Automatic Crediting on Sona

UNIVERSITY OF WATERLOO

Department of Psychology Research Experiences Group
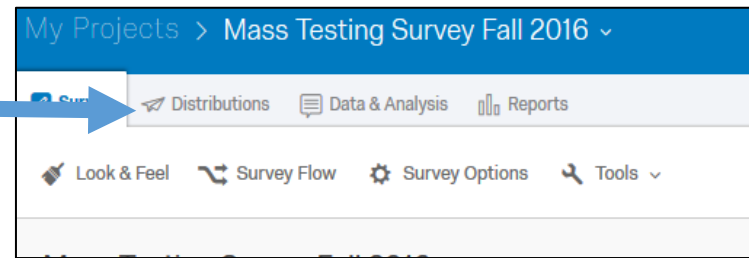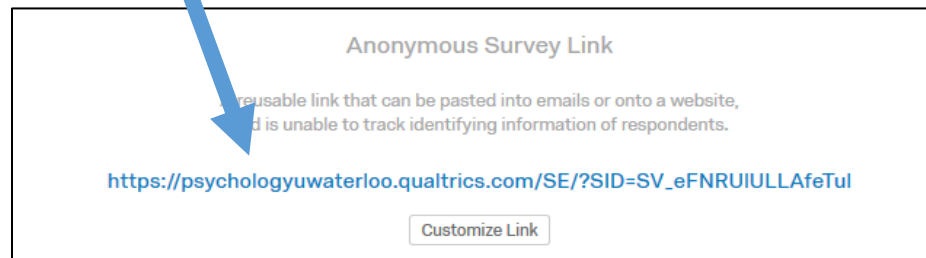
These instructions assume that you already have an account for Qualtrics and SONA. If not see Michelle.
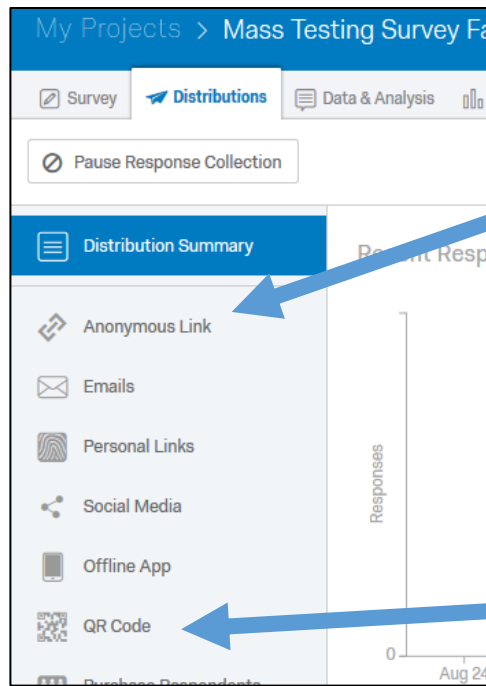
Step 1: Launch your Qualtrics survey

My Projects > Mass Testing Survey Fall 2016

Distributions | Data & Analysis | Reports

Look & Feel | Survey Flow | Survey Options | Tools

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

My Projects > Mass Testing Survey Fa

Survey | Distributions | Data & Analysis

Pause Response Collection

Distribution Summary

Anonymous Link

Emails

Personal Links

Social Media

Offline App

QR Code

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

Anonymous Survey Link

reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.

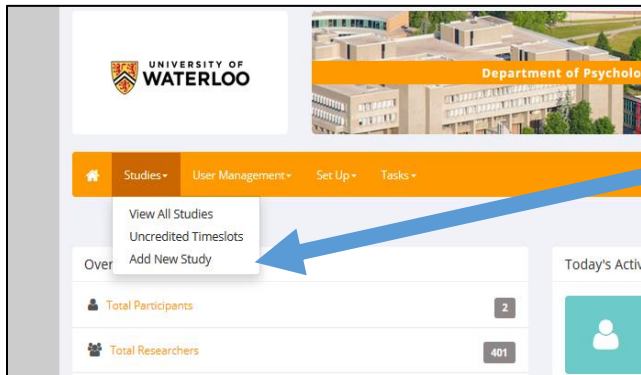https://psychologyuwaterloo.qualtrics.com/SE/?SID=SV_eFNRUlULLAfeTuI

Customize Link

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

Is this a web-based study?	Yes -- study is administered outside the system
Study URL	https://psychologyuwaterloo.qualtrics.com/jfe/form/SV_bPp6InMN5vVZafP?id=%SURVEY_CODE%

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.

Detailed Help

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"

Study Information

Study Name	**Mass Testing Survey Spring 2017**

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

...dy. Participants are not ...until after they sign up.

