

Greetings Researcher,

Welcome to ResearchMatch! We are delighted that you have chosen to use ResearchMatch as a recruitment tool for your study. Below you will find a few tips that will help make the registration and volunteer contact process smooth and successful.

Please register for the monthly ResearchMatch researcher trainings to stay updated on new system features and best practices:

<https://attendee.gototraining.com/r/9112903382698216193>

For additional guidance and help, please contact us:

### Institutional Liaison

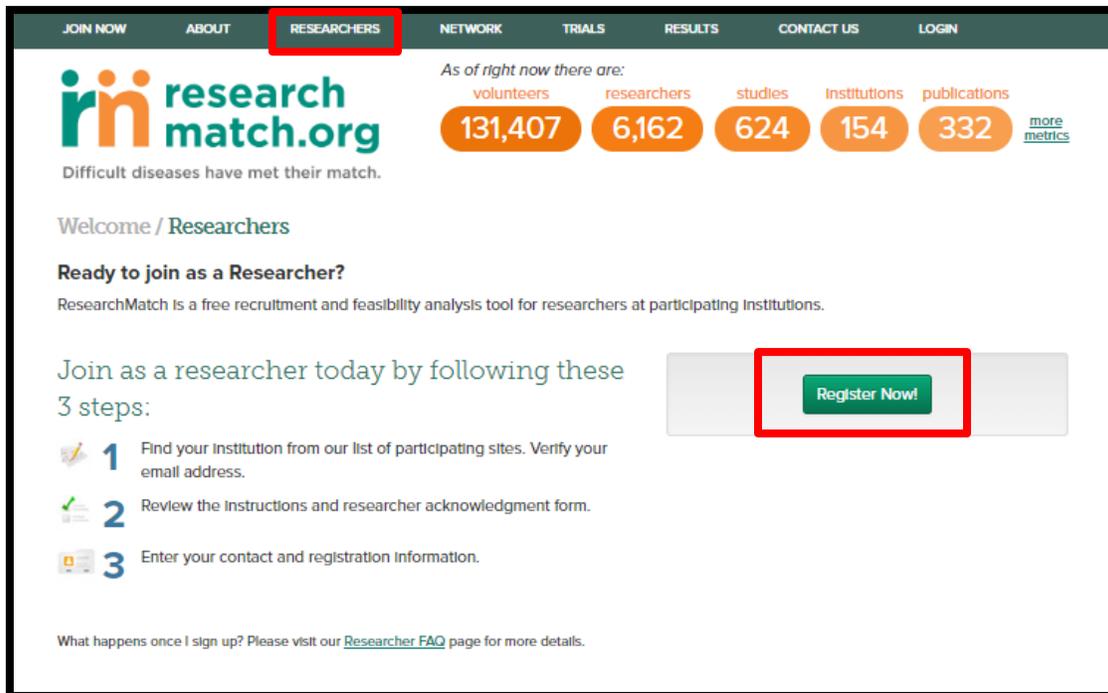
Kevin McCreary X2-8058 [researchcompliance@kent.edu](mailto:researchcompliance@kent.edu)

### ResearchMatch HQ

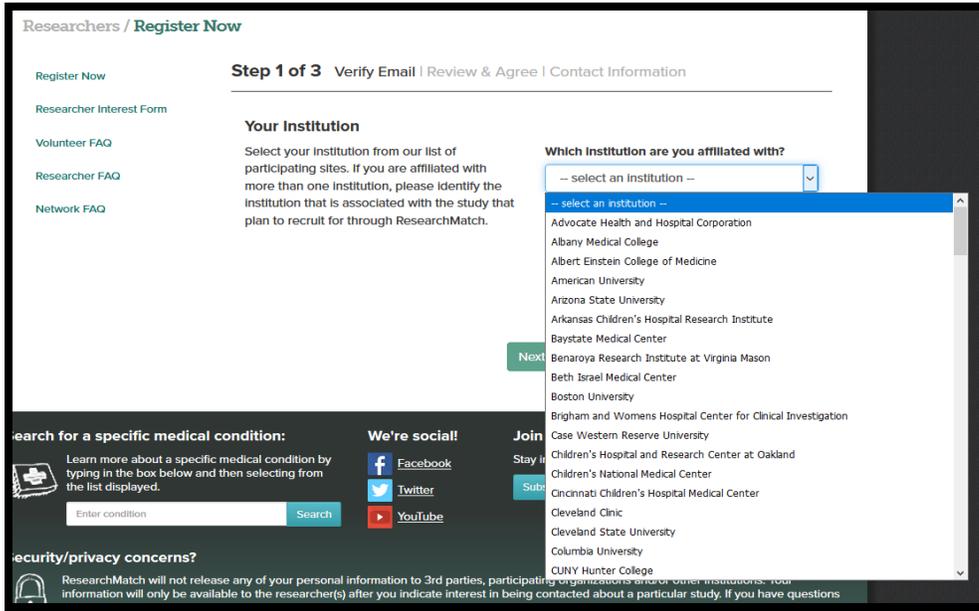
- [info@researchmatch.org](mailto:info@researchmatch.org)

