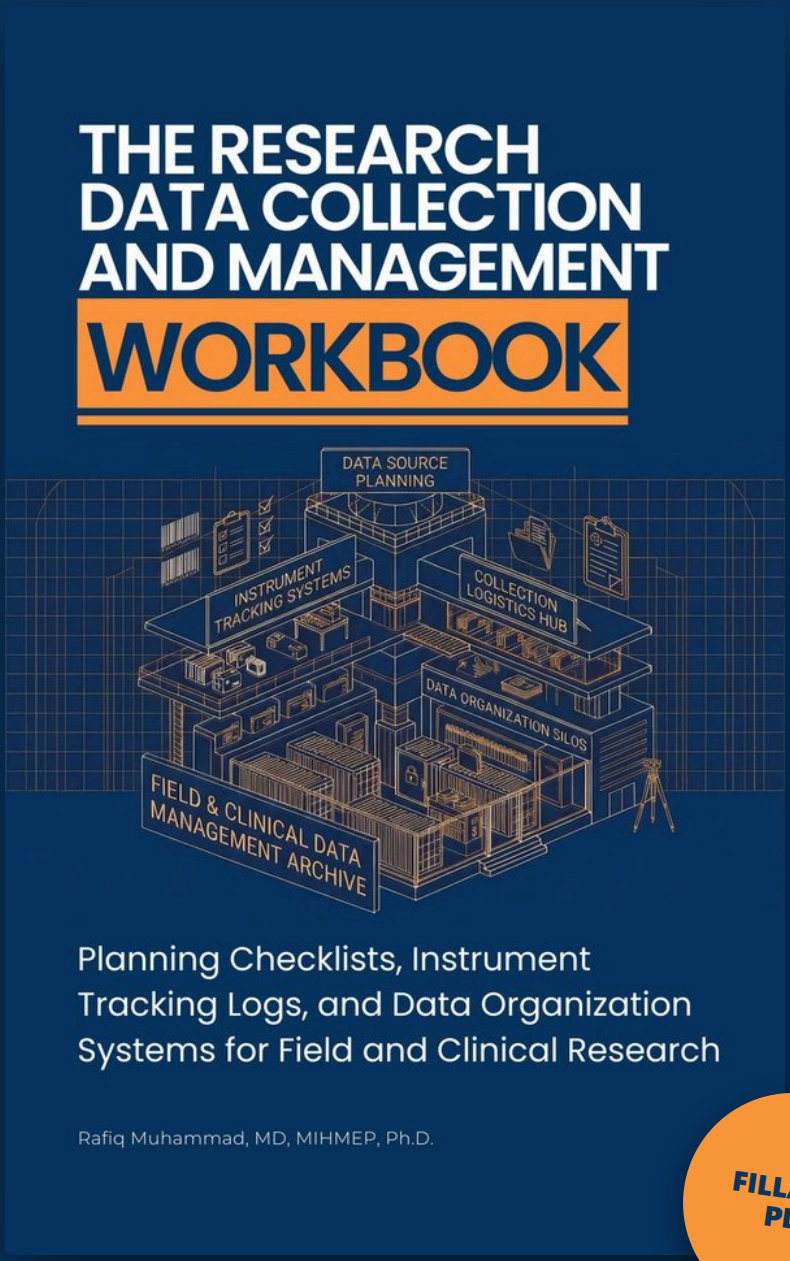
FILLABLE TEMPLATE KIT



FILLABLE PDF

The Research Data Collection & Management Kit

50 fillable templates · US Letter & A4 · type, save, print

The companion kit to the workbook shown above. It contains the templates only. The chapters and the completed examples are in the book.

Rafiq Muhammad, MD, MIHMEP, PhD · Kit Edition 1.0 · 2026 · KIT-DCM

How to use this kit

This kit contains every fill-in template from *The Research Data Collection & Management Workbook*, one per page, in the order you will use them. Each page tells you in a few lines how to fill it in.

> **On screen:** open the PDF in Adobe Acrobat Reader (free), Microsoft Edge, Google Chrome or macOS Preview. Click any white box and type; boxes grow to more lines where answers are long. Tick boxes with a click. **Save often** (Ctrl/Cmd + S) — your answers stay in the file.

> **On paper:** print any page; every box is sized for handwriting.

Working with a supervisor? Each template ends with a sign-off line, so you can bring pages to meetings as they are done.

First time doing this? The kit gives you the tools; the workbook teaches the method. *The Research Data Collection & Management Workbook* explains every template and shows a completed example of each one, built around a single study from start to finish.