...ist 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** https://uwaterloo.sona-systems.com/webstudy_credit.a: ⓘ 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: • Psych 101 Section 1 • Psych 101-Online • Psych 207-Online • Psych 236 • Psych 257 • Psych 261 • Psych 306 • Psych 339 • Psych 354R-online • Psych 363 • Psych 398

Additional Study Information ⌄

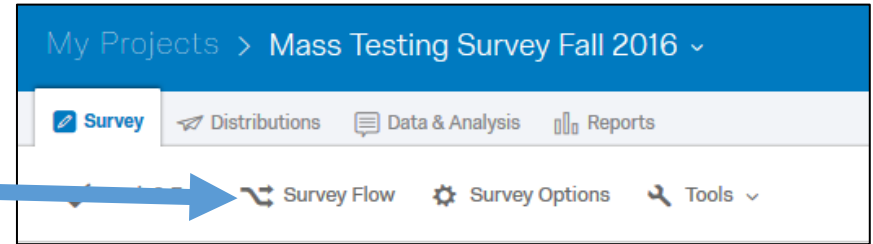|	
Timeslot Usage Limit	9999 hours (approximately 9999 signups)
Participant Sign-Up Deadline	1 hours before the study is to occur
ORE Approval Code	19840 (expires May 5, 2018)

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}
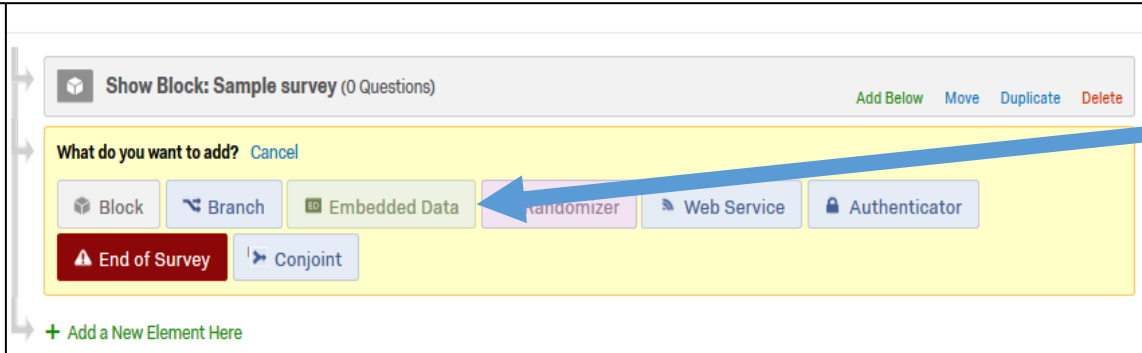
Copy this link for inputting into the "Survey Flow" and "Survey Options" fields (see Step 4).

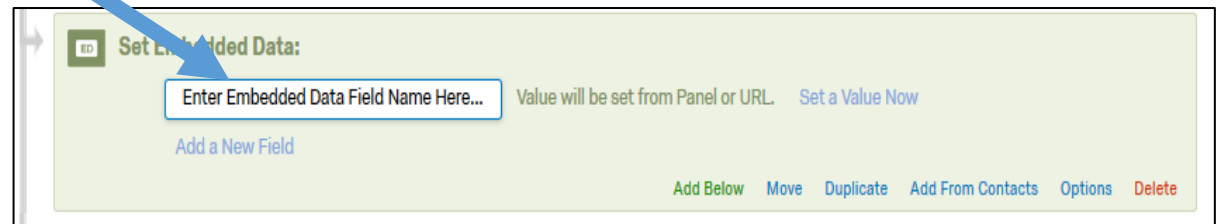## Step 3: Adding an embedded id (Sona ID) in your survey responses

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

My Projects > Mass Testing Survey Fall 2016 ⌄

Survey | Distributions | Data & Analysis | Reports

Survey Flow | Survey Options | Tools ⌄

Survey Flow sample

Show Block: **Default Question Block** (0 Questions)   Add Below   Move   Duplicate   Delete

+ Add a New Element Here

Show Block: **Sample survey** (0 Questions)   Add Below   Move   Duplicate   Delete

What do you want to add? Cancel

Block | Branch | Embedded Data | Randomizer | Web Service | Authenticator
End of Survey | Conjoint

+ Add a New Element Here

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

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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.

