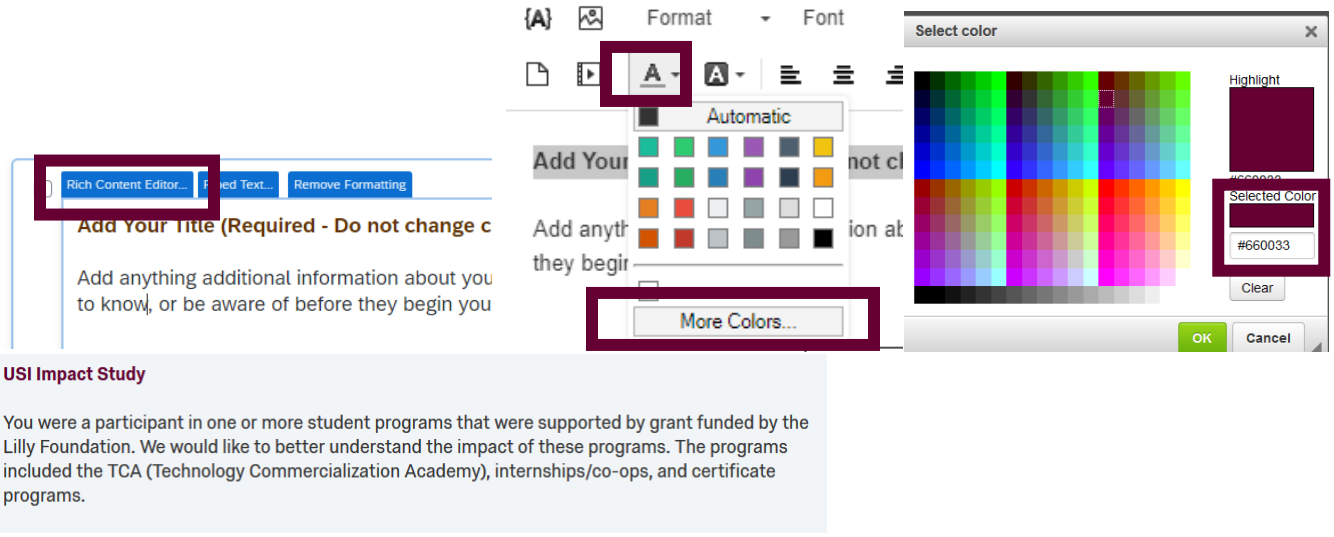
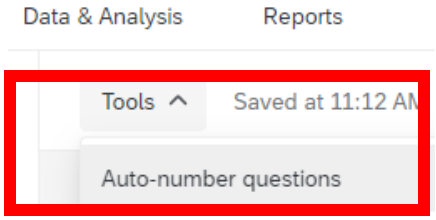
Qualtrics Pre-Approval Check List

The to-do list before submitting for approval.

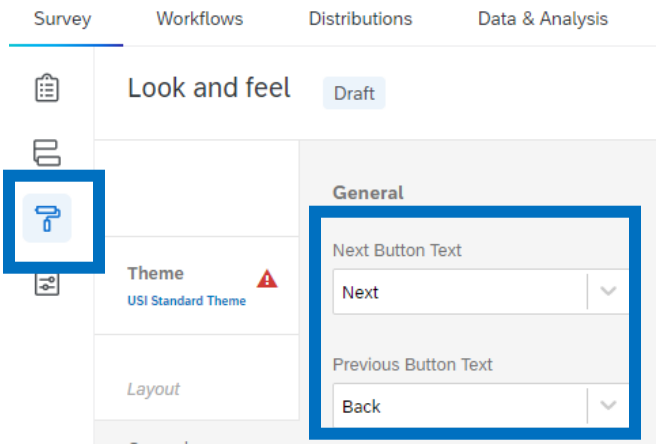
1. Make sure you have added a title to the actual survey/form as part of the first question. The title should be **in bold font** and use the "other" color code #660033 (ex. **USI Impact Study**)
    a. Select "Rich Content Editor".
    b. Select "Text Color" -> "More Colors".
    c. Type in #660033 in the "Selected Color" box.
    d. Bold the title!



2. Re-order your question numbers using Tools → Auto-Number Questions. ("Sequential" is most used.)

a. 

3. Change buttons for each block to "Next" and "Back". Select "Look and Feel" (the paint roller icon) and change those here, and make sure the last block has a "Submit" button (see #4).

a. 

