

# Running a Longitudinal Study in Qualtrics

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This article will help Qualtrics survey designers understand how to create a longitudinal study.

## Before You Start

You will need the following before you can complete this task:

1. Qualtrics account (**Research Core** or equivalent license with access to **Projects** and **Contacts**)
2. Working knowledge of Qualtrics basics

Unlike a one-time use survey, longitudinal designs record repeated observations from the same subject over some period of time. In this example, participants in one of three groups are sent a new survey every morning over the course of ten days. Each day's survey contains instructions specific to its group and expires that evening. Our goal is to use more advanced Qualtrics features to partly automate this process and to track how many of the ten days each subject participated in a survey (subjects are allowed to skip days and then resume).

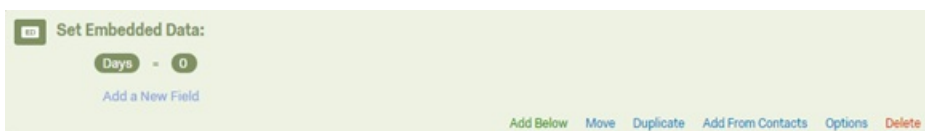
## Create a Contact List

Create a **new Contact List** and leave it empty for now.

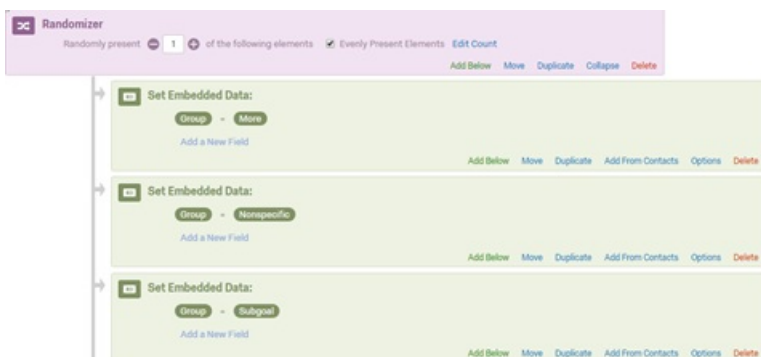
## Set up an Opt-In Survey

This case study consisted of an initial opt-in survey, followed by ten days of follow-up surveys. We obtained participants from the Wharton Behavioral Lab (WBL) for this study.

1. In the survey flow, create an **embedded data** field named Days with an initial value of 0.



2. Randomize Group conditions using a **randomizer** in the survey flow.



3. Create a text-entry question in your survey asking for participants' email address.

What is your email address? Please type the email you check most frequently. Please also make sure that this email address is correct. You will be emailed the links each day.

#### 4. Create a **contact list trigger**.

Triggers

Add Respondent To Contact List On Survey Complete:

Question: Q24 Do you still ...te in this study? Yes Is Selected

Contact List: Reward Survey View 293 members

Update existing list members  
 Unsubscribe the list member

First Name: None  
Last Name: None  
Email: Question Email Please type your email again. Please type your email again.  
External Data Reference: None  
Language: None

Days: Embedded Data Days  
Group: Embedded Data Group

Finish Editing

Add Another Trigger

Close Without Saving Save Triggers

1. Select the contact list created at the beginning of this process.
2. Select **Update Existing List Members**.
3. Choose source of Email field from text entry question in Step 3.
4. Add fields Days and Group and set them equal to the embedded data fields **Days** and **Group**.
5. Set **Survey activation/expiration** time frame in **Survey Options**.

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.  
This survey is valid from: 05-29-2018 00:00 to: 05-30-2018 03:00  
Time zone: America/Denver

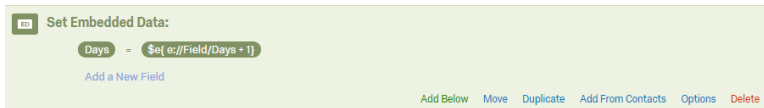
**Note:** The timezone in Qualtrics projects is often (but not always) MST/MDT. Make sure to check the timezone and account for this when setting activation periods.

## Setting up the Additional Surveys

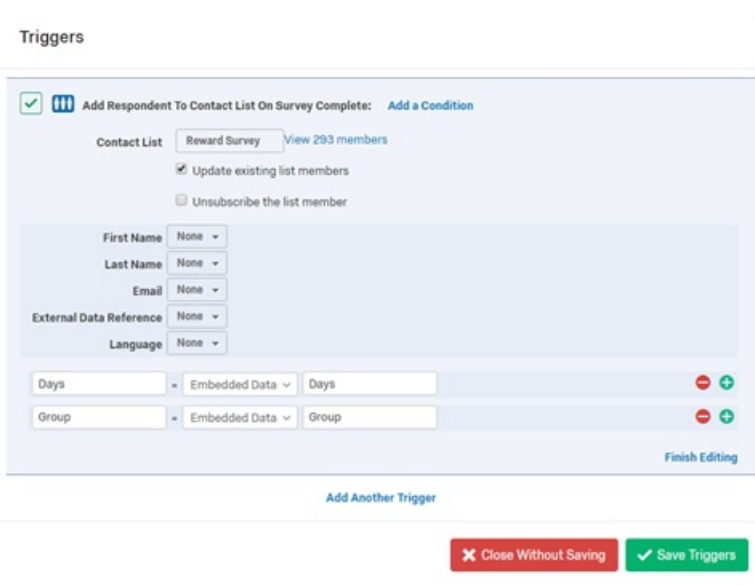
The ten additional surveys all follow the same general format. Complete the following steps on all of the surveys.

