QUALTRICS: How to set up an anonymous ballot

By following the instructions below, you can:

- Create an anonymous ballot, i.e. one where no respondent identifying information is added to the data file by default.
- Limit each invited responder to one ballot submission.
- Deliver a unique ballot link via email to each invited responder.
- Set up a reminder message that is sent to anyone who has not submitted their ballot by a specified time.

How it works:

- Responders receive an email with a unique link to the survey.
- Each respondent can open their ballot multiple times but can only submit it once.
- If a responder starts a ballot, leaves it without submitting, then returns to it before it has timed out, they will return to their original in-progress submission.
- A timer can be added to force submission of any ballot that has been left open too long.
- If someone was submitted a ballot, any attempt to vote a second time results in the message: "You have either already completed the survey or your session has expired."

Steps:

1. Create a new Project
2. Add a descriptive title (text/graphic question type) and ballot questions.
3. Optional: Create a second (or final) page on which the respondent's earlier answers are displayed back to them prior to submitting the ballot.
    - Use the "Insert piped text" option in the text editor to display a prior responses.
    - Include Back arrow keys so respondent can return to previous page of questions.

4. **Survey Option settings**: work through each of listed subsection and adjust the settings as indicated.
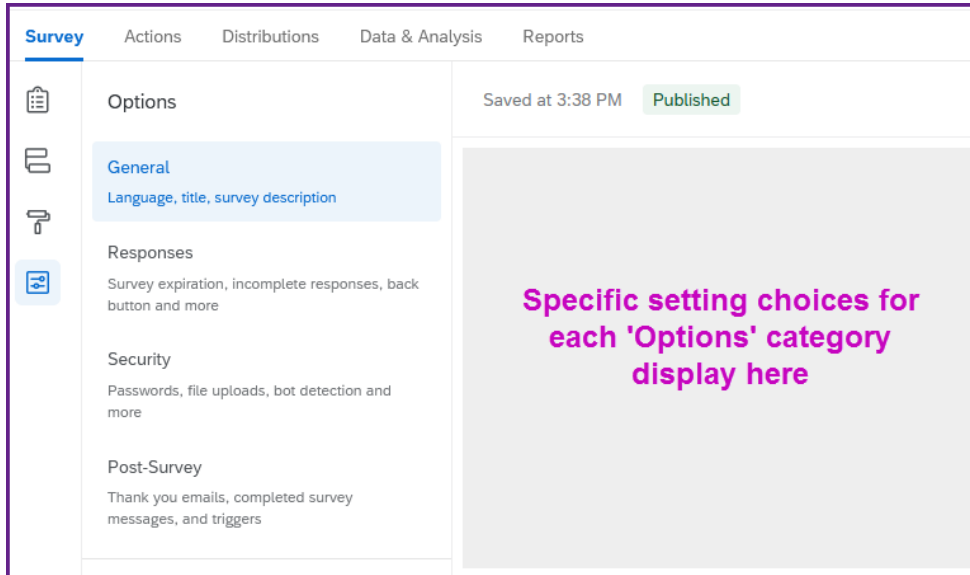
- **Responses:**
  - i. Back button: toggle to the "On" position
  - ii. Incomplete survey responses: indicate how long surveys can be left in progress (abandoned) before they are automatically closed and tagged as "Incomplete".

- **Security**:
  - i. Survey access: change to "Invitation only"
  - ii. Prevent multiple submissions: should be in the "On" position
  - iii. Prevent indexing: should be in the "On" position
  - iv. Anonymize responses: turn to the "On" position
  - v. Optional: add a Survey Expiration date & time (surveys cannot be started after this point)

5. **Publish the survey:** click the blue "Publish" button in the upper right of the screen.

6. **Distribute survey:** click the "Distributions" link (top of screen) > select Email > click the "Compose Email" button. Fill in the following details:
   - TO field: either select an existing contact list or create a new one
   - FROM field: leave the form address as noreply@qemailserver.com, your name and email should be in From/Reply fields
   - WHEN: default is to send in 1 hour – can change this
   - SUBJECT: add a relevant subject label to the email
   - MESSAGE: Write your invitation to participate. Include relevant details that would encourage person to respond & when survey closes.

- ADVANCED OPTIONS: verify invitation email is set to "Individual" link type and change the Link expiration to roughly the same amount of time that the survey will be available (must be active for at least as long as survey is open).

- SEND PREVIEW EMAIL: send the invitation to yourself and check its message and links. If you complete the ballot the preview response will NOT be recorded.

- SEND EMAIL

7. **Send out reminders to those who have not submitted a ballot**

Go to the Distributions screen > Emails > expand the menu for your ballot by pulling down the arrow after the ballot name, then select 'Schedule reminder'.
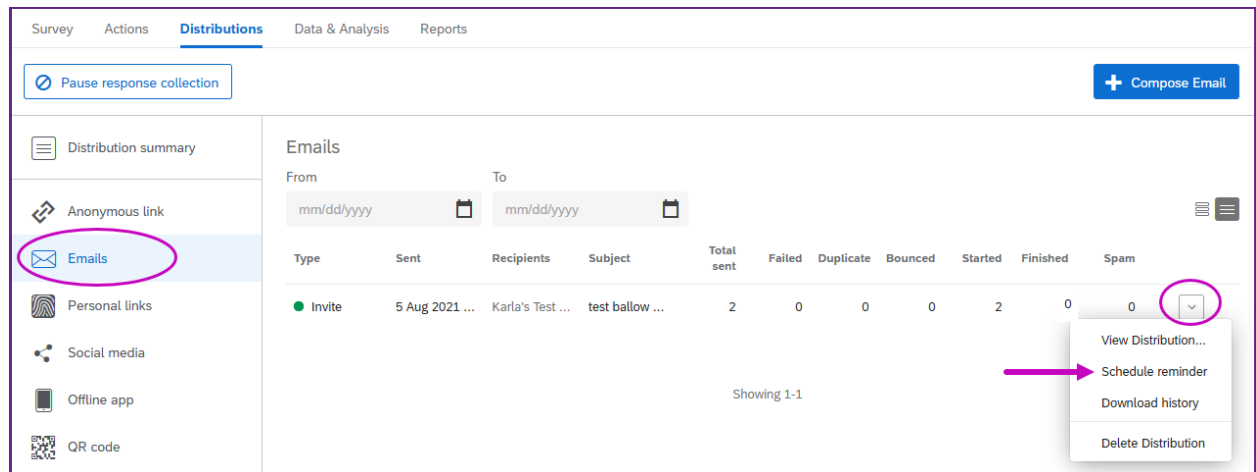
Compose the reminder email:
- o TO: you cannot edit this field. Because this is an anonymous process, you will not know who these people are but you will know how many reminders get sent out, and can check how many ballots have been submitted at any time.
- o FROM: should be the same as in original invitation
- o WHEN: Select Custom ... then pick date and time to send
- o SUBJECT: Add the word "Reminder" in front of original subject line
- o MESSAGE: Can be the same message as original invitation.

Review Collected Responses:

- At any point, you can go into Qualtrics, edit your survey, go to **Distributions** > **Emails** and see how many responses have been collected to date.