Tool 4.5: Guidelines for Designing Surveys in SurveyMonkey to Match Paper Surveys

Why is this tool useful?

When we create databases on SurveyMonkey to record paper survey data, it is helpful to have the database match the paper surveys (ie. Lay out the questions in SurveyMonkey exactly as they appear on your paper survey), so that data is recorded in a systematic fashion. This way, when staff or volunteers are entering data (see Tool 4.4), every survey answer on the paper survey has a field to record data on the matching electronic version. Below are some tips to follow when creating your online database to match your paper surveys. See Tools 4.1 and 4.2 for more information on SurveyMonkey.

Numbering questions

- **It is usually a good practice to turn off automatic numbering in SurveyMonkey.** Our paper surveys often have items that need to be entered into SurveyMonkey but are *not* numbered survey questions (such as the surveyor name, date, and survey question) if these questions are automatically assigned a question number by SurveyMonkey, the remaining questions will not match up.
- **Instead, you should write in the question number in the question text itself**.
    - Because this is not automated, be sure to double check your work!

Making questions required

- There are some items on the paper survey that you want to ensure are entered into the digital database. You should set these questions to "required." Typical required questions are:
    - **Survey number.** Assigning this as required ensures that the person entering the data can't proceed without writing down their survey number.
        - You may also consider writing in a reminder to enter the survey number on the paper survey as well.
    - **Surveyor name**.
        - This may have accidentally been left blank on a paper survey, but you want to know if this is the case (and be sure the person entering the data doesn't accidentally skip the question.) You can revise the prompt that SurveyMonkey gives if the question is blank to read *"If this question was left blank on your survey, write in "None Specified."*
    - **Survey location.**
        - Again, you can revise the prompt that SurveyMonkey gives if the question is blank to read *"If this question was left blank on your survey, write in "None Specified."*
- **Required questions display with an asterisk next to them,** making it easy to check your work at a glance.

Designing and ordering answer options

- **Ensure you are selecting "check one" or "check all" (multiple choice) as appropriate**. In some cases, the research team may decide to make a question "check all" in the SurveyMonkey, even if it is "check only one" on the paper survey, because they do not want to lose data.
  - Multiple choice questions have answer options that display as squares, and "check only one" display as circles—this makes it easy to check your work at a glance.
- **For questions that have answer ranges in multiple columns—be sure the order they display in SurveyMonkey will match the order of your paper survey.** SurveyMonkey is set up to have answer options appear down one row and down another, which you should keep in mind for your paper survey (particularly questions such as age or income level, which have an order to the answer options):

A	D
B	E
C	F

- **It is a good practice to set these questions up in SurveyMonkey before finalizing on your paper survey**, to ensure your paper survey design can be translated into SurveyMonkey.

Dealing with write-ins

- **For questions with a single write-in option among the answer options, the write-in should be the last answer option, whenever possible**, to be compatible with SurveyMonkey's "other" response:
  - ☐ **A**
  - ☐ **B**
  - ☐ **C**
  - ☐ **D (write in):_____**

- **When adding an "other" response option in SurveyMonkey, be sure to select "display as answer choice".** This will ensure that your "other" response corresponds to an answer option check box (not just a comment field).
- **Be sure to label your write in question appropriately:**
  - Revise the label to match the question on your survey (for example *"Other type of insurance")*:
- **Update the error message that displays when an "other" write in answer is left blank**.
  - SurveyMonkey will automatically display an error message if someone checks "other" but does not write in an answer.
  - It is a good practice to update this message to include instructions for people doing data entry. For example: "*You must enter a response. If nothing was written in on your survey, write "None Specified."*

- **For multiple choice questions with *multiple* write in options, you may need to create a secondary question in SurveyMonkey, providing text-box(es) for those write ins,** because SurveyMonkey does not allow you to include multiple "other" fields in your question.

If your survey question looks like this:

- ☐ **A**
- ☐ **B**
- ☐ **C (write in): _____**
- ☐ **D (write in): _____**
- ☐ **E: (write in)_____**

You will need one SurveyMonkey question that just allows for checking off items A through E:

- ☐ A
- ☐ B
- ☐ C
- ☐ D
- ☐ E

And then a separate question to allow for write ins:

If respondent wrote something for answer option C, enter here:_____

If respondent wrote something for a answer option D, enter here:_____

If respondent wrote something for answer option E, enter here: _____

If you have a single write in option but it appears in the middle of the answer options, you may need to employ the same technique of having a second SurveyMonkey question for that write in.

- **For questions that ask for numbers to be written in, consider restricting the SurveyMonkey question to be numerical data only.** This will ensure that the person entering data enters numbers only, rather than writing in words (like "*Three and a half")*.
    - o Depending on the form of your question the method for doing this swill be different. If adding a text box, you can (under "Options") select "Validate Answer for a Specific Format" and selecting "Answer should be…[a whole number] or [a decimal number]."
    - o Be sure you set the range for your numbers appropriately. SurveyMonkey's default is to allow numbers between 1 and 100, but if people are going to be entering larger numbers you will need to adjust this.