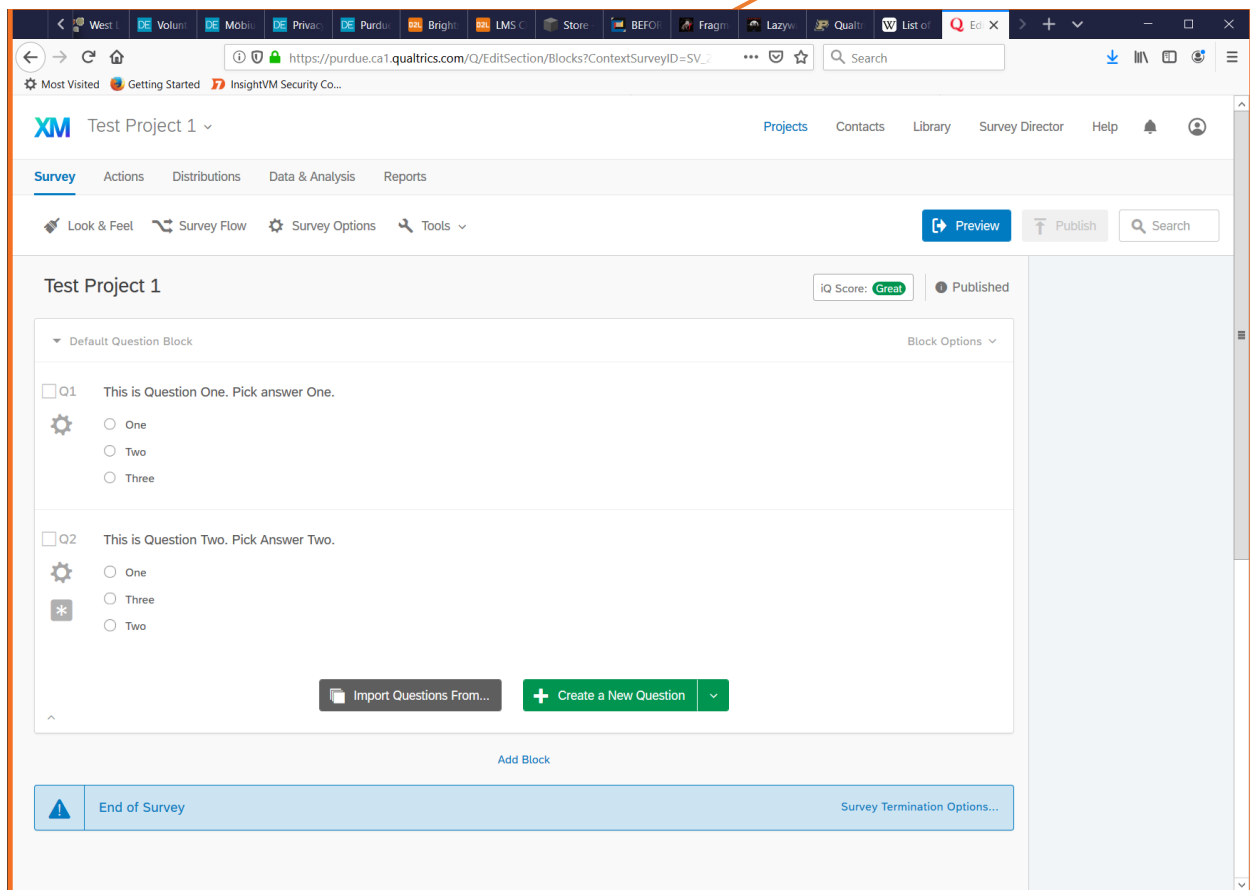


Qualtrics for Sensitive/Restricted Information

Qualtrics is a secure platform for capturing sensitive or restricted information from survey participants, but there are some options that need to be in place to make sure the information is not accidentally compromised.

When creating a survey, there is a menu containing survey options:

