

## How to set up a scoring algorithm and automatic email triggers for Qualtrics measures

**Purpose:** This is a useful tool for prescreening participants for Sona. In Sona you can direct the participants to the Qualtrics survey. When they complete it, it will automatically be scored and they will receive an email either saying that they did not qualify or that they did and the invitation code needed to sign up for the session on Sona (note, this feature must be enabled for your study) can be included.

### Step 1. Login to Qualtrics, the UWM Suvery Tool

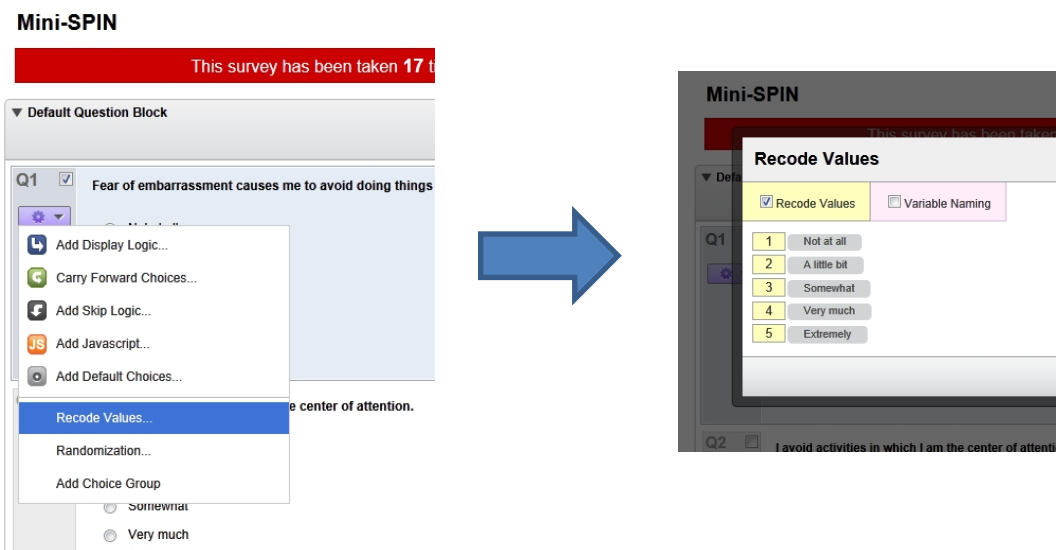
First, you need a Qualtrics account. You can register for one or login to the system at: <https://www4.uwm.edu/survey/>

### Step 2. Edit or create your survey

If you have not done so, create a survey. You may either copy an existing survey from your “My Surveys” tab, or go to the “Create Surveys” tab. See the Qualtrics website for more information regarding creating a survey.

### Step 3. Generating a scoring key for the survey

In order to do the automatic scoring you need to set a scoring scale for each of the items on your measure. You need to be in “Edit” mode for your survey. Right below the item number you can click on the purple button and select “Recode Values” and enter the scoring information.



If there are reverse keyed items, you will need to enter 5, 4, 3, 2, 1 instead of 1, 2, 3, 4, 5. If you don't assign scoring key information, Qualtrics will proceed with default values (i.e., 0, 1, 2, ...  $n$ ).

You need to repeat this procedure for each item on your measure. (I normally set the scoring key on the first item and duplicate this item when creating a new measure – that way you don't have to repeat this cumbersome procedure).

### Step 4. Automatically scoring the survey.

Select “Scoring” under “Advanced Options” located in the top right corner.

Select “Grade” for the Category option.

Below each item, click the button labeled “Auto” then the recoded scoring key information will be displayed. Do this for all items in your measure. Once you click the button, it will change to “Clear.” Of course, you can manually put down any numbers you want, but it is a lot easier to use the Auto function given you have already entered the scoring key information in Step 1.

Default Question Block

Q1 Fear of embarrassment causes me to avoid doing things or speaking to people.

Clear

1 Not at all

2 A little bit

3 Somewhat

4 Very much

5 Extremely

If you check “Show End Of Survey Summary” in the upper right corner, the survey will display the scoring result to the respondent at the end of the survey. You may or may not want to do this.

### Step 5. Create a variable for the survey score to determine eligibility.

Click on Survey Editor and go to Survey Flow of the measure.

Click on “Add a New Element here” and choose “Embedded Data.” Then type “Score” and hit the return key to create the Score field. Then enter the value on the following field is “`#{gr://Grade/Score}`” See the example below.

