

Primary Healthcare Performance Management Hard Skills Training Guide on Using Qualtrics for Data Collection

JLN PHCPM Learning Collaborative

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LEARNING
NETWORK**
For Universal Health Coverage



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For questions or inquiries about this tool or other JLN activities, please contact JLN at JLN@amref.org or the Aceso Global Primary Healthcare Performance Management Technical Facilitators at jlaforgia@acesoglobal.org or jroland@acesoglobal.org

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Preface

The Joint Learning Network for Universal Health Coverage (JLN) is an innovative global community of practitioners and policymakers from more than 44 countries who engage in practitioner-to-practitioner learning to co-develop and implement solutions to common challenges related to universal health coverage (UHC). Embracing a country-led, country-owned model, the JLN provides a unique implementation-focused platform for experience-based knowledge exchange and the co-development of practical resources to support health financing and service delivery reforms. These solutions equip countries with the 'how-to's of designing and implementing efficient, equitable, and sustainable healthcare systems

This guide was made to familiarize users with Qualtrics, an online survey platform widely used for collecting, analyzing, and reporting data. This guide provides step-by-step instructions on how to use Qualtrics to design and administer surveys for the training program, including the Primary Healthcare Performance Management Hard Skills Training Hard Skills Assessment Tool and course evaluation instruments. It explains how to set up and distribute surveys, collect responses from participants, analyze results, generate visual summaries, and produce reports.



What is Qualtrics?



Qualtrics is a:

- A cloud-based platform designed for collecting and analyzing data.
- Widely used for surveys, feedback, and experience management.

Why Use Qualtrics for Data Collection?

- User-Friendly : Easy to design, distribute, and manage surveys.
- Customizable: Tailored questions and branding to fit your needs.
- Collaboration Tools: Share and collaborate with others
- Includes Feedback for Improvement: Includes recommendations to improve survey responses



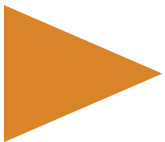
What we've done so far



- Based on our work in Nairobi and your feedback, we've finalized the generic tool
- Set up three Qualtrics accounts for the implementor countries with the generic tool

What you'll need to do

- The tool is very long and includes ALL questions
 - Can be considered two instruments: (1) hard skills; (2) soft skills
- Each country can tailor it to their contexts



First, create an account



Follow this guide to set up a free account:

<https://www.qualtrics.com/support/survey-platform/managing-your-account/creating-account-logging/#AboutCreatinganAccountandLoggingIn>

Create your free account

How will you be using Qualtrics?



