

Virtual Qualitative Data Collection: Best Practices for Teams

Collecting qualitative data using videoconferencing software is now a common practice. Q-PRO offers the following tips and guidance to ensure that your data are collected using robust methods and protect participant confidentiality. Individual projects may require special considerations for virtual data collection; we encourage you to discuss your project with the IRB and Q-PRO as needed.

Technology.

1. Use a secure and HIPAA-compliant software platform. WFBH mandates the use of Webex for this purpose. Use the institutional Webex account, not a personal account that you may have.
2. Know how to use Webex, and how to solve basic technological issues that may arise.

Special Considerations for Sampling.

1. Consider sampling biases when collecting your data virtually. Older adults, for example, or those without reliable internet access, may be underrepresented in your sample if you are using videoconferencing software.
2. Present participants with alternative modes of data collection when possible. For example, offer to interview participants by telephone.

Confidentiality and Privacy.

1. The consent forms should specifically acknowledge the type of recording (video or audio) that will be made of the interaction.
2. The consent forms should specifically acknowledge if participants' identities will be exposed to other participants (e.g. full names on display in a virtual focus group).

Preparing for Data Collection.

1. Consider the technology needed to participate in the study (e.g. a computer with internet access and a webcam, or a smartphone) and confirm in advance with participants that they have access to any needed resources.
2. Consider the Webex functionality needed for your data collection interaction (e.g. screen sharing). Write or obtain a guide on installing and using Webex that covers all features that will be used during data collection, and share it with the study team and participants to reference.
 - a. Obtain an updated user guide or Webex training, as necessary, from the Department of Information Technology and Services (Bryan Wall; bcwall@wakehealth.edu).
3. Pre-test Webex with participants in advance of data collection if possible.
4. Encourage participants to join the virtual meeting in a quiet and private space if possible, or to use a headset. This will improve the sound quality for your recording, and for focus groups, will help protect the privacy of other participants.
5. Have an alternative plan in place in the event that connectivity during data collection is disrupted. For example, have the participant's phone number at hand to complete the interview immediately, or to reschedule. If the data collection interaction requires screen sharing of materials, consider sending a copy of the materials to participants in advance.

6. If Q-PRO is collecting the data, we will prepare a protocol collaboratively with the study team to outline processes, procedures, and responsibilities for data collection (virtual or otherwise). We ask that your team do the following:
 - a. Provide Q-PRO with the name and telephone number for each person we will be interviewing. We will request additional information from your team, if necessary.
 - b. Set up the Webex meeting and make sure participants have the link.
 - c. Consent participants in advance of their scheduled interview/focus group with Q-PRO.

Collecting Data.

Because body language can be difficult to read virtually, interviewers and moderators should use slightly more animated body language than usual. This may help keep the participants engaged.

Recording Audio/Video.

1. Consider how you will record data collection for transcription purposes.
 - a. Webex provides recording tools which include audio and/or video. However, unless you need the video aspect to achieve your research aim, Q-PRO recommends recording the data collection with a handheld audio device rather than directly in Webex, both to minimize participant concerns regarding privacy and to ensure that data are not lost if internet connectivity fails.
 - a. If you do choose to record in Webex, select the option to save the video files to the designated storage location and not to the Webex cloud (which is the default location).

Special Considerations for Focus Groups.

1. Confirm your participant list in advance and provide the list to the moderators. This will help the moderators know if an unauthorized individual enters the group.
2. Keep focus groups small; ideally, 4-5 participants in attendance. While 6-8 is considered ideal for in-person groups, technology adds a layer of complexity.
3. Address privacy with your participants. Participant names will be visible to everyone in the group. Request they not record or share the interaction in any way, including taking screen shots, which will reveal the identities of others.
4. Assign a co-moderator or assistant to troubleshoot ongoing technological issues, read and respond to participant chats, and ensure that written comments are incorporated into the discussion as needed.

Special Considerations for Administering Patient-Reported Outcome Measures.

1. When patient-reported outcome (PRO) items or measures are being administered, the interviewer should avoid reading items aloud, if possible, to minimize potential influences on the participant's response. Participants should read the PRO item on their own and then indicate their response.
 - a. Interviewers can share PRO items with participants by screen sharing in Webex, or the study team can mail materials to participants ahead of data collection.
 - b. If the participant has difficulty reading items or seeing them on the computer screen, the interviewer can read the PRO items aloud, but should note the mode of administration.

Resources.

Individual interview: Sample consent form language

As part of this research study, you will be video and audio recorded via Webex software and also using a handheld recorder. This is being done to ensure that your responses are accurately captured. You understand that you may request the recording be stopped at any time during the research study. You can also withdraw your consent to use and disclose the recording before it is used. You understand that you will not be able to inspect, review or approve the recording or other media (including articles containing such) before they are used in this study. The recording will be destroyed once the study is finished.

Focus group: Sample consent form language

As part of this research study, your focus group will be video recorded via Webex software. This is being done to ensure that everything you say is captured. As part of a group, you may choose not to speak. You should also understand that you will not be able to inspect, review, or approve the video recording before it is used in this study. While Webex is a secure software platform and supported by WFBH, be aware that your name will be displayed online for others to see, and while we ask that participants honor one another's privacy, other participants could potentially share your name or picture with others outside of the group.

Summary.

Employing these tips will help study team collect robust qualitative data using virtual data collection methods and protect participant confidentiality. If you have any additional questions, or want to set up a consultation on your individual project needs, please submit a [Q-PRO Service Request](#).