Qualtrics Guide

Using Qualtrics in your research project/study

(updated April 2022)

1.Introduction

Qualtrics is the University's preferred **online** platform for data collection. Do not use the free version of Qualtrics which has less functionally than the licenced version from the university. Staff and students must access Qualtrics (university login may be requited) via the link: https://mdxl.eu.qualtrics.com/.

Qualtrics can be used to provide online participant information and document consent for different types of research projects and methods. Qualtrics can also be configured to collect data anonymously and under different conditions for hypothesis testing. This document provides an overview for using Qualtrics to provide Participant Information and document Consent for surveys and other types of research activity (e.g., interviews, focus groups, experiments with participants).

A Qualtrics Beginner Tutorial can be found on YouTube. For first time users we recommend that you view the YouTube video titled "**1. Qualtrics Beginner Tutorial**" accessed via the link: (https://youtu.be/_hSo-ldj19k) to show you to how to create a new project and to add a CONSENT FORM (with Participant Information). Other tutorial videos are also available on YouTube to support new and experienced users and researchers. Please read the information below before attempting to create a new Qualtrics project.

1.1 Categories of project risk

First it is important to distinguish between different types of risk associated with research projects. There are two main categories of risk that we should be aware of

(i) **Minimal Risk**
For example, survey questionnaires conducted anonymously online or offline (no personal data collected with non-vulnerable adults and covering non-sensitive issues etc). Anonymous data collection using a questionnaire means that:

- *The questionnaire should not contain any question that asks for data that can be used directly or indirectly (i.e., with other data) to identify the respondent/participant.*
- *The questionnaire should not be returned via email or any means of identifying the respondent/participant.*
- *Online: The questionnaire can be completed using Qualtrics with the anonymous feature activated (as explained in section 2.3 below)*
- *Offline: The questionnaire can be distributed and collected in person (by the researcher) without identifying individual respondents/participants.*

(ii) More than Minimal Risk or High Risk

- *Any projects that involve the processing (including collection using) of personal data (i.e., any data that can identify a living individual directly or indirectly - e.g., voice/video recordings, name, address, email address)*
- *Interviews and focus groups;*
- *experiments or observation studies;*
- *internet/phone use for the collection of personal data, e.g., from social media / apps;*
- *use of vulnerable groups (e.g., aged under 18, adults with cognitive impairment)*
- *sensitive topics (anything deeply personal and distressing, taboo, intrusive, stigmatising, sexual in nature, illegal and potentially dangerous, harmful to national security etc).*
- *programs / systems / mobile devices / drones: use or development with potential to collect/examine personal/sensitive data (e.g., stored on phones, sat navs, smart TVs etc) or engage in any illegal or harmful activity.*

1.2 Participant information and Informed Consent

All participants in any research study/project must first give their informed consent before any data collection activity is undertaken. Informed consent means that participant information must also be given so that the participant is clearly informed of important aspects of the study before giving consent. In Qualtrics we use a CONSENT FORM which contains *participant information* along with a *consent statement*. This CONSENT FORM can be used (i) to obtain consent for an online survey questionnaire (it is the first part of the questionnaire before the questions) or (ii) on its own to obtain online consent from participants to participate in an interview or other research activity.

For MINIMAL RISK projects (i.e., anonymous surveys) the Qualtrics CONSENT FORM (with participant information and consent statement) can be viewed online by the participant as part of the survey questionnaire (before your questions). The participant will then indicate in Qualtrics whether or not he/she consents to participate in the study/project by clicking one of two options – (i) Yes, I consent or (ii) No I do not consent.

For MORE THAN MINIMAL RISK or HIGH RISK projects the Qualtrics CONSENT FORM (with participant information and consent statement) can be viewed online by the participant. The participant will then indicate in Qualtrics whether or not he/she consents to participate in the study/project by clicking one of two options: (i) Yes I consent or (ii) No I do not consent. **Additionally the participant must identify him/herself by giving a name and contact details.** We recommend that you send participants a copy of their completed CONSENT FORM using the email that they provide.

2. Qualtrics use

Qualtrics can be used for the following activities summarised in the two tables below.

