

Electronic Survey Research

Standard

Longwood University requires the use of **Qualtrics** for all electronic survey-based research involving human subjects. This ensures that research data is collected in accordance with institutional and federal data security requirements. Qualtrics provides industry-standard encryption and security features that protect participant confidentiality and ensure data integrity.

Procedures

Faculty-Led and Student-Led Independent Research

Faculty-led and student-led independent research involving electronic surveys must adhere to the following requirements to ensure compliance with ethical and data security standards:

Use of Qualtrics: All electronic survey research must be conducted using Qualtrics to ensure data security and institutional oversight.

Recruitment Plan: Researchers must submit a detailed recruitment plan outlining how participants will be invited to participate in the study. Recruitment methods (e.g., email invitations, social media, flyers) must be clearly documented in the IRB application.

Data Management Plan

- **Storage:** Researchers must store all collected data on secure, University-approved platforms (e.g., Box or other secure platforms) and not retain data in Qualtrics beyond the active research period.
- **Security:** Identifiable data must be encrypted, access-limited, and stored separately from response data when applicable.
- **Deletion:** Researchers must outline a timeline for identifiable data retention and describe the process for secure data deletion in accordance with the IRB-approved protocol.

Student-Led Assignment-Based Research

Student-led survey research must comply with the following requirements:

Use of Qualtrics: All student-led survey research must be conducted using Qualtrics under the supervision of a faculty mentor. The faculty mentor must create the survey template in their institutional Qualtrics account and may share it with the student researcher(s) using the collaboration function.

Recruitment Plan: Student researchers must submit a recruitment plan specifying how participants will be contacted and provided with study information. All recruitment materials must be reviewed and approved by the faculty mentor before IRB submission.

Data Management Plan

- **Storage & Security:** The faculty mentor must set permissions for student access to survey data and ensure that identifiable data is handled appropriately.
- **Data Deletion & Retention:** At the conclusion of the research period or semester, the faculty mentor is responsible for either securely storing or deleting the data per the IRB-approved protocol.
- Student researchers should not retain independent access to the identifiable data beyond the approved research period.

Informed Consent

- All survey participants must be provided clear and concise informed consent information, including:
 - The purpose of the research.
 - Procedures involved in participation.
 - Any potential risks or benefits.
 - How data will be stored and used.
 - Voluntary participation and the right to withdraw at any time.
- For electronic surveys, informed consent can be obtained via a pre-survey consent page. Participants must agree to proceed before accessing the survey questions. Consent templates for student-led and faculty-led survey research as provided on [Solomon](#).
- Please edit the language in these templates to suit your specific research scenario and use the Rich Content Editor to adjust formatting to enhance readability.
- To uphold the principle of voluntary consent, researchers must ensure that the survey does not force any responses (outside of screening and consent questions) so that participants may skip questions or freely advance through the questions without answering. If the researcher needs to collect specific responses for methodological purposes, that should be explained in the informed consent, so that individuals may opt not to take the survey. For example, “To understand [fill in], we need to obtain certain information, so you may not skip all responses. But you should feel free to discontinue the survey if you wish not to answer.”

Data Security Requirements

All researchers must adhere to the following data security protocols:

- Store all data within the Qualtrics platform or other approved secure university systems.
- Avoid using personal devices or third-party applications to handle identifiable survey data.
- Anonymize data to reduce risks of identification or provide a rationale for collecting and retaining identifiable information in the IRB proposal.

- Delete or securely store completely anonymized data promptly after the research project concludes, following the data retention schedule outlined in the IRB-approved protocol.

Instructors overseeing student-led research must:

- Ensure all data are securely stored or deleted from the Qualtrics system after the semester ends.
- Monitor compliance with data security practices among students.

IRB Review and Submission Requirements

Researchers must submit the following materials as part of their IRB application:

Informed Consent Materials

- The informed consent statement must be **presented on the survey's opening screen** before any survey questions are displayed.
- Participants must actively **acknowledge consent** before proceeding (e.g., clicking "I consent" or "I do not consent," with the latter option directing them out of the survey).

Recruitment Materials

Researchers must submit **all materials used to recruit participants**, including:

- Email invitations
- Descriptions of social media posts
- Flyers or posters
- Any other digital or physical recruitment content

Recruitment materials must clearly state that the study is **part of an approved research project** and include the PI's contact information.

Survey Logic and PDF of Survey Questions

Researchers must submit a **PDF copy of the full survey**, including all survey questions and any applied logic (e.g., skip logic, branching).

- To generate this PDF from Qualtrics, follow these steps:
 1. Log into your Qualtrics account and **open the survey**.
 2. Click the **Tools** menu in the top navigation bar.
 3. Select **Export Survey** from the dropdown options.
 4. Choose the **PDF format** and ensure that the "Show Survey Flow" or "Include Survey Logic" option is enabled.
 5. Click **Download** and attach the exported PDF to the IRB submission.

These submission requirements help the IRB verify that consent procedures, recruitment strategies, and survey structure align with ethical research guidelines.

Additional Considerations

- Surveys involving sensitive topics or vulnerable populations require additional precautions and must be reviewed by the IRB, regardless of whether they are independent or class projects.
- Any breach of data security or participant confidentiality must be reported to the IRB immediately.