The workbook, with a completed example of every template: https://www.gradsummit.com/workbooks/research-data-collection-management-workbook/

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Template map

50 templates in the order the workbook uses them. Click a row to jump to it; tick **Done** as you finish each one.

#	Template	Page	Done
Chapter 1 · Data Collection Readiness Assessment			
1.1	Data Collection Go/No-Go Checklist	6	☐
1.2	Study Protocol Summary Sheet	11	☐
1.3	Instrument Inventory & Readiness Log	13	☐
1.4	Data Collection Timeline & Milestone Planner	15	☐
Chapter 2 · The Data Collection Operations Manual			
2.1	Operations Manual Master Template	17	☐
2.2	Research Assistant Training Manual Builder	22	☐
2.3	Protocol Fidelity Monitoring Checklist	25	☐
2.4	Protocol Deviation Log	27	☐
Chapter 3 · Participant Recruitment & Tracking			
3.1	Participant Recruitment & Tracking Dashboard	29	☐
3.2	Recruitment Performance Monitor	31	☐
3.3	Participant Attrition & Retention Tracker	33	☐
3.4	CONSORT/STROBE Participant Flow Diagram Builder	35	☐
Chapter 4 · Collecting Survey Data			
4.1	Survey Distribution & Response Tracking Log	37	☐
4.2	Paper Survey Processing Checklist	39	☐
4.3	Survey Non-Response Analysis Worksheet	41	☐
4.4	Survey Instrument Administration Protocol	43	☐
Chapter 5 · Collecting Interview & Observational Data			
5.1	Interview Scheduling & Completion Tracker	45	☐
5.2	Field Notes & Post-Session Reflection Template	47	☐
5.3	Structured Observation Recording Form	50	☐
5.4	Audio/Video Recording Equipment & Quality Log	52	☐
5.5	Transcription Quality Control Checklist	53	☐
Chapter 6 · Collecting Clinical & Biomedical Data			
6.1	Clinical Data Collection Case Report Form (CRF) Planner	54	☐
6.2	Retrospective Chart Review Data Extraction Form	56	☐
6.3	Laboratory Specimen Tracking & Chain of Custody Log	58	☐
6.4	Source Document Verification Worksheet	60	☐
Chapter 7 · Electronic Data Capture: REDCap & Qualtrics Setup			
7.1	EDC Instrument Design Planner (REDCap Focus)	62	☐

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CHAPTER 3 · PARTICIPANT RECRUITMENT & TRACKING

3.1 Participant Recruitment & Tracking Dashboard

Purpose: The master tracking log for monitoring every participant from first contact through study completion. This single document provides the real-time enrollment picture for the entire study and generates the raw data for CONSORT/STROBE flow diagrams.

Estimated time: 60 minutes initial setup; 5–10 minutes per participant entry; 15 minutes weekly review

Completed example: Template 3.1 in The Research Data Collection & Management Workbook.

Part A: Screening & Enrollment Tracking

PID	Recruit. Source	1st Contact	Screen Date	Eligible? (Y/N)	Inelig. Reason	Consent Date	Enroll Date	Group (if RCT)

Part B: Data Collection Time Points & Study Status

PID	Baseline Sched.	BL Status	FU-1 Sched.	FU-1 Status	FU-2 Sched.	FU-2 Status	W/D Date & Reason	Comp. Status	Supv. Review

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CHAPTER 5 · COLLECTING INTERVIEW & OBSERVATIONAL DATA

5.1 Interview Scheduling & Completion Tracker

Purpose: A master scheduling tool for managing all interview and focus group appointments across the study timeline. Tracks every session from scheduling through transcription, ensuring no data collection event is lost or incomplete.

Estimated time: 20 minutes initial setup; 5 minutes per interview logged

Completed example: Template 5.1 in The Research Data Collection & Management Workbook.

Part A: Scheduling & Session Completion

PID	Type	Sched. Date/Time	Actual Date/Time	Location	Interviewer	Consent?	Equip. Tested?	Comp?	Dur. (min)	Supv. Review

Part B: Post-Session Data Pipeline

PID	Rec. Quality	Field Notes?	Transcript Ordered	Transcript Rec'd	QC Checked?	De-ID'd?	Analysis Ready?	Supv. Review

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End of the sample

This sample shows 2 templates: 3.1 Participant Recruitment & Tracking Dashboard; 5.1 Interview Scheduling & Completion Tracker.

The full The Research Data Collection & Management Kit has 50 fillable templates, each on its own page, with the template map, bookmarks and a Done box for every template, in US Letter and A4.

You can buy the full kit on the page where you downloaded this sample.

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