

Creating Voting Ballots in Qualtrics

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Goal: To create a ballot in Qualtrics that allows each known person to vote once and only once, and to ensure anonymity of votes.

Approach #1:

Outcome: Each person will receive an email containing a personalized survey link. This survey link can be used only once, by the person who receives the email. Personal contact information is not connected to the respondent's ballot, which means there is no way to trace the voter's ballot to the voter's identity.

Caveats:

1. The ballot-designer/survey administrator is unable to know which links are associated with which individuals. Thus, individuals who misplace their ballots must be resent brand new ballots, creating a small risk that the individual could vote twice without being detected.
2. Because each individual receives a personalized survey link, you are unable to place a link to the survey in a newsletter or blast email. You must rely on individuals to use the personalized link provided in the email.

Approach #2:

Outcome: A universal survey link is created that allows you to distribute the link broadly across the university. An authentication procedure is created so that when individuals click the link, they are first prompted to enter some kind of authenticating information (a password, an ID, an email address). Qualtrics attempts to match the entered information with information you provide, and when it finds a match, the individual will be directed to the ballot. This authenticating information is not connected to the respondent's ballot, which means there is no way to trace the voter's ballot to the voter's identity. Once the authenticated voter has submitted their vote, attempts to re-vote will be denied.

Caveats:

1. Because the first page requires voters to enter information, it makes salient the process of submitting personal data. Although this information is not connected to the ballot, it can make some voters feel uneasy.
2. You must choose information that is unique to each voter, and information that voters will be able to easily access. For example: Employee ID only works if every voter knows their employee ID or has it handy. Individuals' tufts.edu email addresses are an option, but individuals who use other email domains (e.g. cs.tufts.edu) will need explicit instructions to use tufts.edu address otherwise they will not match.

Get Started:

Here is your voting ballot.

The screenshot displays the Qualtrics survey editor interface for a project named "voting example". The main content area shows a question titled "Please vote for one candidate." with eight radio button options: Anna A., Bob B., Charles C., Diana D., Emily E., Frank F., George G., and Helen H. The right sidebar contains configuration options for the question type (Multiple Choice), choices (6), answers (Single Answer), position (Vertical), validation options (Force Response), and validation type (None). A red circle highlights the "Survey Options" menu item in the top navigation bar.

Once you've created your ballot, go to "Survey Options" at the top of the Qualtrics page.

This is a close-up screenshot of the top navigation bar of the Qualtrics survey editor. The navigation bar includes the following items: "Survey" (with a pencil icon), "Distributions" (with a paper plane icon), "Data & Analysis" (with a speech bubble icon), "Reports" (with a bar chart icon), "Look & Feel" (with a paintbrush icon), "Survey Flow" (with a curved arrow icon), "Survey Options" (with a gear icon, circled in red), and "Tools" (with a wrench icon). The "voting example" project name is visible below the navigation bar.

When you click on that, a window pops up with lots of different sections. You can leave everything as-is except:

Survey Protection: **Check** “Prevent Ballot Box Stuffing”

Survey Termination: **Check** “Anonymize Response”

Survey Options

Show question numbers. Great for prevention for participants, try a progress bar instead.

Use Custom Survey Validation Messages...

Survey Language: English The language the survey is written in.

Survey Title: Online Survey Software | Qualtrix This text will appear in the browser as the window or tab title.

Meta Description: Qualtrics sophisticated online su Search engines and social media services use this description.

Survey Protection

Open Access. Allow anyone to take this survey.

By Invitation Only. Prevent people from taking the survey using an anonymous survey link.

Password Protection. This password must be entered to take this survey:

Prevent Ballot Box Stuffing. Keep people from taking this survey more than once.

HTTP Referrer Verification. The user must come from this URL to take the survey:

Prevent Indexing. A tag will be added to the survey to prevent search engines from indexing it.

Secure Participants' Files. Files uploaded as responses can only be viewed by users with permission to view responses.

Survey Expiration. The survey will only be available for a specified date range.

Survey Termination

Default end of survey message.

Custom end of survey message...

Redirect to single response report.

Redirect to a full URL, ex. "http://www.qualtrics.com":

Send additional thank you **email** from a library... When distributed via the Survey Mailer.

Anonymize Response. Do NOT record any personal information and remove contact association (not recommended).