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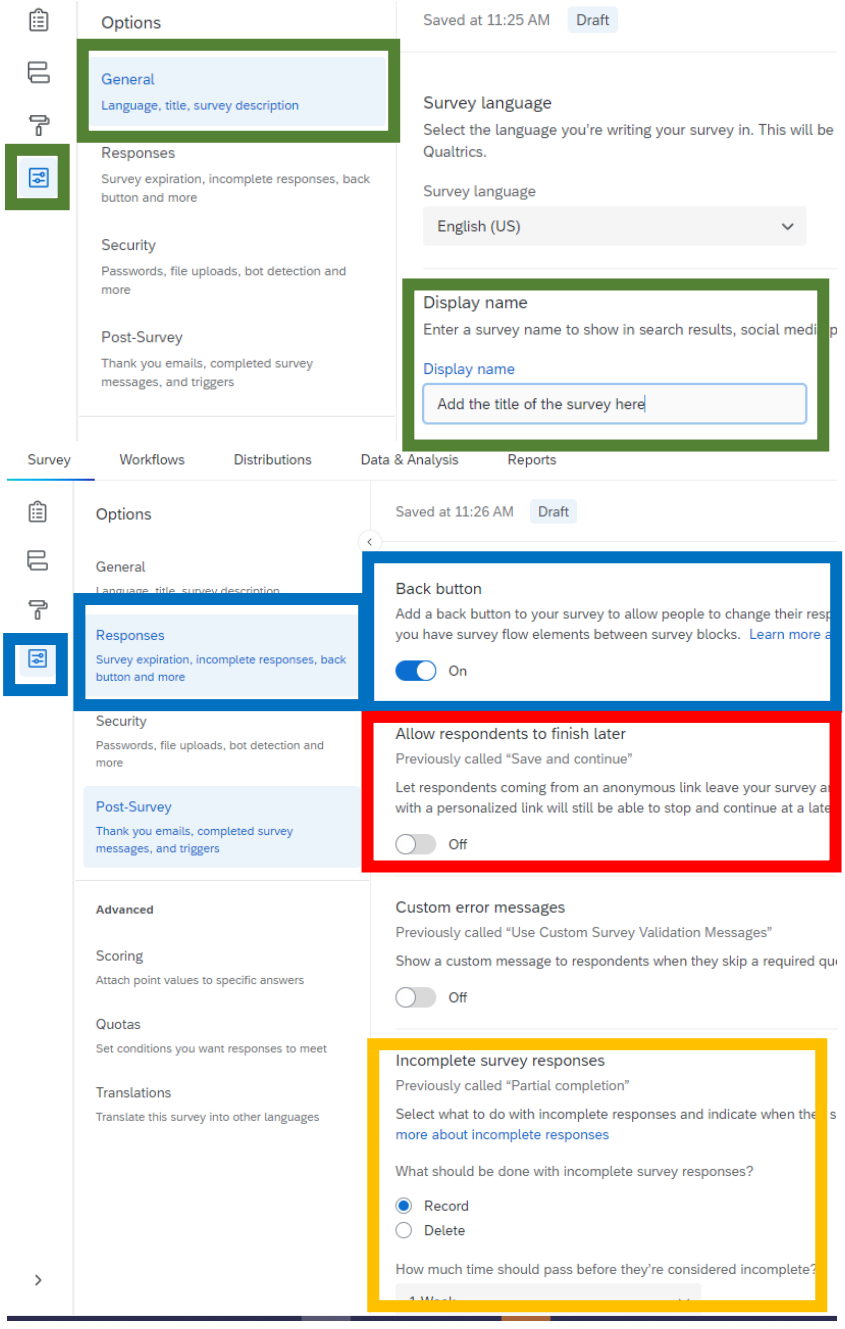
4. Add a “Submit” button on the last question. To do this, move the last question to a new block, then change the next button text to Submit. (Click on Block name (top left corner of start of block, Block #) → the left-side window will display “Next/Previous button text” (select this). If you have a short form that does not have any page breaks or display logic (i.e. the respondent will see all the questions at once and there are no skips), you do not need to put the last question in a new block, just change the next button text to be Submit.

5. Run Spell-check using Tools → Review → Spell Check

6. Survey Options Tab – Make these changes
    a. Survey Options – General: Change the Survey Display Name
    b. Survey Options – Responses:
        i. Enable the Back button
        ii. Disable allow respondents to finish later
        iii. Choose how to handle incomplete response (this will vary between surveys and what you want)



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7. Test your survey!!!! Multiple Times!!! (use the Preview button)
    a. Look for formatting issues such as matrix table questions that require scrolling (solution - split into 2 or more matrix tables) (drag the matrix table column line over so that they are only one line long)
    b. Add page breaks, especially when the survey question types change
    c. Make sure all text is in the default font
    d. Make sure your questions and answer categories match/make sense (Read them out loud).
    e. Check your back/next buttons (are some arrows and some text? – See #3)
    f. Make sure you only have a submit button on the last question (See #4)
    g. Be sure and click the Submit button when testing so you see what happens after one finishes the survey

8. Test any workflow or trigger emails.

9. Download your preview text data and make sure your data is as you would expect.

    a. Data & Analysis Tab -> Export & Import -> Export Data

10. Send for approval only after you are very confident your survey is ready to distribute to the public.