# 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) |  |  |