Business Email

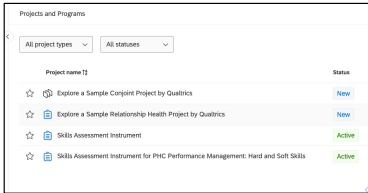
CREATE ACCOUNT





Three Important Screens

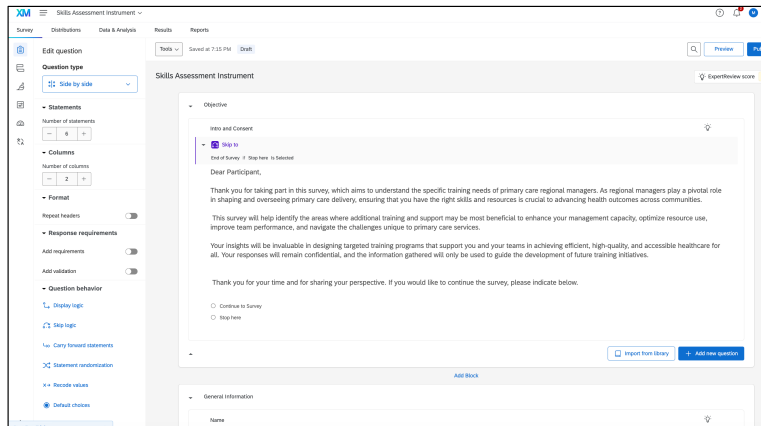
Dashboard



Results Dashboard



Survey Editor



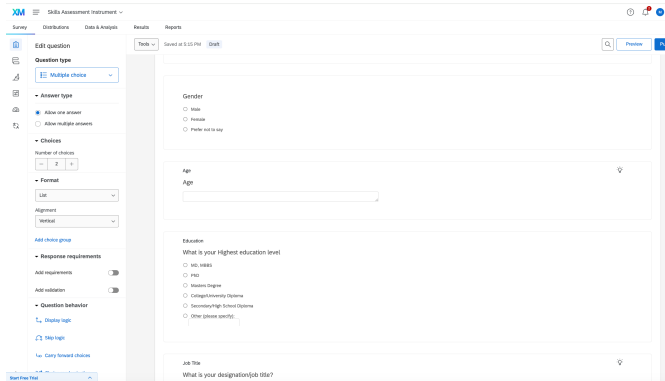
How to Edit the Survey

- When you log in, you will already see the Skills Assessment Instrument

☆ Skills Assessment Instrument

Active

- You can edit the questions by clicking on them and directly editing the text



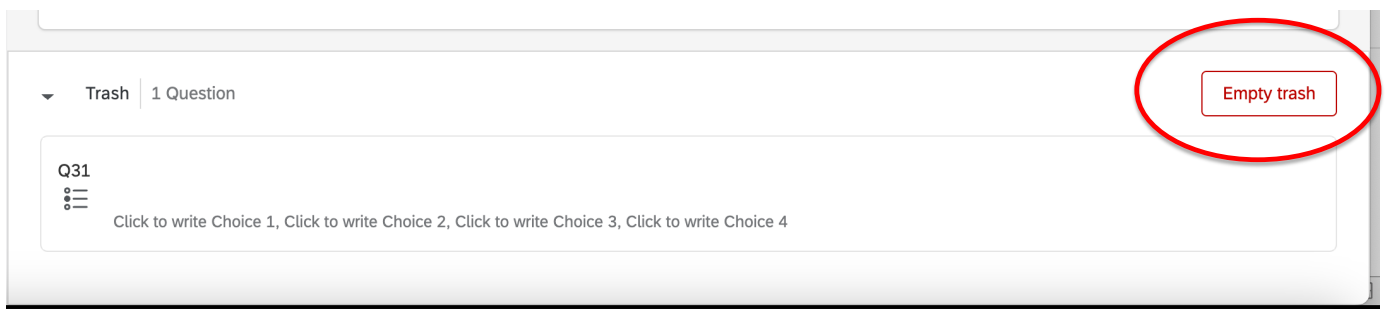
The screenshot shows the 'Edit question' interface for a 'MULTIPLE CHOICE' question. The left sidebar contains settings for 'Answer type' (radio buttons for 'Allow one answer' and 'Allow multiple answers'), 'Choices' (number of choices, format, alignment), 'Mark this question' (checkboxes for 'Require explanation', 'Allow explanation', 'Question behavior'), and 'Show/hide details'. The main content area displays the question text and options: 'Gender' with radio buttons for 'Male', 'Female', and 'Prefer not to say'; 'Age' with a text input field; 'Education' with the text 'What is your HIGHEST education level?' and radio buttons for 'No answer', 'No', 'High School Degree', 'College/University Diploma', 'Bachelor's Degree', and 'Other (please specify)'; and 'Job Title' with the text 'What is your designation/job title?' and a text input field.

How to add or remove a question

The screenshot displays a question editor interface with two question cards. The top card is titled "Job Responsibilities" and contains a text input field with the prompt "Please provide a short description of your current responsibilities". Below this card is a button labeled "New Question Below" with a plus icon, which is circled in red. The bottom card is titled "Education" and contains a radio button question: "What is your Highest education level" with options: "MD, MBBS", "PhD", "Masters Degree", "College/University Diploma", "Secondary/High School Diploma", and "Other (please specify):". To the right of this card is a context menu with options: "Move question", "Copy", "Replace from library", "Add page break", "Preview question", "Add image", and "Delete". The "Delete" option is circled in red. Additionally, a three-dot menu icon is circled in red at the top right of the "Education" card. Both cards have a "+ Add page break" link at the bottom.



