

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

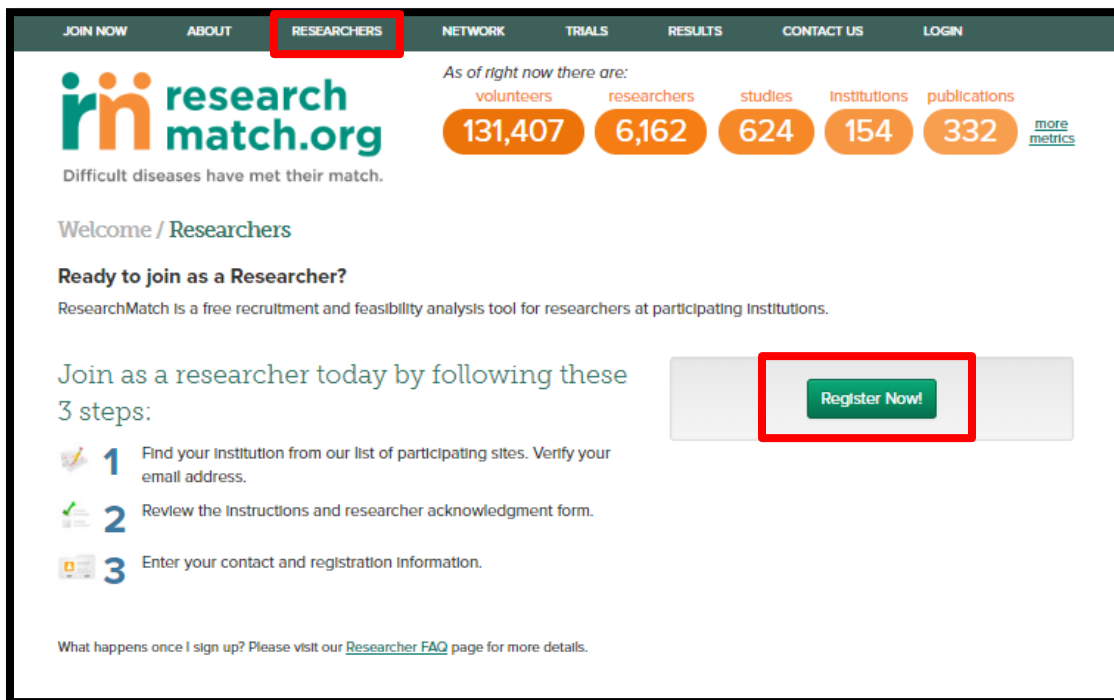
Kevin McCreary X2-8058 researchcompliance@kent.edu

ResearchMatch HQ

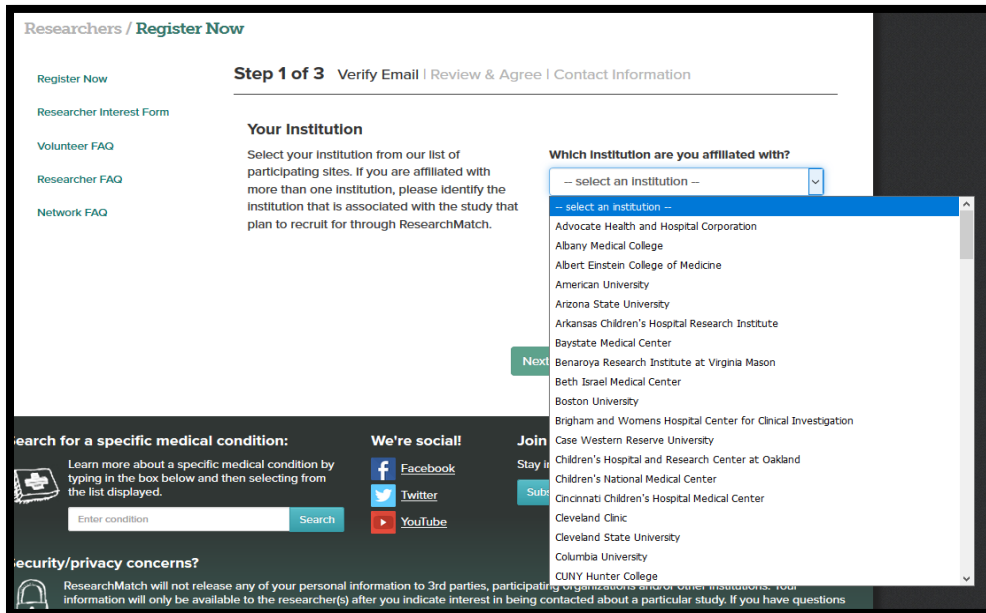
- info@researchmatch.org

Register as a Researcher:

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



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



3. Enter a **valid institutional email** address.
4. 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.
5. Enter your contact information, create a username and password, and chooses your security questions.
6. 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:

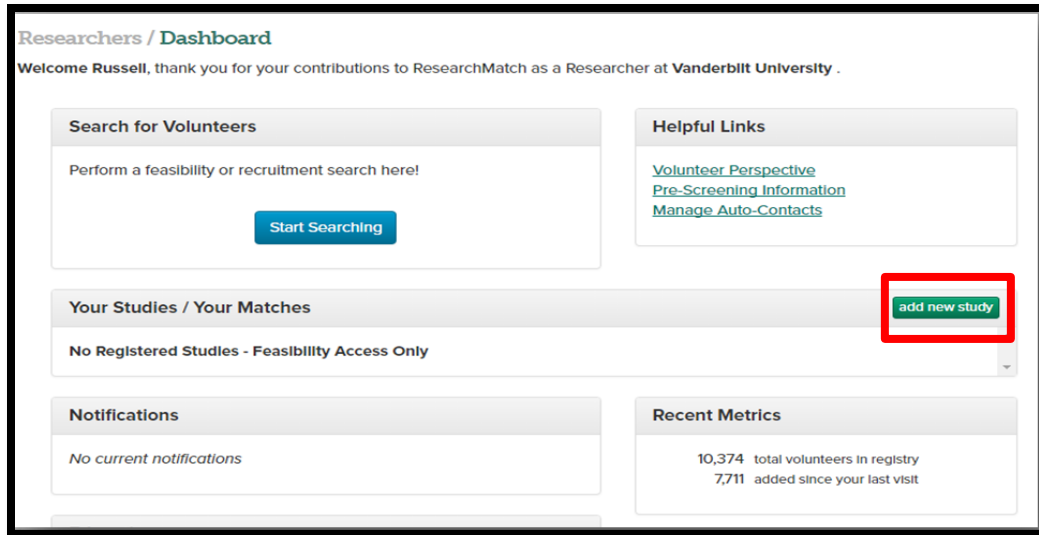
"ResearchMatch (www.researchmatch.org) is an electronic volunteer recruitment registry designed to allow individuals from anywhere in the country an opportunity to securely self-register and express an interest in being prospectively considered for participation in research studies. ResearchMatch provides 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) 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 and participate in other research studies!**

Registering a Study

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



Researchers / Dashboard

Welcome Russell, thank you for your contributions to ResearchMatch as a Researcher at Vanderbilt University .

Search for Volunteers

Perform a feasibility or recruitment search here!

[Start Searching](#)

Helpful Links

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

Your Studies / Your Matches

[add new study](#)