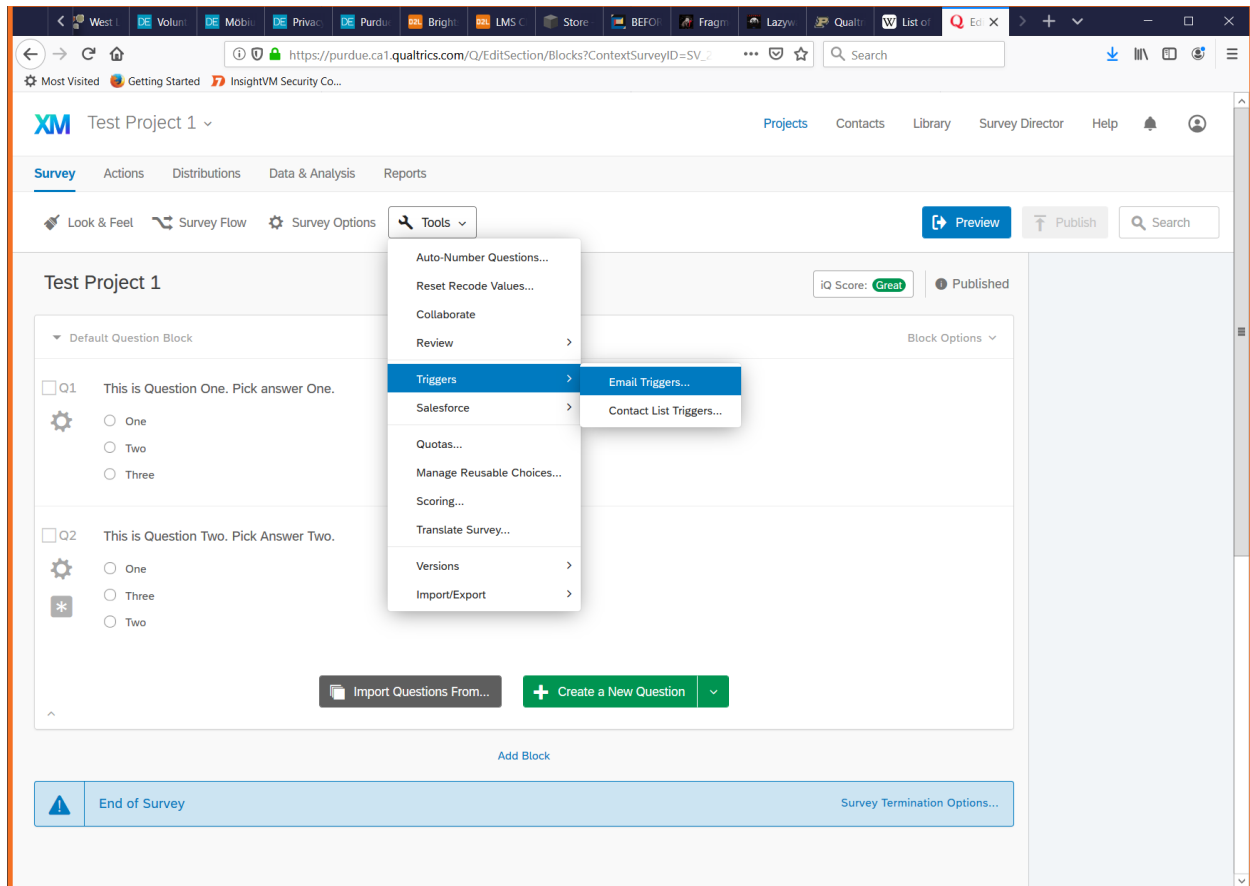


Enter the Survey Options menu and ensure that the following options are in place:

- **Meta Description (Delete or Leave Blank):** Delete any information in this field and leave it blank, unless there is a specific reason a meta description needs to be in place.
- **Open Access vs. By Invitation Only (Select Either):** This option determines whether you can generate an anonymous link to send to anyone, or if you must invite specific people to take the survey. Consider your usage when selecting one of these options. With open access, users can take the survey relatively anonymously but anyone can access it. With invitation only, users will not be anonymous, but the survey will not be open to the public. Consider this option if the survey questions themselves have sensitive information in them, or if the questions need to be kept confidential for some other reason.

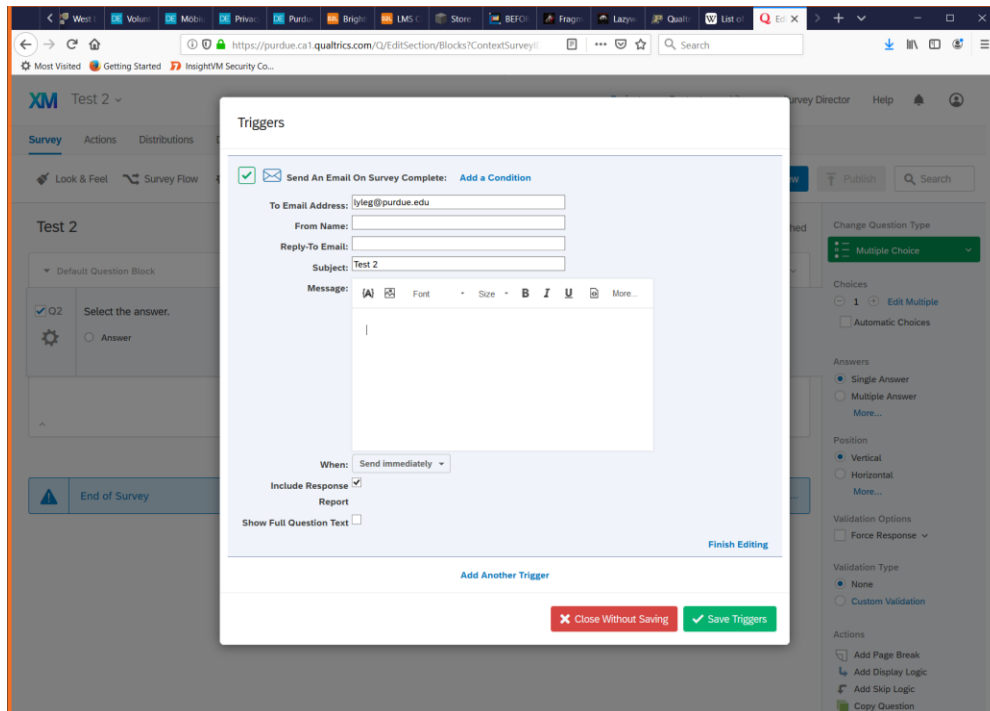
- **Prevent Indexing (ON by default):** This option prevents search engines from discovering your survey page.
- **Secure Participant Files (ON by default):** This option keeps unauthorized Qualtrics users from viewing the survey results. You can invite collaborators from the “Tools” menu, next to the “Survey Options” menu.
- **Survey Expiration (Optional):** Enabling this will set a date beyond which the survey will be inaccessible. There may be practical reasons for leaving a survey up and running, so consider how often you will use a survey before selecting this option.
- **Password Protection (Optional):** Protects access to the survey with a password. The password must be sent separately to potential participants.