Inactive Surveys

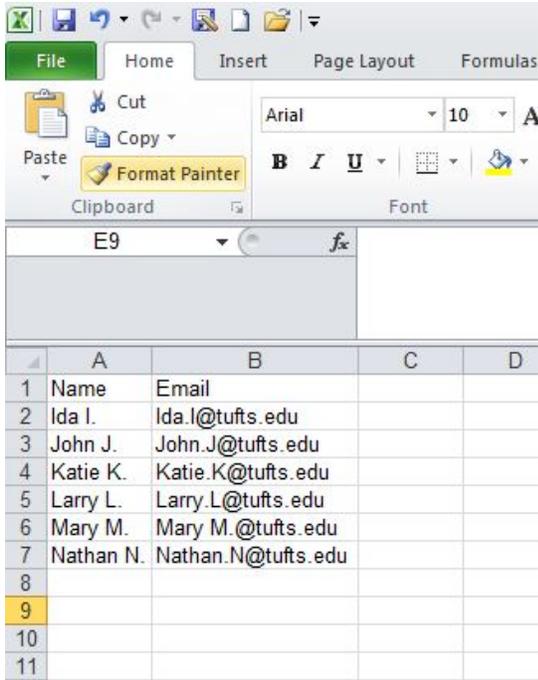
Default inactive survey message.

Custom inactive survey message...

Close

Approach #1:

To distribute this to a known list of people, you will need to first create a .csv file that has each recipient's email address. You can do this in Excel and then save-as a .csv file.

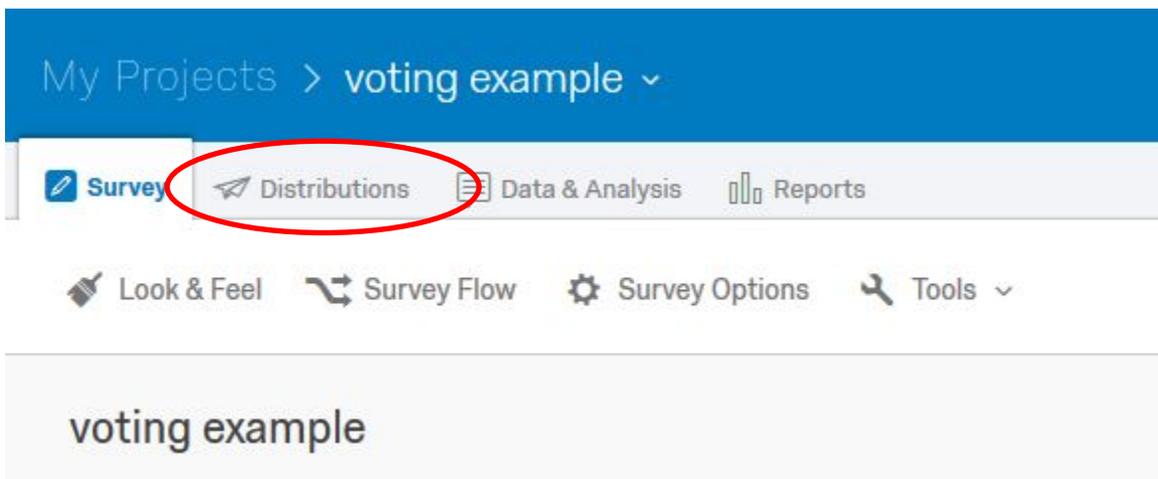


The screenshot shows the Microsoft Excel interface. The ribbon includes File, Home, Insert, Page Layout, and Formulas. The Home tab is active, showing the Clipboard group with Cut, Copy, and Paste options, and the Font group with font face (Arial), size (10), and bold/italic/underline options. The active cell is E9. Below the ribbon is a spreadsheet with the following data:

