

# SONA & Qualtrics Guide for UWinnipeg Honours Students

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# Qualtrics

- Online platform for administering surveys
- Sign up for a UW account, not a trial account:  
<http://ion.uwinnipeg.ca/~clark/research/qualtrics.html>
- Qualtrics Website:  
<https://uwinnipeg.ca1.qualtrics.com/ControlPanel/>
- Support & Tutorial Site: <https://www.qualtrics.com/support/>

# Qualtrics

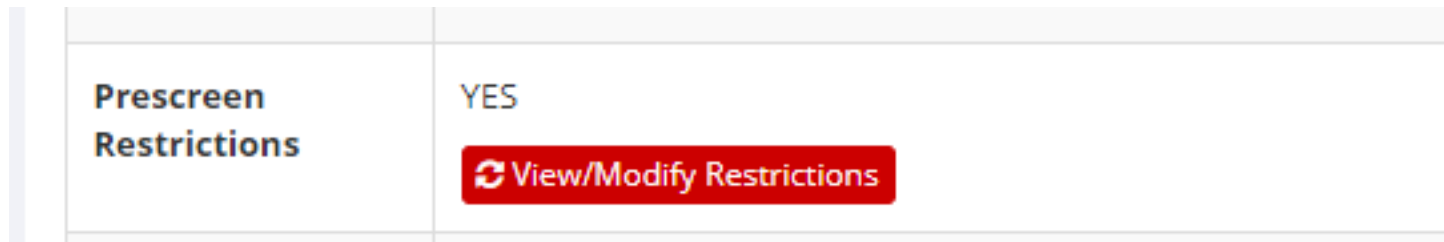
- After your survey is created, create a distribution link.
  - “Distributions”
  - “Get a single reusable link”
- It will look something like:  
[https://uwinnipeg.qualtrics.com/jfe/form/SV\\_8rc5g4TZ1XCzLut](https://uwinnipeg.qualtrics.com/jfe/form/SV_8rc5g4TZ1XCzLut)
- You may send this link to participants.
- Under survey options I also suggest:
  - “Back Button”, “Save and Continue”, “Prevent Ballot Box Stuffing” -> all unchecked
- Note that Qualtrics saves your survey progress using cookies. So if you go halfway through and return on the same device, it will return you to where you left. To start fresh, use private browsing or incognito mode.

# Setting up Studies in SONA

- SONA: <https://uwinnipeg.sona-systems.com/>
- You will receive a researcher account once your study has ethics approval.
- Create your study (External Online) using the recruiting materials approved by the ethics committee.
- Consider excluding studies on similar topics or with similar methods.

# SONA Prescreen

- Using Prescreen, you can select or exclude participants based on certain demographic answers that were set earlier in the year.
- Under prescreen restrictions, click “View/Modify Restrictions”.



Prescreen Restrictions	YES <a href="#">View/Modify Restrictions</a>
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- If your study criteria are not one of the prescreen items, you can enter requirements in the Description or in the Eligibility Requirements. This depends on participants’ reading and complying with the request.

# SONA Prescreen

- To use prescreen, choose the question(s) on which you want to screen people, then click “Set Restrictions”.
- Then select the options you wish to include. e.g., this setup will only allow people who responded “Female” to see the study. Click “Save Changes”.

Next we ask several background questions.

- (age)  
How old are you?
- (gender)  
With which gender do you identify?

Next we ask several background questions.

