# Qualtrics Checklist

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| **Survey** |
| **Task** | **Done** | **Notes** |
| *Survey Builder* |  |  |
| Scales are in order from negative to positive/lowest to highest |[ ]   |
| Matrix questions do not contain too many items |[ ]   |
| Matrix question formatting set to “profile” |[ ]   |
| Survey has been shared with relevant team members  |[ ]   |
| *Survey Options* |  |  |
| Turn on the back button |[ ]   |
| Set time for partial respondents to return to complete survey to 6 months |[ ]   |
| Change display name to survey name, prefixed by “Syracuse University” (e.g., Syracuse University Orange Survey) |[ ]   |
| Turn “Anonymous responses” feature on if survey is anonymous |[ ]   |
| *Look and Feel* |  |  |
| Change next and back buttons to text rather than an arrow symbol |[ ]   |
| Change next button text to “Submit Survey” after last question |[ ]   |
| Set Theme to Syracuse Simple |[ ]   |
| Set Layout to Classic |[ ]   |
| Set Style | Foreground Contrast to High |[ ]   |
| Remove “Powered by Qualtrics” footer |[ ]   |
| *Accessibility Checks* |  |  |
| Rank questions use “fill in the number” format |[ ]   |
| Matrices are set to “profile” format | [ ]  |  |
| Avoid horizontal scrolling |[ ]   |
| Language is concise and easy to read | [ ]  |  |
| **Survey Testing** |
| **Task** | **Done** | **Notes** |
| Publish any survey changes |[ ]   |
| Change Link visibility permission to public when sharing the preview link |[ ]   |
| Share survey preview with stakeholders |[ ]   |
| Remove all preview responses before distribution |[ ]   |
| **Distribution** |
| **Task** | **Done** | **Notes** |
| Change from name/email to the relevant SU office |[ ]   |
| Include Syracuse University watermark as heading on email |[ ]   |
| If using personalized links for the survey, be explicit in the invitation email that the link is personalized and they should NOT share their link with anyone else |[ ]   |
| Include EMPLID as an External Reference field in the distribution list | [ ]  |  |
| **Survey Close** |
| **Task** | **Done** | **Notes** |
| Close survey | [ ]  |  |
| Download survey data as a csv and save to project folder (retain this raw data as a backup ) | [ ]  |  |
| Download distribution history so we have a record | [ ]  |  |
| Response Rates – exclude anyone who did not actually receive the invitation (Email Bounced, Email Failed, etc.); include those who completed or partially completed the survey in the respondent count, but check that they answered a sufficient number of questions (minimum requirement may vary depending on the survey) | [ ]  |  |