### Register as a Researcher:

1. Create an account by clicking **“Register Now”** on the Researchers page



- Select your institution from the drop down list of participating institutions.



- Enter a **valid institutional email** address.
- Review and agree to the **Site Instructions** and **Researcher Acknowledgement form**, by typing **ACCEPT** in all caps before they can continue.
  - Review Site Specific Instructions** – this document will give you information regarding feasibility and recruitment access to ResearchMatch for your institution, contact information for your Institutional Liaison – the Liaison will be your first point of contact for any questions, etc.
  - Review and Accept the Researcher Acknowledgement Form** – This document is also site-specific and describes the guidelines that a researcher at your institution is expected to follow. Your Institutional Liaison or the National ResearchMatch Program Manager may revoke your ResearchMatch privileges if the guidelines in this document are not followed.
- Enter your contact information, create a username and password, and chooses your security questions.
- Redirected to your ResearchMatch Researcher Dashboard with **Feasibility Access only**.
  - Feasibility Access** will allow you to view and search aggregate data within ResearchMatch but you will not be able to contact volunteers. A feasibility search gives you an idea of how many volunteers are available for recruitment through ResearchMatch based on a study's eligibility criteria. You **do not** have to have an IRB approved study to use this feature. It is also a great way to learn more about how the filtering criteria work, so we encourage you to play around with this function!

## **Before you Register a New Study:**

1. **Contact your IRB for approval to use RM as a recruitment tool.** You will need approval for each study using RM. Template language is available here:

### ***ResearchMatch template language for IRB protocols:***

"ResearchMatch.org will be utilized as a recruitment tool for this protocol.

ResearchMatch.org is a national electronic, web-based recruitment tool that was created through the Clinical & Translational Science Awards Consortium in 2009."

### ***ResearchMatch template language for grants:***

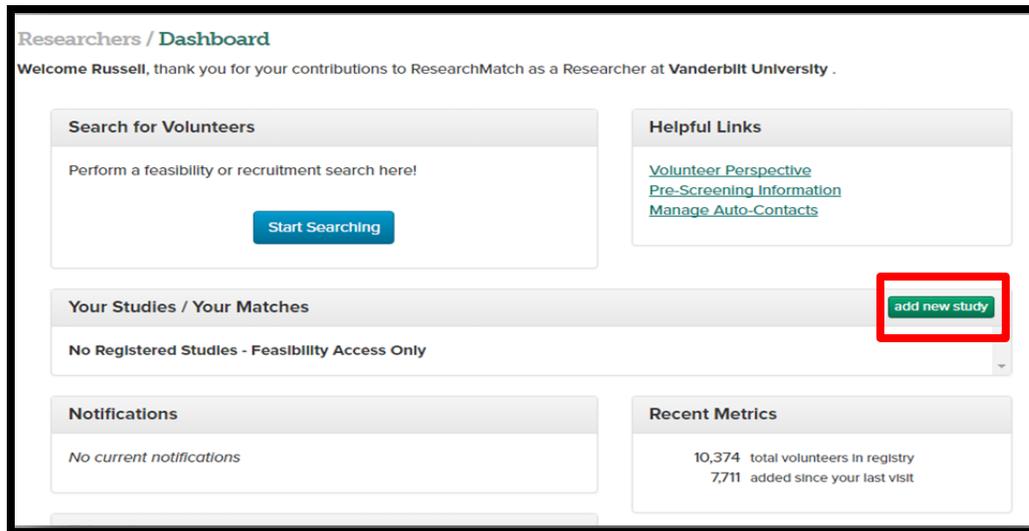
"ResearchMatch ([www.researchmatch.org](http://www.researchmatch.org)) is an electronic volunteer recruitment registry designed to allow individuals from anywhere in the country an opportunity to securely self-register and express an interest in being prospectively considered for participation in research studies. ResearchMatch provides a 'disease-neutral' meeting place through a national portal for willing volunteers to express their interest to engage in research. ResearchMatch 'matches' potential study volunteers with researchers who register to utilize the system as a recruitment tool from participating institutions and their IRB-approved studies in a manner that promotes volunteer privacy and choice at all levels while assisting researchers with their recruitment needs."