Survey Flow Mini-SPIN

Make Smaller Make Bigger

Show Block: Default Question Block (3 Questions) Add Below Move Delete

Set Embedded Data:

Score = `#{gr://Grade/Score}`

Add a New Field

Add Below Move Add From Panel Delete

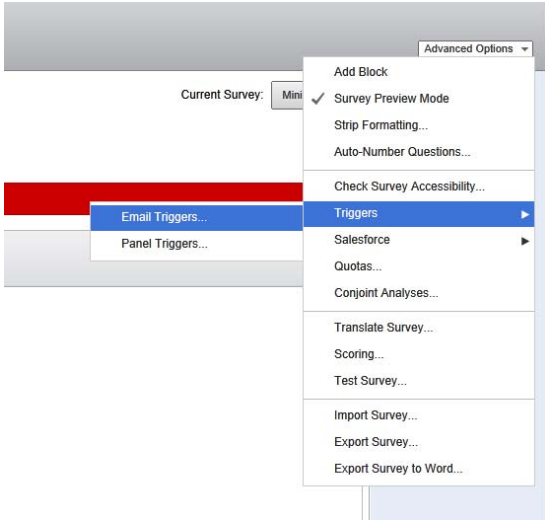
+ Add a New Element Here

The variable name doesn’t have to be “Score” but it should be matching the name of variable you will be linking an email trigger to later. The variable name is case-sensitive.

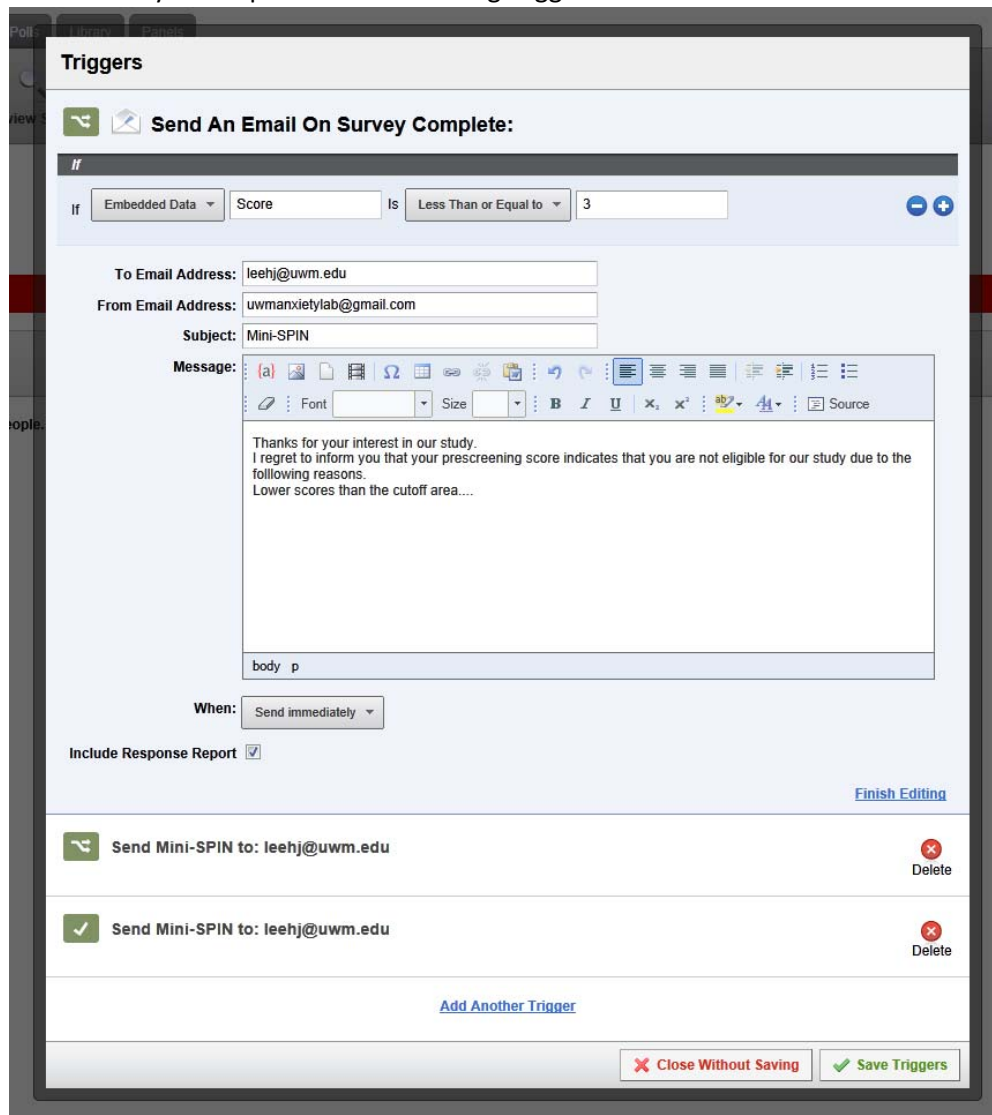
Click on “Save Flow.”

