Field Data Collection Training Best Practices Training Development Checklist

This Field Data Collection Training Development Checklist is intended to provide factors to consider when creating a training program for field data collection forms or for evaluating an existing training program. This checklist may be used regardless of whether paper or digital field forms are employed. Users may consider including this checklist in their Data Management Plan (DMP). Refer to the Data Management Planning Fact Sheet for a discussion of DMPs and the Field Data Collection Training Best Practices Fact Sheet for additional information on training.

Instructions for Use: This checklist is organized into four sections:

I. *Identify training team and requirements:* to be completed prior to the development of the training program.

II. *Develop a plan for troubleshooting support:* to be completed by the training team prior to the development of the training program.

III. *Develop the training program:* to be completed by the training team after the forms have been developed and tested and are ready to be circulated for use.

IV. *Schedule training:* to be completed by the training team after the training program development is complete.

Certain items included in this checklist may not apply to a particular form or organization. This checklist can be modified and adapted to meet your organization's needs. If a checklist item is not relevant, select "NA" for not applicable.

Identify training team and requirements

Identify where and how the training will be delivered • Note: If virtual, the training should allow for screen sharing using the equipment and forms to be used in the data collection activity.	☐ Yes ☐ No ☐ NA
Identify training material reviewers • Note: Reviewers should cover multiple skill levels, including field staff, to ensure material is clear and addresses all questions.	☐ Yes ☐ No ☐ NA
Document the anticipated useful life of the tool/form developed. • Will it be necessary to include a plan for incorporating and disseminating training updates?	☐ Yes ☐ No ☐ NA
Determine whether a test form or environment is needed to complete training and allow users to practice entering data.	☐ Yes ☐ No ☐ NA

Develop a plan for troubleshooting support

Identify the troubleshooting support team • Note: Troubleshooting contacts may be different for device support vs. form support.	☐ Yes ☐ No ☐ NA

Develop the training program

Device training (digital only)	
• Define acceptable devices	☐ Yes ☐ No ☐ NA
• Confirm devices are in working order	☐ Yes ☐ No ☐ NA
• Provide instruction on how to use the device and operating system as necessary	☐ Yes ☐ No ☐ NA
• Address security features of the device	☐ Yes ☐ No ☐ NA
• Provide instruction on connecting the device to other measuring equipment	☐ Yes ☐ No ☐ NA
• Provide troubleshooting instructions and help desk–style contacts	☐ Yes ☐ No ☐ NA
• Define care and storage expectations	☐ Yes ☐ No ☐ NA
Application/Form training	
• Are enough forms available? (paper only)	☐ Yes ☐ No ☐ NA

• Has the application and form been installed and made available on every device? (digital only)	☐ Yes ☐ No ☐ NA
Provide an overview of all features of the application/form	
• Required fields	☐ Yes ☐ No ☐ NA
• Reference values	☐ Yes ☐ No ☐ NA
• Auto-filled or calculated fields (digital only)	☐ Yes ☐ No ☐ NA
• Syncing procedures (digital only)	☐ Yes ☐ No ☐ NA
• How to save/submit data (digital only)	☐ Yes ☐ No ☐ NA
• How to make revisions	☐ Yes ☐ No ☐ NA
• How to handle special scenarios	☐ Yes ☐ No ☐ NA
• Provide troubleshooting guidance (digital only)	☐ Yes ☐ No ☐ NA

Develop the training program (concluded)

Connectivity challenges (digital only)	
• What type of connectivity is available	☐ Yes ☐ No ☐ NA
• Procedures for working offline	☐ Yes ☐ No ☐ NA
• Manual and auto-sync procedures	☐ Yes ☐ No ☐ NA
• Backup plan	☐ Yes ☐ No ☐ NA
Environmental challenges	
• Environmental extremes (bad weather or other field conditions)	☐ Yes ☐ No ☐ NA
• Interface challenges (screen glare, wet or oily hands, etc.)	☐ Yes ☐ No ☐ NA

Schedule training

Identify small group of early adopters to participate in the first round of training.	☐ Yes ☐ No ☐ NA
Define skill levels to receive training.	☐ Yes ☐ No ☐ NA
Determine whether adjustments to training each skill level are needed.	☐ Yes ☐ No ☐ NA
Schedule training session(s) • Note: Allow for enough time between training and the data collection event so that users have an opportunity to familiarize themselves with the device and form.	☐ Yes ☐ No ☐ NA
Provide opportunities for feedback.	☐ Yes ☐ No ☐ NA