	Minimal Risk projects ONLY	**More than Minimal Risk or High Risk projects**
Online participant Information and consent with questionnaire	**A1** For conducting Minimal Risk online Questionnaires. • *No personal data collected* • *No sensitive topics explored.* • *No identification of participant.* • *Respondents will be non-vulnerable adults*	**B1** For conducting More than Minimal Risk or High Risk online Questionnaires • *Personal data may be collected but this has to be stated in the participant information section (see instructions later).* • *Sensitive topics may be explored subject to supervisor oversight.* • *Requires identification of the participant when giving consent (instructions later).* • *An online link to a privacy notice must be given to the participant*

More than Minimal Risk or High Risk projects	
Online participant Information and consent ONLY	**B2** To gain consent when conducting "More than Minimal Risk / Higher Risk" studies • *This includes: any project involving the collection of personal data; interviews (in person, via phone, WhatsApp etc); focus groups, experiments involving humans/animals as participants; any project involving vulnerable groups (under 18 years old, people with cognitive impairment); any project involving sensitive topics (see list in Section 1.1 above);* • *Personal data may be collected if needed.* • *Voice/video recordings may be made ONLY if needed and the participant must be explicitly informed. Also, recordings must be kept secured at all times and deleted after use.* • *For High Risk - Sensitive topics may be explored if necessary but the supervisor should approve taking into account any risks to the student or participants.* • *Requires identification of the participant when giving consent.* • *An online link to a privacy notice must be given to the participant*

2.1 Creating the Qualtrics (online) CONSENT FORM

The Qualtrics CONSENT FORM contains (i) Participant Information and Ii) a Consent statement with options to agree to consent or not to consent. ***Use the information below to create your CONSENT FORM. Please simply copy, paste and remove/amend the information in purple.***

Please only remove/amend the information which is in purple (or if printed in black and white the information in italics). All other information should remain.

1. Project/Study title

Give the title of your study and ensure that it is self-explanatory and relevant to the specific study.

2. Invitation paragraph

You are being invited to take part in a research study. Before you decide it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. If anything is not clear or if you would like more information please contact the researcher via the email given below. Take time to decide whether or not you wish to take part in the study.

3. What is the purpose of the project/study?

The background and aim of the study should be given here. This should be the layman's version of your rationale (no references).

4. Why have I been chosen?

It is important that we assess as many participants as possible. *You can explain how and why the participant was invited (e.g. gender, age), inclusion/exclusion criteria and **how many** other participants will be studied.*

5. Do I have to take part?

It is up to you to decide whether or not to take part. You can withdraw from the study at any time during or after the study. If you have already completed the study and wish to withdraw consent at a later date then please contact the researcher via the email below.

***If the study is MINIMAL RISK** (anonymous questionnaire) then add the following:*
"It may not be possible to withdraw any answers (to questions) that you give since no personal data will be collected to identify you and your answers."

6. What will I have to do?

You need to describe in detail what the participant will be required to do.

E.g.,

- You will be asked to complete a questionnaire which will take approximately 15-20 minutes.

- You will be asked to give answers to questions interview which will take approximately 45-60 minutes of your time. The interview will be conducted via Zoom or in person.

- You will be asked to (i) complete tasks using a prototype software and (ii) complete a questioinnaire after you have completed the tasks.

If you are gaining consent for an interview or a software evaluation study add the following: "If you consent to take part in this study, you will be asked for your name and email address and the researcher will get in touch with you to arrange the study."

7. What are the possible risks or benefits of taking part?

There are no known risks in participating in this project. We hope that participating in the study will help you. However, this cannot be guaranteed. The information we get from this study may help us to……*this should be related to the practical benefit of your study (taken from the rationale). Where there is no intended benefit to the participant from taking part in the study this should be stated clearly.*

8. Data Protection and Confidentiality

Personal data is any data that can lead to the identification of a specific (living) person. It can be obviously identifiable data (e.g. name or ID number, email address, voice recording) but it can also be a combination of "innocent" data such as age, height/weight, wealth, job position, company, city, etc. that when combined can lead to the identification of a person.

