

Qualtrics to SONA Automatic Credit Granting Guide

After recent Research Guide updates, researchers are no longer required to conduct in-person debriefings for online studies.

Follow these steps to set up automatic credit granting from Qualtrics. Following the research guidelines, in order to grant credit online without participants having to attend an in-person debriefing, participants must pass a quiz following the debriefing. The quiz must be at least two questions long and we suggest allowing participants to have three chances to successfully pass both questions. If participants fail after 3 attempts they will need to contact a researcher for an in-person debriefing. For more information regarding research guidelines, see [Researchers Guide](#) (found in Department Resources on the Psychology website).

The following guide offers step-by-step instructions on how to set up automatic credit granting for online surveys hosted by Qualtrics.com

Step 1

Submit a SONA short form for an “Online Study”. If it is not an “Online study”, Qualtrics will not redirect back to SONA and grant credit.

Step 2

Create a block for your debriefing (it helps to have the debriefing as a stand alone block).

Q58



The study is now complete. In order to receive credit for participating, you must read the debriefing and pass the debriefing comprehension quiz. If you have any problems or questions, please contact Mathew Coles at mcoles@email.arizona.edu

Q57



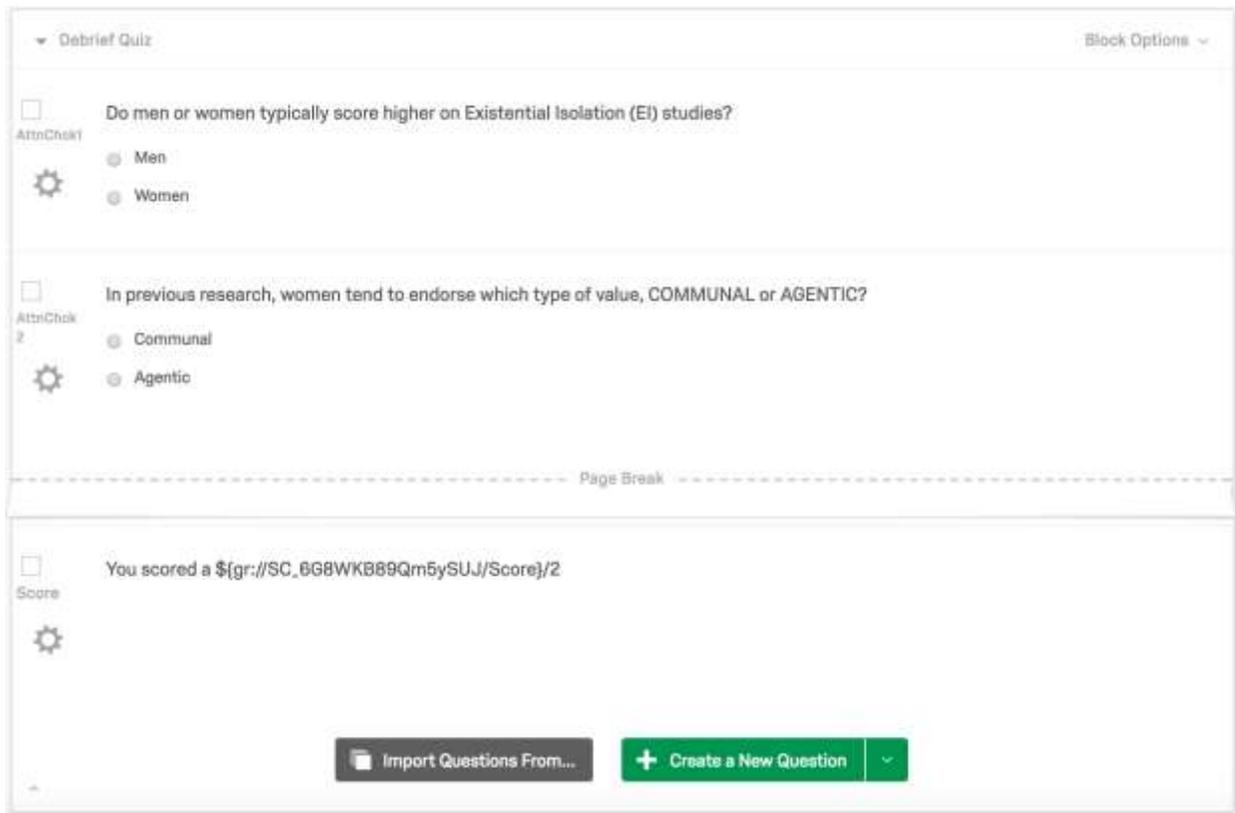
Thanks for your input! Now let me tell you a bit more about what we are investigating and what we expect to find. The purpose of this study is to investigate preferred personality traits in partners and children. Specifically, we will examine the preference of communal or agentic traits in partners, sons, and daughters, and the reasoning behind these preferences. Agency is defined as the degree to which an individual can make decisions about their life. An agentic personality is related to the pursuing of goals and advancement. A communal personality is regarded as the willingness to sharing thoughts or feelings with another person or group of people, and the involvement in the formation and maintenance of social connection. Specifically, we hypothesize that male participants prefer more communal traits for their future wives, prefer communal and agentic traits for their future daughters, and mostly agentic traits for their future sons. Furthermore, we predict that men prefer more agentic daughters than wives because they see their daughters as more of an extension of themselves. At the same time, they see their sons as even more of an extension of themselves than their daughters because father and son have the same gender.

