

# HOW TO GRANT AUTOMATIC CREDIT USING QUALTRICS AND SONA

The Sona system allows researchers to post online studies (e.g., Qualtrics surveys) as an experiment on the Sona website so that participants can sign up for and complete these studies outside the Sona survey system. This instruction set describes how to post your Qualtrics survey on Sona and automatically give credit to participants without having to manually enter credits.

These instructions assume that you already have accounts for Qualtrics and Sona and that your study has been IRB approved.

## Step 1: Launch your Qualtrics survey

1. Make sure your survey is Active by checking the box to the left of the Survey name on the main page
2. Click on the survey you wish to use from your Qualtrics account
3. Click “Launch Survey” (toward the top of your screen)
4. Copy the Anonymous Survey Link provided. It looks like this:

**Your Anonymous Survey Link:**

[http://ucscas.qualtrics.com/SE/?SID=SV\\_bpCe7uhByVIV8j3](http://ucscas.qualtrics.com/SE/?SID=SV_bpCe7uhByVIV8j3)

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our [Survey Mailer](#) [Custom Link](#)

## Step 2: Create your experiment in Sona

1. Log into the Sona website
2. Click “Add New Study” near the top of the screen
3. Choose “Online External Study” then continue
4. Enter all of the survey information as you normally would
5. Post the anonymous survey link from Qualtrics (step 4 above) into the window labeled “Study URL”
6. Scroll to the end of the link that you have just pasted and add this text: `&id=%SURVEY_CODE%`
7. Once you have added all of the information you need, scroll to the end of this screen and click “Add this study”
8. A new screen will appear that looks like this:

**System Message: Study updated.**

**Study Information**

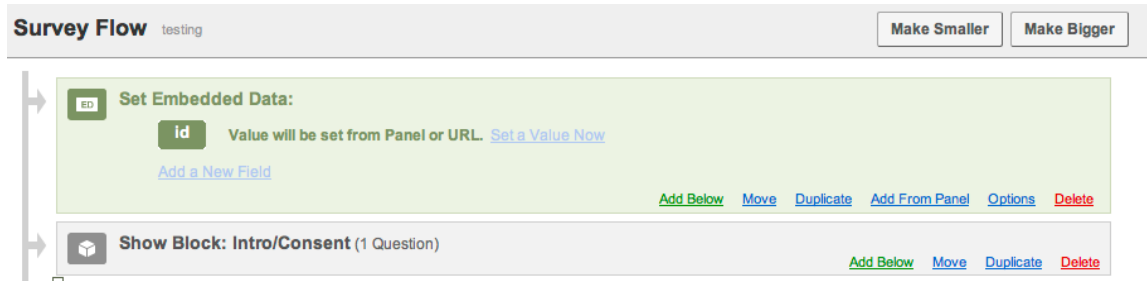
<b>Study Name</b>	<b>Graduating Senior Survey Fall 2013</b>
<b>Abstract</b>	online survey about your experiences in Psychology at UWM
<b>Description</b>	The Psychology department wants to hear from you! We want to know what aspects of your experience as a Psychology major were beneficial and enjoyable and what aspects we could improve. Please complete this brief (15-20 minute) survey to tell us what you think.
<b>Web Study</b>	This is an online study. Participants are not given the study URL until after they sign up.
<b>Website</b>	<a href="#">[View Study Website]</a> <a href="#">[Sample Link with Embedded ID Code]</a> <b>Qualtrics Redirect to a URL:</b> <code>https://uwmilwaukee.sona-systems.com/webstudy_credit.aspx?experiment_id=130&amp;credit_token=df4df0ca1c2c4933a6266b0cf86cfc4e&amp;survey_code=\${e://Field/id}</code> <b>Completion URL:</b> <code>https://uwmilwaukee.sona-systems.com/webstudy_credit.aspx?experiment_id=130&amp;credit_token=df4df0ca1c2c4933a6266b0cf86cfc4e&amp;survey_code=XXXX (client-side)</code> <small>In the example URL above, replace the XXXX with the identifier passed with SURVEY_CODE to your external webstudy. If your external webstudy is configured to support this functionality, then this will allow participants to be marked as having completed the study in the system as soon as they complete it at the external URL.</small>

