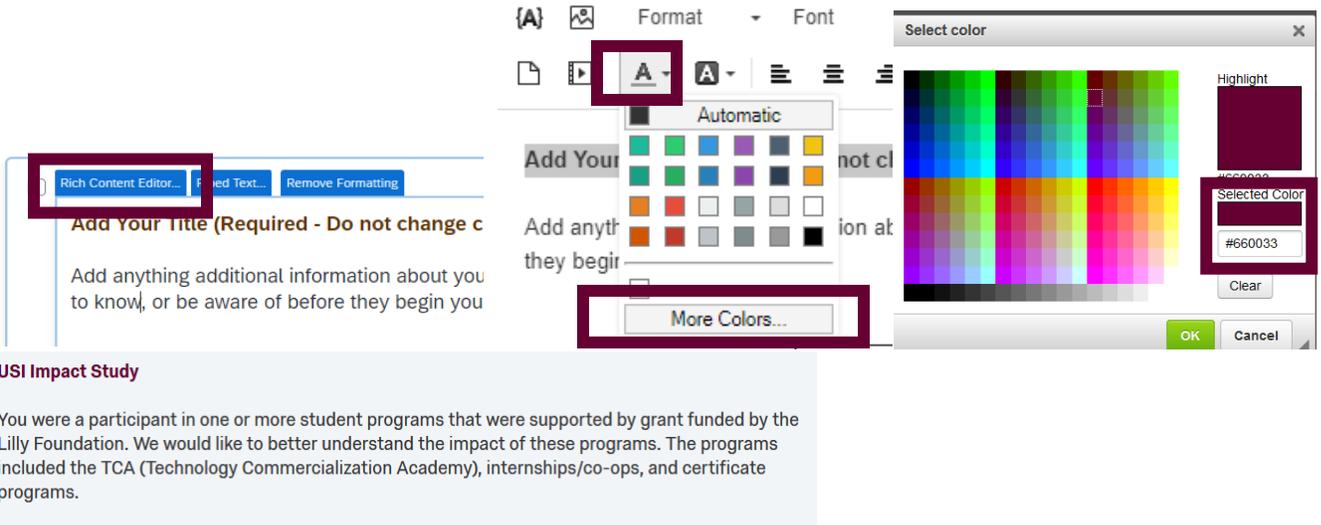


## Qualtrics Pre-Approval Check List

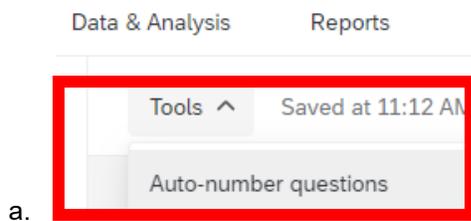
### The to-do list before submitting for approval.

1. Make sure you have added a title to the actual survey/form as part of the first question. The title should be **in bold font** and use the “other” color code #660033 (ex. **USI Impact Study**)
  - a. Select “Rich Content Editor”.
  - b. Select “Text Color” -> “More Colors”.
  - c. Type in #660033 in the “Selected Color” box.
  - d. **Bold the title!**



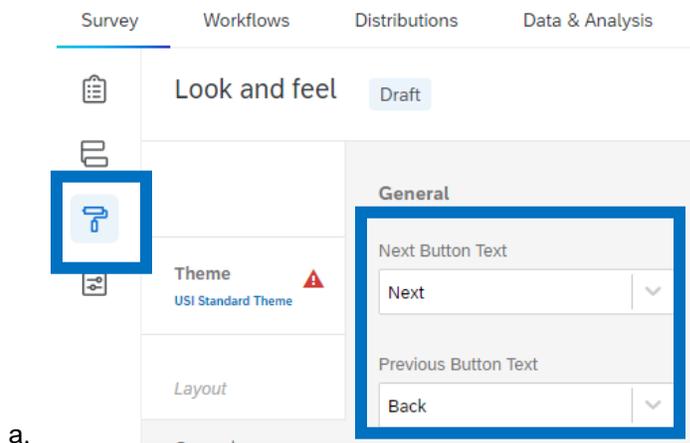
The screenshot shows the Rich Content Editor interface. A text block is visible with the title "USI Impact Study" in bold and the color #660033. The "Format" menu is open, showing the "Text Color" option selected. A "Select color" dialog box is open, showing a color palette with the color #660033 selected. The "More Colors..." button is also highlighted.

