10 Tips for Training Community Data Collectors to Use REDCap

Community-Based Participatory Research (CBPR) **prioritizes equitable partnerships** with the communities where the research takes place. In CBPR projects, **community members are key actors** in developing and conducting research, often including data collection.

Research Electronic Data Capture (REDCap) is a secure system for collecting and managing research data. REDCap offers a wide array of tools and features that allow research teams to meet the specific needs of their study.

This document outlines **ten tips for training community data collectors to use REDCap**, with an emphasis on the unique circumstances of data collectors:

- with limited or no prior experience using REDCap, and
- who live and work remotely from the training team

Not all tips will work for all teams. We encourage you to use this resource as a menu of options to choose from as you plan your team's REDCap training.

1 SET UP DATA COLLECTORS' REDCAP ACCOUNTS AND DATA COLLECTION DEVICES BEFORE TRAINING

a. **Activate or request accounts** for new data collectors, as needed.

b. **Add data collectors** to the REDCap project(s).

c. If using REDCap Online, **bookmark** the REDCap login webpage in the internet browser.

d. If using the **Mobile App**:

i. Have all data collectors log into their REDCap accounts and request an **API token** for each REDCap project. If the trainer is the one creating the accounts, they can complete this step on the data collectors' behalf.

ii. **Install** the Mobile App and create a user account on each device.

iii. **Link** users to their devices. Each data collector should have their own device.

e. Install software that allows you to **remotely access data collection devices** to troubleshoot technology issues (e.g., TeamViewer)

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2 TRAIN DATA COLLECTORS IN PERSON

a. It is easier for trainers to **build relationships** with data collectors, read and react to their **nonverbal cues**, and **help them with technology issues** at in-person trainings.

b. If not all trainers can attend the training in person, a **hybrid training** (with some trainers online and others in person) is preferable to a fully remote training.

c. If training must be done fully remote/online, trainers should build in additional **1-on-1 time** to check in with individual data collectors.

3 BUILD IN TIME FOR RELATIONSHIP-BUILDING

a. Have everyone wear **name tags** and **introduce** themselves, including trainers.

b. Do an **icebreaker activity** and set **group agreements** at the beginning of training.

c. **Sit and chat** with data collectors during meals and breaks to get to know them better.

4 CREATE TRAINING PLANS AND RESOURCES THAT WORK FOR VISUAL (GRAPHIC AND WRITTEN), AUDITORY, AND KINESTHETIC (HANDS-ON) LEARNERS WITH VARYING ACADEMIC LITERACY LEVELS, SUCH AS:

a. **Training Manual:** detailed graphic and written instructions

b. **PowerPoint slides:** detailed graphic, written, and oral information, mirroring the Training Manual

c. **Technology Step-by-Step:** brief, focused graphic and written tool listing where to click when

d. **Stickers** added to data collection devices to provide high-level graphic and written reminders

e. **Screen-sharing:** visually clicking through REDCap while orally explaining each step

f. **Video recording** of screen-share shared after training

g. **Interactive games** that reinforce key information — for example:
i. Create a **quiz** (e.g., using Slido) with questions about using REDCap and following data collection procedures, and offer a prize to the person who answers the most questions correctly.
ii. Print out **the steps of data collection** (e.g., recruit the participant, download the record, complete the interview, send the data, etc.), mix them up, hand them out, and have data collectors put them in order.
iii. Brainstorm **common data collection scenarios** and offer 4 choices for each one; ask data collectors to go to the corner and of the room representing the choice they think is correct. For example: It's the night before a scheduled interview. What do you need to do? A) Reread your Training Manual, B) Download the participant's record ID, C) Send the data from your last interview, or D) Call the PI.

5 REPEAT IMPORTANT INFORMATION IN A VARIETY OF WAYS

a. Explain **what** REDCap is, **why** you are using it, **where** to go **when**, and **how** to complete each step of the procedures.

b. **Screen share each step** data collectors will need to complete twice — ask them to just watch the first time, and to follow along with you the second time.

c. If data collectors are using both REDCap Online and the Mobile App, clearly explain the **differences** between them.

d. Use **graphics** to illustrate the steps in the process and "**zoom out**" of the details periodically.

e. Use **metaphors** (for example: a REDCap project is a filing cabinet, DAGs are drawers, records are folders, instruments are paper forms, etc.)

6 PAY ATTENTION TO WHO IS DOING WELL AND WHO IS STRUGGLING, AND RE-SEAT DATA COLLECTORS ACCORDINGLY

a. **Option 1**: Seat people who are doing well next to people who are struggling so the former can help the latter

b. **Option 2**: Put data collectors into small groups based on skill level — this way you can focus your help all those who are struggling while those doing well move forward more independently.

7 PAUSE FREQUENTLY TO ANSWER QUESTIONS AND TO TAKE BREAKS

a. If someone asks a question privately that may be helpful to others, repeat the question and **give the answer to the full group**.

b. Most people can only concentrate deeply for about **20 minutes** at a time! Do your best to break up didactic training (e.g., PowerPoints, screen-sharing) with hands-on learning (e.g., following along) or a break at least every half hour.

c. Incorporate **activities** throughout the day to moderate the group's energy:

i. **Icebreakers** to build relationships and start the day in a good way.
ii. **Energizers** to perk up after a meal, help refocus after a break, etc.
iii. **Grounding activities** to encourage reflection, bring calm energy, etc.
iv. **Closing activities** to acknowledge relationships and knowledge gained, and to help everyone feel emotionally safe as they transition out of training.

8 GATHER AND INCORPORATE DATA COLLECTORS' FEEDBACK

a. Ask data collectors to complete a **brief, anonymous feedback form** at the end of each training day. Example questions include:

i. What is one thing you **learned** today?
ii. What was your **favorite part** about today?
iii. Do you have any **questions** that haven't been answered yet?
iv. How was our **pace** today? [too fast, just right, too slow]
v. What would help you **feel more engaged** or learn better?
vi. Is there **anything else** we could do to improve this training?

b. Review the feedback with the training team and **use it to adjust** the next day's agenda, rearrange the seating, add PowerPoint slides to address questions, etc.

9 ASK DATA COLLECTORS TO PRACTICE AND COMPLETE A CERTIFICATION WITH A TRAINER BEFORE BEGINNING DATA COLLECTION

a. **Provide clear guidelines for practice and certification** so data collectors know what to do to prepare and how they will be assessed.

b. Tell data collectors what will happen if they miss the certification **deadline** or do not pass certification.

c. If multiple trainers will be conducting certifications they should take careful notes, then meet after each call and decide on the outcome together. This ensures **equity across trainers** (i.e., no one is scoring harder than anyone else).

d. Encourage data collectors to **practice together**.

10 SET UP SYSTEMS OF ONGOING SUPPORT FOR DATA COLLECTORS, SUCH AS:

a. Set up procedures for data collectors to **inform you each time they enter/send data** (e.g., text message, email, Teams chat, etc.).

b. Update data collectors regularly on their individual and team **progress** (e.g., weekly email updates, online project dashboards, etc.).

c. Present certified data collectors with **certificates** at their next team meeting.

d. **Celebrate small wins** (e.g., bonuses for reaching goals, email "shoutouts", etc.)