**Step 6. Generate automatic email triggers based on the score** – note this is general, see below for more specifics.

Under the Advanced Options menu, select Triggers >> Email Triggers, as seen below.



Here, you can set up as many automatic email messages as you wish that will be sent out according to their scores on the measure. Click on “Add a Condition” The example below shows that when Score (this is the variable you created in the scoring algorithm – again this is case-sensitive) is less than or equal to 3, the following email message is sent out automatically as soon as the survey is completed. The following trigger is set to be sent to the researcher (in this case – [leehj@uwm.edu](mailto:leehj@uwm.edu)).

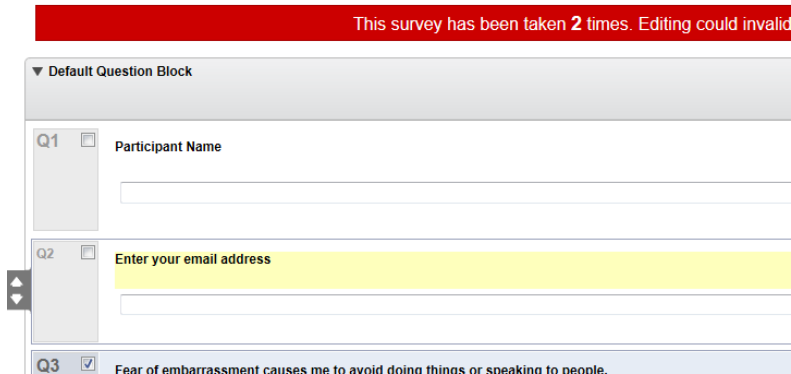


## Step 7. How to send an automatic email notification to the RESPONDENT immediately?

This step is a bit more complex but I will walk you through that. Once you do it, you will know it's not a big deal.

(a) To do this, you need to have a question receiving their email address in the Qualtrics measure you are administering.

### Mini-SPIN - Testing



This survey has been taken 2 times. Editing could invalidate responses.

▼ Default Question Block

Q1  Participant Name

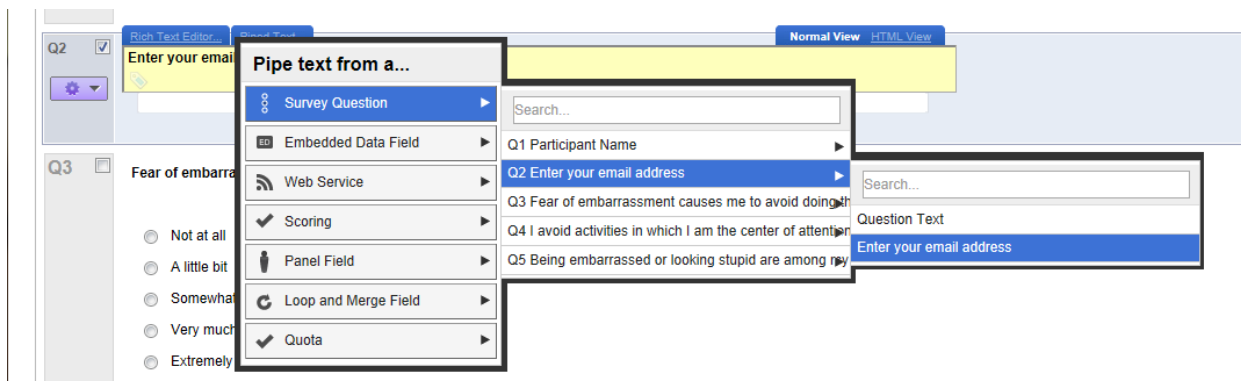
Q2  Enter your email address

Q3  Fear of embarrassment causes me to avoid doing things or speaking to people.

Here, Q2 is an email address. The Item Type (top right) should be "Text Entry."

(b) If you click on any part of the text, you will see a blue menu labeled "Piped Text". Place the mouse cursor at the end of the text, and browse the Piped Text menu down as you see below.

