4 tips for better longitudinal data collection with case management

The essentials checklist

Case management is an important piece of the longitudinal data collection puzzle. It gives you the tools you need to save time, prevent duplicated efforts, and easily track subjects or entities over a prolonged period of time.

Whether you're preparing for a longitudinal data collection project or curious about how case management software features ensure its success, get four tips you need for success in our essentials checklist!

Before we get into strategies for better longitudinal data collection with case management, let's take a brief moment to level set on the definitions of the two.

What is longitudinal data collection?

Longitudinal data collection is the practice of capturing data on the same subjects or entities at multiple intervals over long periods of time.

Depending on your industry, you may also refer to it as:

- Cohort studies
- Panel studies
- Trend analysis
- Time series studies

What is case management and how do data collection platforms with case management features help with longitudinal data collection?

Because longitudinal data collection consists of multiple surveys or forms over time, that opens up the door to data quality issues and unnecessary redundancies as people try to keep track of what they've already done before.

Case management features in data collection platforms address those challenges by **helping you organize and systematize** the process of collecting, managing, and tracking data.

Case management solutions revolve around the specific entities or subjects (aka cases) you're surveying instead of the survey itself. This organization is what allows you to track the right subject, no matter how long it's been.

Now we know why case management is helpful—and often necessary—for successful longitudinal data collection.

Let's dive into the strategies you can use to reduce manual lift and improve data quality!

1. Create and assign cases to data collectors

Because longitudinal data collection occurs over a long period of time, it's important to keep both data collectors and cases organized.

By creating and assigning cases to specific data collectors, this ensures that they only access and collect data for the cases they're assigned to.

This reduces the likelihood for multiple people collecting the same data. This is an added benefit in situations where you don't have direct supervision over data collectors.

2. Set up workflows to automate case assignment

Automatically assign follow-up surveys to data collectors based on responses in earlier forms to ensure quality control and seamless workflows.

For large projects with many data collectors and multiple follow-up surveys, this also introduces time savings and reduces confusion for your team.

3. Screen segments easily for assessments and surveys

When you need to get benchmark data before conducting further surveys, case management gives you the ability to easily set up qualification workflows so that you send only the right respondents to future survey rounds.

4. Leverage capabilities that let you collect and manage data offline

Some case management solutions give you the ability to not only collect and store data without an internet connection, but assign cases and make responses collected on one device be available on another as well.

Having offline capabilities gives your team the freedom they need to conduct data collection regardless of their environment.

Conducting longitudinal data collection? Here's what to look for in a solution

Longitudinal data collection requires a solution that has both data quality and case management capabilities.

First and foremost, if your primary objective is data collection, it's important to research data collection software that **upholds data quality** and gives you the **flexibility you need to build adaptable workflows**.

Secondly, if that data collection is longitudinal in nature, it then becomes important to consider data collection software that has built-in case management features.

As you go on your search, consider these must-haves in a solution:

1. Unique IDs

This is a non-negotiable.

Always make sure you can track your cases through a unique ID.

It's how you prevent duplicate responses from being collected or data collectors collecting data for the same case!

2. Offline capabilities

If there's a chance your data collection will occur in areas with unreliable internet, explore **data collection software that offers offline case management features**.

This ensures that data from one form can be used in subsequent forms in real time.

3. Data collector management functionality

Assigning cases to specific data collectors organizes data collection efforts and makes your data monitoring processes easier and more actionable by **connecting interviewers to the responses they gathered**.

4. Cases datasets

Storing survey and subject IDs in specific datasets enables you to **easily track and manage data collection for individual cases**.

Discover how SurveyCTO ensures successful longitudinal data collection with powerful native case management features.

Contact Us For A Strategic Consultation On How To Ensure Data Collection Success