No Registered Studies - Feasibility Access Only

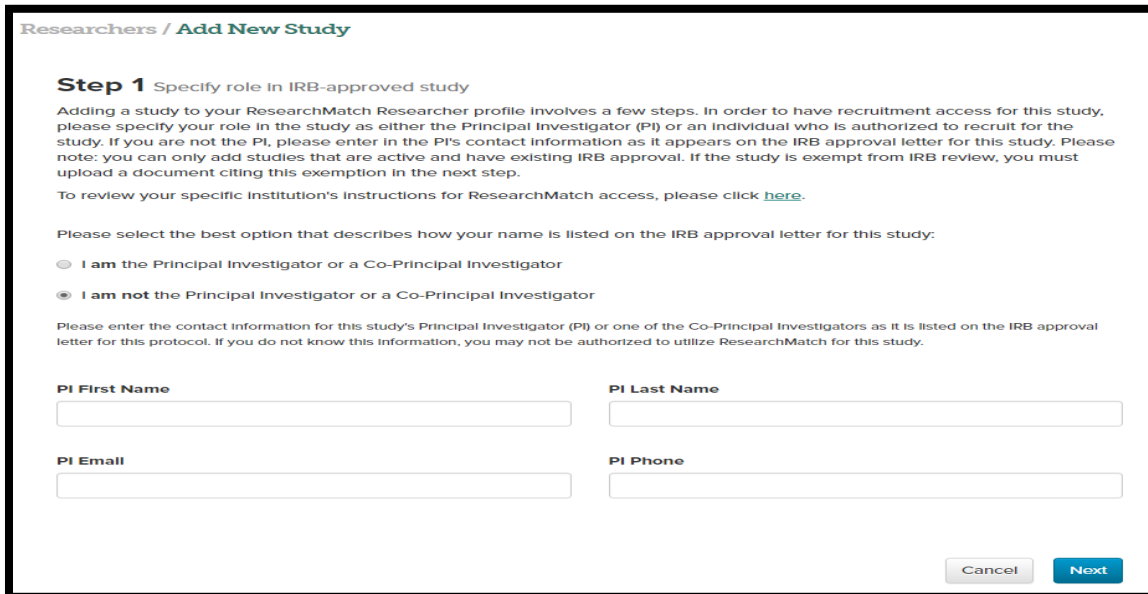
Notifications

No current notifications

Recent Metrics

10,374 total volunteers in registry
7,711 added since your last visit

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...)



Researchers / Add New Study

Step 1 Specify role in IRB-approved study

Adding a study to your ResearchMatch Researcher profile involves a few steps. In order to have recruitment access for this study, please specify your role in the study as either the Principal Investigator (PI) or an individual who is authorized to recruit for the study. If you are not the PI, please enter in the PI's contact information as it appears on the IRB approval letter for this study. Please note: you can only add studies that are active and have existing IRB approval. If the study is exempt from IRB review, you must upload a document citing this exemption in the next step.

To review your specific Institution's Instructions for ResearchMatch access, please click [here](#).

Please select the best option that describes how your name is listed on the IRB approval letter for this study:

☐ I am the Principal Investigator or a Co-Principal Investigator

☒ I am not the Principal Investigator or a Co-Principal Investigator

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.

PI First Name

PI Last Name

PI Email

PI Phone

[Cancel](#) [Next](#)

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 ?

-- select a study type --

Recruitment population of interest for this protocol? ?

-- select a category --

Can this protocol be categorized as rare disease research? ?

-- select a choice --

[Optional] Please describe which IRB at your Institution reviewed this study ?

Upload IRB Letter of Approval ?

