

Yale

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**MEDICAL
LIBRARY**

CWML Statistics in Qualtrics

Instructions & FAQs

Basic Instructions

1. Go to: https://yalesurvey.ca1.qualtrics.com/jfe/form/SV_6hCqad76NI3Z5hs
 - a. Or:
 - i. Visit [Staff Links](#) and use the link there.
 - ii. Alternatively, create your own bookmark for the link above.
 - iii. Short link: <https://bit.ly/cwml-stats-qualtrics>
2. Complete the form for each relevant activity/interaction, following the prompts and using the [glossary](#) and [FAQs](#) from [prior documentation](#) if needed.

Further Documentation

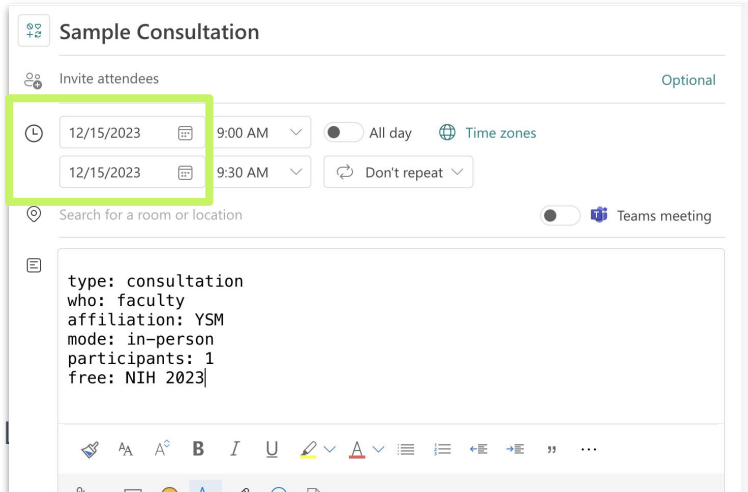
1. On pages 5-13, view side-by-side instructions showing you what the process looked like before in Outlook Stats, compared to what it looks like now in Qualtrics.
2. On pages 15-18, view FAQs.
3. See additional in-depth documentation on the Staff Links page.

Side-by-Side Instructions

Comparing
Outlook Stats to
Qualtrics Stats

Side-by-Side Instructions: Date

In the past, date was automatically captured by Outlook Stats. *Unfortunately this will no longer be the case.*



The screenshot shows the Outlook meeting creation interface for a meeting titled "Sample Consultation". The "Invite attendees" section is highlighted with a green box. It contains two rows of date and time selection. The first row shows "12/15/2023" and "9:00 AM" with a calendar icon and a dropdown arrow. The second row shows "12/15/2023" and "9:30 AM" with a calendar icon, a dropdown arrow, and a "Don't repeat" dropdown menu. Below this, there are options for "Search for a room or location" and "Teams meeting". The meeting details section below shows:

```
type: consultation
who: faculty
affiliation: YSM
mode: in-person
participants: 1
free: NIH 2023
```

In Qualtrics, if you complete your stats the day the interaction occurred, select Yes and date will be automatically recorded.

Are you completing this survey on the date the interaction occurred?

If Yes, today's date will be recorded as the date of the interaction.

If No, you'll be asked to enter a date (the default for this field is yesterday's date).

Yes

No

Side-by-Side Instructions: Date *(continued)*

If you don't complete your stats on the day the interaction occurred, select **No**, then enter date. By default, this date is yesterday.

Enter date interaction occurred

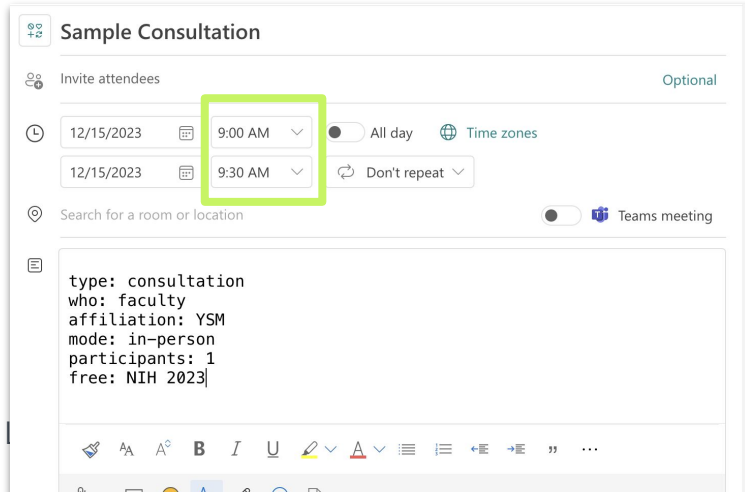
Enter using MM/DD/YYYY format. For example: **01/03/24**

(Default is yesterday's date.)