"ResearchMatch was developed in 2009 by institutions affiliated with the Clinical and Translational Science Awards Consortium ([www.ctsacentral.org](http://www.ctsacentral.org)) and is maintained at Vanderbilt University. The Vanderbilt Institutional Review Board (IRB) provides oversight of the project as a recruitment tool."

2. **Obtain IRB approval for the recruitment message you will email your research 'matches'.** This message is limited to 2000 characters and **cannot** contain any of your contact information, including name, phone number, email, URLs or links to webpages. There is a template on the IRB forms webpage under the recruitment tab.
3. **Obtain IRB approval for your REDCap/Qualtrics prescreening (eligibility) survey, if desired.**
4. **(OPTIONAL) Please feel free to register as a volunteer at [www.researchmatch.org](http://www.researchmatch.org) and participate in other research studies!**

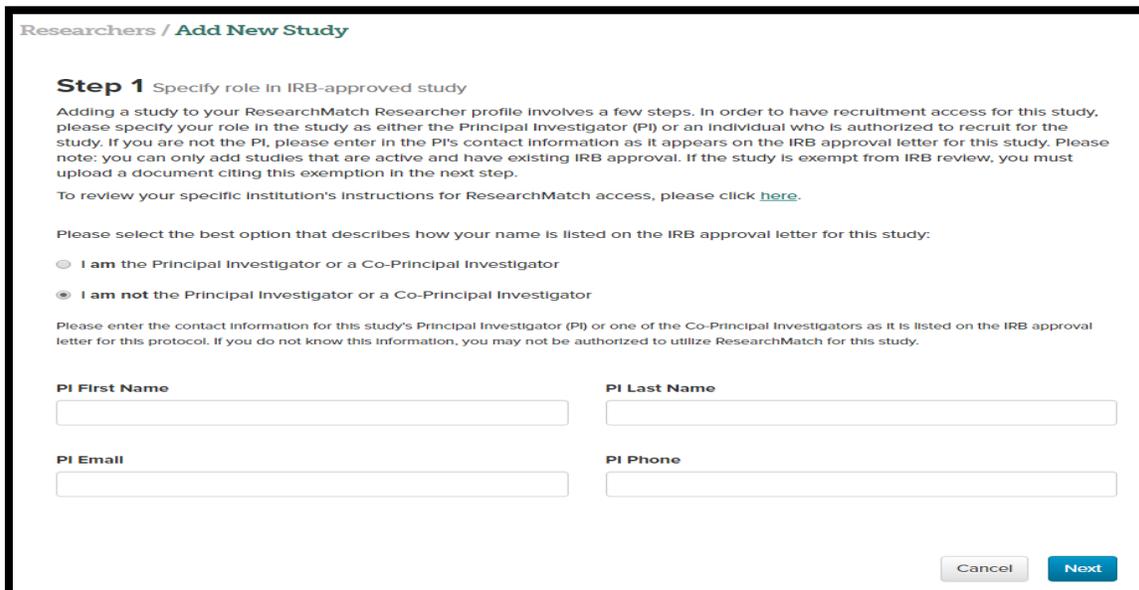
## Registering a Study

1. From your Researcher Dashboard, click “Add New Study.”



The screenshot shows the Researcher Dashboard for Russell at Vanderbilt University. The dashboard includes sections for 'Search for Volunteers', 'Your Studies / Your Matches', 'Notifications', and 'Recent Metrics'. The 'add new study' button is highlighted with a red box.

2. Indicate your role in the study as either the Principal Investigator (PI) or not the PI (proxy). If you are a proxy, you will need to enter the Principal Investigator’s name and email address.
  - Proxy – Any team member authorized to recruit for the study (study coordinator, research assistant, recruitment manager...)



