

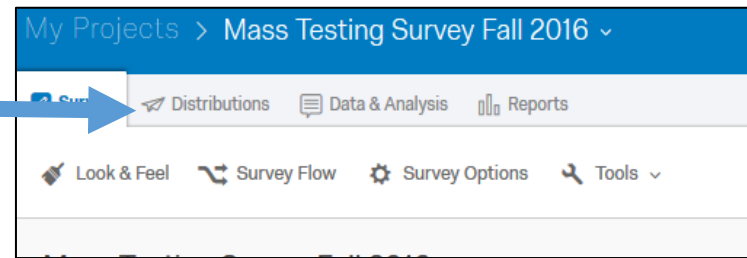
Automatic Crediting on Sona



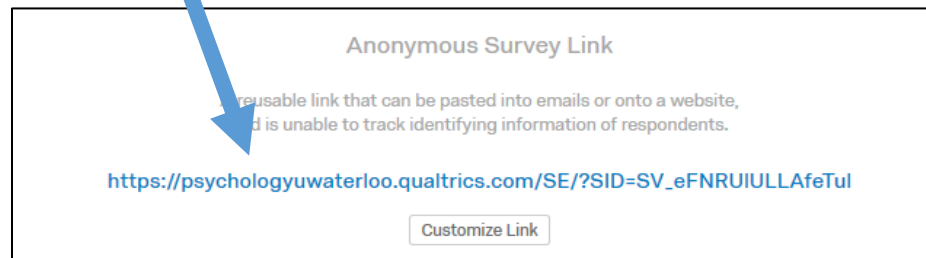
These instructions assume that you already have an account for Qualtrics and SONA. If not see Michelle.

Step 1: Launch your Qualtrics survey

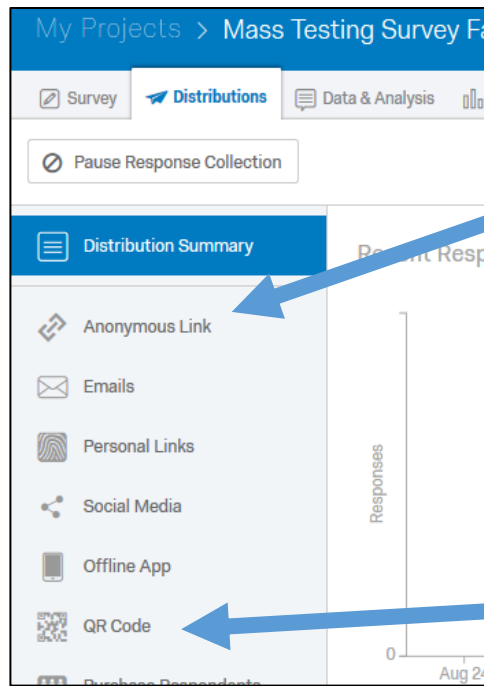
1. Click on the survey you wish to use from your Qualtrics account
2. Click "Distributions" (tabs located in top left of screen)



3. Click "Anonymous Link"
4. Copy the anonymous survey link that is provided

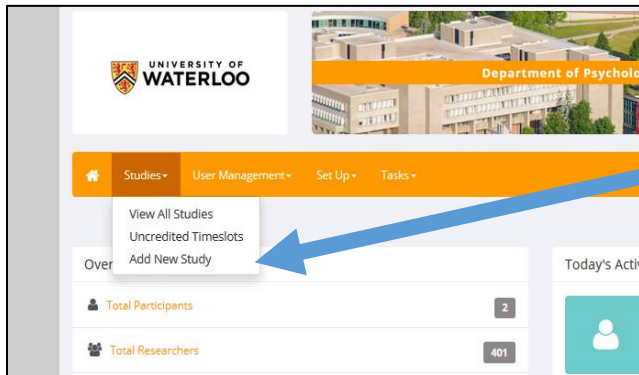


5. If you would like to add a QR code to your flyers you can create one for your survey by clicking this link



Step 2: Create your experiment in SONA

1. Log into your SONA account
2. Click “Add New Study” from the drop down menu under the “Studies” tab
3. Select “Paid” or “Credit” in the “Online External Study” section
4. Enter all the survey information as you normally would

A screenshot of the 'Select Study Type' form in SONA. The form has a title 'Select Study Type' and a sub-header 'To add a new study, you must first select the type of study you would like to add, as well as the compensation type once you have added it, so please be sure to select the correct type of study now.' There are three main study types listed: 'Standard Study', 'Multi-Part Standard Study', and 'Online External Study'. Each type has a description and radio button options for 'Paid' and 'Credit'. The 'Online External Study' type is selected, and its 'Credit' option is also selected. A 'Continue' button is at the bottom. A blue arrow points from the 'Add New Study' option in the previous screenshot to this form.A screenshot of the 'Study URL' field in the 'Advanced Settings' section of the SONA form. The field is labeled 'Study URL' and contains the text 'https://psychologyuwaterloo.qualtrics.com/jfe/form/SV_bPp6inMNSvVZafP?id=%SURVEY_CODE%'. Below the field, there is a note: 'If the text %SURVEY_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study. You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add ?id=%SURVEY_CODE% to the end of the URL to make use of this feature.' There is a 'Detailed Help' link below the note. A blue arrow points from the 'Continue' button in the previous screenshot to this field.