2. Re-order your question numbers using Tools → **Auto-Number Questions**. (“Sequential” is most used.)



The screenshot shows the "Tools" menu in Qualtrics. The "Auto-number questions" option is highlighted with a red box.

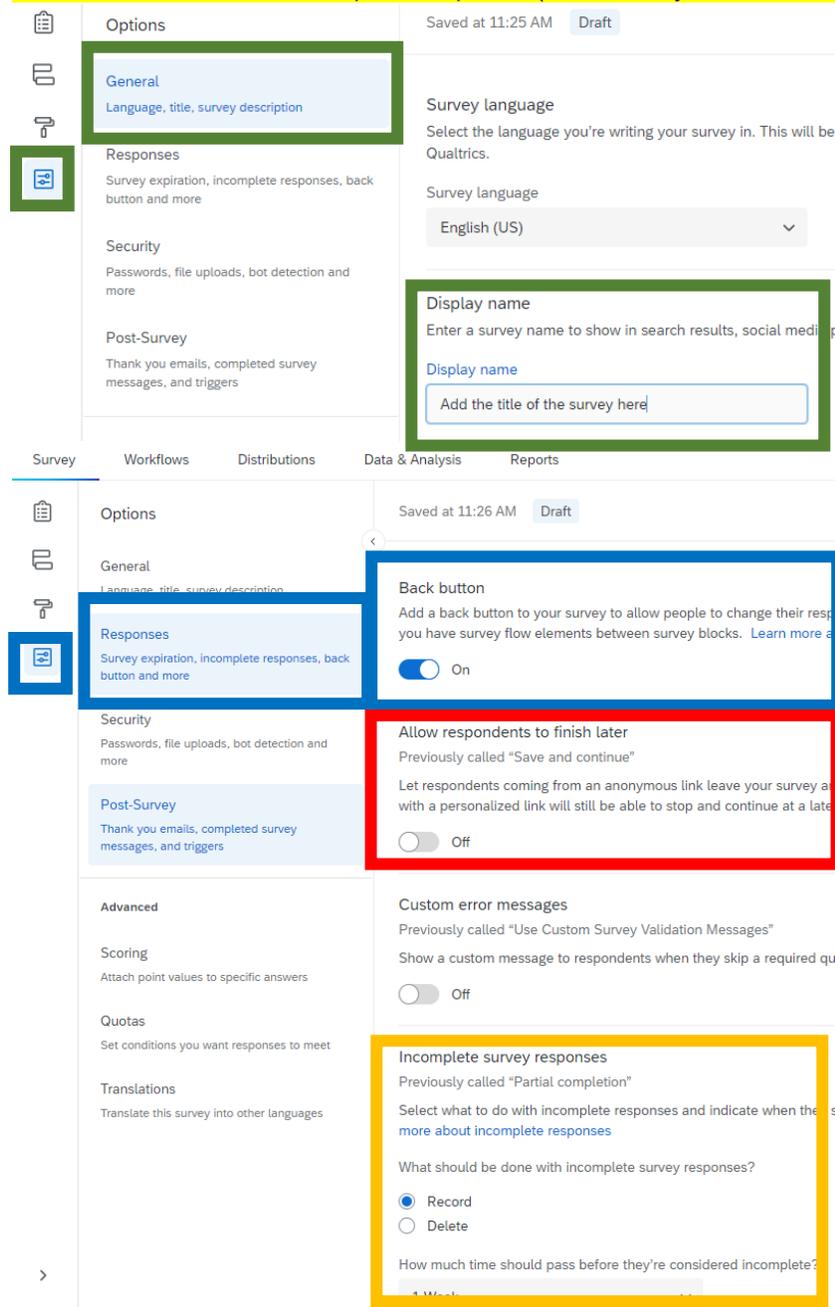
3. **Change buttons for each block to “Next” and “Back”**. Select “Look and Feel” (the paint roller icon) and change those here, and make sure the last block has a “Submit” button (see #4).



