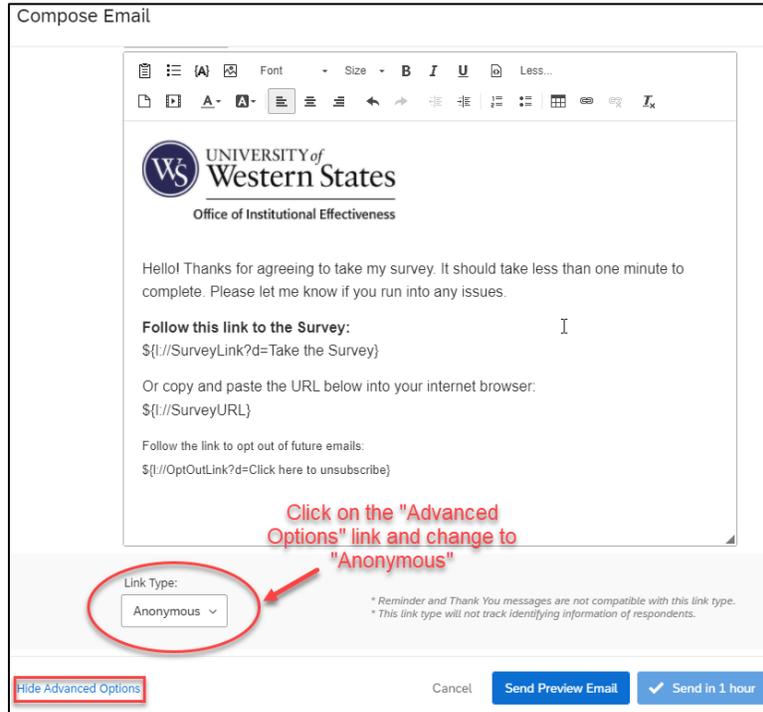
- 2. Email:** two different email strategies are discussed below.
 - **Individual Link:** Sends a personalized link via Qualtrics to each contact uploaded to your list. These links cannot be used by those who have not received them. This is a good strategy to use when collecting data where you need to be able to associate the responses submitted with the name of the individual. The respondent information can be saved with the option to return later to complete or modify their responses. To reiterate, **data is clearly identified with the respondent information and does not provide anonymity**. One benefit of this strategy is the individual like allows you to send targeted reminders only to those who have not yet completed the survey (unlike an anonymous link). See how to set up email for individual links below.



It is possible to send a personalized link via Qualtrics to each contact uploaded to your list, but **remove all response identifying information (name, email, IP address, etc.) from your data**. In the Survey Options menu, go to the Security tab, and turn on the option to anonymize responses. By using this combination of individual links and anonymizing the data, you will be able to see who responded to your survey and send targeted survey reminders, but not be able to associate any data to individual responders.



- **Anonymous Link:** Sends a personalized link via Qualtrics to each contact uploaded to your list but **removes all response identifying information** (name, email, IP address, etc.) before saving it in the data. The advantage of this option, rather than anonymous link strategy presented in #1 above, is respondent information can be saved with the option to return later to complete or modify their responses. A disadvantage of this option you cannot see who responded to your survey or send targeted survey reminders.



3. Sending From Another Email Address

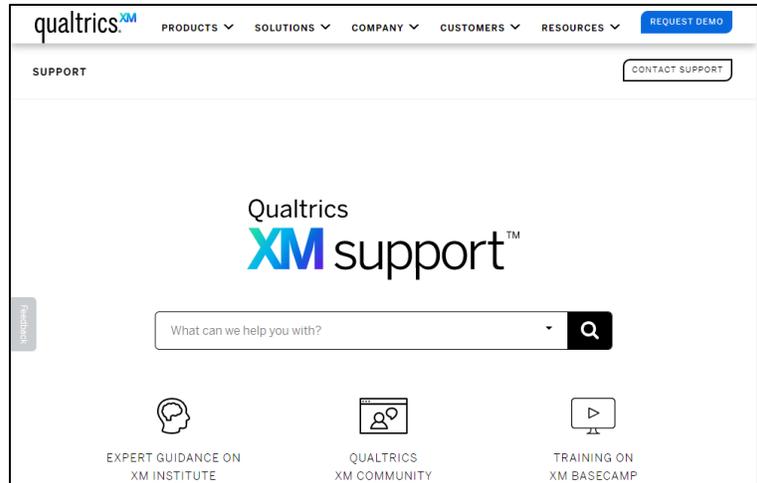
- By default, your survey will be sent from your personal UWS email account. One advantage of using a personal email is that in many cases it may help increase participation rates. A disadvantage is that individuals can respond to the email invitation, which may not be desirable.
- Please reach out to the office of institutional effectiveness (surveys@uws.edu) if you would like your survey to be sent from a different email and discuss strategies.