The screenshot shows the 'Add New Study' form. Step 1 is 'Specify role in IRB-approved study'. The form includes instructions, a radio button selection for the role (PI or not PI), and input fields for PI First Name, PI Last Name, PI Email, and PI Phone. The 'Next' button is highlighted in blue.

### 3. Fill in the study information and upload the IRB Final Action Letter.

**Step 2** Tell us about your study

Please enter in information regarding the study that you wish to recruit for via ResearchMatch, including information regarding its IRB status and affiliation. This information will be routed for approval by your ResearchMatch Liaison upon completion or your study PI in the case you are entering informatino to recruit on their behalf. you will be notified via email on the outcome of your recruitment access request after it has been reviewed. Please note that you will have the opportunity to add additional studies or submit successful continuing review information via your researcher profile page.

Please enter the contact information for this study's Principal Investigator (PI) or one of the Co-Principal Investigators as it is listed on the IRB approval letter for this protocol. If you do not know this information, you may not be authorized to utilize ResearchMatch for this study.

**IRB #**  **IRB # (confirm)**

**NCT #**

**Study Title (as written on the IRB approval letter)**

**Contact Type**

Recruitment  Survey Only

**Study Type**

**Recruitment population of interest for this protocol?**

**Can this protocol be categorized as rare disease research?**

**[Optional] Please describe which IRB at your institution reviewed this study**

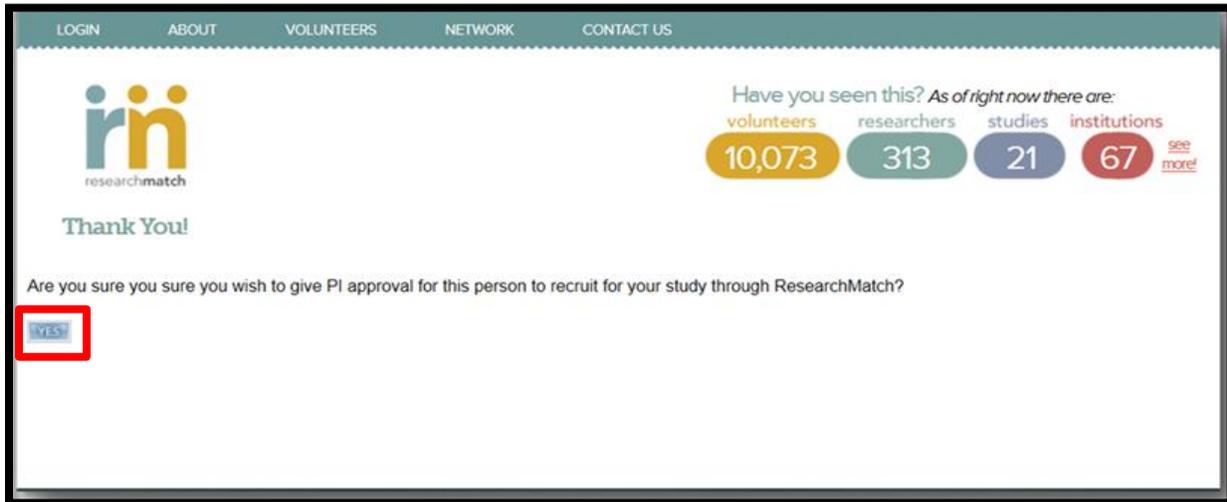
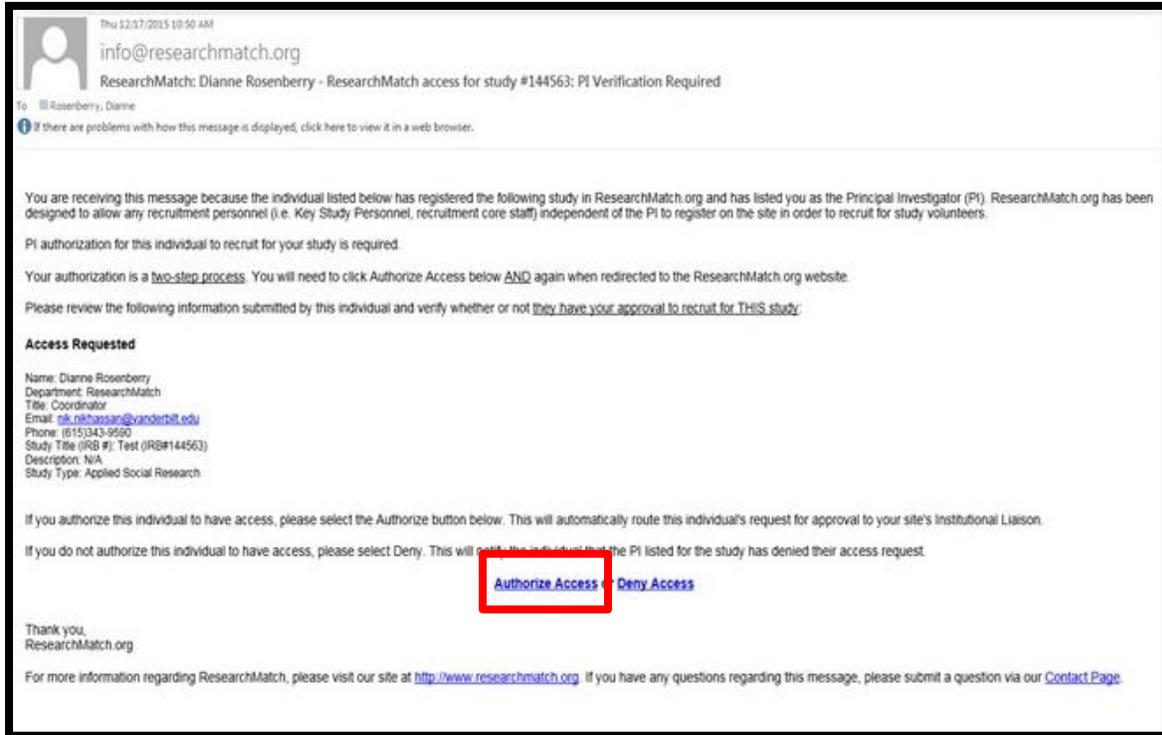
**Upload IRB Letter of Approval**