Remember: Empty trash after removing a question



- At the very bottom of the survey, you will find the trash, and you will need to empty it before adding new questions

Remember: Publish to make sure changes are saved

The screenshot shows the 'Edit question' interface for 'JLN Skills Assessment Instrument-Liberia'. The left sidebar contains settings for 'Question type' (Rank order), 'Choices' (Number of choices: 5), 'Format' (Drag and drop), and 'Response requirements' (Add requirements and Add validation, both toggled off). The main area displays a table for 'C. Leadership/Decision-Making' with two columns: 'Importance: How important is this skill to the successful practice or performance of your job? (Select one)' and 'Confidence: How confident are you to effectively apply this skill in your job? (Select one)'. Each column has a 5-point scale (1=Not important/confident, 2=Somewhat important/confident, 3=Neutral, 4=Important/Confident, 5=Very important/confident) and two rows of radio button options. The 'Publish' button in the top right is circled in red.

How to change side-by-side choices

Question type
Side by side

Statements
Number of statements: - 4 +

Columns
Number of columns: - 2 +

Format
Repeat headers:

Response requirements
Add requirements:
Add validation:

Question behavior
Display logic:
Skip logic:
Carry forward statements:

Hard Skills

Data Measurement/Col

Hard skills refer to knowledge and abilities related to data measurement, analysis, interpretation and presentation as well as quality improvement that managers and supervisors use in their jobs. They do not include clinical skills

Data Measurement/Collection

	Column Options					Column Options				
	1 = Not important	2 = Somewhat important	3 = Neutral	4 = important	5 = Very important	1 = Not confident	2 = Somewhat confident	3 = Neutral	4 = Confident	5 = Very confident
Importance: How important is this skill to the successful practice or performance of your job?										
Confidence: How confident are you to effectively apply this skill in your job?										
Ability to select and use methods and instruments to collect and collate quantitative data on PHC performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to identify data gaps and needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to explain the importance of data collection for improving PHC policies, programs and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to identify and use other data sources outside of health data systems (e.g., HMS, DHIS, etc.) to assess performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

+ Add page break

- You can:
- edit the text by double clicking on the statement
 - add a statement using +next to “number of statements”
 - remove statement by deleting the text

How to Improve the Survey: Qualtrics gives you an expert review score

Skills Assessment Instrument

ExpertReview score Fair

Objective

Intro and Consent

End of Survey if Stop here is Selected

Dear Participant,

Thank you for taking part in this survey, which aims to understand the specific training needs of primary care regional managers. As regional managers play a pivotal role in shaping and overseeing primary care delivery, ensuring that you have the right skills and resources is crucial to advancing health outcomes across communities.

This survey will help identify the areas where additional training and support may be most beneficial to enhance your management capacity, optimize resource use, improve team performance, and navigate the challenges unique to primary care services.

Your insights will be invaluable in designing targeted training programs that support you and your teams in achieving efficient, high-quality, and accessible healthcare for all. Your responses will remain confidential, and the information gathered will only be used to guide the development of future training initiatives.

Thank you for your time and for sharing your perspective. If you would like to continue the survey, please indicate below.

Continue to Survey

Stop here

Import from library Add new question

Add Block

General Information

ExpertReview score Fair

ExpertReview

We scored 10 experts to improve your survey.