12/15/2023

Side-by-Side Instructions: Duration

In the past, duration was automatically captured by Outlook Stats. *Unfortunately this will no longer be the case.*



A screenshot of the Outlook meeting creation interface. The title is "Sample Consultation". Below the title, there are options to "Invite attendees" (Optional), "All day", and "Time zones". The meeting start time is set to "12/15/2023 9:00 AM" and the end time is "12/15/2023 9:30 AM". The "Don't repeat" option is selected. There is a "Search for a room or location" field and a "Teams meeting" toggle. The meeting details are listed as follows:

```
type: consultation
who: faculty
affiliation: YSM
mode: in-person
participants: 1
free: NIH 2023
```

In Qualtrics, enter how long the interaction was in minutes. The minimum duration is 5 minutes.

How long was this interaction (in minutes)?

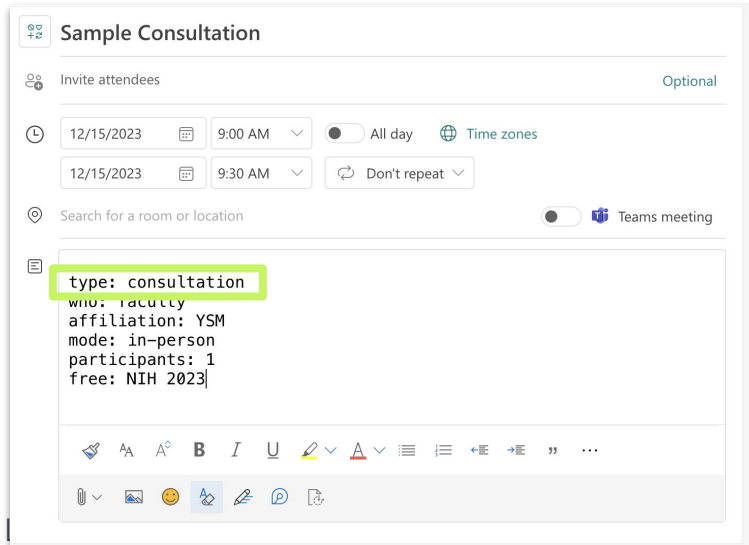
List time in minutes, as a whole number. For example: **30**

(The minimum amount of time that can be recorded is 5 minutes.)

45

Side-by-Side Instructions: Type

Formerly, manual entry field with 3 choices.



Sample Consultation

Invite attendees Optional

12/15/2023 9:00 AM All day Time zones

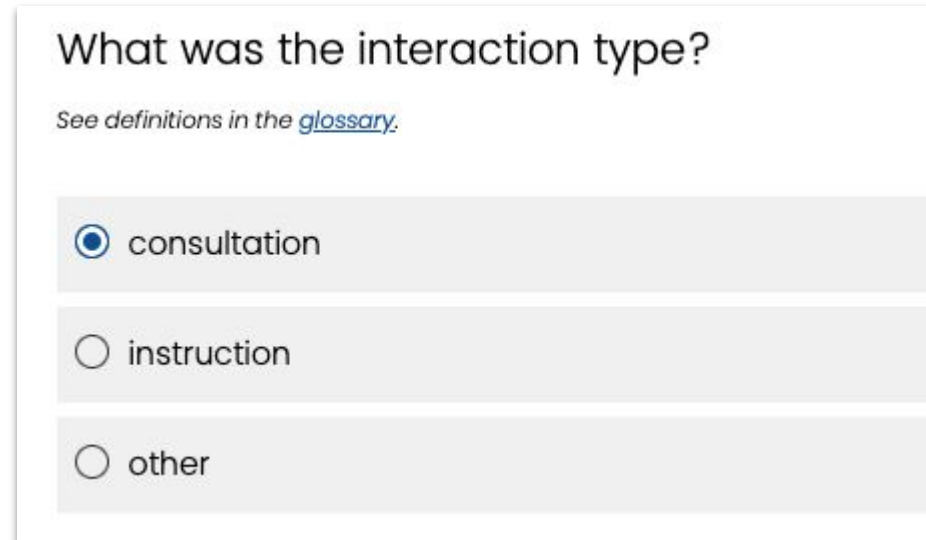
12/15/2023 9:30 AM Don't repeat

Search for a room or location Teams meeting

type: consultation
who: faculty
affiliation: YSM
mode: in-person
participants: 1
free: NIH 2023

Rich text editor toolbar: Bold, Italic, Underline, Text color, Background color, Bulleted list, Numbered list, Undo, Redo, Quote, etc.

