## How to give Automatic Credit on Sona when using Qualtrics
aka. External Study Credit Granting with Qualtrics

### Step 1: Launch your Qualtrics Survey

1. Create your survey through Qualtrics
2. Click on the survey you want to use
3. Click “Launch Survey” (top of screen)
4. Click “Activate your survey to collect responses”
5. Copy the survey link that is provided

### Step 2: Creating your experiment through SONA

1. Log into your SONA researcher account
2. Website: [https://uci.sona-systems.com/](https://uci.sona-systems.com/)
3. Click “add a new study”
4. Choose “credit” under “Online EXTERNAL Study”
5. Complete the study information form
   1. Paste the anonymous survey link (from Qualtrics) under “Study URL”
   2. At the end of your link (from step A above), add this text: “?id=%SURVEY_CODE%”
   - For example: If the Qualtrics URL (Anonymous Survey Link) is:
     [https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE](https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE)
     then change it to [https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE?id=%SURVEY_CODE%](https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE?id=%SURVEY_CODE%)
     (Note: “id” must be in lower-case)
   - Note: If your Qualtrics URL has “/SE/” in it, like [https://yourschool.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE](https://yourschool.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE) then this is the old style of Qualtrics URL.
   - You can either find the new style of URL for Anonymous Link, or instead of adding ?id=%SURVEY_CODE% change it to &id=%SURVEY_CODE% (change the ? to &).
6. After completing all your information, scroll down and click “Add this study”
7. A new screen with an overview of your survey will now display a URL labeled “Qualtrics Redirect to a URL”
8. In Qualtrics, configure the survey to accept the survey code number, as an embedded data field named “id.” Remember to use lower-case as this is case-sensitive.

### Step 3: Inserting an id number into your survey in Qualtrics

1. In Qualtrics, click “Survey Flow” near the top of your page (Under the EDIT SURVEY tab)
2. Add a New Element” by selecting “Add below” on the first block of your survey.
3. Click “Embedded data”
4. Type “id” in the box that says “Enter Embedded Data Field Name Here...”
5. Move this embedded data element to the top of the survey flow screen
6. Click “Save Flow” at the bottom of the screen
Step 4: In Sona, copy the Qualtrics Redirect to a URL link

1. In Qualtrics, configure the Survey options, Survey Termination, Redirect to a Full URL option, and provide the Qualtrics Redirect to a URL value from your Sona Systems site. (You may simply copy and paste the unaltered value from Sona into Qualtrics).

https://yourschool.sona-systems.com/webstudy_credit.a
Step 5: If you have an “End of Survey” element setup in the Survey Flow, you will need to:

1) Choose “Survey Flow” in QUALTRICS
2) Click “Add Below” or “Add Element” at the end of your survey
3) Click “End of Survey” in the yellow window that appears
4) Click “Customize” (red link)
5) Click “Redirect to a URL”
6) Paste Qualtrics Redirect to a URL link.
7) Click “OK”
8) Click “Save Flow”

Your screen should look like this:

![Qualtrics Redirect to a URL](https://yourschool.sona-systems.com/webstudy_credit.a)

Step 6: Testing External Study Credit Granting Integration

- Go to the SONA website. Choose the experiment you created.
- Click “Sample Link with Embedded ID Code”
  - If this link does not appear, then verify that you’ve setup the correct study type (Web Study) and the Study Status is “Online External (web) Study” – Administered outside the system.
  - If the study type is NOT correct, create a new study of the correct type (Online External Study).
  - If the study type is correct, but you still do not see the “Sample Link with Embedded ID Code,” then verify you have %SURVEY_CODE% correctly in the Study URL field (review Step 2 of the integration instructions).
Example on where to find the sample link:

<table>
<thead>
<tr>
<th>Study Status</th>
<th>Visible to participants</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active study</td>
<td>Appears on list of available studies</td>
<td></td>
</tr>
<tr>
<td><strong>Online (web) study</strong></td>
<td>Administered outside the system</td>
<td></td>
</tr>
</tbody>
</table>

- Duration: 30 minutes
- Creditpoints: 1 Creditpoints

**Website**

- [View Study Website](#)
- [Sample Link with Embedded ID Code](#)

**Qualtrics Redirect to a URL**

https://yourschool.sona-systems.com/webstudy_credit.asp:

**Instructions**

You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add `?id=%%SURVEY_CODE%%` to the end of the URL to make use of this feature.

**Detailed Help**

- Once this link appears, properly, click it and take your survey as if you were a participant.
- When you reach the end of the survey, you should be redirected back to the Sona site.
- If you are not, then you need to check that you configured the redirect correctly in your online survey (the last step of the integration instructions).
Step 6: Continued...

- When you are redirected to the Sona site, if you see the message, “No credit given, because you are not a participant, and therefore cannot sign up for this study,” then it worked!

- That indicates that the system received a code indicating who you are, and it realizes that you are not a participant and can’t sign up for the study.

- If you see a message like “Invalid Survey Code” or “Invalid Survey Code: -6,” then you need to check the last step of the integration instructions again. Most likely the problem is there.

- Remember that the redirect URL you paste in from the Sona site to your survey is unique for EACH study on your Sona site. You can’t use the same re-direct URL for different studies.

Congrats! The External Study Credit Granting with Qualtrics set-up is now complete!