Number of each rating

11 Fair

10 Good

7 Poor

2 Very Poor

0 Not Rated

11 Fair

10 Good

7 Poor

2 Very Poor

0 Not Rated

11 Fair

10 Good

7 Poor

2 Very Poor

0 Not Rated

11 Fair

10 Good

7 Poor

2 Very Poor

0 Not Rated



Your goal is to try to get it to <10 minutes

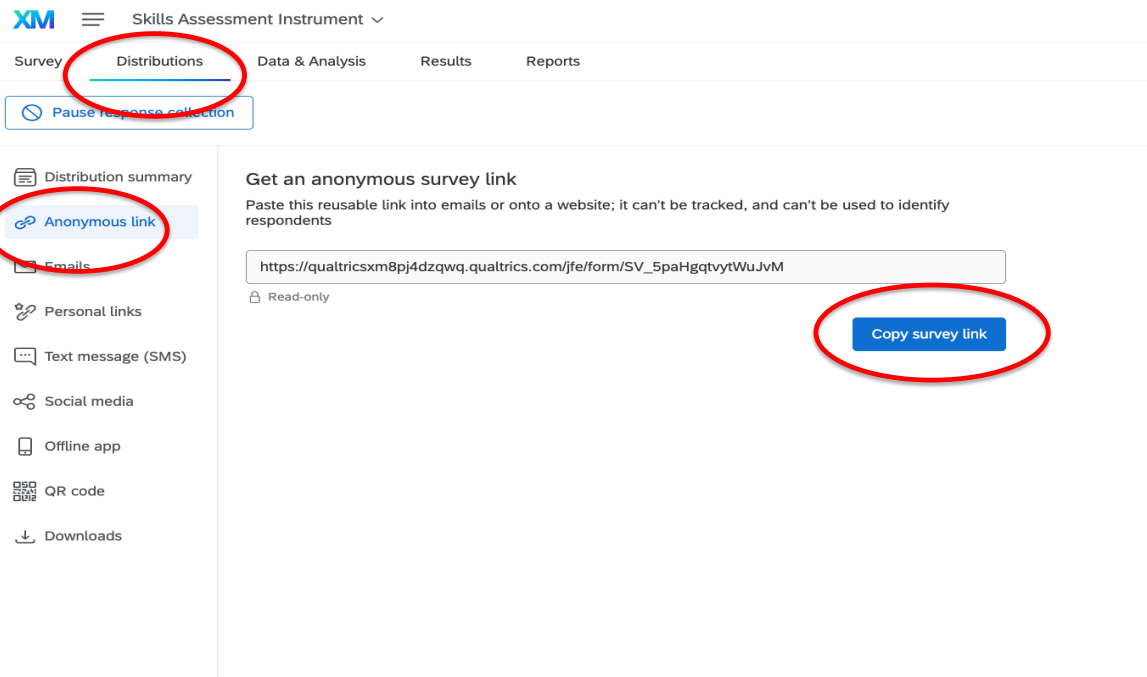
ExpertReview

We found **5** ways to improve your survey.



Severe	3	51 Rows Goal 20	Number of matrix tables Methodology Did you know that respondents don't like matrix questions? Research has shown that response quality and completion rates both decline when questions use the matrix format. We've detected that the number of matrix rows contained in your survey may negatively impact the quality of data that you collect. We recommend simplifying possible responses (for example: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree could be simplified to Disagree, Neutral, Agree). Learn more about matrix tables Affected questions (7)	Severe
Moderate	0			
Minor	2			
Suggestion	0			
Passed	7			
Filter by issue type				
All issue types				
Survey error				
Methodology				
Compliance assist				
		7 Questions	Optimize questions for mobile Methodology Up to 53% of survey starts on Qualtrics happen on mobile devices, unfortunately many of these respondents on mobile end up leaving before they finish the survey - making sure that your survey is "mobile-friendly" can help increase both completion rates and the representativeness of your data. Learn more about optimizing for mobile Affected questions (7)	Severe
		19,6 Mins Goal 7,0	Predicted duration Methodology Our data indicates that surveys longer than 9 minutes start to see substantial levels of respondent break-off on mobile devices - sometimes long surveys are necessary, but in order to increase your survey completion rate we'd suggest that you make sure this is not for those rare cases. Learn more about recommended survey durations	Severe

How to share the survey with respondents



The screenshot displays the Qualtrics XM interface for a 'Skills Assessment Instrument'. The 'Distributions' tab is selected and circled in red. Below the navigation bar, there is a 'Pause response collection' button. On the left sidebar, the 'Anonymous link' option is highlighted and circled in red. The main content area is titled 'Get an anonymous survey link' and includes instructions: 'Paste this reusable link into emails or onto a website; it can't be tracked, and can't be used to identify respondents'. A text input field contains the URL: `https://qualtricsxm8pj4dzqwq.qualtrics.com/jfe/form/SV_5paHgtvytWuJvM`. Below the input field is a 'Read-only' lock icon. A blue 'Copy survey link' button is circled in red.