There was one independent variable in this study. First, we manipulated whether the participants were thinking about preferred personality traits of their ideal future partners, sons, or daughters. Our dependent variable, or what we measured, was whether men prefer more agentic or communal personality traits for their ideal future partners, sons, or daughters. There was also a mediator variable in this study, the degree of self-extension towards an ideal future partner, son, or daughter. Again, we are hypothesizing that men prefer more communal traits for their ideal future partners, agentic and communal traits for their ideal future daughters, and mostly agentic traits for their ideal future sons. We think that the degree of self-extension towards ideal future partners, sons, and daughters is positively correlated with the number of agentic personality traits preferred for each family member.

If you have any further questions, please feel free to ask the experimenter or use the contact information provided below to contact a member of the research team at a later time.

Step 3

Create a new block for the “Comprehension Quiz” and create (at least) two questions testing participants understanding of your debriefing. After a page break, create a 3rd question that indicates a participant score. E.g., “You scored a ___/2”. This should be a “Text only” question type. This becomes important in Step 5.



Step 4

Score your questions. Go to “Tools” dropdown menu at the top and select scoring. This brings up a new screen which allows you to “score” your survey. Only select the correct answers to your debriefing quiz by clicking on the answers themselves (as shown in the screenshot below, the grey answer will become green and will be assigned a value of 1) . To save, scroll back to the top of the screen and select “Back to Survey”.

Comprehension check

Q59 What was the mediator variable in this study?

Clear

1

the degree of self-extension towards their ideal future partner, son or daughter

#

The amount of communal traits assigned for their ideal future partner, son or daughter

#

The amount of agentic traits assigned for their ideal future partner, son or daughter

Q60 an agentic personality is related to what?

Clear

1

the pursuing of goals and advancement

#

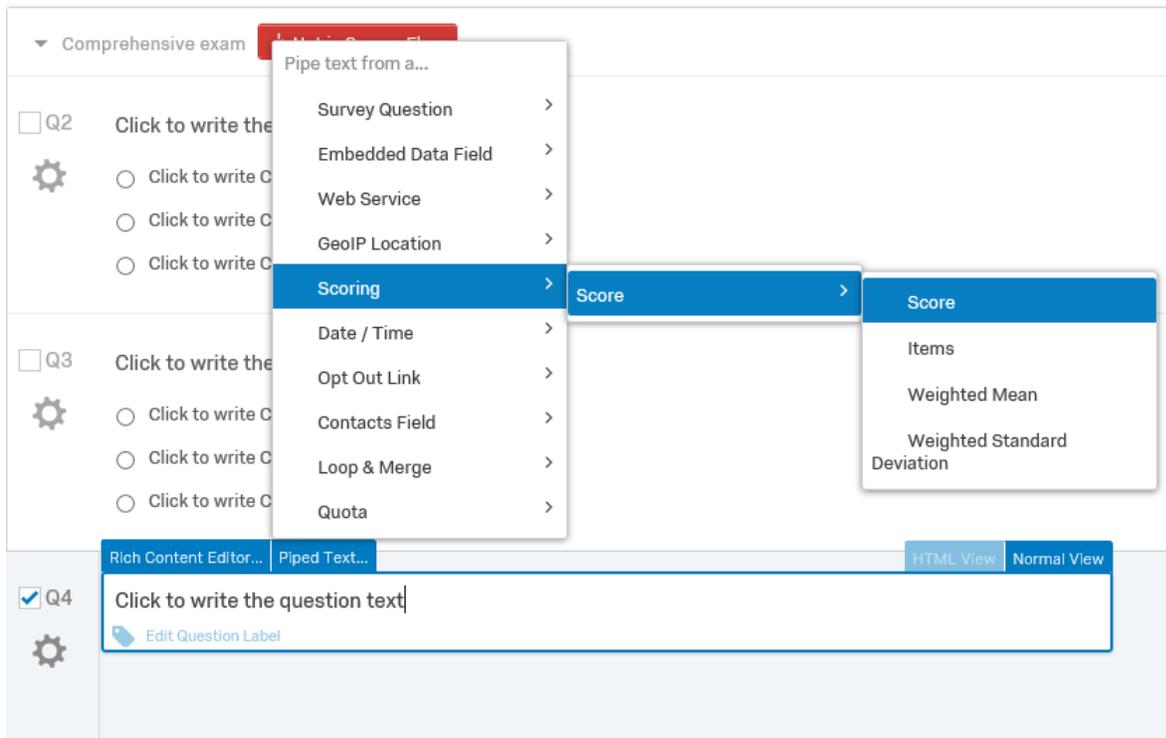
willingness of sharing thoughts and feelings with another person