5. Paste the anonymous survey link from Qualtrics into the URL field of the “Advanced Settings” section of the study
6. Scroll to the end of the link that you have just pasted and add the text: “?id=%SURVEY_CODE%”
7. Once you have added all the information you need, scroll to the end of the study information screen and click “Save Changes”

8. A new screen will appear that looks like this:
9. Copy the link that says "Qualtrics Redirect to a URL"

Study Information

Study Name	Mass Testing Survey Spring 2017
Duration	60 minutes
Credits	1 Credits
Website	View Study Website Sample Link with Embedded ID Code

Qualtrics Redirect to a URL

[Instructions](#)

You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add ?id=%SURVEY_CODE% to the end of the URL to make use of this feature.

[Detailed Help](#)

Restrictions

Prescreen Restrictions	YES View/Modify Restrictions
Course Restrictions	Participants must be in at least one of these courses: <ul style="list-style-type: none">Psych 101 Section 1Psych 101-OnlinePsych 207-OnlinePsych 236Psych 257Psych 261Psych 306Psych 339Psych 354R-onlinePsych 363Psych 398

Additional Study Information

Timeslot Usage Limit	9999 hours (approximately 9999 signups)
Participant Sign-Up Deadline	1 hours before the study is to occur
ORE Approval Code	19840 (expires May 5, 2018)

An example of what the redirect link looks like is:

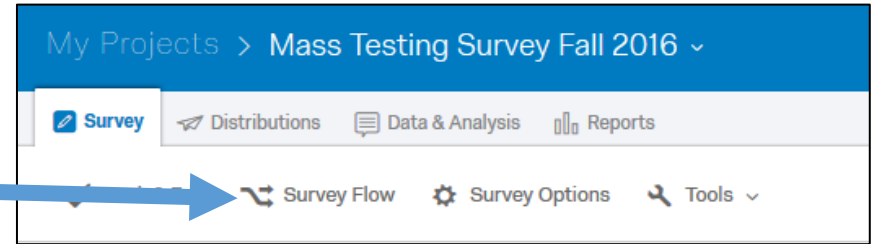
[https://uwaterloo.sona-systems.com/webstudy_credit.aspx?experiment_id=4153&credit_token=67161a3091724b68b28abfb43f72cd5e&survey_code=\\${e://Field/id}](https://uwaterloo.sona-systems.com/webstudy_credit.aspx?experiment_id=4153&credit_token=67161a3091724b68b28abfb43f72cd5e&survey_code=${e://Field/id})

Copy this link for inputting into the "Survey Flow" field (see Step 4).

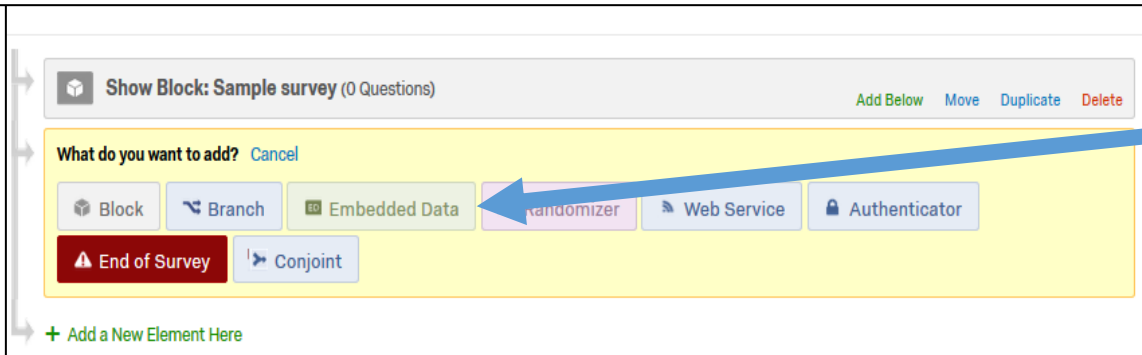
NOTE: We no longer input the redirect code into "Survey Options" as this will override the 'Eng of Survey' element in "Survey Flow"