Anonymity in Online Survey Research – How to pay participants

It is important to understand when a survey is truly anonymous and when it is confidential. In order for participation in an online survey to be considered truly anonymous, these items must be true:

- The survey tool is configured to not collect IP address information from participants
- No individually identifiable information (e.g., name, birth date, identification numbers, mailing address, email address, etc.) is being collected by the researchers as part of the survey instrument or disbursement of an incentive.
- No combination of indirect identifiers is being collected which would reasonably allow the investigator or anyone else to identify participants.

If participants' names, email addresses, or other contact information are collected for incentive purposes, the survey will not be considered anonymous by the IRB. If you collect this information, you should do so outside of your survey instrument. The best practice in this instance is to set up a second survey instrument to collect the contact information, and to link from your data collection survey to the optional drawing survey. If you do this, you should state in your IRB proposal and in the informed consent language that:

Responses collected are anonymous and cannot be associated with you. If you choose to provide your contact information for the purposes of receiving the incentive, your participation in this study will be confidential, not anonymous. You may be required to complete a form providing information in order to receive the incentive/payment/gift card.

If offering an incentive/token of gratitude (e.g. \$5 gift card for survey completion), researchers should obtain participant contact information outside of the main survey to separate any identifiers from survey responses. For example, a second, separate link at the end of the survey would collect participant emails for distributing the incentive/thank you. Researchers should store the email addresses separately and delete the file after disbursing any incentives.

Note that crowdsourcing platforms (e.g., MTurk, Prolific, Qualtrics etc.) pay participants on behalf of the researchers, ensuring the anonymity of the surveys. These platforms effectively maintain a separation between researchers and participants, eliminating the need for a separate survey to collect information related to incentive payments.

Technical Settings for Surveys

Researchers should pay special attention to the following topics when creating a survey in Qualtrics: The Qualtrics survey platform is customizable, and investigators are reminded to turn off location collection settings, such as IP address or longitude/latitude settings, which can be used as identifiers.

Distribution of your survey: Qualtrics allows several methods of distributing your survey. The IRB recommends the use of a reusable Anonymous Link or QR code. This link can be placed within an IRB-approved recruitment script, flyer, advertisement, or posted to a social media site. Anonymous links are easy to use, and they will collect responses without identifying information such as IP address and geo-location.

Screening questions

Applying skip logic: skip logic allows you to send participants to a future point in the survey based on how they answer a question or a set of questions. This is useful to use at the beginning of a survey to screen participants for eligibility. For example:

Question 1: Do you or have you ever been diagnosed with hypertension? ☐ Yes ☐ No

If the respondent answered “No” to the screening question, they would be directed to a page that could say, “Thank you for your interest but you do not meet the eligibility criteria for this project.”

Informed consent

Include your study description and consent material on this page. Ask the respondent if they consent to participate in the research:

- ☐ I consent to participate in this research
- ☐ I DO NOT consent to participate in this research

Use skip logic to send any respondent who checks the “I do not consent” option to the Version 1 final submit page with no further questions.

If your survey will be publicly accessible and there is a possibility that minors may access the link, ensure that the consent option explicitly confirms participant age. For example:

- ☐ I confirm that I am 18 years or older and consent to participate in this research."

Survey Questions

Branching logic will allow you to create multiple branches of a survey so that respondents who meet certain criteria are presented with specific questions. This function is useful for students using the free version of Qualtrics if they are wishing to survey different types of participants in a certain population.

Final Pages

There are three versions of this page:

Version 1 – this is the “thank you for your interest page” that respondents who do not meet your screening criteria or do not consent are sent to.

Version 2 – For research with no incentives

This final page should appear after the respondent submits their survey responses and is only for the respondents who did complete your survey. On this page you will have information thanking the respondent for their participation, providing information and resources if needed.

Include a link to the anonymous IRB reporting page

<https://www.longwood.edu/studentresearch/institutional-review-board-irb/report-irb-concern/>

Make sure to edit the hyperlink into the text. For example:

If you have any concerns about this survey or your participation, you may anonymously report them to the Longwood University IRB [here](#).

Version 3 – For anonymous research with incentives

In addition to the material in Version 2, you will include a link to a second survey where participants will enter their to protect the anonymity of your participants. Include language that explains the purpose of this second survey. For example:

This link will take you to an entry form for compensation for your participation in this survey research. Your details cannot be connected in any way to the responses you have provided in this survey (and will not be seen by the researchers – if a third party is administering disbursement of the incentive). INSERT LINK SOMEWHERE.

Qualtrics Accounts

Faculty can create a Qualtrics account on the University site license by contacting the DEC. Students can create a free Qualtrics account. The Qualtrics free survey account allows for collaborations between Qualtrics users (i.e. faculty and students).

Features of a Free Qualtrics Account

- You can only have 3 active surveys at a time

- You are limited to only 500 responses per account. This includes retaken and deleted responses
- Surveys are limited to only 30 questions
- Question types are limited to multiple choice, text entry, text/graphic, matrix table, slider, form field, rank order, and side-by-side
- Survey logic includes only skip logic, display logic, and branch logic
- Limited Look and Feel (theme/templates)
- Other features/limitations

Document Attributes

Last approved by IRB: May 2025