Q61 This question type is not currently supported

Step 5

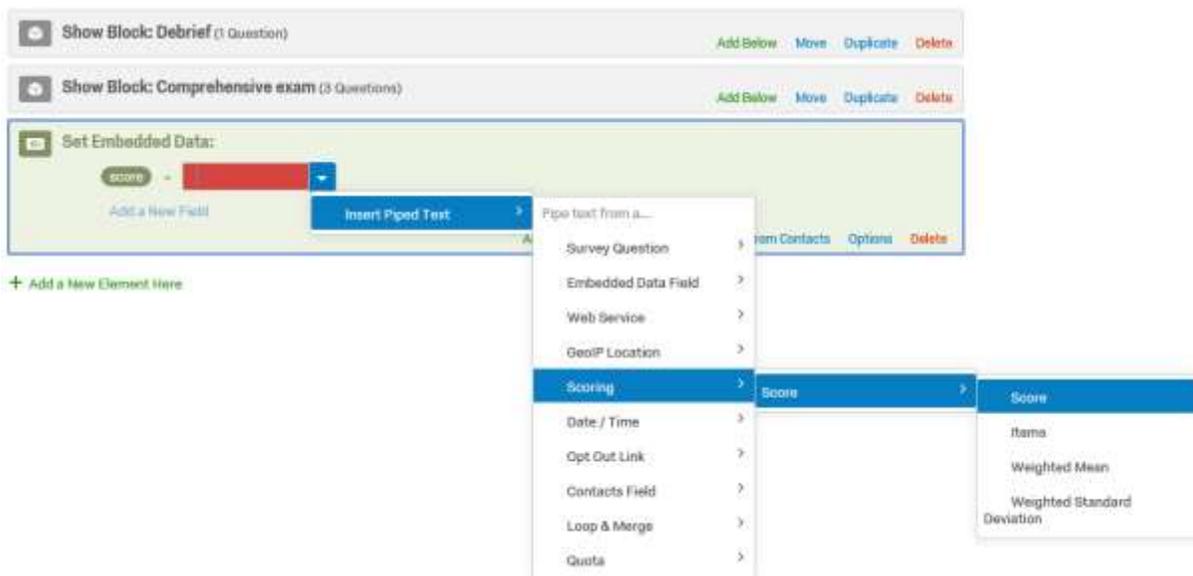
On your scoring question (created in Step 3) select piped text→scoring→score→score. Then add to the line “You scored” “/2”

“you scored (your scoring code goes here)/2”



