

Using Email Distribution on Qualtrics

If you have a specified group of people that you are intending to survey and you want to be able to track at the individual level who has and hasn't completed a survey, using the Email Distribution function in Qualtrics can be very useful. Each individual is sent a unique survey link tied to their specific email address, allowing you to manage who is and isn't participating (particularly valuable if you are also providing incentives as part of your survey). You're also able to easily send reminders to those that haven't completed a survey (and thank those that have) with a few simple clicks.

Once you've created your survey in Qualtrics and it's ready to send out, you can follow these steps to use the Email Distribution function.

1. Set up your contact list

Make your contact list as a **CSV file**.

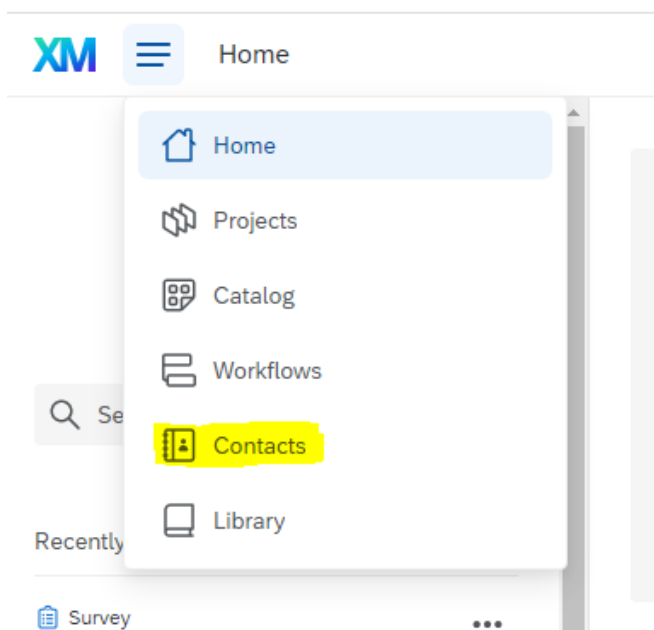
Using column headers **FirstName LastName** and **Email** makes things easiest.

	A	B	C
1	FirstName	LastName	Email
2	Madeleine	deBlois	mdeblois@arizona.edu
3	Rachel	Leih	rleih@arizona.edu
4	DeeDee	Avery	davery@arizona.edu
5	Michele	Walsh	Mwalsh@arizona.edu

Though you are only required to include email addresses, it can be valuable to include the contact's name so you can personalize their email invite.

You can also include other fields (along with name and email) but note that you should not include any sensitive information, or fields you wouldn't want participants viewing.

Then, upload your list of contacts to Qualtrics. This is done in the 'Contacts' section.



You may be asked to select what is dividing the fields, also known as the “Delimiter.” For a CSV, it is a comma. For an Excel file, it is a Tab.

Check the preview screen at the bottom to ensure it is separately the fields correctly.

Add Contacts

Browse... Reload Delimiter: Tab Enclosure: "

S-STEM C2 Participants Contact List.txt 28 Contacts

- The maximum file size is 100mb.

Updating Existing Contacts

- Use a 'RecipientID' column containing recipient IDs and add any optional fields
- Contact data will be updated. New fields will be added as necessary.

Example Document

Verify Fields

Fields	First Contact	Next Contact	Third Contact
FirstName	[Redacted]	[Redacted]	[Redacted]
LastName	[Redacted]	[Redacted]	[Redacted]
Email	[Redacted]@mail.pima.edu	[Redacted]@mail.pima.edu	[Redacted]@mail.pima.edu

Skip this step Add Contacts

2. Create & Send Email Message

TEST COPY -- 2020-2021 S-STEM Pre-Sur... Projects Contacts Actions Library Help

Survey Actions **Distributions** Data & Analysis Reports

Pause Response Collection Compose Email

Distribution Summary

Anonymous Link

Emails

Personal Links

Social Media

Offline App

QR Code

Compose Email

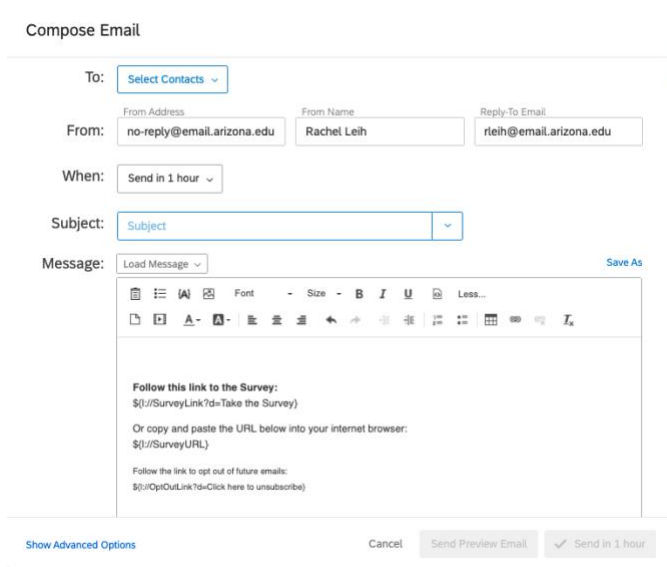
You can create the email message in 2 places – in the project itself or in your Messages Library.

