

## 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 such as 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 [Survey guidelines \(unco.edu\)](https://www.unco.edu/survey-guidelines), guidelines for research integrity and compliance ([Research Integrity & Compliance \(unco.edu\)](https://www.unco.edu/research-integrity-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
- Outline the process for deactivating Qualtrics accounts

### TYPES OF QUALTRICS ACCOUNTS

- **Survey Creation:** 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 well 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 could be upgraded to a Survey Distribution account on an individual basis. If the user does not elevate permissions within one-year, the account will be deactivated.
- **Survey Limited Distribution:** The user has the same permissions as View Only and Survey Creation but also has the ability to distribute surveys. Undergraduates would be limited to distributing 2 surveys per year with 100 responses per survey. Graduate students working on thesis or dissertation would be limited to 2 surveys per year with responses limited as outlined in an approved IRB Protocol. 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 students working on class projects or capstone research and for many staff positions.
- **Survey Unlimited Distribution UNC Branding – 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.
- **Survey Distribution with UNC Branding – official business:** The user can create and distribute surveys using the institution-wide UNC Branding for official business with no limitation on the 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 limited to staff positions in specific administrative units such as OIRE.

## 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](https://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 Protocol](#)
  - 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](mailto: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](mailto:ORSP@unco.edu)

## 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](mailto:OIRE@unco.edu)
- Deactivated accounts can be reactivated for returning students and employees by contacting [OIRE@unco.edu](mailto:OIRE@unco.edu)
- Accounts that have been deactivated for 6 years may be deleted.