Set Embedded Data:

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

You Embedded Data block should look something like this

Survey Flow   Mass Testing Survey Fall 2016

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

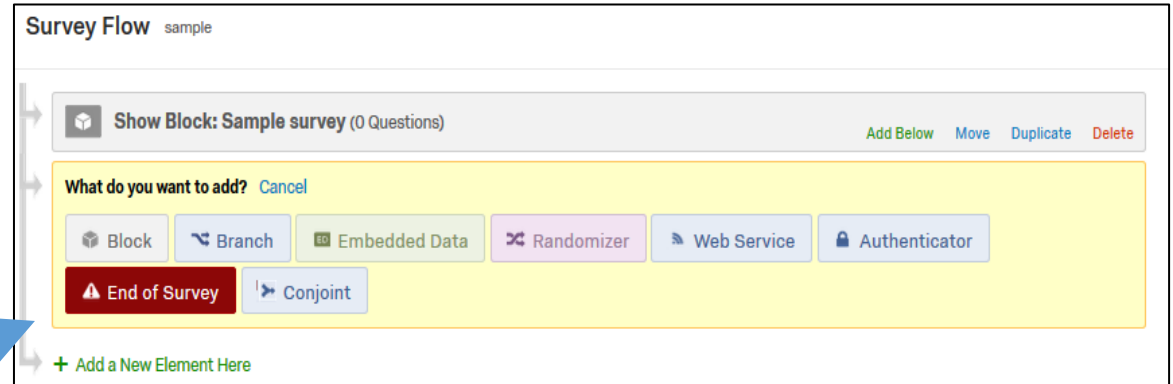Add Below   Move   Duplicate   Add From Contacts   Options   Delete

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.

Survey Flow sample

Show Block: Sample survey (0 Questions)   Add Below   Move   Duplicate   Delete

What do you want to add? Cancel

Block | Branch | Embedded Data | Randomizer | Web Service | Authenticator
End of Survey | Conjoint

+ Add a New Element Here

Show Block: Sample survey (0 Questions)

⚠ **End of Survey**   Move   Duplicate   Customize   Delete

Customize End Of Survey

☑ Override Survey Options
○ **Default** end of survey message.
○ **Custom** end of survey message...
○ Redirect to single response report.
◉ **Redirect** to a URL ...   http://www.qualtrics.com

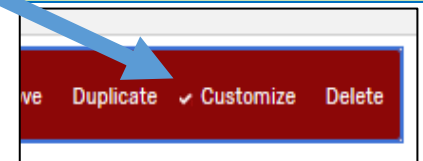☐ Send additional thank you email from the library...
☐ Do not increment quota counts.
☐ Show Response Summary.
☐ Do NOT record any personal information and remove panel association (not recommended).

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".

ve   Duplicate   ✓ Customize   Delete

Step 5: Adding the URL to "Survey Options"

Survey Options

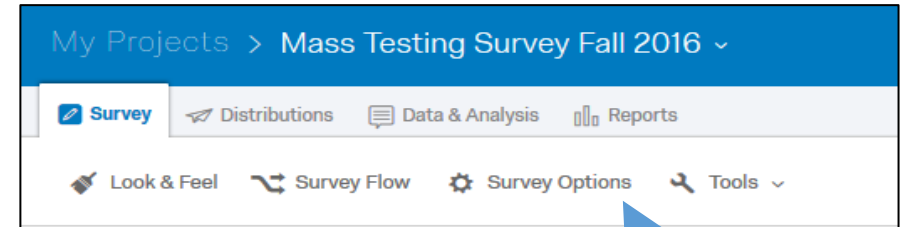|	
Survey Experience 📋	☐ **Back Button.** Enable respondents to change their responses.
	☑ **Save and Continue.** Allow respondents to save and continue later.
	☐ **Show Question Numbers.** Great for previews. For participants, try a Progress Bar instead.
	☐ **Use Custom Survey Validation Messages...**
	Survey Language: [English ▾] The language the survey is written in.
	Survey Title: [Mass Testing Survey F15] This text will appear in the browser as the window or tab title.
	Meta Description: [Survey Software, Enterprise Sur] 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 Referer 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": [https://uwaterloo.sona]
	☐ **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   ✓ Save

My Projects > Mass Testing Survey Fall 2016 ˅

✎ **Survey**   ✈ Distributions   💬 Data & Analysis   📊 Reports

🖌 Look & Feel   ⤨ Survey Flow   ⚙ Survey Options   🔧 Tools ˅

Step 5: Adding the URL to "Survey Options"

1. From the survey menu click "Survey Options"
2. Select "Redirect to a full URL," in the Survey Termination section.
3. Paste the completed URL from the "Survey Flow" "End of Survey" field.
4. Click "Save".

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** https://uwaterloo.sona-systems.com/webstudy_credit.as ❶ 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

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