XM Skills Assessment Instrument

Survey **Distributions** Data & Analysis Results Reports

Pause response collection

Distribution summary

Anonymous link

Emails

Personal links

Text message (SMS)

Social media

Offline app

QR code

Downloads

Get an anonymous survey link

Paste this reusable link into emails or onto a website; it can't be tracked, and can't be used to identify respondents

`https://qualtricsxm8pj4dzqwq.qualtrics.com/jfe/form/SV_5paHgtvytWuJvM`

Read-only

Copy survey link

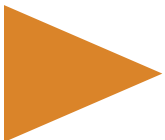


Data and Analysis Tab: Editing Data if Needed

- You do not need to clean the data however,
- If you would like to remove an incomplete response or edit a typo in the responses the Data & Analysis tab allows that
- You can also export the data to excel

The screenshot shows the Qualtrics interface for the 'Data & Analysis' tab. The 'Data & Analysis' tab is circled in red. The table below shows the following data:

Recorded Date	QID4 - Name	QID26 - How many years in your current post? (Select one)	QID27 - Have you participated in training programs to strengthen your skills and ab...
Dec 3, 2024 4:42 PM	Resp 1	1-5 years	
Dec 3, 2024 4:42 PM	Resp 2	1-5 years	
Dec 3, 2024 4:42 PM	Resp 3	6-10 years	Yes
Dec 3, 2024 4:42 PM	Resp 4	>10 years	Yes



Viewing Results



Survey Distributions Data & Analysis **Results**

Page 1

Pages Add

Search current page

Page 1

- Name
- Gender
- Age
- What is your Highest education level
- What is your Highest education level: Other...
- What is your designation/job title?
- Please provide a short description of your current...
- What best describes your current role in the primary...
- What best describes your current role in the primary...
- Hard skills refer to knowledge and abilities...
- Hard skills refer to knowledge and abilities...
- Other Hard Skill Training Needs Please specify the...
- Other Hard Skill Training Needs Please specify the...
- Other Hard Skill Training Needs Please specify the...
- Other Hard Skill Training Needs Please specify the...
- Soft/Relation Skills for PHC Performance Management...

Name

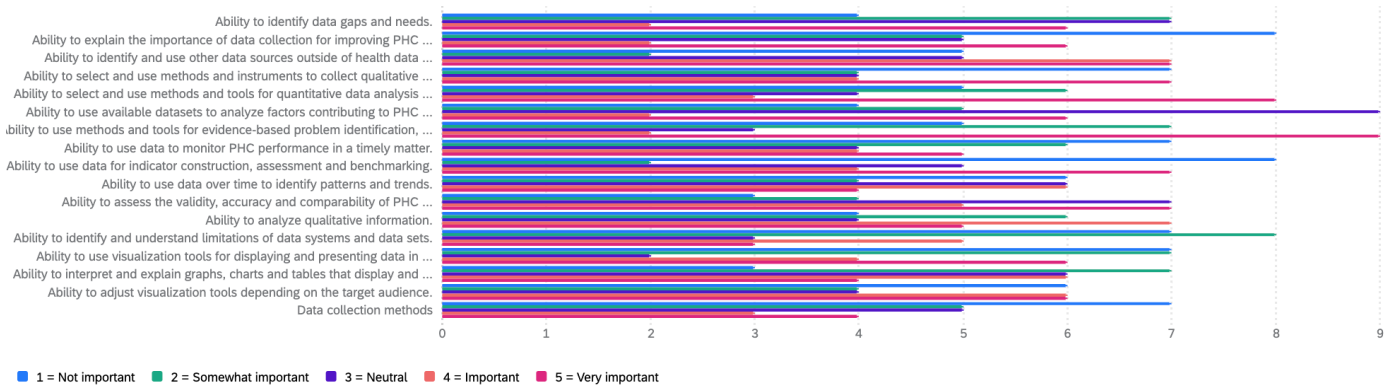
x

Gender

Male

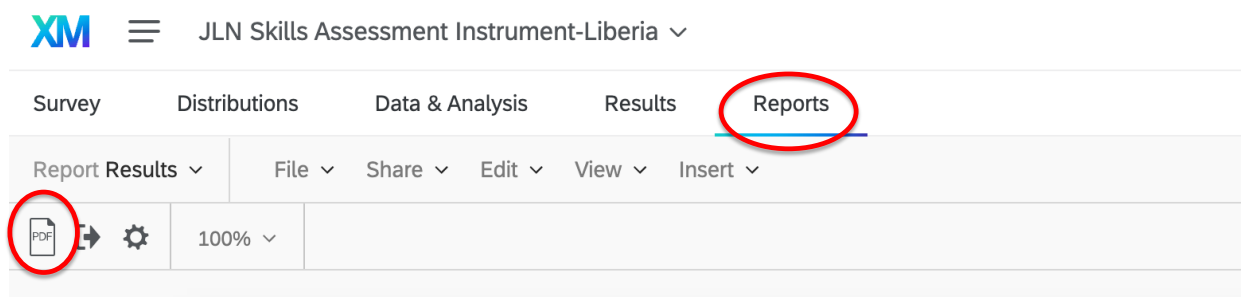
Graphs are automatically generated as responses are completed