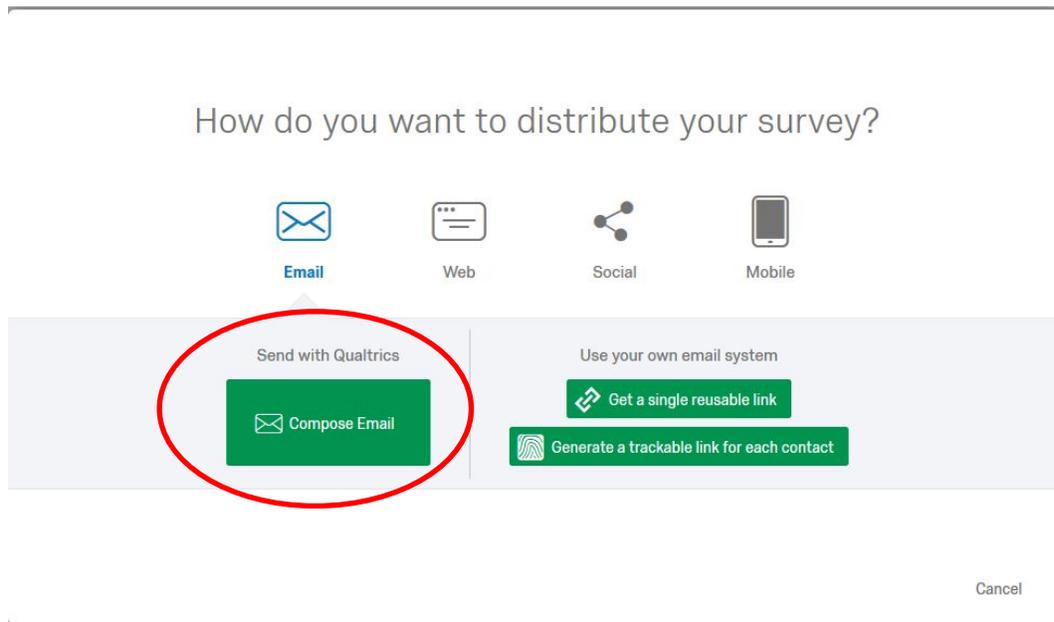
	A	B	C	D
1	Name	Email		
2	Ida I.	Ida.I@tufts.edu		
3	John J.	John.J@tufts.edu		
4	Katie K.	Katie.K@tufts.edu		
5	Larry L.	Larry.L@tufts.edu		
6	Mary M.	Mary.M@tufts.edu		
7	Nathan N.	Nathan.N@tufts.edu		
8				
9				
10				
11				

Import this .csv file to Qualtrics to create a “contact list” or “panel” – instructions and tutorial here: <https://www.qualtrics.com/support/survey-platform/contacts/creating-a-contact-list/>

Then return to your survey and click on the “Distributions” tab.



You will be prompted with a box that says, “How do you want to distribute your survey”. Click “Send with Qualtrics: Compose Email”.



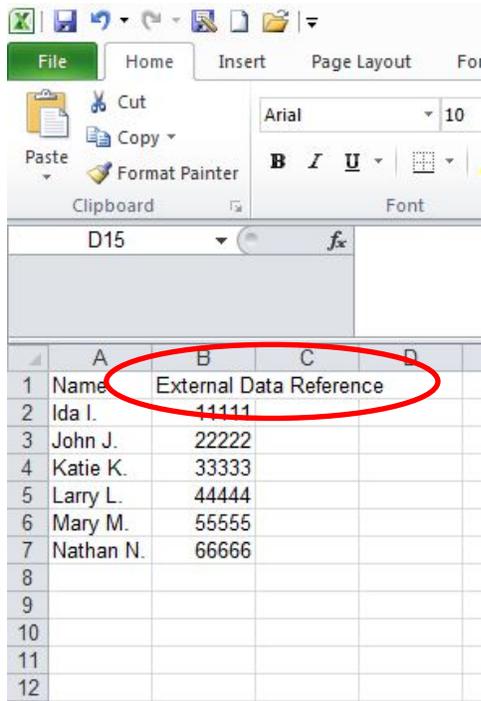
From there, you will be brought to a window where you can type the email that your respondents will receive. Then, follow the instructions below to use Qualtrics to email out the survey to each individual:

<https://www.qualtrics.com/support/survey-platform/distributions/email-distribution/emails/emails-overview/>

Approach #2:

To use the authentication approach, you will first need to create a list of unique identifiers to be used in the authentication process.