9. Copy the link under “Qualtrics Redirect to a URL”. In the above example that would be:  
[https://uwmilwaukee.sona-systems.com/webstudy\\_credit.aspx?experiment\\_id=130&credit\\_token=df4df0ca1c2c4933a6266b0cf86cfc4e&survey\\_code=\\${e://Field/id}](https://uwmilwaukee.sona-systems.com/webstudy_credit.aspx?experiment_id=130&credit_token=df4df0ca1c2c4933a6266b0cf86cfc4e&survey_code=${e://Field/id})

### Step 3: Insert an embedded id number in your Qualtrics survey

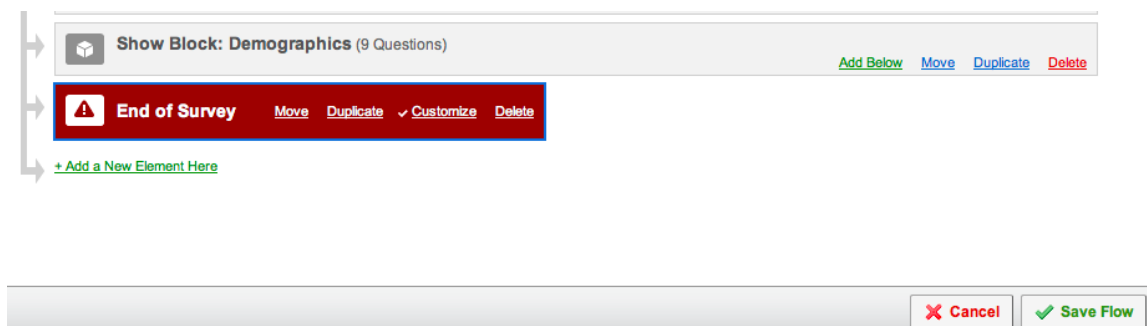
1. In Qualtrics go back to the survey you have just launched.
2. Click “Survey Flow” near the top of the page.
3. Click the “Add Below” option on the first block in your survey.
4. Choose “Embedded Data” from the yellow window that appears.
5. Type “id” in the box that says “Enter Embedded Data Field Name Here...”
6. Move this embedded data element to the top of the survey flow screen.
7. Click “Save Flow” at the bottom of the screen.

Your Embedded Data block should look something like this:



### Step 4: Add an end of survey screen in Qualtrics that links to the Sona website

1. Choose the “Survey Flow” menu in Qualtrics.
2. Scroll to the very end of your Survey and choose “Add Below,” or “Add Element” 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 participants to see this element.
3. Choose “End of Survey” from the yellow window that appears.
4. Choose “Customize” in the red End of Survey element.
5. Choose “Redirect to a URL...”
6. Paste the “Qualtrics Redirect from URL” link that you copied from Sona above (in Step 2, #9, ends in Field/id}
7. Click “OK” and “Save Flow.” The bottom of the Survey Flow Screen should now look like this:



### Step 5: Test your work – please don’t skip this step!

1. Go back to the Sona website
2. Choose the experiment you have just created using these instructions.
3. At the top of the Study Information Page, click the link that says “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 text
6. Run through your survey.
7. After your last screen you should be able to click the “next” button in your survey. **NOTE: You will want to instruct participants to click the next page arrow button to ensure they receive credit. If they do not click Next at the last screen they will not receive credit.** Click the “Next” button.

8. Qualtrics should now show a message indicating you are being redirected.
9. Once you are redirected the page should look like this. You will have an error message because as a researcher you are not able to earn credit. However, students will see a system message indicating that credit has been granted. If you want to double-check that create yourself a fake student account and sign up for and run through the survey.

experiment management system

UNIVERSITY OF WISCONSIN  
**UWMILWAUKEE**

Department of Psychology

Welcome to the UWM Psychology Research Sign-Up System

**System Message: No credit given, because you are not a participant, and therefore cannot sign up for this study.**

User ID:  @uwm.edu

Password:

• **New Participant?**  
Request an account here.

• **Lost your password?**  
Click here to retrieve it!

Email questions to [larsoncl@uwm.edu](mailto:larsoncl@uwm.edu)  
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(9:14 AM)

And that is it. These instructions can easily be modified for existing studies – the process is the same.