

School of Information Policy on Access to Qualtrics

Qualtrics Survey Software is a generalized survey service permitting the creation of survey instruments, distribution of the surveys, data storage and analysis. The University of Michigan has purchased a university-wide site license for this service and each unit within the University has its own Brand*. This policy is to inform the School of Information community of the types of accounts available under the SI Brand*, provide guidance on what account type is appropriate (depending on the user's role) and what qualifies as inappropriate use of the system as well as the consequences of misuse. This policy applies to all users of the SI Brand* in the Qualtrics Survey Software. If you sign up for an account under a different UM unit, please refer to that unit's policies.

The structure below is to ensure the software is not used for applications outside the license (i.e. for commercial startups, for companies the user is employed by, or otherwise non-SI related use), that IRB approvals are obtained when necessary, and that other relevant school guidelines are followed.

I. Access

Individuals should create **trial access** account themselves, which gives the user the ability to access all the features of the system but NOT to activate (and thus distribute) surveys. To activate the surveys, the user must apply for an upgrade to the appropriate account type (see section below regarding different account types).

Types of accounts

i. Master's Students for Class Projects

1. Students should apply for an upgrade by contacting the instructor of their class in which the project has been assigned. The instructor will give the approved list of student names to the brand administrator**. The brand administrator will then upgrade the appropriate accounts.
2. These accounts will be automatically set to expire May 1st of the same academic year. The survey data will be archived in the system, but the student will no longer have access to the system unless continuing access is requested and their instructor approves.
3. Once upgraded, you will receive a copy of this policy.

ii. Faculty/Staff/Doctoral Students

1. Faculty/Staff/Doctoral Students should apply for an upgrade by contacting the brand administrator** directly.
2. This account will not automatically expire, but will be terminated if/when the user is no longer at the School of Information. Again the data will be archived in the system unless specifically deleted.
3. You will receive a copy of this policy when upgraded and then a reminder annually after that.

*The SI Brand refers to the accounts under the SI name and under SI policies.

**SI's Brand Administrators are Becky O'Brien and Todd Raeker

II. Inappropriate Use/Abuse

a. Descriptions of Inappropriate Use/Abuse

Inappropriate Use/Abuse consists of (but is not limited to) the following:

- i. Distributing surveys which require IRB approval of Human Subjects Research without obtaining proper IRB approval. See Student Guide to Human Subjects Research (<http://www.irb.umich.edu/studentguide.pdf>) for help on deciding if your survey requires IRB approval.
- ii. Not following Human Subjects protocol for experiments under IRB approval.
- iii. Using SI Brand* account for non-SI related activities. This includes personal use or use on behalf of a company/other unit (whether for pay or not)
- iv. Inappropriate language or content in the survey itself.

b. Consequences

Inappropriate behavior/content/usage or other abuse of the SI Qualtrics Brand will lead to the following consequences:

- i. *1st incident - Warning:* A warning email will be sent to the abusing party (as well as the class instructor in the case of class project use). This email will let the user know that a violation of SI's policies has occurred and that the violating behavior must stop immediately.
- ii. *2nd incident – Removal of Access:* If there is a second violation of SI's policies, then the abusing individual's access to the Qualtrics system will be removed.

Note: If the 1st incident is determined to be gross misconduct then SI may remove access to Qualtrics at that time. The label of gross misconduct will be at the discretion of the Brand Administrators and/or other SI administrative authorities.