The screenshot shows the "Look and Feel" settings in Qualtrics. The "Next Button Text" is set to "Next" and the "Previous Button Text" is set to "Back". The "Look and Feel" icon is highlighted with a blue box.

## Qualtrics Pre-Approval Check List

4. Add a "Submit" button on the last question. To do this, move the last question to a new block, then change the next button text to Submit. (Click on Block name (top left corner of start of block, Block #) → the left-side window will display "Next/Previous button text" (select this). If you have a short form that does not have any page breaks or display logic (i.e. the respondent will see all the questions at once and there are no skips), you do not need to put the last question in a new block, just change the next button text to be Submit.
5. Run Spell-check using Tools → Review → Spell Check
6. Survey Options Tab – Make these changes
  - a. Survey Options – General: Change the Survey Display Name
  - b. Survey Options – Responses:
    - i. Enable the Back button
    - ii. Disable allow respondents to finish later
    - iii. Choose how to handle incomplete response (this will vary between surveys and what you want)



The image displays two screenshots of the Qualtrics Survey Options interface. The top screenshot shows the 'General' tab selected in the left-hand menu, with the 'Display name' field highlighted in green. The bottom screenshot shows the 'Responses' tab selected, with three settings highlighted: 'Back button' (On), 'Allow respondents to finish later' (Off), and 'Incomplete survey responses' (Record).

**General**  
Language, title, survey description

**Responses**  
Survey expiration, incomplete responses, back button and more

**Security**  
Passwords, file uploads, bot detection and more

**Post-Survey**  
Thank you emails, completed survey messages, and triggers

Options | Saved at 11:25 AM | Draft

Survey language  
Select the language you're writing your survey in. This will be Qualtrics.

Survey language  
English (US)

Display name  
Enter a survey name to show in search results, social media, etc.

Display name  
Add the title of the survey here

Survey | Workflows | Distributions | Data & Analysis | Reports

Options | Saved at 11:26 AM | Draft

**Back button**  
Add a back button to your survey to allow people to change their responses. If you have survey flow elements between survey blocks. [Learn more about back buttons](#)

On

**Allow respondents to finish later**  
Previously called "Save and continue"

Let respondents coming from an anonymous link leave your survey and return later. Respondents with a personalized link will still be able to stop and continue at a later date.

Off

**Custom error messages**  
Previously called "Use Custom Survey Validation Messages"

Show a custom message to respondents when they skip a required question.

Off

**Incomplete survey responses**  
Previously called "Partial completion"

Select what to do with incomplete responses and indicate when they should be considered incomplete. [Learn more about incomplete responses](#)

What should be done with incomplete survey responses?

Record  
 Delete

How much time should pass before they're considered incomplete?  
1 Week

## Qualtrics Pre-Approval Check List

7. Test your survey!!!! Multiple Times!!! (use the Preview button)
  - a. Look for formatting issues such as matrix table questions that require scrolling (solution - split into 2 or more matrix tables) (drag the matrix table column line over so that they are only one line long)
  - b. Add page breaks, especially when the survey question types change
  - c. Make sure all text is in the default font
  - d. Make sure your questions and answer categories match/make sense (Read them out loud).
  - e. Check your back/next buttons (are some arrows and some text? – See #3)
  - f. Make sure you only have a submit button on the last question (See #4)
  - g. Be sure and click the Submit button when testing so you see what happens after one finishes the survey
8. Test any workflow or trigger emails.
9. Download your preview text data and make sure your data is as you would expect.
  - a. Data & Analysis Tab -> Export & Import -> Export Data
- 10. Send for approval only after you are very confident your survey is ready to distribute to the public.**