In Qualtrics, select one type from list.



What was the interaction type?

See definitions in the [glossary](#).

consultation

instruction

other

Side-by-Side Instructions: Who

Formerly, manual entry field with 12 choices.

In Qualtrics, select role(s) from list.

Sample Consultation

Invite attendees Optional

12/15/2023 9:00 AM All day Time zones

12/15/2023 9:30 AM Don't repeat

Search for a room or location Teams meeting

```
type: consultation
who: faculty, researcher
affiliation: YSN
mode: in-person
participants: 2
free: finding data
```

Last Updated: 01/03/2024

Who was the interaction with?

Select all that apply.

- faculty
- student
- post-doc
- researcher
- staff
- resident
- fellow
- clinician
- nurse
- alumni
- other
- unknown

Side-by-Side Instructions: Affiliation

Formerly, manual entry field with 11 choices.

In Qualtrics, select affiliation(s) from list.

Sample Consultation

Invite attendees Optional

12/15/2023 9:00 AM All day Time zones

12/15/2023 9:30 AM Don't repeat

Search for a room or location Teams meeting

```
type: consultation
who: faculty_researcher
affiliation: YSN
mode: in-person
participants: 2
free: finding data
```

Last Updated: 01/03/2024

What affiliations were involved in this interaction?

- YSM
- YNHH
- YSN
- YSPH
- PA online
- PA onsite
- Yale Grad
- Yale College
- Yale other
- external
- unknown

Side-by-Side Instructions: Mode

Formerly, this field defaulted to Zoom. If not Zoom, manual entry from 6 choices.

In Qualtrics, Zoom is also the default. Select another option to change.

Sample Consultation

Invite attendees Optional

12/15/2023 9:00 AM All day Time zones

12/15/2023 9:30 AM Don't repeat

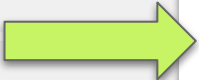
Search for a room or location Teams meeting

```
type: consultation
who: faculty, researcher
affiliation: YSN
mode: in-person
participants: 2
free: finding data
```

Last Updated: 01/03/2024

In what mode did this interaction occur?

- in-person
- Zoom
- phone
- email
- chat
- other



- in-person
- Zoom
- phone
- email
- chat
- other

Side-by-Side Instructions: Participants

Formerly, this field defaulted to 1 or could be entered manually.

Sample Consultation

Invite attendees Optional

12/15/2023 9:00 AM All day Time zones

12/15/2023 9:30 AM Don't repeat

Search for a room or location Teams meeting

```
type: consultation
who: faculty, researcher
affiliation: YSN
mode: in-person
participants: 2
free: finding data
```

Last Updated: 01/03/2024

In Qualtrics, 1 is also the default. Enter another number to change.

How many participants were involved in this interaction?

Please list the number of participants as a whole number. (The minimum number of participants is 0; the default number, already entered below, is 1)

For example: 12

1

How many participants were involved in this interaction?

Please list the number of participants as a whole number. (The minimum number of participants is 0; the default number, already entered below, is 1)

For example: 12

2

Side-by-Side Instructions: Free Tags

Formerly, this field could be entered manually.

List your custom free tags, separated by commas.

Sample Consultation

Invite attendees Optional

12/15/2023 9:00 AM All day Time zones

12/15/2023 9:30 AM Don't repeat

Search for a room or location Teams meeting

```
type: consultation
who: faculty, researcher
affiliation: YSN
mode: in-person
participants: 2
free: finding data
```

If you'd like to add free tags to this interaction, list them below:

*Please separate tag concepts by commas. For example: **systematic review, COVID-19***

finding data

Last Updated: 01/03/2024

FAQs

Existing FAQs

All the existing FAQs still apply. Read on for additional ones.

What if I need to change my answers?

- The new Qualtrics form cannot be edited by you, as you could your Outlook Stats before. Because of this, we ask you to enter your stats with attention to detail and accuracy.
- However, if you really need to change something, please contact Kaitlin and Lei.

Is this Qualtrics form collecting personal data?

- The Qualtrics feature that collects IP addresses and location information is turned off.
- Qualtrics metadata we are collecting on this form:
 - Date your response started, ended, and was recorded
 - How long it took you to complete the form
 - Progress level of form (e.g., only 50% complete)
- Via Yale CAS, we are also collecting your NetID.

How do I use free tags?

- See [previous documentation](#) for information on how to use free tags, which work nearly identically as before.