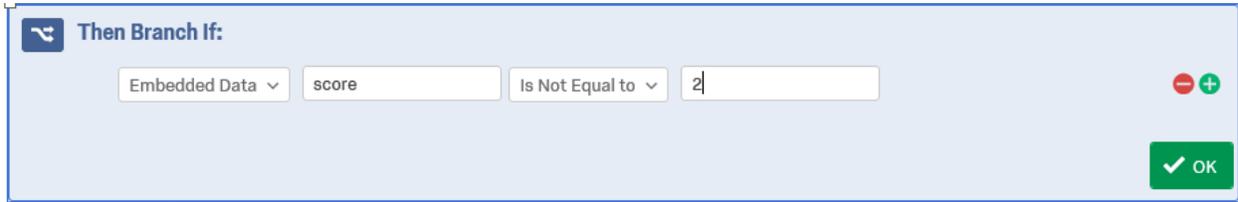
Step 6

Go into your survey flow. And add the debrief block and Comprehensive exam block. Now create an embedded data block. In the embedded data field enter “Score”. Now select “set value now” and click on the down arrow→ insert piped text→ scoring→ score→ score.



Step 7

Add a new element “Branch” and select “add a condition”. Click on the down arrow and change to “Embedded data”. Enter in first box “Score” select “is not equal to” and type in “2” in the second box.

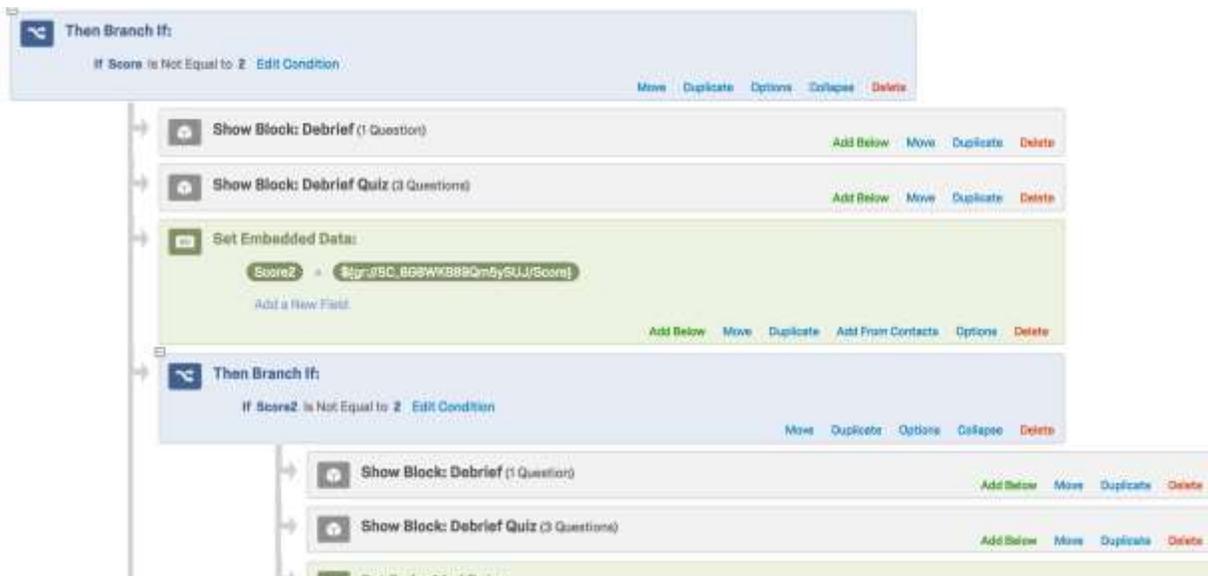


Step 8

Repeat steps 6 through 7 but with each subsequent embedded data field, title the embedded data “Score2” and “Score3” respectively. Additionally, subsequent branching conditions will need to refer to “Score2 is not equal to” and “Score3 is not equal to” respectively. However, when assigning Score2/Score3 a value, continue to set it to insert piped text → scoring → score → score (see Step 6). This is important because in some cases Qualtrics will refer to the original scoring embedded data, such that even if a participant passes the debriefing quiz on their 2nd or 3rd attempt, it will still move through the survey as if the participant failed the quiz. This method essentially resets the scoring data field for branching logic in survey flow.

When creating a new block, you can select “Add Below” → select “Block” → select appropriate block. This feature allows you to present a single block multiple times without actually duplicating the block in your survey.

Each branch should contain the debriefing block, the comprehension quiz, the embedded data field, and branch if Score# does not equal 2 (see below).