There is one more setting survey creators MUST select to secure their survey information. Navigate to the “Email Triggers” selection in the “Tools” menu:



Once there, you will find that the checkbox “Send an Email on Survey Complete” is checked, and cannot be unchecked. There is also a checkbox at the bottom of the window that says “Include Response Report.”

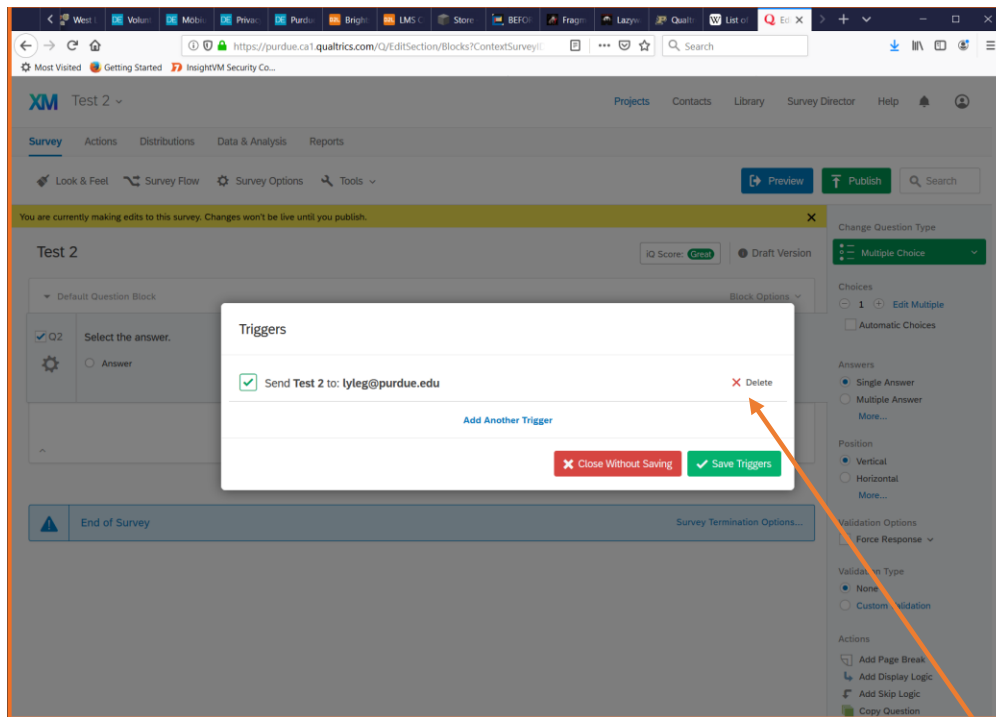
If you want to be notified whenever a survey is completed ensure that the “Message” field has a short message in it, AND that the “Include Response Report” option is UNCHECKED. This way, Qualtrics will send an email to whomever the survey creator designates, but without including the potentially Sensitive or Restricted survey responses. If the message field is left blank, the email might not be sent.



This is important because when Qualtrics sends an email with the survey results, the message actually contains a link to the results. If an email containing this link is lost or compromised, ANYONE who has access to the email now has access to that survey result.

If you don't want or need an email at all, go ahead and click the green “Save Triggers” button at the bottom of the window, then proceed to the following:

Return to the “Email Triggers” selection in the “Tools” menu. You should be presented with a window that looks similar to this:



This window displays all of the active email triggers for the survey. Click the red X to the right of the email trigger(s) to delete, then select “save triggers.” Now, Qualtrics will NOT send emails upon survey completion at all.

Removing email results links or deleting triggers is incredibly important to the security of sensitive or restricted information, but if the survey does not involve such information the survey creator can use email triggers if they wish.

Once all necessary security selections have been made, be sure to “Publish” the survey to save changes. Clicking “Publish” will make the survey ready for distribution, but it WILL NOT auto-distribute. Survey creators must still manually distribute the survey from the “Distributions” menu.