If your Study is MINIMAL RISK (i.e., anonymous survey questionnaire) then add the following statement:

Personal data (e.g., your name, email address, voice or any data that can identify you) WILL NOT be collected by this study and your confidentiality will be protected.

If your STUDY is MORE THAN MINIMAL RISK (interviews / software evaluation / observation / focus groups etc) or HIGH RISK add the following statements:

Personal data) WILL BE processed by this study (since you will be identified or identifiable) and your confidentiality will be protected. All information you provide will be treated in accordance with the UK Data Protection Act 2018 which incorporates the GDPR.

Please view/download a Privacy Notice for Research Participants at:
https://www.mdx.ac.uk/about-us/policies/privacy/privacy-notice-for-research-participants

<Optional>: The interview will be recorded and the recording will be deleted after it has been transcriped. If you do not wish to be recorded then you can indicate this to the researcher before the start of the interview. No information identifying you will be published by the study/researcher.

9. What will happen to the results of the research study?

The results of the research study will be used as part of an *Undergraduate/Postgraduate* dissertation. The results may also be presented at conferences or in journal articles.

10. Who has reviewed the study?

The study has received full ethical clearance from the Research ethics committee who reviewed the study. The committee is the *Please state the name of the Committee here.*

11. Contact for further information

If you require further information, have any questions or would like to withdraw your data then please contact:

Include your details (name and University email address)
Include supervisors' details (name, address, work number and email address)

CONSENT STATEMENT

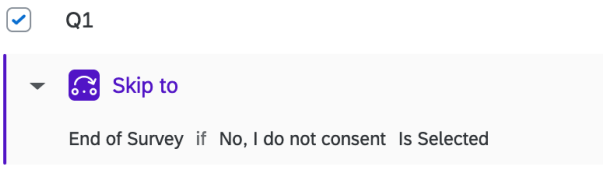
I have read and understood the participant information above and I freely and voluntarily give my consent to participate in this project/study.

Insert your two consent options (using forced response) as explained in the video

- *Yes, I consent*
- *No, I do not Consent*

{Please make sure that these options are working. If someone clicks on "No I do not Consent" then they should be sent to a final page thanking them for considering your study.

You will need to add a SKIP LOGIC statement at the top of the form. The SKIP LOGIC is available under the "Question behaviour" option on the left sidebar in Qualtrics



}

***If your study/project is MINIMAL RISK** (**i.e. an anonymous online survey questionnaire only**) then this is the end of your CONSENT FORM. You should start your questions after this point (see the video for further advice on creating your questionnaire). Remember to follow guidelines in Section 2.3 below to make the form collect data anonymously.*

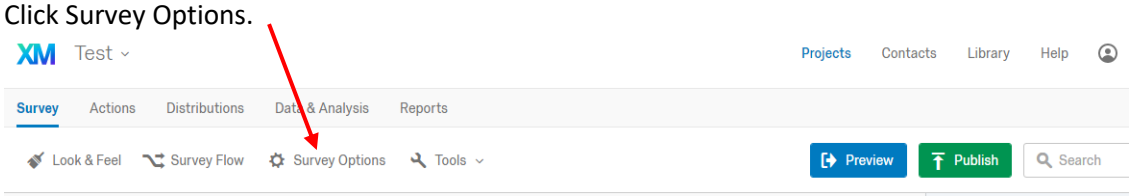
***If your study/project is MORE THAN MINIMAL RISK** (**e.g. needing consent interviews / software evaluation studies / observation studies / focus groups etc**)) **or HIGH RISK** then you will need to identify your participant and document his/her consent. This means that you will need to add two text boxes to request*
(i) the participant's name and (ii) participant's email address (after someonce clicks on "Yes I consent). Note: We recommend that you send participants a copy of their completed CONSENT FORM using the email that they provide.