Step 9

Save survey flow. Create a new block titled contact researcher. Create a multiple choice question which states “You have failed the Quiz please contact the researcher [INSERT RESEARCHER NAME AND CONTACT INFORMATION].” Only allow a single choice, e.g., “Okay, I will contact the researcher”. At this point, we do not want the participant to be able to move further in the survey because if participants reach the end, they will be awarded participation credit. In order to prevent a participant from moving forward, we need to create a custom validation that is impossible to pass. Custom validations stipulate conditions that must be met in order to pass a given survey question.

Select “Custom Validations” on the right side of the screen (this is an available option for multiple choice type questions). Select the Contact Researcher question, and then “Okay, I will contact the researcher” (or whatever your single answer is) and then “is displayed”. Press “+” → “and” → Consent agreement → “I disagree to consent” → “is selected”. Select an error message and then save. We suggest creating a custom error message that reiterates to the participant to contact the researcher.

Presumably in an online study you have a consent form embedded in the survey with an option to agree or disagree. If a participant disagrees, an error message preventing them from viewing the survey should stop them from continuing with the survey. Therefore, in our custom validation above, in order to pass they must have selected disagree (which the participant could not have done if they are currently completing the survey), which creates an impossible pass.

Custom Validation

Validation will pass if the following condition is met:

contact You were ...m (phelm@email... ▾	Okay, I will contact the researcher. ▾	Is Displayed ▾	⊖	⊕	
And ▾	agree If you agre...ticipate in th... ▾	Disagree ▾	Is Selected ▾	⊖	⊕

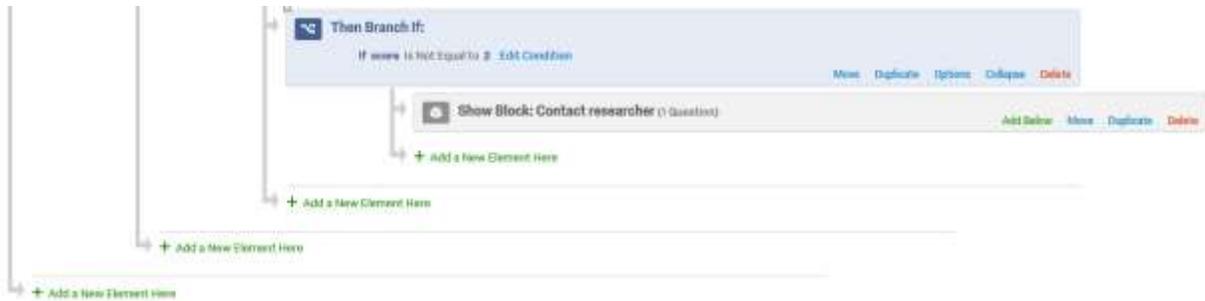
Choose an error message to display on failure: Did not pass debrief quiz ▾

Close

✓ Save

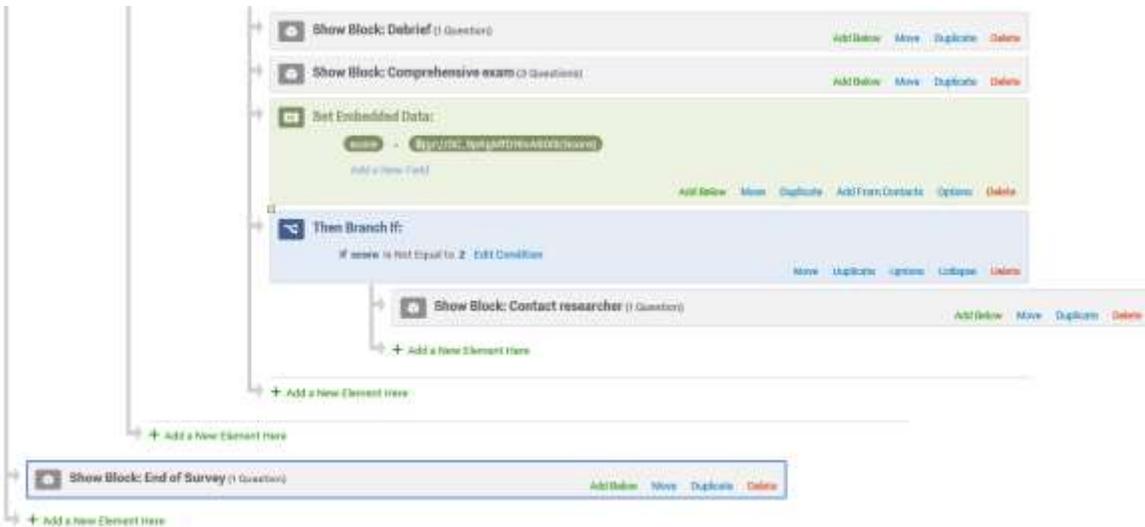
Step 10

Go into Survey flow add the contact researcher block following the third attempt at completing the debrief quiz (i.e., after the branch option). Save survey flow.



