# Online recruitment and online surveys

## Psychology programmes (undergraduate and postgraduate)

## Advice for students preparing research proposals and applications for research ethics approval

# ONLINE RECRUITMENT

There are often specific issues relating to the suitability of an online approach to participant recruitment and to confidentiality or anonymity that need to be considered when recruiting online.

**Why does online recruitment and data collection require special consideration?**

Once you have posted something online, you have little control over where it goes or how long it might circulate. Unlike a poster which gets taken down quite quickly, the messages you upload online are likely to remain in some format long after you graduate. Please bear this in mind when preparing online recruitment materials and ensure that all documents are checked carefully by you and by your supervisor – they could be 'out there' as an advertisement for you and for the university for some time!

**What should recruitment materials include?**

When recruiting people (including asking them to forward the email to other people) make sure the text you send out includes:

- the title of the research
- the inclusion/exclusion criteria
- how long it [the experiment / questionnaire] will take
- the fact that the research is part of your degree studies
- that it has been approved by the Psychology research ethics committee
- your own name AND your supervisor's name, work telephone number and email address

**What do I need to explain in my research ethics application if I intend to recruit via social media?**

You will need to specify <u>exactly which social media</u> you will use **in your E2 form**. You will also need to state whether or not the site is moderated. If a site is moderated it is likely to have a 'gatekeeper' (i.e. someone who is responsible for XXX) and consent must be obtained from him / her before any attempt to recruit is made.

**When is Gatekeeper permission NOT needed (for recruiting via social media or other internet site) ?**

When the space is 'public space'.

Twitter and Facebook personal accounts are examples of ‘public space’ and are not moderated. The term ‘public space’ refers here to areas of a website where there is an expectation, determined by privacy settings and or Terms of Use, that data will be publicly accessible.

Most social media environments fall within this definition (i.e. those where a username may be required, but access is automatically granted and where the forum is not subject to moderation where the moderator can effectively limit or control access). Social media of this kind can be used to recruit participants without ‘gatekeeper consent’.

**When is Gatekeeper permission required (for recruiting via social media or other internet site)?**

When the space is ‘private space’.

A private space is one that is available only to other space members in a location where users would expect their comments to be private. Although the process for gaining access may be nearly instantaneous, these spaces can be accessed and viewed only after the user has obtained a login and/or password designed to restrict all forms of access. Examples include many private forums, communities and chatrooms, instant messaging systems and forums/groups where an administrator or moderator controls admittance and where content cannot be accessed or viewed by the general public.

When a website is moderated.

If a website is moderated (such as a blog, self-help group or discussion forum) you need to seek and obtain explicit permission to recruit via the website. Approval should be sought from administrators before posting to Facebook groups or Facebook "pages" (these are different from personal account pages). This should be obtained from the manager/moderator in the same way that you would obtain it for a local company (i.e. by sending a ‘gatekeeper letter’ explaining the research, what help you want and including the full questionnaire and participant information).

**Do I have to submit a draft gatekeeper letter for approval before I send it?**

Yes.

Draft ‘gatekeeper letters’ (the email text) to third party websites (e.g., discussion forums with a moderator) must be included with your application for research ethics approval. Explicit consent will be required from the gatekeeper to be sent to the Research Ethics Officer. If moderated forums are used and gatekeeper consent is not submitted, any conditional ethical approval will be withdrawn.

**Where do I send the gatekeeper permission when I receive it?**

Formal consent from the website manager/moderator must be submitted to the Research Ethics Officer (Morag MacLean) before you begin to collect data. Without this gatekeeper consent, ethical approval will be null and void and your work will **not** be assessed.

**What needs to be included about anonymity/confidentiality in the participant information and the application form (E2) for all online recruitment and research?**

The usual considerations apply as for any form of research but in addition to the usual considerations for a paper questionnaire, you will need to be clear about the use of IP addresses.

**What is an IP address?**

An IP address is a unique identifier that is assigned to every device connected to the Internet; in most cases, individual computers are assigned a unique IP address, while in some cases the address is assigned to a larger node or Internet gateway for a collection of computers. Nearly all websites and Internet service providers store activity logs that link activity with IP address, in many cases, eventually to specific computers or users. Most survey instruments have collection of IP addresses as the default. If you intend your online questionnaire to be anonymous, you must ensure that no IP addresses are stored and say so in the participant information and application form.