B. Data for Decision-Making and Action Planning - Importance: How important is this skill to the successful practice or performance of your job? (Select one) 26 ⓘ



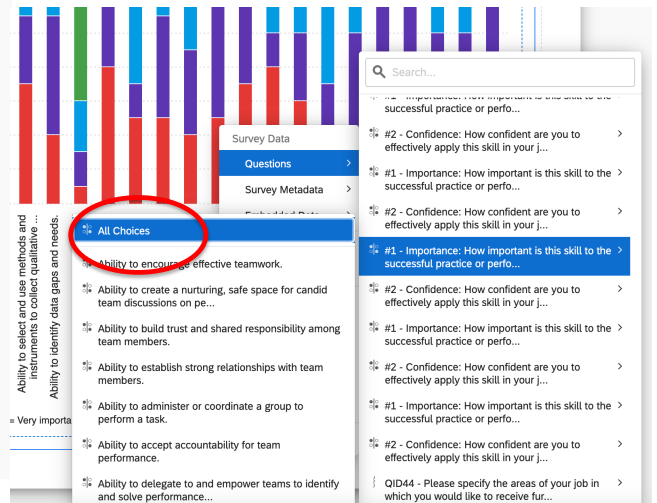
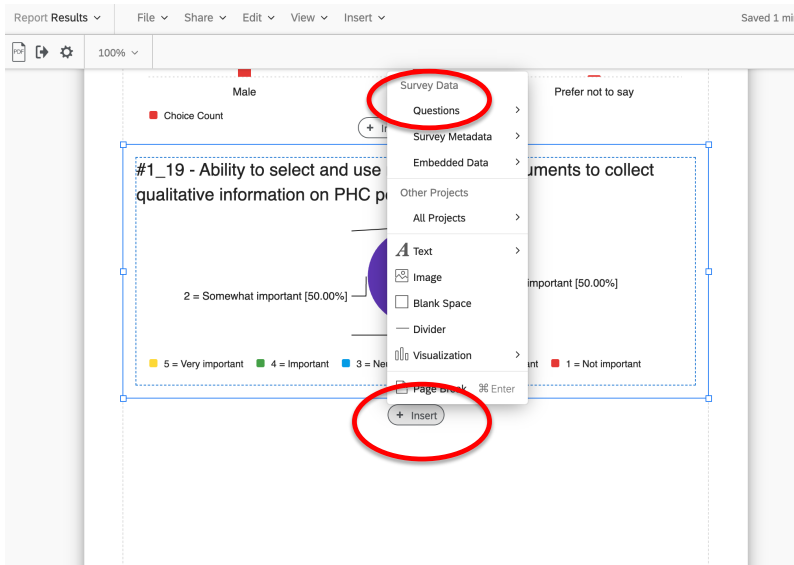
Generating Custom Reports of Results

- In addition to results page, you can generate custom reports with custom figures based on your needs and export them to PDF



Adding a summary of a question to a report

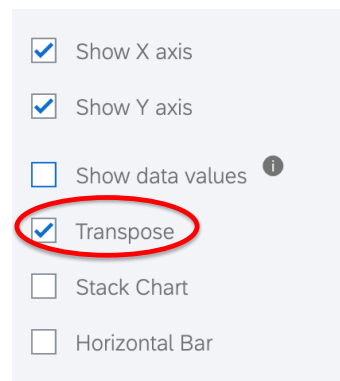
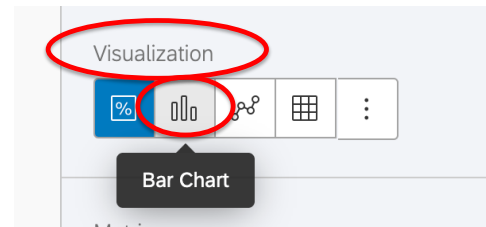
- For the side-by-side questions, choose all choices if you'd like to see all skills side by side



Changing summary data to a visualization in a report

#2 - Confidence: How confident are you to effectively apply this skill in your j...