Step 3: Adding an embedded id (Sona ID) in your survey responses

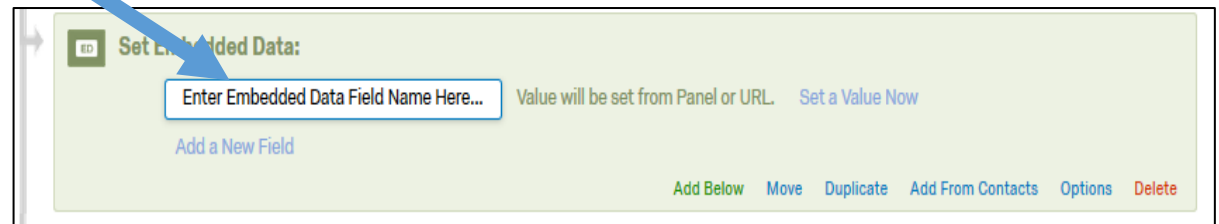
1. In Qualtrics, go back to the survey you have launched.
2. Click "Survey Flow" near the top of the page.



3. Click the "Add Below" option on the first block in your survey.
4. Choose "Embedded Data" from the options



5. Type "id" in the box that says "Enter embedded data field name here..."
 - This block should be at the top of the survey flow screen. If not move to that position.
6. Click "Save Flow" at the bottom of the screen.



You Embedded Data block should look something like this

Survey Flow Mass Testing Survey Fall 2016

The screenshot displays a vertical sequence of three survey blocks in an editor interface. On the left side, a vertical grey bar contains three right-pointing arrows, each aligned with one of the blocks. The first block is light green and titled 'Set Embedded Data:'. It contains two data field entries, each with a label in a rounded rectangle, a description 'Value will be set from Panel or URL.', and a 'Set a Value Now' link. The second entry has a placeholder label 'Enter Embedded Data Field Name Here...'. Below the entries is an 'Add a New Field' link. At the bottom right of this block are several action links: 'Add Below', 'Move', 'Duplicate', 'Add From Contacts', 'Options', and 'Delete'. The second block is light grey and titled 'Show Block: Information & Consent Letter (5 Questions)'. It has the same set of action links at its bottom right. The third block is light blue and titled 'Then Branch If:'. It contains a single conditional statement: 'If Please don't start the survey until you have private, uninterrupted time available with no distractions. Are you ready to participate? Yes, I'.

ED **Set Embedded Data:**

id Value will be set from Panel or URL. [Set a Value Now](#)

Enter Embedded Data Field Name Here... Value will be set from Panel or URL. [Set a Value Now](#)

[Add a New Field](#)

[Add Below](#) [Move](#) [Duplicate](#) [Add From Contacts](#) [Options](#) [Delete](#)

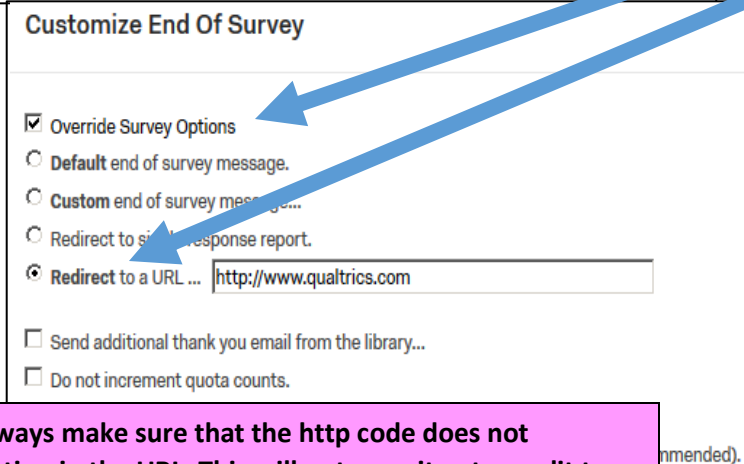
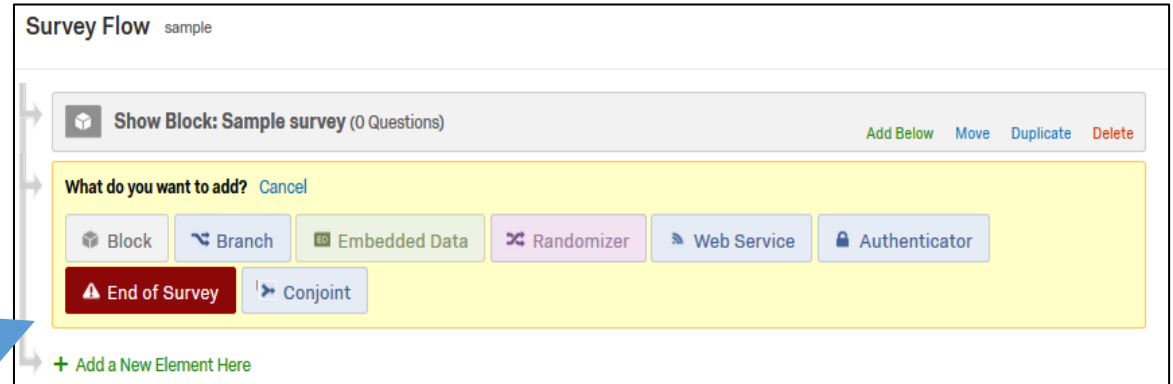
Show Block: Information & Consent Letter (5 Questions) [Add Below](#) [Move](#) [Duplicate](#) [Delete](#)

