



Instructions: Qualtrics can be used to conduct online elections if precautions are observed. Consider a Qualtrics project as your ballot, a Qualtrics question as your poll, your Qualtrics contacts list as your electorate, and you as the Election Official with an election committee.

The checklist includes mandatory settings as well as other best practices which will be dependent upon the ballot design. Adhere to the checklist to reduce the likelihood of voter fraud or challenges from members of the electorate. Complete this form and then prepare (1) a list of poll(s), (2) a list of eligible voters including email, first and last names (MS Excel) and (3) "voter invitation and reminder email messages". Start early in the process (two-week minimum) so that you will have time to build and test your ballot. Once your election committee approves the ballot, open the election with an invitation email to your uploaded electorate, send scheduled reminder emails over several business days, close and report the election results for committee certification.

College/Dept: _____

Election Official:	_____	_____	_____	_____
	First Name	Last Name	Email @csulb.edu	Phone

Member:	_____	_____	_____	_____
	First Name	Last Name	Email @csulb.edu	Phone

Member:	_____	_____	_____	_____
	First Name	Last Name	Email @csulb.edu	Phone

Election Title: _____

Electorate: Faculty Staff Students Auxiliary Eligible Voter Count: _____

General Purpose: _____

Ballot Instructions: _____

How many polls (positions/measures) will be on your election ballot? _____

How will winners be declared or measures be passed?
 Majority Plurality Proportional Ranked Choice Other: _____

How many business days will the election remain open? _____

Election Opens:	_____	Election Closes:	_____
	Election Starts		Election Ends

Email Reminders:	_____	_____	_____
	Reminder #1	Reminder #2	Final Reminder



1. Have you selected your Qualtrics Options?

- Check “By Invitation Only” (Survey Options → Security → Survey Access → By Invitation Only) *
- Check “Prevent Multiple Submissions” (Survey Options → Security → Prevent Multiple Submissions)
- Check “Anonymize Response” (Survey Options → Security → Anonymize Response) *
- Check the “Back Button” (Survey Options → Responses → Back Button)

2. Have you designed your Qualtrics ballot?

- Include an election title (Look & Feel → General → Header)
- Begin with “Voter Instructions” (Builder → Edit Question → Question Type → Text/Graphic)
- Add “Page Breaks” between polls (Builder → Poll → Ellipsis Drop-down)
- Use “Next” and “Back” buttons with multiple polls (Look & Feel → General → Button Text)
- Create a customized “Cast your Vote” button (Builder → Block → Block Behavior → Format)
- Create a customized “End of Survey” message (Survey Flow → Add New Element)
- Include the phrase “Vote for One” or “Vote for Multiple” choices for each poll statement
- Include a choice labelled “Abstain” for each poll so that voters can do just that *
- Encourage voters to save a ballot receipt (Builder → End of Survey → Response Summary) *

3. Have you randomized the order of your poll(s) and/or Poll choices? *(May or may not be required)*

- Randomize poll order per ballot (Builder → Block → Block Behavior → Question Randomization)
- Randomize choice order within each poll per ballot (e.g., a list of candidates)
(Builder → Edit Question → Question Behavior → Choice Randomization)

4. Have you completed the preliminary tasks before launching the ballot?

- Pre-test your election ballot using Qualtrics “Preview” with your committee members *
- Remove your practice votes before launching the election *
- Make a copy of your final ballot before launching the election

5. When you launch your election, did you...

- Upload your list of eligible voters into a Qualtrics Contact List *
- Email an Outlook message alerting your list of eligible voters of the pending election *
- Invite your electorate to vote using the Qualtrics Email Distribution feature *
- Schedule reminder messages for those who delay casting their votes *

6. Have you saved your messages using the “Qualtrics Library”?

- Save your email invitation message
- Save your email reminder message(s)
- Save your custom “end of survey” message

7. Have you created a “Qualtrics Reports” to monitor the election?

- Build a customized Qualtrics Election Report

Mandatory (10):

Recommended (16):

*Qualtrics settings that are mandatory are identified with an asterisk.