2.3 Anonymising data collection when using Qualtrics (for Minimal Risk surveys)

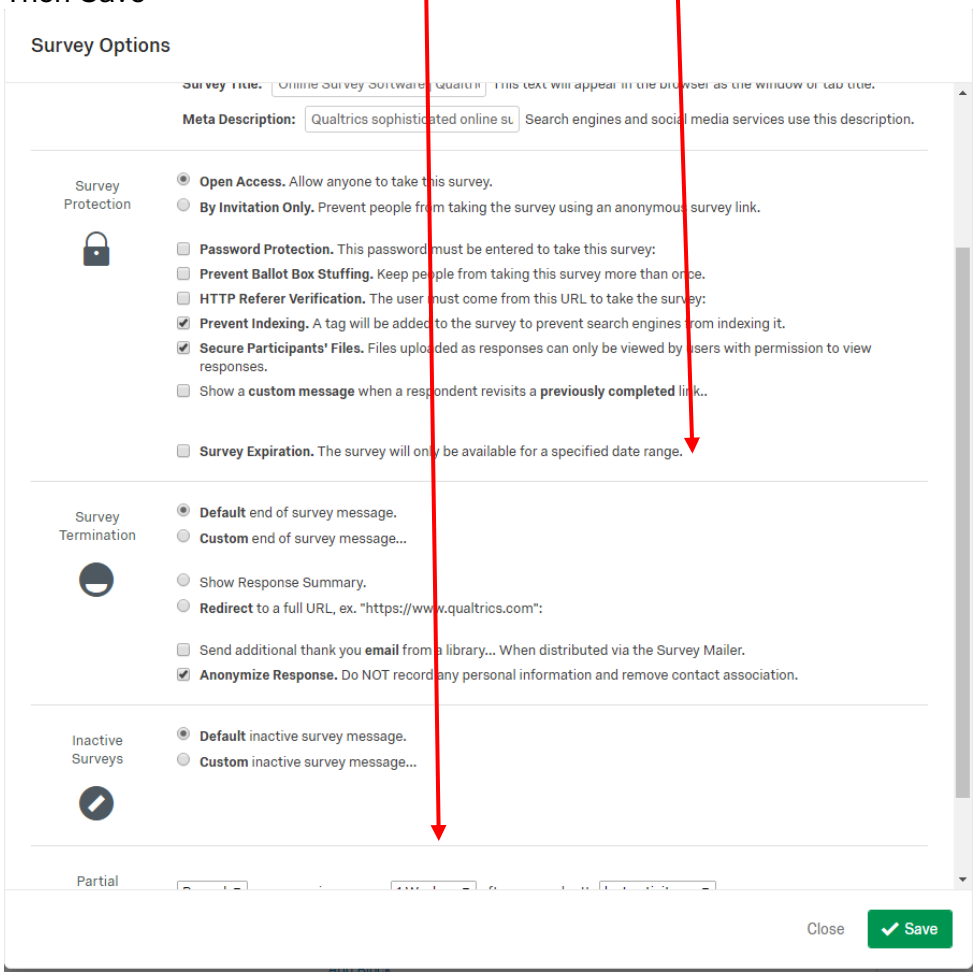
PLEASE NOTE: To avoid collecting additional personal data e.g. IP addresses you should collect data anonymously. This can be achieved by doing the following when logged into Qualtrics.

1. Click **Survey Options**
2. Under Survey Protection tick: '**Secure Participants Files'**.
3. Under Survey Termination tick: '**Anonymise Response'**.
4. Then click **Save**

Click Survey Options.



In Survey Options click the following:
Under Survey Protection tick: 'Secure Participants Files'.
Under Survey Termination tick: 'Anonymise Response'.
Then Save



***Note:** If your project must involve the collection of personal data then discuss this with your supervisor.

Additional notes:

Bulk emails
Note: The University's Computer Use Policy for Students and Alumni says: "Do not send unsolicited bulk email messages, chain mail or spam". It is important that when contacting potential research participants that bulk emails are not sent. You should discuss with your supervisor, the number of potential participants needed for your study and who you intend to contact.

Participant recruitment information
If you are using Qualtrics, then you will need to send your potential participants information (usually via email) to invite them to take part in your study. This is called "participant recruitment information", and should contain brief information about the study/project, an invitation to take part in the study and a link to the Qualtrics form.