As in approach #1, you will need to create a .csv file that contains the information you will be using to authenticate each individual. For this example, we'll use ID numbers. **NOTE: The information that is to be authenticated should have a column header of "External Data Reference."**

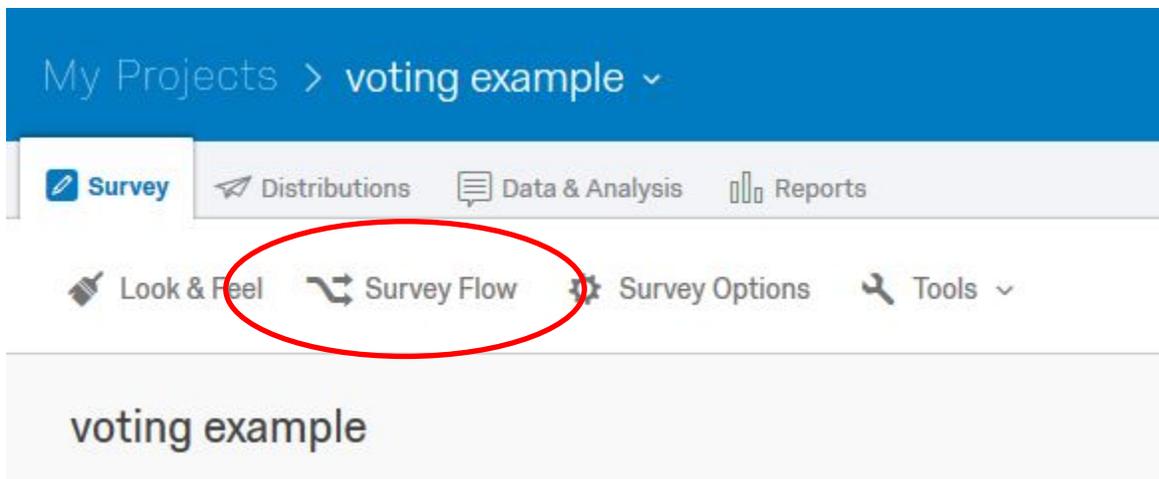


The screenshot shows the Microsoft Excel interface. The ribbon includes File, Home, Insert, Page Layout, and Formulas. The Home ribbon is active, showing the Clipboard group (Cut, Copy, Paste, Format Painter) and the Font group (Font face: Arial, Size: 10, Bold, Italic, Underline, Text color, Background color, Font color, Font style). The active cell is D15. The spreadsheet data is as follows:

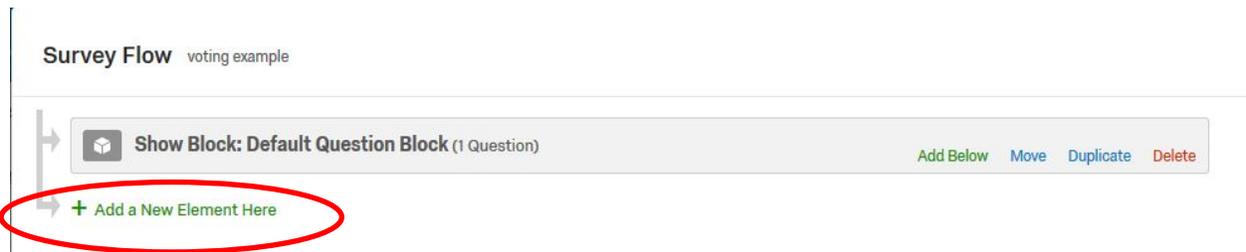
	A	B	C	D
1	Name	External Data Reference		
2	Ida I.	11111		
3	John J.	22222		
4	Katie K.	33333		
5	Larry L.	44444		
6	Mary M.	55555		
7	Nathan N.	66666		
8				
9				
10				
11				
12				

Upload this as a contact list to Qualtrics. (Again, Qualtrics has a guide for doing so here: <https://www.qualtrics.com/support/survey-platform/contacts/creating-a-contact-list/>) **When Qualtrics tells you that you forgot to put email addresses into your contacts list, please click "Skip This Step."**

Return to your survey. Click on "Survey Flow."