We recommend creating the message in your project and saving it from there for future use.

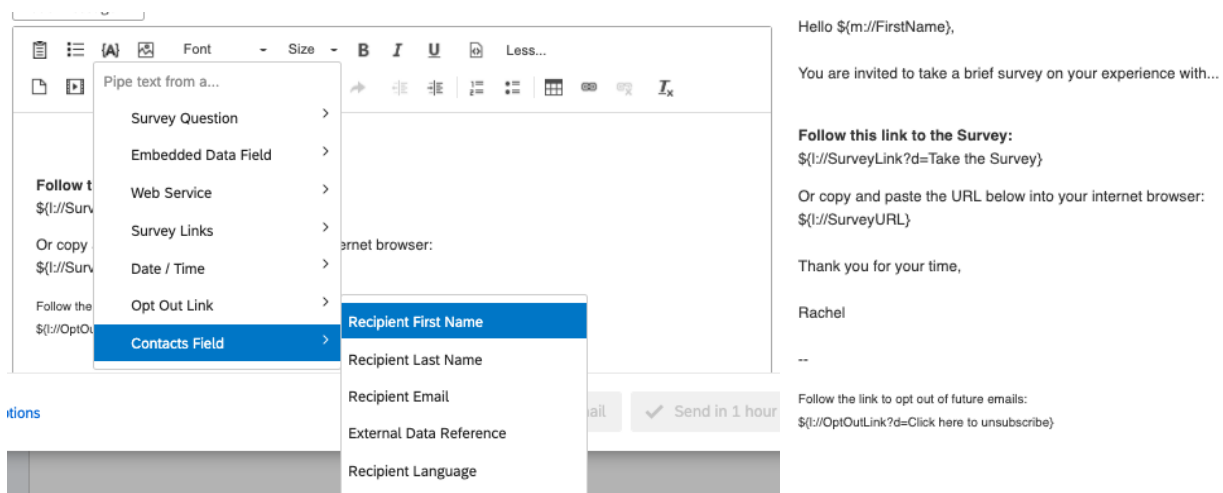
You can find the email distribution tab by navigating to **Distribution > Emails**. Once here, you'll select **'Compose Email.'**

Your email is already populated with some important information you don't want to delete – the survey link and an opt out link. This is required by Qualtrics, but you can edit the text to say things like “Cooperative Extension really values your input. If you take this survey now, we won't send you any reminders. But if you don't want to get any reminders, you can click here”

You'll type the rest of your email invitation message in the box, and can select 'Save As' (in the right corner just above the message window) to save the message to your library for future use. We suggest adding a relevant signature block here so that it looks more like a “legit” email and less like automated spam.



If you'd like to include the participant's name in the email, simply select the piped text icon **{A}** > **Contacts Field** > **Recipient First Name** and include this code where you'd like their name to be displayed (shown below). A piped name will typically appear as “\${m://FirstName}.”



Select Contacts: Here you'll choose the contact list you previously created. It will appear under a menu that pops up under "My Library."

From Name: This is the name that will show up as the 'sender' of the email and can be any name, not necessarily the creator of the survey.

Reply-to Email: This is the email address that will receive any replies to the survey invite. This does not have to be the same as the person listed under **From Name**.

For instance, you may want the From Name to be the name of the person participants have most direct contact with and recognize, but have the Reply-to Email be the person managing the survey logistics.

When: You can specify when the email will be sent, if you'd like to send it now or schedule for a specific time in the future.

Show Advanced Options: One important thing to note is that, by default, the invitation links will expire in 60 days. After this point, you'll have to create a new invitation. We often choose a date further in the future (e.g. one year from today) using the **Survey Expiration** settings under **Survey Options** instead, but you can select the option that is best for your specific needs.

Send Preview Email: Before you send out the email to your list, it can be useful to send yourself a preview email, to ensure all formatting and links work.

3. Track Progress and Send Follow-Up Emails

Once you've sent your invitation emails out, you'll be able to track your progress under the Distribution section. In the Distribution Summary, you can view your recent responses, total responses, and completion rate.