**Note:** You may want to complete one and then copy it nine times.

1. **Increment the Days** variable by 1 to count this day's participation. Use **math operations** on the embedded data in survey flow like this:  
**Days = \$e{ e://Field/Days + 1}.**



2. Create a trigger to update your contact list.

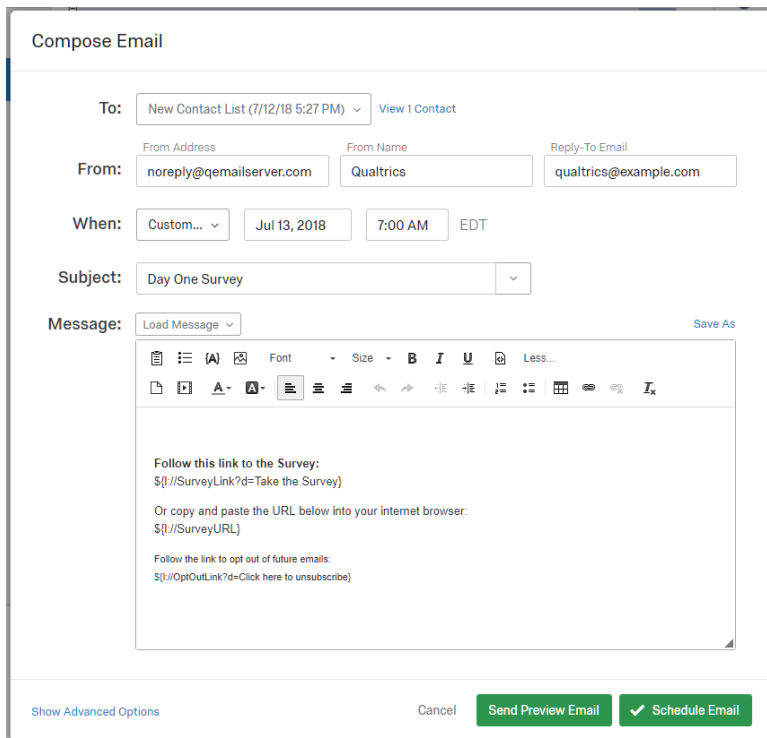


3. Set expiration times for your survey under Survey Protection as described in Step 5 of the opt-in survey.

## Email Survey Links

When your surveys are ready to go, you can schedule a **distribution via email**.

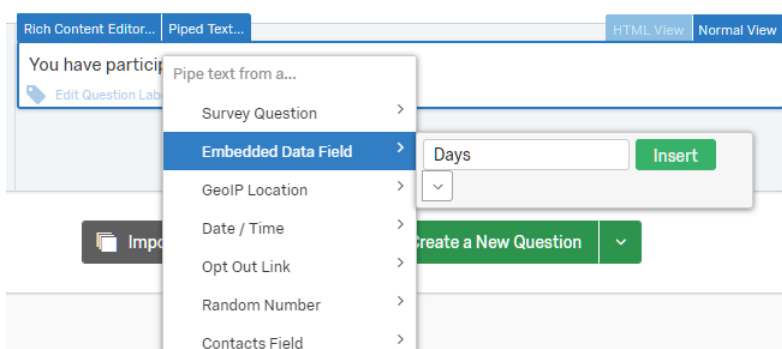
1. Go to the **Distributions** tab, select **Email**, then **Compose Email**.
2. Select your contact list next to the **To** label.
3. Set your desired **From** and **Subject** field values. Add any additional **Message** content.
4. Next to **When**, select **Custom** and then the date and time you want the link sent.
5. Send yourself a preview and then schedule your email.



# Displaying the Day Count

Optionally, you may want to display to your subjects how many days they've participated so far. This is easily accomplished using **piped text**.

1. Create a question in your survey and in its label write something like "You have participated ", then select **Piped Text** in the label editor followed by **Embedded Data Field**. You may now either type or select the field named **Days** and finish the message text.



2. The final label text will look something like this.

You have participated  $\$(e://Field/Days)$  days.

3. Click **Preview** to see the piped text field replaced by its value.

You have participated 0 days.



## Questions?

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