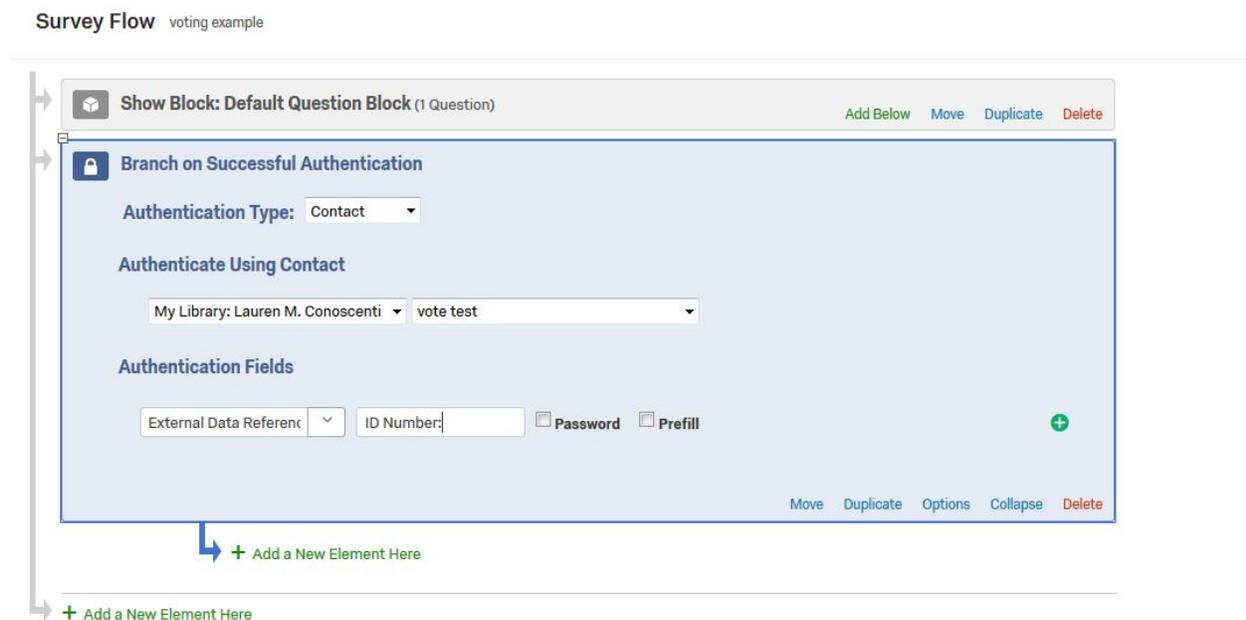
You will be brought to your survey flow page, and you will want to click on “Add a New Element Here.”



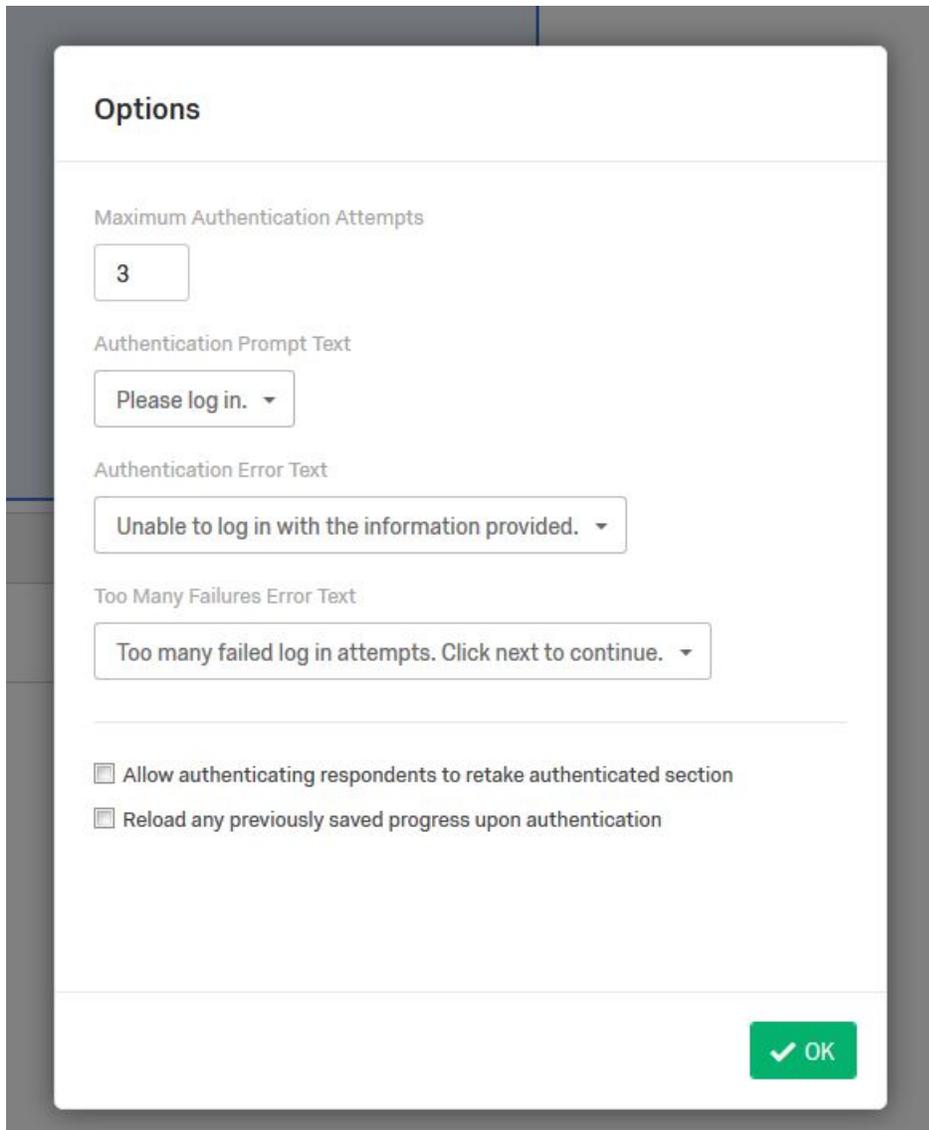
Click “Authenticator.”