Field	Min	Max	Mean	Standard Deviation	Variance	Responses	Sum
Ability to explain the roles and functions of effective performance management for meeting system goals	1.00	5.00	3.31	1.29	1.67	26	86.00
Ability to apply coaching and mentoring techniques for engaging with front-line staff to improve their performance	1.00	5.00	2.85	1.46	2.13	26	74.00
Ability to act like a change agent; motivating and accompanying team members in change processes	1.00	5.00	3.04	1.53	2.34	26	79.00
Ability to accept accountability for problems and mistakes	1.00	5.00	3.19	1.33	1.77	26	83.00
Ability to facilitate and lead problem-solving to find effective solutions	1.00	5.00	2.92	1.33	1.76	26	76.00
Ability to provide accurate and timely information to those who need it at the appropriate time	1.00	5.00	3.12	1.12	1.26	26	81.00
Ability to develop, schedule and coordinate effective action plans to address identified performance problems and gaps.	1.00	5.00	2.85	1.49	2.21	26	74.00
Ability to instill performance ownership or	1.00	5.00	3.27	1.51	2.27	26	85.00



- The default will be a summary of statistics table; you can change it to a visualization
- If you are choosing a bar chart for the side-by-side questions, make sure to transpose them so they can be more easily read



There are other options Qualtrics offers



- **Skip Logic**
 - If a respondent answers “no” to a certain question they are taken to the next section as the follow-up questions may not be relevant
 - For example, if respondents answers “no” to if they had previous trainings, we would not want to ask them about the details of these previous trainings so they can skip these questions
- **Customizing Report Visualizations**
 - You can customize fonts, colors, and margins in the report

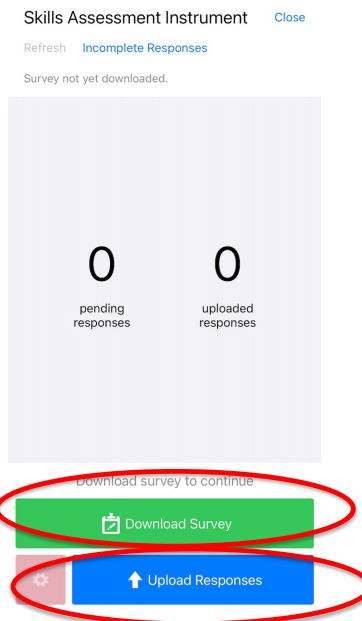
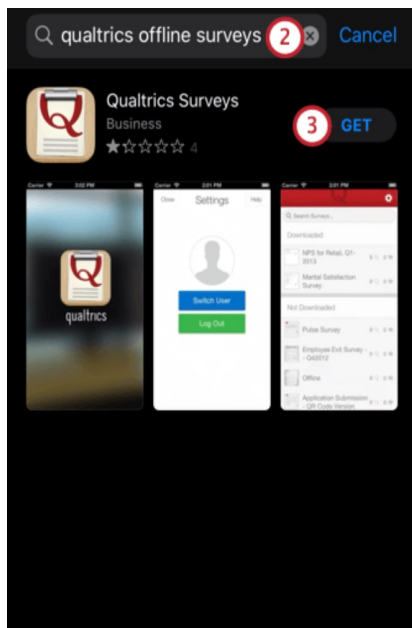


Offline Data Collection



- Qualtrics allows you to collect data offline using an iOS or Android app that has the survey downloaded
 - The App is called: Qualtrics Offline Survey
 - This data can then be uploaded when there is connectivity
 - This would need subscription – awaiting confirmation from Qualtrics Team

Downloading the Offline Data Collection App



When surveys are completed, you can upload them as if they were collected online



Video Recording of Using Qualtrics



- Screen Recording of all steps
 - <https://www.loom.com/share/05c651940d9d49f2a384782d734d4208?sid=18192780-58c8-4097-a7dc-183af3df0759>

Thank you!