No file chosen

#### Important!

If you are a proxy, the PI will received an email to authorize access for you to recruit for the study. The PI does not need an account.

Please note, it is a two-step process. The PI would need to click “authorize access” in the body of the email and then will be redirected to ResearchMatch system where they would need to click “yes” again. If the PI does not respond to both messages, the request will still be pending. See screen shots below.



Also, these emails may go to their junk or spam folders, so please ask the PI to check there as well. If the email needs to be resent to the PI, please contact your liaisons.

Lastly, your liaison will receive your request, verify the information is correct, and approve/deny your request. If approved, you will have recruitment access for that study. If denied, you will receive an email letting you know why and how to resubmit the request.

## Researcher Dashboard:

Your researcher dashboard provides an at-a-glance overview of the studies you have registered with ResearchMatch, contact information for your institutional liaisons, and the starting point for finding volunteers.

**Researchers / Dashboard**

Welcome Kaysi, thank you for your contributions to ResearchMatch as a Researcher at **Vanderbilt University Medical Center**.

**Search for Volunteers**

Perform a feasibility or recruitment search here!

Start Searching

**Helpful Links**

- [Volunteer Perspective](#)
- [Pre-Screening Information](#)
- [Manage Auto-Contacts](#)

**Your Studies** add new study

IRB #	# Searches	# Contacted	Status <span style="font-size: 0.8em;">⌵</span>	REDCap Survey <span style="font-size: 0.8em;">⌵</span>	NCT ID <span style="font-size: 0.8em;">⌵</span>	Expiration
liaison001 [ extend ]	37	10	Confirmed	<input checked="" type="checkbox"/>	N/A	05/29/2020
123456	0	0	Pending self validation	<input checked="" type="checkbox"/>	N/A	N/A

**Notifications**

*No current notifications*

**Recent Metrics**

131,417 total volunteers in registry  
145 added since your last visit

**Education**

[Register for monthly training](#)

[Site Instructions](#)

[Researcher FAQ](#)

**Video Tutorials**

[How to Perform a Search for Volunteers](#)

[How to Add a Study and Contact Volunteers](#)

**Your Liaisons**

- Leah Dunkel
- Kaysi Phillips
- Loretta Byrne

**Profile** Last updated on 01/19/2018

[Edit contact information](#)

[Change your password](#)