In the blue box, leave “Authentication Type” as “Contact.” Then, select the contacts list (that you uploaded earlier) the “Authenticate Using Contact” drop-downs. Then, select in the “Authentication Fields” the “External Data Reference” option. The “Optional Label...” can be replaced with whatever text you’d like this prompt to be prefaced with. You can click “password” if you want the information to be replaced with a dot as soon it is entered by the voter, as in a password form.



You can click on “Options” if you want to customize how voters interact with the authentication page. You can create your own text to accompany the authentication prompt (for example, if you would prefer for it to say, “Please enter your ID number,” instead of “Please log in.”, you’ll want to create that custom text), as well as the error messages that might appear if someone does not enter information that can be authenticated. Leave the other two boxes UNCHECKED, however.



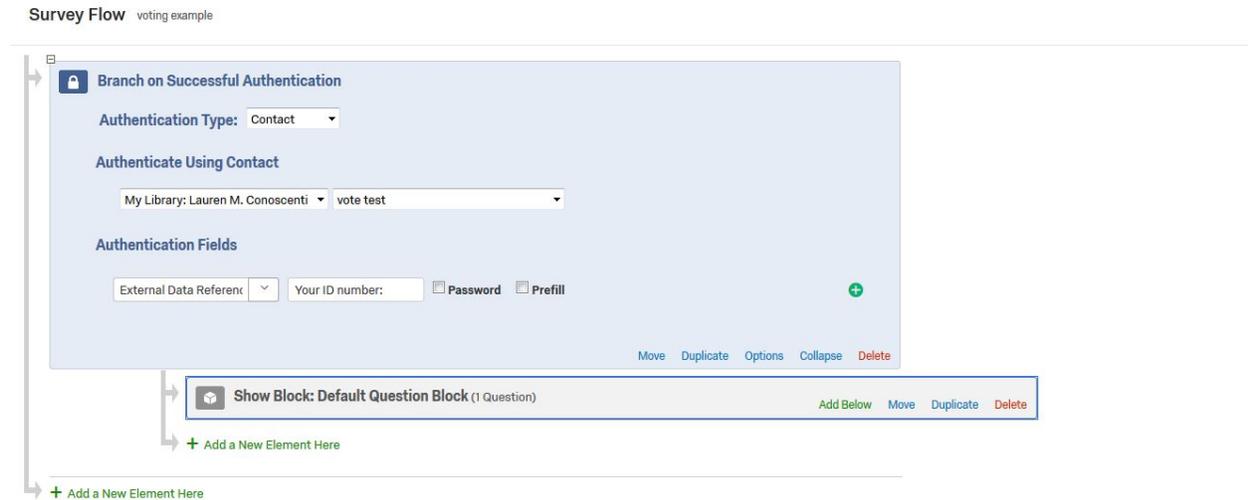
The image shows a configuration window titled "Options" with several settings for authentication. The settings are as follows:

- Maximum Authentication Attempts:** A text input field containing the number "3".
- Authentication Prompt Text:** A dropdown menu with the selected text "Please log in." and a downward arrow.
- Authentication Error Text:** A dropdown menu with the selected text "Unable to log in with the information provided." and a downward arrow.
- Too Many Failures Error Text:** A dropdown menu with the selected text "Too many failed log in attempts. Click next to continue." and a downward arrow.