Then Branch If:

If Please don't start the survey until you have private, uninterrupted time available with no distractions. Are you ready to participate? **Yes, I**

Step 4: Add an “End of Survey” screen that links to the SONA website

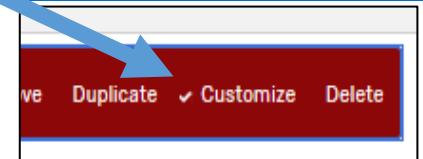
1. Choose the “Survey Flow” from the tab menu in Qualtrics
2. Scroll to the very end of your Survey and choose “Add Below” or “Add a New Element Here” at the very end of your survey.
 - You want to make sure this block will be outside of any randomization or conditional statements because you want all participant responses to be included in this element.
3. Choose “End of Survey” from the options.



TIP: Always make sure that the http code does not duplication in the URL. This will not permit auto credit to occur. It is recommended to always check the first few days after the survey is launched to ensure that the participant is credited for completed surveys.

4. Click “Customize” in the red, End of Survey element.
5. Check the “Override Survey Options” box
6. Select “Redirect to a URL ...”
7. Paste the Qualtrics redirect link you copied from your SONA study into the box that appears next to the words “Redirect to a URL”.
8. Copy the new URL (to be used in the next step).
9. Click “OK”.
 1. Remember, to put an “End of Survey” element that is not customized for participants that decline to participate.
10. Click “Save Flow”.

Your “End of Survey” element should now have a check beside the word “Customize”.



****NO LONGER DO THIS STEP****

By inputting the redirect URL in this field it will override the 'End of Survey' element in "Survey Flow".

Step 5: Adding the URL to "Survey Options"

Survey Options

Survey Experience

- Back Button. Enable respondents to change their responses.
- Save and Continue. Allow respondents to save and continue later.
- Show Question Numbers. Great for previews. For participants, try a Progress Bar instead.
- Use Custom Survey Validation Messages...

Survey Language: The language the survey is written in.

Survey Title: This text will appear in the browser as the window or tab title.

Meta Description: Search engines and social media services use this description.

Survey Protection

- Open Access. Allow anyone to take this survey.
- By Invitation Only. Prevent people from taking the survey using an anonymous survey link.
- Password Protection. This password must be entered to take this survey.
- Prevent Ballot Box Stuffing. Keep people from taking this survey more than once.
- HTTP Referrer Verification. The user must come from this URL to take the survey.
- Prevent Indexing. A tag will be added to the survey to prevent search engines from indexing it.
- Secure Participants' Files. Files uploaded as responses can only be viewed by users with permission to view responses.
- Survey Expiration. The survey will only be available for a specified date range.


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).

Inactive Surveys

- Default inactive survey message.
- Custom inactive survey message...


Close



Step 6: Test your work

1. Go back to your SONA account.
 2. Choose the experiment you have just created.
 3. At the top of the Study Information page, click the link "Sample Link with Embedded ID Code".
 4. This should take you to the first screen of your survey.
 5. Look at the URL. There should be the text "?id-#####" where the #'s are five numbers.
 6. Run through your survey.
 7. After the last screen of your survey you should be able to click the next button to end the study.
 8. Qualtrics should now show a message indicating you are being redirected.
 9. Once you are redirected the page should indicate an error as occurred.
 10. Although you receive this message, participants who are logged in through SONA and sign up for this experiment should see a System Message that indicates credit has been granted.
- If you want to verify how a participant is credited you could test run a participant (a test participant that the REG has set up – see REG coordinator).

Study Information

Study Name	Mass Testing Survey Spring 2017
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 Inactive study : Does not appear on list of available studies Online (web) study : Administered outside the system
Duration	60 minutes
Credits	1 Credits
Website	View Study Website Sample Link with Embedded ID Code Qualtrics Redirect to a URL <code>https://uwaterloo.sona-systems.com/webstudy_credit.a:</code> Instructions <p>You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add ?id=%SURVEY_CODE% to the end of the URL to make use of this feature.</p> Detailed Help

ALWAYS CHECK THE FIRST FEW DAYS OF YOUR STUDY ONCE IT IS APPROVED AND ACTIVE TO ENSURE THAT PARTICIPANTS ARE RECEIVING THEIR CREDITS