## Recruitment Access:

1. From the **Researcher Dashboard**, click the “*Start Searching*” button.
2. Choose ‘*recruitment*’ as the search type, then select the study you wish to recruit for.
3. Choose the appropriate location and demographic filters of your target population to define your cohort.
4. Specify health conditions by typing in the health conditions you’d like to search. (ResearchMatch uses Boolean Logic, which can be tricky to use! If you have any questions, please contact your liaisons!)
5. Specify medications.
6. Click ‘*Select volunteers*’.
7. Click ‘*Save your search*’ and assign this search a title. Saving recruiting searches allow Researchers to keep track of previous searches and should be used if the pool of volunteers is greater than 1,500. Researchers can *load previous search criteria* – which will display the pool of volunteers that were generated during a previous search.
8. **Contact Volunteers** page will list out all the de-identified volunteers that meet the search criteria (displays U.S. state of residence, race, BMI, age, and gender). Check which volunteers you’d like to send your contact message to. There is also the option of sending the contact message to a random sample of eligible volunteers.
9. Enter in IRB approved Contact Message and link to REDCap/Qualtrics survey (if applicable).
10. Check if you would like the auto-contact feature enabled, allowing ResearchMatch to automatically search the database for specified search criteria and send a contact message if any new volunteers meet that criteria. The rule expires after 30 days.
11. Certify the study is IRB approved, and the contact messages does not contain any identifying information (study personnel names or contact information) or URLs (links to study website).
12. Click ‘*preview message*’.
13. If contact message is correct, click ‘*send message*’.

### **Important!**

You will receive a mock contact message similar to what the volunteers will see. However, the links in your email will not be active. The links are not active until they are sent to selected volunteers.

## Enrollment Continuum:

The Enrollment Continuum is a tool that keeps track of the volunteers that have been contacted to participate and have responded that they are interested in the study. You can access the continuum by click the study IRB # on your dashboard. After a volunteer responds that they are interested, they are put in the study’s Enrollment Continuum, which contains their name and contact information. **Researchers should regularly update their Enrollment Continuum and Volunteer status.** Researchers will receive automated emails from ResearchMatch notifying them if there are Volunteers that require follow-up and are flagged as “*action required.*” Volunteers that are flagged as ‘not eligible’ receive a system generated email from ResearchMatch letting them know they are not eligible for that particular study. By completing this Enrollment Continuum, ResearchMatch can collect valuable data on how the system is working.

Researchers / Study - IRB# liaison001

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**Study Details**

Study for liaisons to test - extending inclusion criteria - (IRB# liaison001)

NCT ID :	N/A	<a href="#">[ edit NCT ]</a>	Role :	PI
ResearchMatch Expiration :	05/29/2020		Contact Type :	Recruitment
IRB Approval Letter :	<a href="#">[ view doc ]</a>		Rare Disease? :	No
Study Type :	Other			
Population :	Both			
Proxy List :	Melanie Gomez, Carl Jennings, Loretta Byrne, Leah Dunkel, Aimee Edgeworth, Michael Russell, Nicolette Davis, Savitri Matthews, Leslie Boone, Terr Edwards, Nik Nikhassan, Paul Harris, Dianne Rosenbery, Loretta Byrne, Lauren Mergen, Shelby Epps,			

[\[ Remove self from study \]](#) [\[ Close study \]](#)

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**Enrollment Continuum**

Please update the status of the volunteers listed in the **Action Required** column below. Volunteers listed in the **Contact in Progress** column for more than two weeks also require action.

As you contact potential volunteers with additional study information, move each across the continuum. The eventual status of all volunteers should be reflected in 'final outcomes' columns. Volunteers want to hear from you. Please try to contact volunteers within a few days.

9 volunteers have agreed to be contacted

				ACTION REQUIRED	CONTACT IN PROCESS	NOT ELIGIBLE	NO RESPONSE	VOLUNTEER DECLINED	NOT USED/STUDY FULL	NOT USED/OTHER	ENROLLED						
<input checked="" type="checkbox"/>	Vol, Dummy	<a href="#">contact info</a>	<a href="#">health info</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											
<input checked="" type="checkbox"/>	Vol, Dummy	<a href="#">contact info</a>	<a href="#">health info</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											
<input checked="" type="checkbox"/>	Vol, Dummy	<a href="#">contact info</a>	<a href="#">health info</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											
<input checked="" type="checkbox"/>	Vol, Dummy	<a href="#">contact info</a>	<a href="#">health info</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											

Good luck, and thank you for joining the ResearchMatch Team!