- Allow authenticating respondents to retake authenticated section
- Reload any previously saved progress upon authentication

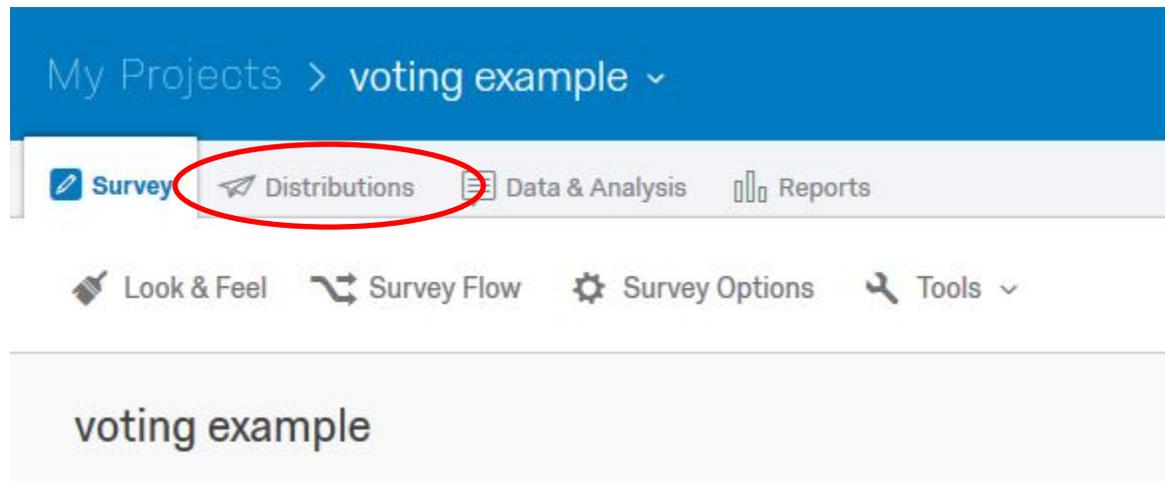
At the bottom right of the window is a green button with a white checkmark and the text "OK".

Next, MOVE the element so that it is above the first block. Do this by clicking and holding the word “Move” in the bottom right of the blue box. Then, MOVE the block of questions containing your actual ballot so that it is “nested” under the authentication box. It should look like this:

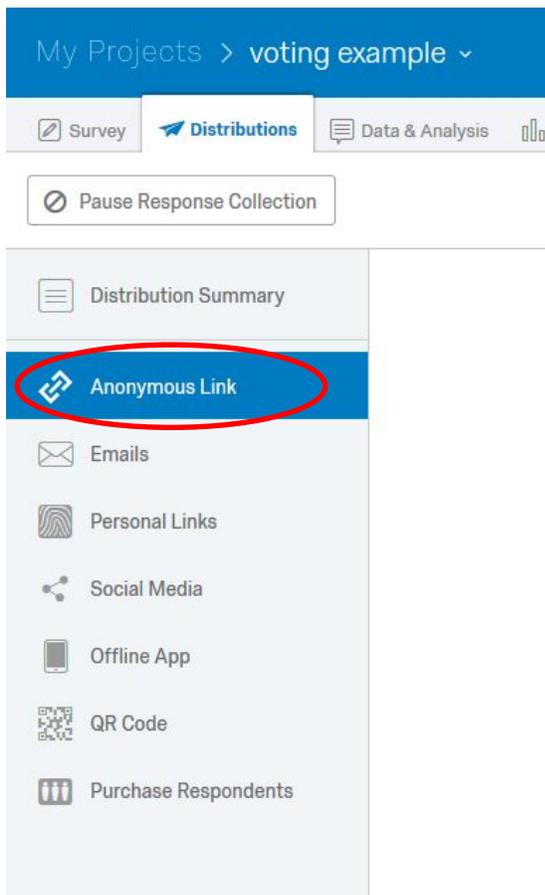


Then, “Save Flow.”

Next, to distribute your link, you’ll want to go to “Distributions”



And then click “Anonymous Link”.



You will then have a survey link to distribute widely. For more information on anonymous links, you can click here: <https://www.qualtrics.com/support/survey-platform/distributions-module/web-distribution/anonymous-link/>