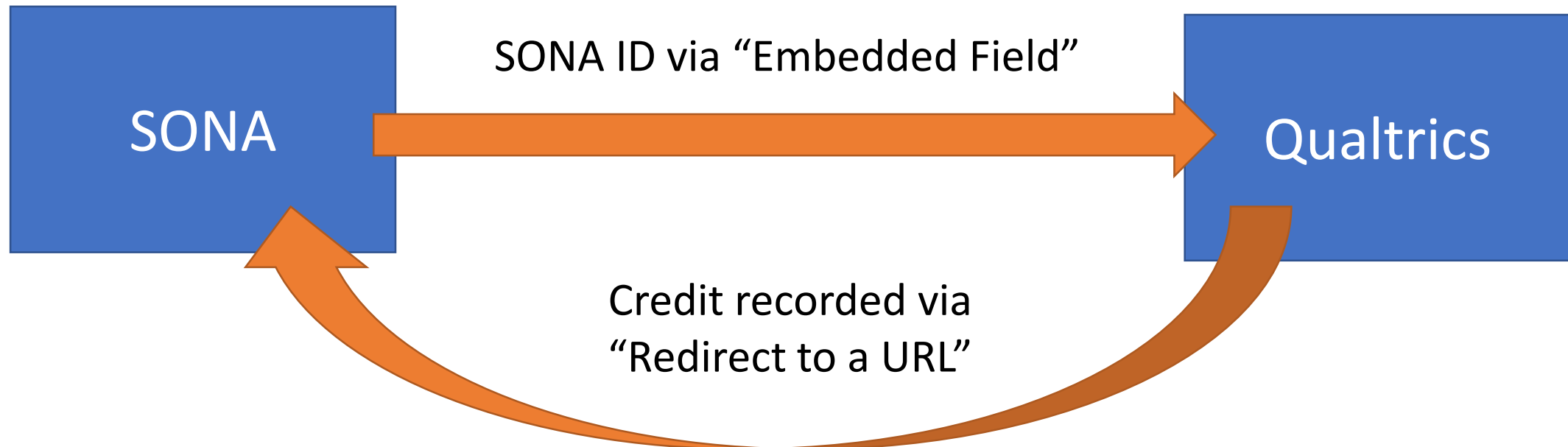
(gender)With which gender do you identify?

Choices:

- Female
- Male
- Another gender identity

# Setting Up Automatic Credit Granting (Online Studies Only)

- SONA tracks credits
- Qualtrics collects data
- Problem: how can we tell who has finished a study?

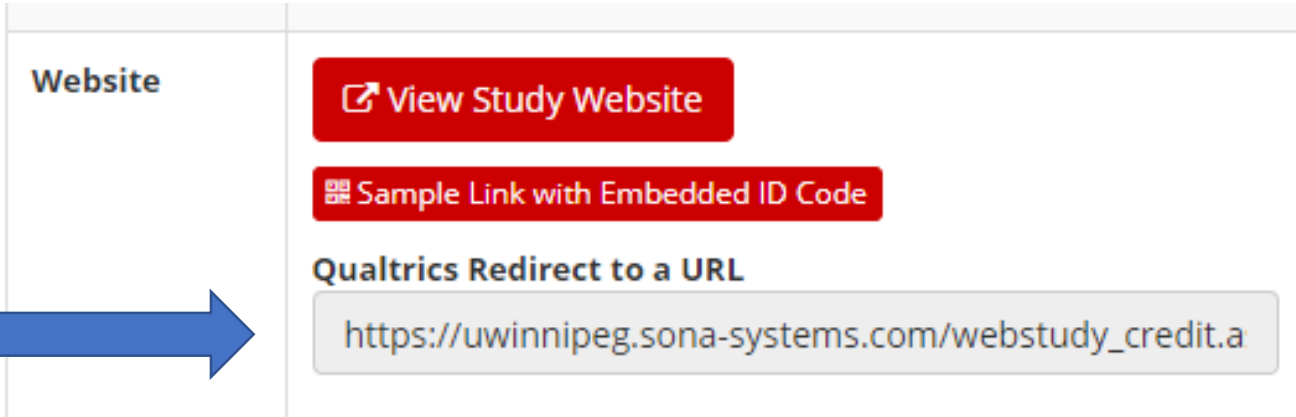


# 1. Set up SONA to send IDs to Qualtrics

- Add the Qualtrics Study link in the “Study URL” box.
- Append `?id=%SURVEY_CODE%` to the end of the link.
- This will send the SONA ID to Qualtrics.
- e.g.:

[https://uwinnipeg.qualtrics.com/jfe/form/SV\\_bapRgNwgbmlvcK9?id=%SURVEY\\_CODE%](https://uwinnipeg.qualtrics.com/jfe/form/SV_bapRgNwgbmlvcK9?id=%SURVEY_CODE%)

- Then copy the “Qualtrics Redirect to a URL” link that SONA provides

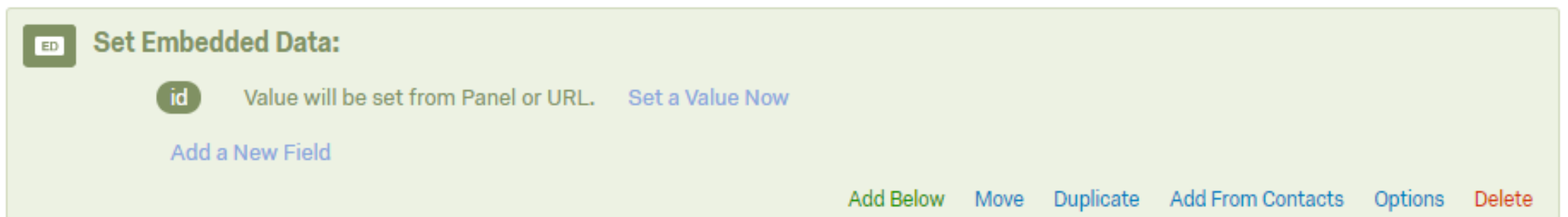


The screenshot shows a user interface for setting up a website. On the left, there is a column labeled "Website". To the right, there are three red buttons: "View Study Website", "Sample Link with Embedded ID Code", and "Qualtrics Redirect to a URL". Below the "Qualtrics Redirect to a URL" button, there is a text box containing the URL [https://uwinnipeg.sona-systems.com/webstudy\\_credit.a](https://uwinnipeg.sona-systems.com/webstudy_credit.a). A large blue arrow points from the left towards the "Qualtrics Redirect to a URL" button and its associated URL.



## 2. Set up Qualtrics to Capture SONA IDs

- Configure Qualtrics to capture each participant's SONA ID.
- In the "Survey Flow" add a new element that is "Embedded Data". Set its value to **id**
- This will record each participant's SONA # in the field id.
- (Tip: If you also create an Embedded Data called **Q\_TotalDuration** it will record the amount of time a participant spent doing the survey in seconds.)



The screenshot shows the 'Set Embedded Data' configuration screen in Qualtrics. It features a green header with a small 'ED' icon and the text 'Set Embedded Data:'. Below this, there is a list of embedded data fields. The first field is 'id', which is highlighted with a dark green circle. To its right, the text reads 'Value will be set from Panel or URL.' followed by a blue link 'Set a Value Now'. Below the list, there is a blue link 'Add a New Field'. At the bottom right of the panel, there are several action links: 'Add Below' (green), 'Move' (blue), 'Duplicate' (blue), 'Add From Contacts' (blue), 'Options' (blue), and 'Delete' (red).

### 3. Set up Qualtrics to Send IDs back to SONA

- Configure Qualtrics to tell SONA when a participant has completed the study.
- In the “Survey Options -> Survey Termination” select the option “Redirect to a full URL”.
- Paste the *Qualtrics redirect to a URL* link you copied from SONA.

Survey  
Termination



- Default end of survey message.
- Custom end of survey message...
- Show Response Summary.
- Redirect to a full URL, ex. "https://www.qualtrics.com":

# Setting up Qualtrics

- SONA will only automatically grant credits to people who complete the entire study. Therefore, on your final (feedback) page it can be useful to put in big red letters: “Click NEXT >> one more time to ensure that your credit is recorded.”
- After your timeslot has expired, you may still have to grant some credits manually. Download your data file and look for the field “id” -> these are the SONA numbers of everyone who has completed the study. Give credit to people who did the study.