

Qualtrics Roles and Responsibilities

Updated as of June 2016

This document outlines how the enterprise license of Qualtrics software may be managed and organized at Ohio State. It describes the roles, responsibilities and expectations of people who interact with the Qualtrics software.

The following roles and responsibilities for Qualtrics use at Ohio State have been established and are described in this document:

- [Survey Coordinating Committee](#)
- [Division Administrators](#)
- [Group Administrators](#)
- [Individual Users](#)
- [Brand Administrators](#)

Survey Coordinating Committee

The OSU Survey Coordinating Committee (SCC) was created to reduce survey burden and improve the quality of survey information. The committee is comprised of staff from Institutional Research and Planning, Enrollment Services, Human Resources, the Center for the Study of Student Life, the Statistical Consulting Center, the Wexner Medical Center, the Alumni Association, faculty council, the university staff advisory committee (USAC) and the IRB.

The members of the SCC are in the best position to guide the responsible use and best practices for the Qualtrics software.

We suggest that SCC have the following responsibilities:

1. Approving additional Brand Administrators (see responsibilities below)
2. Providing feedback on training materials

Division Administrator(s)

Description: Ideally, each college/department/unit would have 1 – 2 administrators. The non-academic units/departments could be grouped under broader divisions depending on their needs and/or usage. This structure does not have to follow the university pattern of organization. Typically, division administrators are approved and acknowledged in their roles by their supervisors (either a dean, assistant dean, chair, director, supervisor...). Division administrator responsibilities are below.

Division Administrator Responsibilities:

- Maintain annual (or as needed) training for all the related courses and policies related to data access and research with human subjects.
- Create group administrators.
- Create and modify intra division groups.
- Create intra division groups administrators.

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- Maintain minimum permission needed for each group administrator.
- Maintain the individual accounts/division membership, in the case that the division does not have groups.
- Serve as first point of contact for group users if there are any; if not, first point of contact for individual users.
- Review/maintain/terminate users within the division/group based on academic progress and/or affiliation with the university.
- Liaison between group administrators and brand administrators.
- Respond promptly to brand administrators or individual users' requests.
- Direct group and/or individual users to proper practice, research and training resources.
- Assist in the IRB or SCC approval process.
- Maintain IRB training certificate and other required trainings.
- Comply with Qualtrics Terms of Use and OSU guidelines and policies related to research.
- Distribute the codes that grant access to User Types.
- Consent to have your name posted to public website as contact for your division (or a surrogate general email and phone number for all requests for your division)
- Adhere to all university policies concerning protection of institutional data and intellectual property.
- Attend periodic Division Administrator sessions facilitated by Brand Administrators.

Group Administrators (Optional)

Description: This type of administrator could be useful for managing centers, units, and smaller departments.

Group Administrator Responsibilities:

- Maintain annual (or as needed) training for all the related courses and policies related to data access and research with human subjects.
- Assist the division administrators by maintaining individual user accounts.
- Review/maintain/terminate users within the group based on academic progress and/or affiliation with the university.
- Serve as first point of contact for individual users.
- Adhere to all university policies concerning protection of institutional data and intellectual property.

Individual Users

Description: Any student, faculty, researcher, or staff member associated with The Ohio State University may have a Qualtrics account, subject to Qualtrics Terms of Use. Typically, every user is associated with a division.

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Individual User Responsibilities:

- Maintain annual (or as needed) training for all the related courses and policies related to data access and research with human subjects.
- Respond promptly to brand administrators or division administrators.
- Adhere to all university policies concerning protection of institutional data and intellectual property.
- Maintain IRB training certificate and other required trainings as required.

Benefits of being affiliated with a division and/or group:

- Endorsement and branding.
- Collaboration (sharing of questions, survey, skins, user panels, etc.)
- Guidelines and best practices for robust data collection, depending on the division's and/or group's resources/practices.

Brand Administrators

Description: Oversees the technical, licensing, vendor relationship and general use of Qualtrics at the university. There are currently four out of five Brand Administrators at the university level from the following groups:

- **OCIO:** to quickly respond to technical issues with the Qualtrics service
- **Institutional Research and Planning (IRP):** this office coordinates several large-scale surveys to faculty, staff and students.
- **Center for the Study of Student Life:** this office coordinates several large-scale surveys to students
- **Purchasing:** liaise with Qualtrics on terms of agreement, contracts for additional services, annual maintenance fees
- **[Pending] Wexner Medical Center:** there are different rules that apply to surveys conducted for medical research.

Brand Administrator Responsibilities:

- Maintain up to date roster of division administrators and confirm completion of IRB training for each division administrator.
- Comply with Qualtrics Terms of Use and OSU guidelines and policies related to research including but not limited to:
 - Obtain IRB and other necessary certification within 30 days of becoming a Brand Administrator.
 - Adhere to all university policies concerning protection of institutional data and intellectual property.
- Act as primary contact with Qualtrics account representatives. This may involve inviting an account representative to attend regular Brand Administrator meetings to:

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- share concerns about what works and does not work for Ohio State,
 - advocate for changes and share suggestions,
 - request clarifications on policies.
- Create onboarding materials for new division administrators
- Respond promptly to division administrators or individual user's requests.
- Create division administrators.
- Create and modify cross division groups.
- Create cross division group administrators.
- Direct individual users to proper research and training resources.
- Manage the request process used by college/units/departments to create/change division administrators.
- In cooperation with each division create user types and templates that can be entered to grant users more permissions.
- Maintain the list of user types and remove user types that are no longer in use.
- Liaison between division administrators and Qualtrics by updating the necessary IP addresses as needed
- Direct users to their division administrators for IRB or SCC approval process.
- Maintain knowledge base articles about the service.
- Collaborate with the Other Brand Administrators to hold quarterly Qualtrics Administrators Working Group sessions.
- Participate in biannual Brand Administrator meetings.
- Communicate outages of the service to administrators and end users when notified of outages by vendor. Outage and planned maintenance communication will be provided through OCIO's System Status page.

End of document.