## ONLINE QUESTIONNAIRES

**Are ethical considerations for online questionnaires different from those for hard copy questionnaires?**

Online questionnaires are governed by the same general considerations as paper versions but some aspects of them require more thought and you need to provide some additional information to the Research Ethics Committee.

**What needs to be included in the E2?**

State which questionnaire tool you will use (Qualtrics is currently available within the Department and is the one you should use).

Ensure any questionnaire tool you use is switched to 'do not collect IP addresses' in your online survey. For Qualtrics select 'Anonymize Response' from the Survey Options (see Wakefield Morys-Carter for help). Confirm that you will do this in the E2 and in the participant information.

**Participant information**

1. **Advertising text/images**

It is understandable that initial requests for research help may be character limited (e.g. Twitter has a limit of 140 characters). For this reason, any long and short text requests for help should be submitted for approval. Any short text requests for help should link to a page giving a long-text request for help (in keeping with the wording / content used in the participant information sheet). These should include your name and email address, and if possible, a statement that the research has been approved by the Psychology Research Ethics Committee at Oxford Brookes University.

### 2. Landing Page

This should be the full participant information sheet, but if it is not, it needs to be short. It is up to you and your supervisor to decide if you need to have a short lading page that gives a brief description of the research and then then leads to a full participant information sheet or whether your email/social media invitation is clear enough that you can use the participant information as the landing page. NB: You will need to describe the recruitment process from the initial contact to the submission of the questionnaire in detail in your E2.

### 3. Full participant information (either as the 'landing page' or reached from the 'landing page')

This should follow the guidelines for a participant information sheet with all appropriate headings. Follow the guidelines on the Psychology resources page (Research Ethics section). It will need to make any inclusion/exclusion criteria clear, and should thank anyone not meeting these criteria for their interest before stating that there is no need for them to continue.

Your supervisor's name and work contact details should be hyperlinked in the participant information as could the contact details for the Research Ethics Officer.

State when the online questionnaire will close and when all data will be deleted from the survey site. This information should also be included in the E2.

**Consent**

While it is usually acceptable for the submission of the questionnaire responses to be taken as consent, the Internet is notoriously porous. As a result, you might wish to discuss with your supervisor whether the following is included before the participant can access the questionnaire.

> For the purposes of carrying out this Survey, the University uses the survey tools provided by Qualtrics with whom the University's Faculty of Health and Life Sciences holds an agreement. There is always a certain element of risk of data loss when data is collected and processed in an internet environment. This risk cannot be eliminated entirely and participants consenting to take part in the survey need to be aware of this risk. However, personal data will be minimised to the extent possible for the survey and the University believes that Qualtrics offers sufficient guarantees to keep the data secure while it is being processed. These security obligations are set out in the agreement between Qualtrics and the University.
>
> Further information about Qualtrics can be found on the following web site: http://qualtrics.com/
>
> [] I consent to participate in this survey

To add this consent question in Qualtrics, change the item type of a new question to 'Replace from Library – Question Library' and then look for the question in Oxford Brookes University Faculty of Health and Life Sciences – Question Library – Ethics – Consent Question.

The use of other wording for asking for participants to signal consent should be clearly justified in the E2.

**Summary of findings**

A summary of the findings (approved by the supervisor) should be available to participants if they wish it and also sent to third party (moderated) websites who offer help with recruitment.

You must specify how and when the summary will be made available to participants in the participant information and in the E2. If participants are informed that they can email the researcher if they wish a summary of the research findings, the email addresses must be stored only until the point at which a summary approved by the supervisor can be sent, after which they must be deleted and this should be made clear in the participant information. A website gets around this problem as long as you set it up in advance and put a link to it into the participant information.

**Piloting**

All online questionnaires (and participant information) must be piloted before going live. A 'preview' link to the questionnaire should be included in the E2 and sent by email to Keron Harris so that your full questionnaire can be reviewed. Do not 'activate' the questionnaire until you receive full ethical approval.

