

Collecting Qualitative Data Remotely: Lessons Learned for Researchers

The shift from in-person to remote conduct of clinical research as a result of the COVID-19 pandemic [1] has substantively impacted data collection procedures in qualitative studies, and has introduced important new considerations for qualitative researchers. In an effort to guide clinical researchers interested in conducting evidence-based qualitative research [2] and transitioning their qualitative research – particularly group-based programs – to remote methods, we present a summary of these considerations below:

General Considerations

Overall remote methods



- Will qualitative data be collected from individuals, dyads, or groups?
- If medical information is needed, can existing electronic health record (EHR) data be used, or will primary data collection be required?
- Will remote procedures be conducted via telephone only or video-conferencing software?
- Will any materials be distributed prior to or during remote procedures? If so, will the materials be distributed via mail, email, or screen share?

Audio recording & software



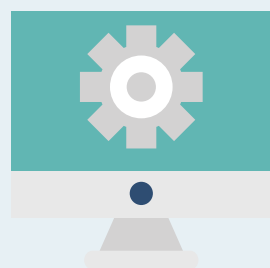
- Ensure access to HIPAA-compliant web platform
- Determine type of recording (e.g., video or audio)
- Denote when to turn off recording
- Establish data safety procedures for transfer and storage of audio files (e.g., local device or the cloud)

Remote recruitment



- Utilize social media platforms, depending on age targets and confidentiality requirements
- Consider additional screening criteria needed for safety and appropriateness of participation
- Determine whether to include or exclude international participants
- Establish procedures for obtaining clinician confirmation, if applicable

Remote assessments



- Determine survey tool to be used (e.g., REDCap)
- Determine whether a remote visit is needed for data collection or if assessments can be emailed
- Obtain participant contact information
- Obtain participant consent to record remote visit
- Establish procedures for ineligible participants

Remote informed consent



- Obtain appropriate IRB approval for electronic consent (e-consent) or assent by participants
- Send informed consent form prior to study visit (e.g., via encrypted or unencrypted email, or mail)
- Validate participant identity prior to consent
- Consider whether a witness presence and co-signature will be required

Considerations for Interviews

Preparing participants



- Evaluate and address different levels of video-based comfort among group participants
- Conduct test call with participants in advance to troubleshoot technology and connectivity issues
- Construct and share a list of video-based functions
- Establish and review procedures for participants identified as at risk

Opening remote groups



- Ensure all participants are present in the group
- Ensure that all video cameras are on, if applicable
- Change distracting background settings
- Set expectations with group participants
- Review procedures for responding and taking turns
- Review mute and unmute options with participants
- Review recording permissions with participants
- Pose initial question to group participants

Confidentiality: participants



- Join remote group from private location only
- Ensure that background view of video camera does not contain any personally identifying information
- Use headphones to maximize privacy and confidentiality of all group participants
- Avoid using participant names during group
- No personal electronic recordings are permitted

Confidentiality: group leaders



- Enable virtual waiting room and validate all participants prior to admitting them into session
- Lock meeting once all participants are present
- Enable screen-sharing with participants if needed
- Use mute function as needed
- Turn off chat function for group participants
- Leave group session after all participants have left

Facilitating remote groups



- Co-facilitators can assist with technical issues, redirecting and engaging participants, integrating and consenting latecomers, managing at-risk participants, and handling session recordings
- Summarize impressions of remote session and elicit feedback from participants (particularly important given loss of body language information)

[1] Park ER, Chiles C, Cinciripini PM, Foley KL, Fucito LM, Haas JS, Joseph AM, Ostroff JS, Rigotti NA, Shelley DR, Taylor KL, Zeliadt SB, Toll BA. Impact of the COVID-19 Pandemic on Telehealth Research in Cancer Prevention and Care: A Call to Sustain Telehealth Advances. Cancer. In press. [2] O'Brien BC, Harris IB, Beckman TJ, Reed DA, Cook DA. Standards for reporting qualitative research: a synthesis of recommendations. Acad Med. 2014 Sep;89(9):1245–51. doi: 10.1097/ACM.0000000000000388. PMID: 24979285.