No file chosen

Back

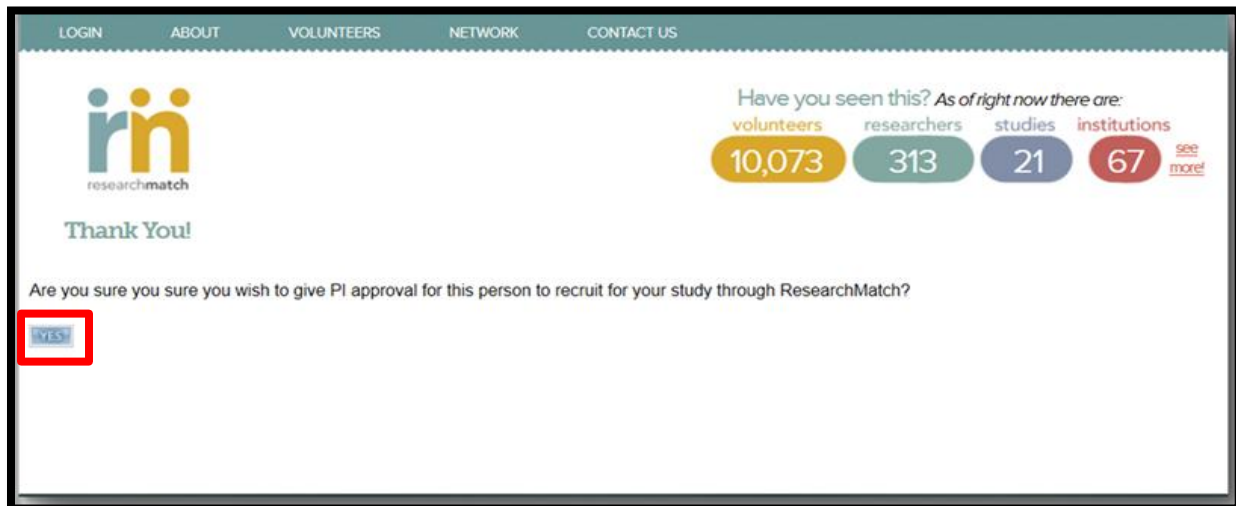
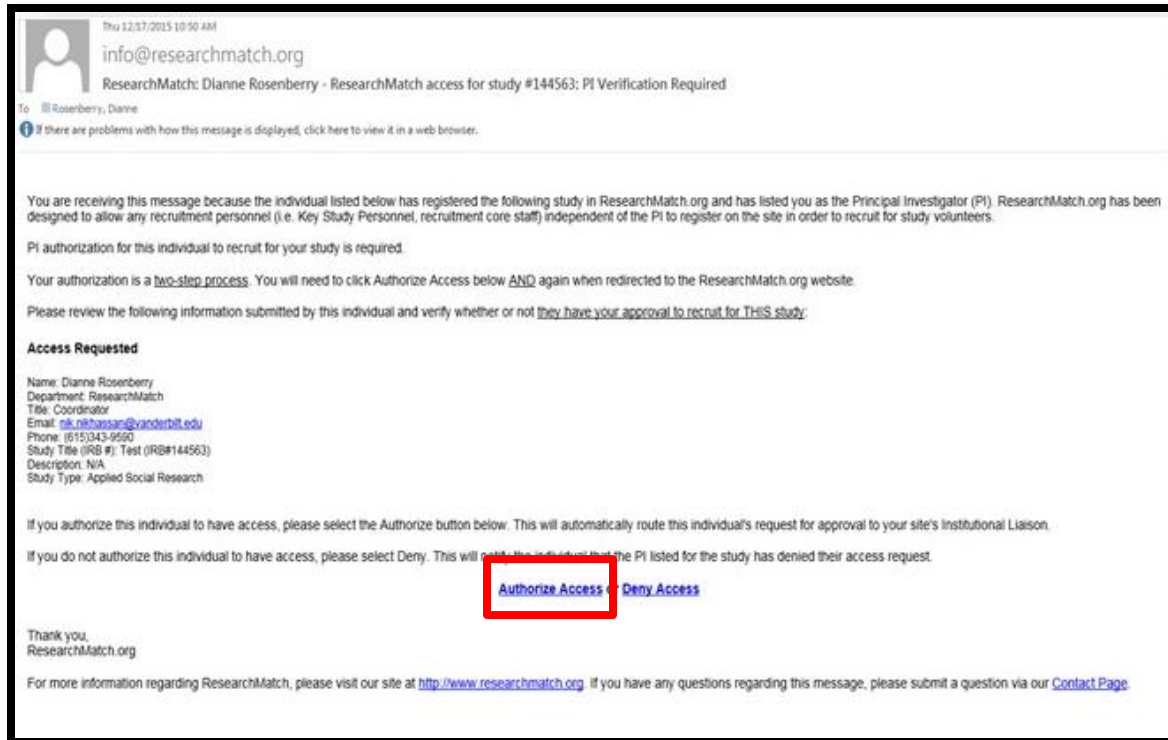
Cancel

Next

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.

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.

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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

Study Details

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

NCT ID :

N/A

[edit NCT]

ResearchMatch Expiration :

05/29/2020

IRB Approval Letter :

[view doc]

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, Terri Edwards, Nik Nikhassan, Paul Harris, Dianne Rosenberry, Loretta Byrne, Lauren Mergen, Shelby Epps,

Role :

PI

Contact Type :

Recruitment

Rare Disease? :

No

[Remove self from study]

[Close study]

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	contact info	health info	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Vol, Dummy	contact info	health info	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Vol, Dummy	contact info	health info	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Vol, Dummy	contact info	health info	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Vol, Dummy	contact info	health info	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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