"Piped Text >> Survey Question >> Q2. Enter your email address >> Enter your email address"



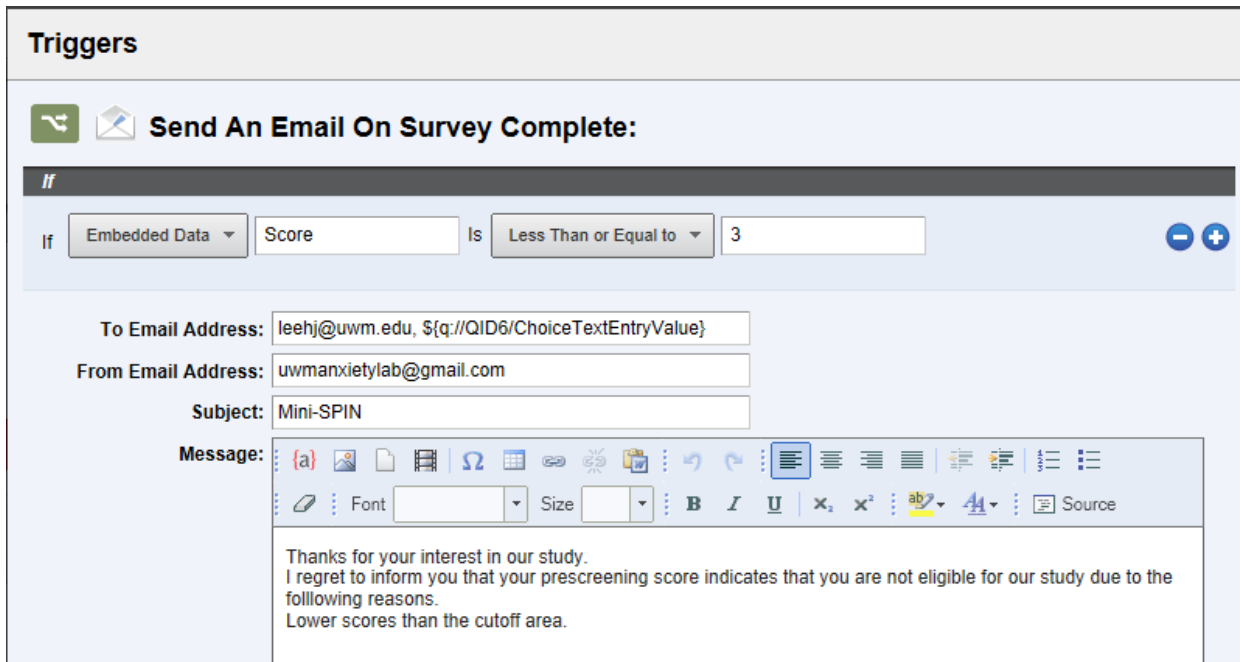
Make sure you will NOT select the "Question Text" at the last step.

Then, you will see a strange string at the end of the text such as "\${q://QID6/ChoiceTextEntryValue}"

This is the variable that will contain each individual's email address once they respond to the questionnaire. Please know that this value will vary depending on the order of the item created within the measure. So, you can't simply copy the value from this manual. ("QID6" means Question ID #6. It is six because this is the sixth item I made on the survey, although I placed it as a second item in the measure. It seems that Qualtrics remember when each item was created and that number can't be changed. So, if you make your email item as the very first item of the measure, your string variable will be \${q://QID1/ChoiceTextEntryValue}

You don't have to worry about this as long as you follow the instructions on how to use the Pipe Text menu.