**The questionnaire**

*Avoid forcing respondents to answer questions*.

> In a paper questionnaire the respondent is free to skip any questions they please, no matter what instructions you give them. Questionnaire software gives you the capability to require answers – i.e. you have to answer the current question to get to the next one. It is NOT a good idea to do this. Only make a question compulsory if it is one without which the entire questionnaire is valueless. (Making all questions in your questionnaire can often prove irritating and respondents may choose to withdraw from the study if they are forced to answer to questions. Please take this into account when designing your online questionnaire. You may be able to handle missing data spread throughout the dataset if you have an appropriate sized sample.

*Include a progress bar at the bottom of each page*

*Include a clear 'submit' button so that participants know when their responses will be submitted.*

This allows them to simply close the browser and quite without saving their responses. This means of withdrawing should be mentioned in the Participant information.

*Decide if you need a debrief page and if so, where it should be.*

Not all online (or paper) questionnaires need a debrief. In general, a debrief is needed if you withheld information from the participants or actively deceived them (e.g. by giving them an untrue 'cover story').

In some cases the exact focus of the research may not be made clear in the participant information because you do not want to bias your participants' responses (withholding information). If this is the case, you can say so in the participant information and then provide a debrief which explains the focus of the study more clearly.

Support information (e.g. reassurance and/or links to other organisations or advice on whom to contact for help) is only needed if the research touches on sensitive issues. Make your decision about whether or not you need to add this kind of information in consultation with your supervisor and with the most vulnerable potential participants in mind.

If a debrief is necessary, think about whether or not it should be accessible to participants who choose not to submit their responses.

*Remind participants how and when to get hold of a summary of the results*

*Do not forget to thank your participants for their time.*

## *Using Qualtrics for face-to-face testing or online experiments*

***Can I use Qualtrics to set up an experiment?***

*It is possible to use Qualtrics to test participants in the lab (for example, setting up an experiment in Qual*trics). Please consult your supervisor to find out if Qualtrics is suitable or if it would be better to use Psychopy.

**What are the differences between using Qualtrics for an experiment for face-to-face testing and distance, online testing?**

*Face-to-face testing*

When you choose to use Qualtrics to set-up your experiment it is good practice to ensure that the potential participants reads the participant information before they arrange to visit the lab. The participant information sheet should also be given as a hard copy and reviewed by the participant immediately before data collections begins and does not need to be included in Qualtrics. Consent forms should be signed instead of using a consent button in Qualtrics. Your E2 should explain how you will debrief (if a debrief is necessary, see above). For face to face testing, if a debrief is required, it is usually better to be verbal and accompanied by a hard copy for the participant to take away.

Most studies do not need debriefs as the relevant information is included in the participant information.

*Online (distance) testing*

If Qualtrics is used for an experiment administered at a distance as well as online, in other words when you will not meet the participant, you should ensure that the participant information and consent paragraph are on the opening pages.

**Does my Qualtrics questionnaire/experiment need to have been finalised before I apply for research ethics approval?**

*For online questionnaires*

If you are using Qualtrics to collect data via online questionnaire, you MUST finalise your Qualtrics questionnaire before you apply for research ethics approval. It is only possible to assess the participants' experience by working through the finished questionnaire. You must provide the link to the preview version by email to Keron Harris (keron.harris@brookes.ac.uk), the Psychology Administrator at the same time as you submit the hard copy of the research ethics application.

*For online experiments (in use for face-to-face testing)*

We do not usually ask to see MatLab or PschoPy experiments as long as we can review the stimuli and how the experiment is to be presented (the research experience for the participants). Some students use Qualtrics as an alternative to PsychoPy.

If you are using Qualtrics in this way (to run a study where you are going to be present during data collection and that is not a questionnaire study), you do not need to finalise your Qualtrics program before you apply for research ethics approval as long as you explain the way the data will be collected in your application for approval and attach all recruitment materials (adverts, recruitment texts, participant information etc). Please note that if the materials are sensitive or your description of the way the data are to be collected in Qualtrics is not clear, you might be asked to submit the finalise Qualtrics for review before you are given full approval.

Morag MacLean
Psychology Research Ethics Officer