Step 11

Create a new block. This block should be the “end of survey” block for participants who passed the Quiz. You may also want to include contact information for the researcher. Make sure this new survey block is *not* in the series of branches following failed quizzes.



Step 12

In survey flow at the bottom of your survey add an “Embedded data” element. In the embedded data field enter “id” in lower case. Do not assign a value to this embedded data field. Save survey flow.



Step 13

Note: You will be unable to complete the subsequent steps until your study has department approval and available on the SONA website.

In Qualtrics select “Distributions” → “anonymous link”, and then copy link. Go into SONA and select your study, go to “Study menu” → “Change study information”. Now paste link into “Study URL” at the end of the link and add `?id=%SURVEY_CODE%` to the copied URL with no spaces. E.g., your original link may look like:

https://uarizona.co1.qualtrics.com/jfe/form/SV_cBxaRe6WS5rCx6Ux but change it to:

https://uarizona.co1.qualtrics.com/jfe/form/SV_cBxaRe6WS5rCx6Ux?id=%SURVEY_CODE%

Save Study Information.



Step 14

On the SONA site, select “Survey Information” and scroll down to the “View Study Website” Button. Below this button will now be a “Qualtrics Redirect to a URL” link. Copy this link and return to your Qualtrics survey.

In Qualtrics, select “Survey Options” (next to Tools, near the top of the screen), and scroll down to the “Survey Termination” section. Select “Redirect to a full URL...” and paste the redirect link from the SONA page into this form. Save Survey Options.

Study Name	999B
Study Type	 Web Study This is an online study. Participants are not given the study URL until after they sign up.
Study Status	Visible to participants : Approved Active study : Appears on list of available studies Online (web) study : Administered outside the system
Duration	60 minutes
Credits	2 Credits
Website	View Study Website Sample Link with Embedded ID Code Qualtrics Redirect to a URL <input type="text" value="https://www.qualtrics.com/s/453a4e2c89923dc9add73f24&survey_code=\${e://Field/Id}"/>

Survey Termination



- Default** end of survey message.
- Custom** end of survey message...
- Redirect to single response report.
- Redirect** to a full URL, ex. "http://www.qualtrics.com":
- Send additional thank you **email** from a library... When distributed via the Survey Mailer.
- Anonymize Response.** Do NOT record any personal information and remove contact association (not recommended).

Step 15

You're now finished! For participants to receive credit. They must first sign up for a timeslot, and thus you still must create timeslots for participants to sign up. Select timeslots → add timeslots → set “final participation date” and “max number of participants”. Then select add timeslot.

Add Timeslots : 999B

This study was created as an online (web) study. Because a participant may participate in an online study at any time, most researchers create a single timeslot. The single timeslot contains the maximum number of participants who may participate, and has a final participation date of the last date that participants may participate.

Final
Participation
Date

Tuesday, October 31, 2017

Final
Participation
Time

12:00 PM

Max. Number
of Participants

200

Researcher

ALL

Add This Timeslot

After participants complete the survey and successfully pass the quiz they will now be redirected back into SONA and automatically granted credit. Participants who fail the debriefing quiz will be stuck in on the “contact researcher” question. If these participants want to receive credit, they must contact the researcher to meet and receive a debriefing in person. After an in person debriefing, researchers can still manually assign credit to participants via normal SONA credit assigning procedures.

NOTE: By using this method, you must make sure that your consent form validation does *not* bring a participant to “end of survey”. If your survey does route participants out of the survey, they will be granted credit automatically. In order to avoid this, create a custom validation question that displays an error message (e.g., “You have selected DISAGREE to the consent form. Thank you for your time”). This method prevents participants from (a) continuing past this point without agreeing to the consent; and (b) prevents them from seeing an “end of survey” screen and getting automatic credit.

If you have any questions you can contact Mathew Coles at mcoles@email.arizona.edu or Peter Helm at phelm@email.arizona.edu.