How to use Zoom for Qualitative Data Collection

Introduction:

The following is a guide on how researchers can use Zoom for qualitative data collection. This is a working document. If you have any feedback, please contact us so we can update this document.

IRB Approval

1. Be sure the IRB protocol indicates the study and procedure is occurring remotely using a videoconference platform. If the IRB was previously approved with indication that the process will occur in-person, it should be revised noting the new process.
2. Participants can give verbal consent for a study if it was mentioned in the research proposal. If your study has a “Waiver of Documentation of Consent”, you must provide a copy of a cover letter to participants (this does not need to be signed). Otherwise, researchers are required to obtain acknowledgment of consent form (via Qualtrics)
   a. If you are recording this videoconference, it must be included in all consent information.
   b. Researchers should determine whether participants who do not consent to recording to continue in the study. It may be useful to include this information in recruitment information.

Technology and Videoconference Platforms

1. Because students will be most comfortable and familiar with Zoom, we strongly recommend researchers use this videoconference platform. However, researchers should understand Zoom’s Encryption Policy, and they should make sure their participants understand it as well.
2. Researchers should take additional steps to enhance security in the videoconferences. Please see the Privacy and Security Tip below.

Privacy and Security Tips
1. Researcher should create private meetings for each session, rather than using their Personal Meeting ID. Using a PMI for a research session could result in unwanted visitors joining a meeting when you are collecting data.
2. To ensure privacy, researchers could create a meeting password as well. This will help ensure that only those with a private meeting link and password can access a study.
3. If your study doesn’t require participants to share their screen, be sure to disable screen-sharing for other participants.
4. For smaller groups, it may be best to create waiting rooms.
5. Don’t use Zoom for file transfers. Please use UT Box when transferring files between the research team and research participants. There is a way to switch this function to off in the settings.
6. Lock meetings. Once all participants have entered the meeting, the host can lock the meeting which will not allow anyone else to join.
7. When using Record function, always record to the computer. Though you will have the option to record to the cloud, please refrain from doing so. All recorded meetings should be saved to the computer and then promptly transferred to UT Box and immediately deleted from the computer.
   a. When using Record function, please make sure all participants consent. The meeting room should require permission and/or alert participants that they are being recorded, however, all researchers are expected to verbally consent participants prior to recording any session.
8. Researchers should wait until just before the session to share meeting details with participants. Sending meeting links and information directly to participants rather than posting online (i.e. SONA)

9. **We strongly encourage researchers to practice!** Practice using the technology by having a mock session or focus group before you begin data collection and test your recording technology in advance.

**Prepare your participants**

1. It is important to communicate with participants in advance, so they know what to expect when engaging in these videoconferences.
2. Consider doing the following when you are in the recruiting phase of your study:
   a. Let participants know if video recording is mandatory.
   b. Be clear that internet access is required to participate in this study.
c. Ask participants to use a secure internet connection and not public WiFi.
d. Ask participants to join from a private location to try to minimize the number of interruptions.

3. Before the actual study begins, inform participants that there may be risks that are specific to completing a study in a videoconference such as confidentiality risks.

4. It may be useful to provide participants with written instructions for joining the Zoom call and any specific tools they may be required to use.

**Conducting the Videoconference and Focus Groups (for researchers)**

1. Be sure to conduct the call from a private room to minimize disruptions.
2. At the beginning of the call:
   a. Introduce yourself and the project (building rapport will help the participants feel more comfortable).
   b. Remind participants that it will be helpful if they are in a private area to minimize disruptions.
3. Do not record the meeting at the beginning. You should always let the participants know when you intend to begin the recording.
   a. If it is important to study, state the time, date and group number at the beginning of the recording.
4. You can share the screen when necessary like going through examples.
   a. You can also enable screensharing for participants if it is necessary for the study. It may be helpful to include a "how-to" in the instructions you send before the study.

If you are conducting a focus group, these additional tips may be helpful:

1. Ensure you have adequate staffing
   a. A facilitator
   b. A note taker
   c. Some who can help with technical support.
2. It may be helpful to give a demonstration on how to use Zoom such as:
   a. How to turn the camera on and off
   b. If you have a preference on how to facilitate conversation go over those now.
      i. Mute/Unmute
      ii. Raising a hand
   c. Ask participants to not record the session.
3. It may be best to familiarize yourself with some tools within Zoom
a. **Whiteboard** - The whiteboard feature will allow you to share a whiteboard that you and other participants can annotate on.

b. **Screensharing** - This feature allows hosts (and participants, if allowed) to share an entire desktop or phone screen, a portion of your screen, iPhone/iPad screen, and much more.

c. **Polling** - This will allow you to create single-choice and multiple-choice questions for your meeting. Hosts have the ability to download a report of polling after the meeting.

d. **Reactions** - This will allow participants can react during by sending thumbs up or clapping.

e. **Chat** - The in-meeting chat allows to send messages to other users within a meeting. Private messages can be sent to individual users as well.

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**Additional Resources for Remote Qualitative Data Collection**

- [Human Research and the IRB - Office of Research Support and Compliance - University of Texas](#)
- [How to manage participants in a meeting - Zoom](#)
- [Working with Zoom - University of Texas ITS](#)
- [Group Breakouts using Zoom Breakout Rooms - University of Texas Wiki](#)
- [Using Zoom Videoconferencing for Qualitative Data Collection: Perceptions and Experiences of Researchers and Participants](#)
- [Conducting qualitative interviews and focus groups online - Quirkos](#)
- [UCSC LEEPS Lab Protocol for Online Economics Experiments](#)