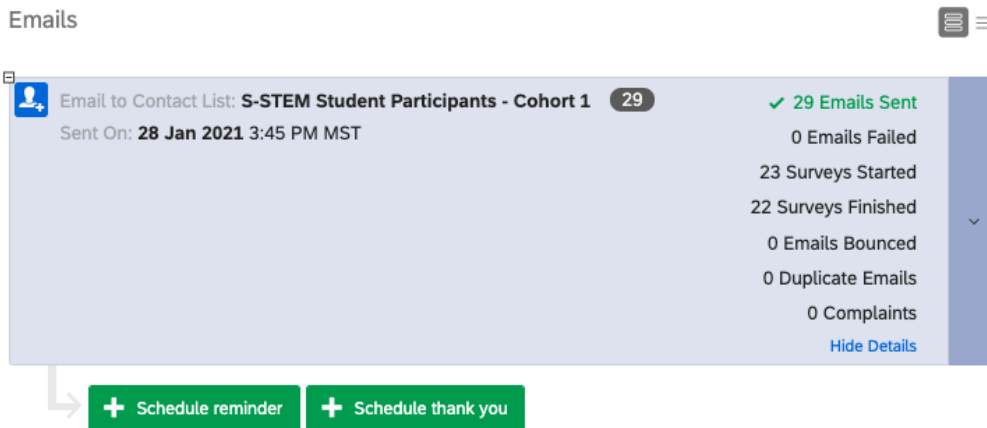
Recent Responses



All Responses

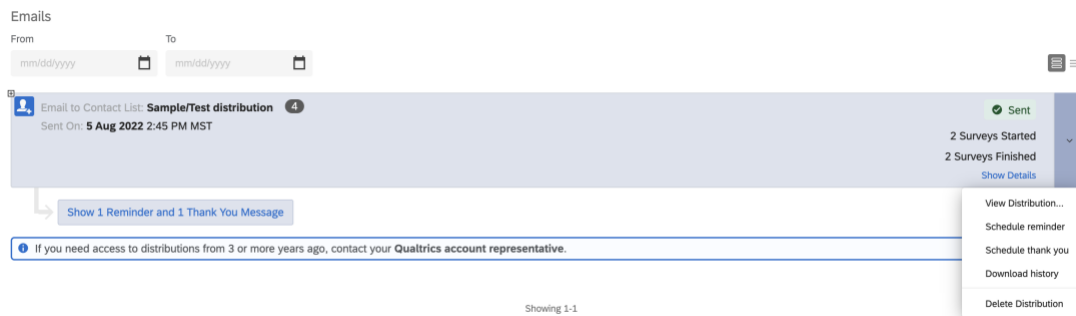
Distribution Channel	Audience Size	Surveys started	Responses	Completion Rate
Invite Over Email	29	23	22	96%

In the Email Distribution section, you can view the details of your email distribution, including how many surveys are started and finished. Here, you can also schedule reminders to unfinished respondents and thank yous to finished respondents. These both have the same interface as the original email invitation.



Showing 1-1

If you want to see who has completed the survey, you can download the distribution history. This will give you person-by-person status, along with their unique survey link in case you need it for any reason.



Showing 1-1

The spreadsheet will tell you the name, email address, survey status, unique link, and completion date, if applicable:

	A	B	C	D	E	F	G
1	Response ID	Last Name	First Name	Email	Status	End Date	Link
2	R_3JCL3ktVXCI	Two	Person	p2@arizona.edu	Finished Survey	8/5/22 14:50	https://uarizona.co1.qualtrics.com/jfe/form/SV_7ZJG1t8Z6HbEY3b?Q_DL=8uurGgRTSy1
3		One	Person	p1@arizona.edu	Email Sent		https://uarizona.co1.qualtrics.com/jfe/form/SV_7ZJG1t8Z6HbEY3b?Q_DL=8uurGgRTSy1

Schedule Reminders & Thank yous

Schedule a reminder or reminders ahead of time that will be sent to folks who haven't completed the survey (these people are automatically selected by the system) by clicking on the dropdown menu on the right-hand side. You can select a custom date and time in the dropdown menu.

Schedule a thank you that will be sent to folks who **have** completed the survey (these people are automatically selected by the system) by clicking on the dropdown menu on the right-hand side. You can select a custom date and time in the dropdown menu.

Email to Contact List: **S-STEM C2 Participants** 28
Sent On: 27 Apr 2022 1:06 PM MDT
28 Emails Sent
1 Survey Started
Show Details

To: Unfinished Respondents

From Address: no-reply@email.arizona.edu
From Name: ~~Trace Lane Ewinghill~~
Reply-To Email: ~~trace@email.arizona.edu~~

When: Custom... Apr 27, 2022 1:48 PM MDT

Subject: Pima-UAZ STEM Bridge End of Year Survey <Action Req...>

Message: Load Message

Save As

Under your original distribution, all reminders and thank yous are tracked:

Email to Contact List: **Sample/Test distribution** 4
Sent On: 5 Aug 2022 2:45 PM MST

- 4 Emails Sent
- 0 Emails Failed
- 2 Surveys Started
- 2 Surveys Finished
- 0 Emails Bounced
- 0 Duplicate Emails
- 0 Complaints

Reminder message to: **Unfinished Respondents** 2
Sent On: 5 Aug 2022 2:58 PM MST

Thank you message to: **Finished Respondents** 2
Sent On: 5 Aug 2022 2:59 PM MST

+ Schedule reminder + Schedule thank you