Package #2:

Informed Consent linked to a Qualtrics Questionnaire and Financial Accountability Form

This manual will guide you through the personalization of the Informed Consent (IC) template built in Qualtrics. This template is based on the guidelines provided by the Faculty Ethics Review Board (FERB) and outlines all relevant information that is legally required to be presented to the subject before participation. The template consists of three Qualtrics surveys that you will link to each other using the steps in this manual. After filling in the Informed Consent participants are automatically redirected to a second questionnaire that can be edited and used for data collection. After completing data collection, the participant will be redirected to the Financial Compensation Form. A unique, random participant ID is generated in the template for the main questionnaire of your study. This unique ID is then stored (together with the date) in the data of both the main questionnaire and the Financial Compensation Form, linking participation to compensation.

The forms can be signed digitally by the participants by filling in their name, the date and agreeing to the presented terms by selecting *'I agree'.* After agreeing they can continue to the related study. You can edit the text in the template and add information specific to your study (indicated with []) and delete any information that is not relevant to your study.

Personal information necessary to verify consent should always be collected and stored separately from the collected data.

If you have any questions after reading this manual you can contact us at labs.fsw@uu.nl.

Instructions

1. Download 'Package #2 **–** Qualtrics' from our website.
2. Unzip the package to a suitable location on your computer
3. Log into Qualtrics and select 'Create new project'
4. Click 'Create your own' and then click 'Survey'
5. You'll see four options for starting a survey. Select 'From a File' and then 'Choose file'
6. Select the '1_Informed_Consent_Qualtrics.qsf' file you downloaded in step 1 and click 'Get started'
7. Repeat steps 4-6 for the '2_Qualtrics_Questionnaire.qsf' file and the '3_Financial_Accountability_Form.qsf' file.

You will now make sure participants are sent from the Informed Consent to your questionnaire.

8. In the '2_Qualtrics_Questionnaire' or your own Qualtrics survey, go to 'Distributions'.
9. In the tab 'Email', click 'Get a single reusable link' and copy the Survey Link that is provided.
10. Now go to the '1_Informed_Consent_Qualtrics' survey and click on 'Survey Flow'

11. Find the **second** red ‘End of Survey’ box and click ‘Customize’.
12. Select ‘Redirect to a URL’, paste the link you copied in step 9 and click ‘OK’.
13. Click ‘Save Flow’.

If you are using your own or an already existing Qualtrics survey for your data collection, follow step 14-20 on that survey. If you are building your survey in the ‘2_Qualtrics_Questionnaire’ template, skip to step 21.

14. In your own Qualtrics survey, go to ‘Survey Flow’.
15. Click ‘+ Add a New Element Here’ and choose ‘Embedded Data’.
16. Before editing this block, click ‘move’ in this block and move the block all the way to the top of the survey flow.
17. Click ‘Set a Value Now’ and in the drop-down menu choose ‘Insert Piped Text’, then ‘Random Number’.
18. In the ‘Min’ text box, type ‘100’. In the ‘Max’ text box, type ‘99999’, and then click ‘Insert’.
19. Click on the text ‘Create New Field or Choose From Dropdown..’ and here, type ‘LoginID’.
20. Click ‘Save Flow’.

To authenticate their identity, each participant is provided with a unique participation ID that is saved in the data of both the main questionnaire and the Financial Accountability Form. To make sure the ID is transferred from one survey to the other, you will have to edit several parts of these questionnaires.

21. In the ‘2_Qualtrics_Questionnaire’ or your own Qualtrics survey, click on ‘Tools’, go to ‘Triggers’ and select ‘Contact List Triggers’.
22. Click on the box right next to ‘Contact List’, go to ‘My Library’, and select ‘New Contact List’.
23. Think of a name for your Contact List and type it in the box. It is best to pick a name that is related to the name of your experiment or survey.
24. Next to the box where you have typed in the name of the contact list, click “Save”.
25. Next to ‘External Data Reference’ select ‘Embedded Data’ and type: LoginID
26. Click ‘Save Triggers’

Now you will make sure that all participants that finish your survey will get sent to the form for financial compensation.

27. Go to the ‘3_Financial_Accountability_Form’.
28. Click on ‘Survey Flow’
29. In the blue box named ‘Branch on Successful Authentication’, find the header ‘Authenticate Using Contact’ and select your library from the drop-down menu.

30. In the drop-down menu next to this, select the contact list you created in steps 22-24.
31. Click on ‘Save Flow’
32. Go to ‘Distributions’
33. Click on ‘Get a single reusable link’
34. An Anonymous Survey Link will appear. Copy-paste this link to a Word document.
35. Add this line to the link: **?LoginID=${e://Field/LoginID}** . Make sure there is no space between the first and the second part of the link.
36. Copy the full link including the line you added in the previous step.
37. Go to the “2_Qualtrics_Questionnaire” or your own Qualtrics survey.
38. Click on ‘Survey Flow’.
39. In the red box called ‘End of Survey’, click ‘Customize’.
40. Select ‘Override Survey Options’ and then select ‘Redirect to a URL’.
41. Paste the link with the additional part in the box.
42. Click ‘OK’ and ‘Save Flow’.

43. **Important: After you have finished all these steps, make sure to go to each of** these **three surveys, go to the right top corner, click ‘Publish’, and click ‘Publish’ again. You can now start your study.**