Other Email Development Tips

- You may consider including the UWS logo or email header images in message, so it is more obvious to the receiver that this is an official survey from the university (if appropriate). Please reach out to communications@uws.edu if you do not currently have access to university or department logos or headers.
- In accordance with Policy 1010, please develop email messaging that aligns with [UWS Brand Guidelines](#) for fonts, colors, etc. General use fonts for emails and desktop applications are Arial and Garamond.
- It is always good idea to send a “preview” message to yourself first to preview the text, spacing, images and links going out to your respondents. Please note that this message will likely take several minutes to arrive in your mailbox. Wait at least five minutes before sending another test message.
- **Contact lists** for email distribution can be developed manually or imported/uploaded from a file. Please note that the current documentation from Qualtrics for importuning a list refers to the Contacts page/menu. This is out of date – please look for the Distribution page/menu instead.

Key Qualtrics Resource Guides

Qualtrics offers a variety of user guides. In addition to the guides highlighted below, [Qualtrics Support](#) is a great place to start. Please note that Qualtrics offers a variety of products. At this time, the university only has access to the **CoreXM** product.



Video Training and On-Demand Courses

- [Getting Started Webinar Series \(qualtrics.com\)](#). Includes on-demand videos of how to design a survey, launch a survey, analyze data and develop a corresponding report.
- [Applying Best Practices in Questionnaire Design \(qualtrics.com\)](#). New to Qualtrics? Start here! This six-video series will teach you the basics of building and distributing a survey project, as well as how to report on your research data.
- [Implementing Research Methodology \(qualtrics.com\)](#). Includes help to ensure your research project is methodologically sound by learning the basics of survey methodology and how to apply it.
- [Collecting Research Feedback \(qualtrics.com\)](#). Learn how to manage contacts and distribute your survey through different channels to engage your target audiences and drive response rates.
- [Configuring Your Research Project \(qualtrics.com\)](#). Learn survey building fundamentals by creating question and answer choices that engage respondents.
- [Customizing Your Research Project \(qualtrics.com\)](#). Explore the advanced tools and features that allow you to tailor the survey experience of your respondents and improve your response collection.
- [Driving Response Rates \(qualtrics.com\)](#). Obtain the data you need by implementing survey design and distribution methods that drive high response rates.
- [Minimizing Survey Fatigue and Bias \(qualtrics.com\)](#). Implement survey design best practices to collect high quality data by minimizing bias and respondent survey fatigue.
- [Using Qualtrics for Standalone Projects](#). Engage more employees with Qualtrics around the office by creating shared registration forms, coordinating schedules for team events, testing knowledge with quizzes, and more.

User Guides

Qualtrics offers a variety of different on-demand user guides to help support you in the development of your project. Below are some of the ones that may be the most useful to help get you started.

Account Settings

- [Account Settings \(qualtrics.com\)](#)
- [Notifications Feed \(qualtrics.com\)](#)

Getting Started

- [Survey Basic Overview \(qualtrics.com\)](#)
- [Library Basic Overview \(qualtrics.com\)](#) – You can store surveys, graphics, messages, and other file types within your Qualtrics libraries.
- [Collaborating on Projects \(qualtrics.com\)](#) – You can collaborate on surveys with individual users and groups in your organization.

Survey Distribution

- [Distributions Basic Overview \(qualtrics.com\)](#)
- [Contacts Basic Overview \(qualtrics.com\)](#)
- [Email Survey Invitations \(qualtrics.com\)](#)
- [Security Survey Options \(qualtrics.com\)](#) – Includes how to collect anonymous data.
- [Email Distribution Management \(qualtrics.com\)](#)
- [Reminder & Thank You Emails \(qualtrics.com\)](#)
- [Embedded Data \(qualtrics.com\)](#) – Includes how to include additional embedded data fields for a respondent, which may help with analyzing data (see “Setting Values from a Contact List” section of this page).

Analysis

- [Recode Values \(qualtrics.com\)](#) – How to recode values assigned to answer choices for analysis.
- [Data & Analysis Basic Overview \(qualtrics.com\)](#)
- [Results vs. Reports \(qualtrics.com\)](#)
- [Results-Reports Basic Overview \(qualtrics.com\)](#)
- [Advanced-Reports Basic Overview \(qualtrics.com\)](#)