

UNC QUALTRICS ACCOUNT PROTOCOLS

Qualtrics is UNC's supported tool for creating surveys. All of UNC's Faculty, Staff and Students have access to Qualtrics. Appropriate uses of Qualtrics include institutional planning and assessment; faculty and student research; collecting information needed to conduct departmental procedures and planning; and class projects like those in research methodology courses.

PURPOSE

The purpose of this protocol is to describe university procedures regarding the creation, use, and deactivation of Qualtrics accounts to facilitate use of the tool in accordance with [UNC Survey Protocols](#), guidelines for [research integrity and compliance](#), and best practices for data security and privacy.

This guidance is intended to:

- Define categories of Qualtrics accounts for different types of users
- Describe the procedures for individuals to create Qualtrics accounts
- Describe the procedures for individuals with existing Qualtrics accounts to renew those accounts in accordance with current protocol
- Outline the process for deactivating Qualtrics accounts

TYPES OF QUALTRICS ACCOUNTS

- **Survey Creation:** This is the default account type for new accounts. The user can create surveys, view reports and/or results that have been specifically shared with them by the survey owner, but this type of user cannot distribute surveys. This user type is suited for students who are learning survey methodology in a class but do not need to distribute the survey. This account type would also work for administrators or committee members who do not need to distribute surveys but who need to view survey results. This type of account can be upgraded to a Survey Distribution account on an individual basis.
- **Survey Distribution - Undergraduates:** The user has the same permissions as View Only and Survey Creation but also has the ability to distribute surveys. Undergraduate students are limited to distributing 2 surveys per year with 100 responses per survey. This type of account would be suited for students working on class projects or capstone research. Undergraduate accounts are set to expire at the end of the academic year in which they are created but can be re-instated with no loss of data at the user's request.
- **Survey Distribution – Graduate Students:** Graduate students working on thesis or dissertation are limited to 10 surveys per year with 3000 responses, which can be adjusted to conform to an approved IRB Protocol. The user would be expected to follow the UNC Survey Protocol with respect to surveying campus constituents. Graduate student accounts do not have an expiration date.
- **Survey Unlimited Distribution– research and operations:** The user can create and distribute surveys with no limitation on number of surveys, invitees, or responses. The user would be expected to follow the UNC Survey Protocol with respect to surveying campus constituents. This type of account would be suited for faculty, for campus units that use Qualtrics for data collection forms, and for some graduate student and staff positions.

PROCEDURE FOR CREATING A NEW QUALTRICS ACCOUNT

- New Qualtrics accounts can be automatically generated for any current student, faculty or staff by logging in at unco.qualtrics.edu. New accounts will be established at the most restricted account type (i.e., Survey Creation, no distribution).
- The login page will contain instructions on how to elevate account permissions. Students will need a faculty or staff sponsor to elevate permissions. These instructions can also be sent to the email associated with the newly created account:
 - Read and accept the [UNC Qualtrics Terms of Use](#)
 - Read and agree to follow the [UNC Survey Protocols](#)
 - Acknowledge that human subjects research must be covered by an [IRB Protocol](#).
 - Complete appropriate [training in human subjects research](#), and provide documentation of that training to OIRE
- OIRE will elevate account permissions within 3-5 *business days* of the user completing the above instructions.
- For courses where faculty will be requiring the use of Qualtrics for teaching, they can contact OIRE@unco.edu and codes will be generated to give to students in those classes that will elevate permissions automatically. Faculty should note that in some cases, they may want to apply for an [omnibus IRB](#) to cover actual human subjects research. Note omnibus IRBs only cover research that qualifies as exempt. For questions as to what qualifies as exempt, please contact ORSP@unco.edu

PROCEDURE FOR RENEWING AN EXISTING QUALTRICS ACCOUNT

- Qualtrics users whose accounts were created prior to the adoption of these protocols in September 2023 will be asked to renew their accounts by January 1, 2025
- Users with existing accounts will be contacted via email to fill out the Qualtrics account renewal form to confirm that they have read and agree to the UNC Qualtrics Terms of Use and Survey Protocol and to provide documentation of training in human subjects research

PROCEDURE FOR DE-ACTIVATING A QUALTRICS ACCOUNT

- Accounts will be deactivated in accordance with HR/IM&T offboarding procedures. Undergraduate student accounts will be set to expire one year from the account creation date. Employees may transfer their surveys to another UNC employee prior to their departure. Faculty and graduating students who wish to transfer their surveys to their account at another institution should contact OIRE@unco.edu
- Deactivated accounts can be reactivated for returning students and employees by contacting OIRE@unco.edu
- Accounts that have been deactivated for 6 years may be deleted.