

IRB Guidance for Online Survey Research

Survey Software: All UM faculty, staff, and students are strongly encouraged to use our secure and robust UM-supported Qualtrics software, and it's free! Go to umt.qualtrics.com

- A valid University of Montana NetID is required to create and administer your surveys. First-time users will be prompted to enter their first name, last name, and university email.

Basic items to include with your application:

1. **IRB Application** – Please use the latest version of the form, which can be downloaded directly from the [IRB forms page](#). *Tip: Please do not copy somebody else's old application.*
2. **Recruitment materials** – Provide a copy of all recruitment materials, which may include emails, letters, flyers, posters, social media scripts, or any other script (message) that you intend to use to recruit your potential subjects. You may provide QR codes or URLs on your materials, but you must also provide an actual copy of the content of where these link.
3. **Online Confidentiality Form** – Please be sure to attach this simple, [one page form](#). It informs you about the difference between “confidential” and “anonymous.” And it lets us know what software you're using.
4. **Copy of the actual Survey(s)** – Attach a PDF copy of the full and complete survey(s).
 - In Qualtrics, go to your survey. Click on Tools, and in the drop-down menu, scroll down to Import/Export. Mouse-over and select Print survey. Print it as an Adobe PDF.

Survey Consent Language: Item #1 of any survey should consist of a consent form to participate in the research. You may use an abbreviated version of the written consent form or use the suggested online consent form ([see the ICF template](#)). This first item should end with the options:

- (1) I agree to participate in this research, [*allow to continue*] or
- (2) I do not wish to participate in this research. [*send to the end page and thank them for their time*]

This first item on the survey needs to be “required” to be answered, as it is the consent to participate in research. However, please note that none of the following items on the survey may be “required” -- all subsequent items must be voluntary to answer.

Please check your spelling, grammar, and page layout before you submit your application. The IRB needs to see final versions of documents so that they may be approved.

Anonymity: For a survey to be considered “anonymous,” you may not collect any IP addresses or email addresses. You need to set these parameters when you design your survey. An additional note about demographic information: Caution needs to be taken so that certain demographic information cannot potentially identify a subject, especially in a state like Montana where we have many small, rural communities.

How to set up an “anonymous” survey but allow participants to be contacted afterwards:

If you want your survey data to be “anonymous” but then allow the subjects to do something additional after completing the survey (such as enter a drawing, be sent a gift card, receive the results of your study, or be contacted for future research opportunities), then you can simply set up a second and separate survey to collect their contact information.

Method:

1. Create a 2nd, brand new survey in Qualtrics. This will probably only consist of one item. After writing the title of your research (or some kind of header), your text in this item should read something like, “If you would like to...XXX, then please enter your email address below. Your contact information will never be linked to the survey data.” Save. Copy the URL for this 2nd survey to your clipboard (or wherever you want to save it).
2. Return to your 1st survey. For the very last item (or on the end page), state something like, “If you would like to be entered into a drawing... or receive the aggregated results from this study, then please click on the link below. You will be directed to a completely separate location where you can enter your contact information.” **[then paste in the link to the 2nd survey.]** Done. *Make sure you test out the functionality before you submit your IRB application and again before your survey goes live!*

Amazon M-Turk Surveys: Please note that the IRB considers Amazon Mechanical Turk workers as identifiable. For this reason, please state throughout the application materials that the subject’s identity and the data collected will be “confidential” and not “anonymous.”

Online Surveys with Minors

Federal regulations and University policy requires that *written* parental permission and minor assent must be obtained for subjects 17 and younger to participate in human subjects research. For this reason, online survey research with minors is generally not allowed. Certain exceptions may apply on a per-case basis; contact the IRB office if you need to discuss your research. Note that different universities have different policies, and what may be allowed at one may not be allowed at another. [This is the policy at the University of Montana.](#)