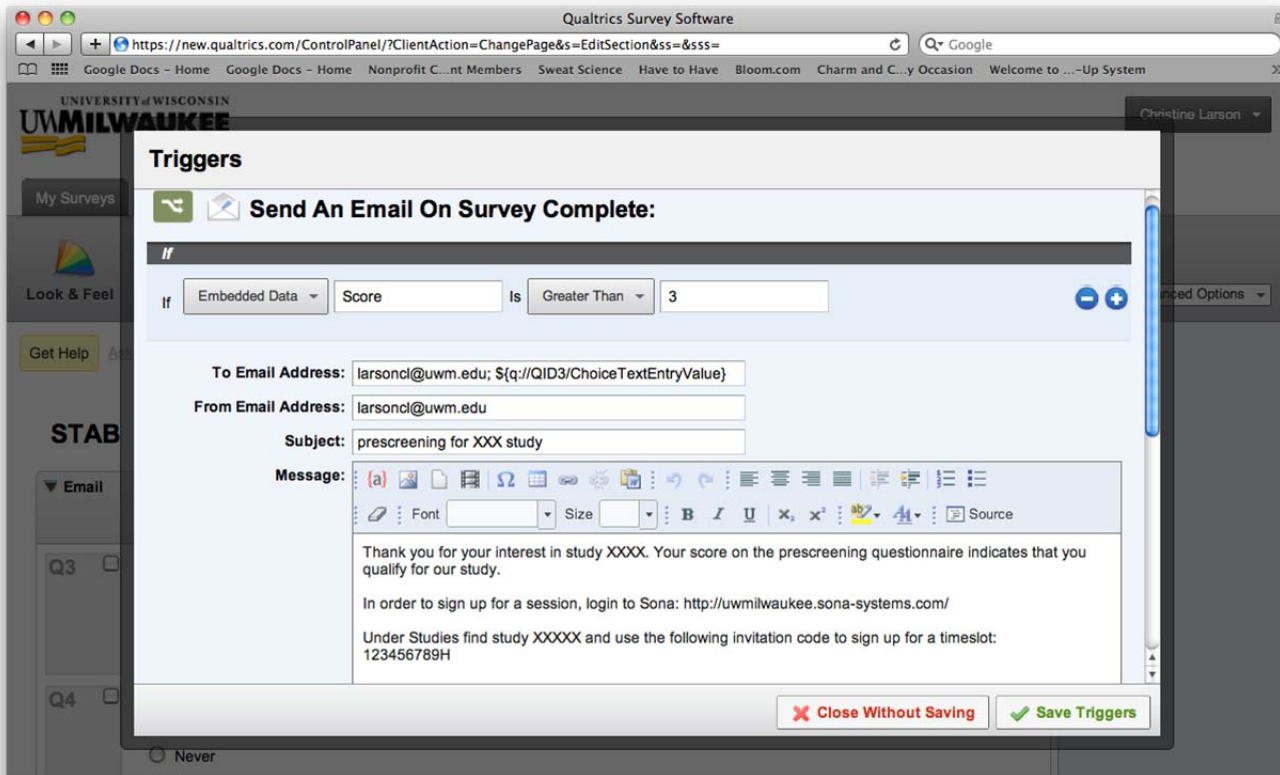
(c) Go to the Email Trigger menu under the Advanced Options.



As you see in the image above, I added both my email ([leehj@uwm.edu](mailto:leehj@uwm.edu)) and the weird string value (the email of each respondent). Upon completion of the survey, this email will be automatically sent to both the researcher and the respondent. This way, you can send the study code that should be entered to the SONA system only to those who meet the screening criteria.

If they enter a wrong email address in the email field, they will not get this message because the true value of this string variable is determined by what they enter into the text box.

You can also create a trigger for when the participants DOES meet screening criteria. In this email you may include an invitation code that will allow them to login to Sona and sign up for your session. See the example below.



Note that you must have this invitation code entered in your Study Configuration on Sona. This can be set under your study (in Sona) by selecting Change Study Information and entering the invitation code you send to participants under the Advanced Settings.

Another alternative to the automatic email is for the researcher to manually send the participant an email with the invitation code. Or, rather than using an invitation code you can manually add the participant to the session (see Sona Researcher Instructions).

- Another useful option you might want to use.

If you click on Survey Options, you will see the section named “Survey Termination”

The screenshot shows the 'Survey Termination' settings in Sona. It is divided into three sections: 'Survey Termination', 'Inactive Surveys', and 'Partial Completion'.  
1. 'Survey Termination' (indicated by a 'Thank You' sticky note icon):

- Default end of survey message.
- Redirect to single response report.
- End of survey message from a library...
- Redirect to a URL full URL, ex: "http://www.qualtrics.com":
- Send additional thank you email from a library...
- Anonymize Response. Do NOT record any personal information and remove panel association (not recommended).

2. 'Inactive Surveys' (indicated by a 'No' sign icon):

- Default inactive survey message.
- Display inactive survey message from a library...

3. 'Partial Completion' (indicated by a progress bar icon):  
How long to wait before partially completed surveys are closed and data is recorded.

Here, you can enter the SONA system address as the Web redirect address. In that case, they will be automatically transferred to the SONA login page.

### Step 8. Generate a URL for the survey and insert it into your Sona study description

You will need to generate a URL that participants can use to take the survey. In Qualtrics, under the Distribute Survey tab, you can generate a URL link.

In Sona, under the Study Description (which you can change by selecting Change Study Information) you can insert the link into the “Detailed Description” section. Be sure to inform participants that they need to complete the survey in order to determine if they meet eligibility quality. The following HTML code will allow you to insert a clickable link in the Detailed Description field.

Syntax:

```
<a href="url">Link text</a>
```

Example:

```
<a href="url">https://milwaukee.qualtrics.com/SE/?SID=SV_e5TKblwFessadfTriWHY</a>
```