UIC CENTER FOR CLINICAL AND
UNIVERSITY OF ILLINOIS
AT CHICAGO TRANSLATIONAL SCIENCE

Guide to ResearchMatch

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Using ResearchMatch.org

Introduction

ResearchMatch (RM) is a CTSA collaborative effort and a national partnership to create a centralized, web-based recruitment registry that will connect individuals who are interested in participating in research with researchers nationwide. The University of Illinois at Chicago has agreed to participate in this effort. Vanderbilt University houses and manages ResearchMatch. The Vanderbilt University IRB, in compliance with its Federalwide Assurance (FWA #0005756), has approved and will provide ongoing regulatory oversight for RM.

Purpose
To describe the process for UIC Investigators who plan to use ResearchMatch.org as a recruitment tool.

Scope
This SOP applies to UIC personnel who plan to use RM as a recruitment tool and the Institutional Liaisons who will manage the process.

Delegation of Activities
The Principal Investigator may delegate recruitment access in RM to a "proxy" (non-PI) at UIC, using the tools in the RM system. PI must approve proxy request in RM before a proxy can gain access.

Definitions

Feasibility analysis
An analysis that allows the Investigator to view the ResearchMatch registry in aggregate. The Investigator specifies search criteria, views the number of registrants meeting these criteria within ResearchMatch and basic demographic data regarding the population of interest.

Institutional Liaison
University of Illinois at Chicago (UIC) representative who serves as a gatekeeper, provides daily management of researcher access requests in RM, and ensures that the integrity of researcher access to ResearchMatch.org is upheld.

Recruitment access
Access granted to an Investigator after he/she has been verified as a UIC researcher and has received IRB approval for the use of ResearchMatch as a recruitment tool.

ResearchMatch Researcher
A researcher according to ResearchMatch may be a protocol's Principal Investigator (PI) and/or the PI's recruitment proxy (e.g. key study personnel at UIC authorized to recruit for studies in accordance to UIC IRB policy). Proxy researchers undergo PI approval prior to being routed to Institutional Liaison approval.

Procedures

Number	Responsibility	Activity
1.0	Researcher	Requests an account in RM at: https://www.researchmatch.org/researchers Agrees to the online "Researcher Acknowledgement" in order to proceed
2.0	Institutional Liaison	Checks the Investigator's eligibility for a feasibility analysis: Must be UIC researcher Removes access to feasibility analysis for anyone who is not part of UIC (source of info may include UIC phonebook or Net ID).
3.0	Researcher	Conducts a feasibility analysis.
4.0	Researcher	If interested in using RM in recruitment, prepares and submits an IRB initial application or amendment that includes: Inserting ResearchMatch template language in the protocol and IRB Application A recruitment message that will be sent to "matched" volunteers by RM (this would be similar to language used for a recruitment flyer). Click here for template language you can use in your IRB documents.
5.0		After receiving UIC IRB approval to use RM for the given study, the PI (or designee) will register the study for recruitment access in ResearchMatch. Registration will include: Basic contact information Details regarding the study
5.1		Upload the current UIC IRB approval letter into the RM database.
5.2		Provide RM with IRB-approved recruitment message to be sent to "matched" volunteers (similar to what might be used in an IRB-approved flyer).
6.0	Researcher	Reviews the e-mail from RM stating that there has been a request for the study to be registered in RM
6.1		Confirms that he/she has requested the study be registered in RM.
7.0	CCTS Institutional Liaison	Reviews study information entered into RM Sets the RM expiration date to mirror the IRB approval/expiration date.
8.0	OPRS Institutional Liaison	Confirms IRB approval for use of ResearchMatch in recruitment for the identified study.
9.0	CCTS Institutional Liaison	Approves recruitment access request in RM.
10.0	ResearchMatch	Sends the PI an e-mail approving recruitment access.
11.0	Researcher	PI must accept access to RM for the study. Logs in to ResearchMatch as a Researcher and follows steps to select his/her population for recruitment.
11.1		Reviews the e-mail from RM stating that there has been a request to select the population for recruitment.
11.2		Confirms that he/she has selected the population for recruitment

12.0	Research Match	Inserts the study's recruitment content into the standard ResearchMatch electronic notification that informs possible matched Volunteers that a researcher has identified them as a potential match for their study.
12.1	ResearchMatch Volunteer matches	Replies yes, no, or chooses not to respond through a set of quick links available in the RM notification.
13.0	Researcher	Accesses potential research subjects through the "matched" volunteers who replied "yes" to the RM notification. This information is made available on the researcher's ResearchMatch study dashboard. The researcher will be responsible for managing this contact information as called for by their IRB-approved study protocol.
14.0	Researcher	Updates IRB status by submitting current IRB approval letters to ResearchMatch to document successful continuing IRB oversight for the lifetime of the study.

ResearchMatch Study Search & Contact Process

This web page provides an overview of the ResearchMatch study search and contact process from both the Researcher & Volunteer experience.

Researcher Experience

Step 1: Researcher registers active, IRB approved protocol into ResearchMatch system.

Step 2:   Institutional Liaison reviews request and approves if the study is active, has current IRB approval, and is affiliated with UIC in the ResearchMatch network.

Step 3: Researcher receives confirmation email that they have been authorized to recruit for study volunteers via ResearchMatch.

Step 4: Researcher must 'accept' this recruitment access confirmation *(instructions provided within email message received by researcher once liaison confirms their request).*

Step 5: Researcher logs into ResearchMatch with registered username and password.

Step 6:   Researcher selects "Search for Volunteers."

Step 7:   In order to search with recruitment access privileges, the researcher must first associate (or link) any given search with an approved, registered protocol in the ResearchMatch system. ResearchMatch provides the researcher with their list of existing protocols in the ResearchMatch system and they must select the one for which they are completing the search. If they select none – they must search with feasibility only access.

Step 8: Researcher proceeds through step-by-step ResearchMatch Search Builder by entering in study criteria (i.e. vicinity from institution or by state, age, gender, BMI, height, weight, race).

Step 9: Upon completing the Search, the researcher with recruitment access is able to view exactly how many ResearchMatch Volunteers meet their criteria along with their anonymous, itemized health profiles.

Please note: if the researcher only had feasibility access and thus did not link this search to a specific IRB approved protocol, they would only view aggregate information once reaching this point in the Search that would show an approximate number of ResearchMatch Volunteers that meet this criteria. Itemized, anonymous health profiles are NOT provided for feasibility access.

Step 10: Researcher with recruitment access is able select from the list of possible matches exactly which ResearchMatch Volunteers they wish to contact.

Step 11: Researcher proceeds to "Contact Volunteers" page.

Step 12: Researcher reviews directions to enter in IRB approved recruitment language for this protocol. This may be the same information as is printed on a flyer or poster regarding the protocol – the researcher may simply cut and paste this language into the ResearchMatch window.

Step 13: The researcher must confirm that this language they are entering is IRB approved recruitment language for the protocol AND excludes direct study contact information. Please note: ResearchMatch will ensure that institution name & city/state of study location is provided to volunteer.

Step 14: Researcher submits message. ResearchMatch immediately routes message to the possible 'matched' Volunteers' email inboxes.

Step 15: Researcher waits for Volunteer response and is shown metrics regarding how many volunteers respond yes, no, or do not respond. This information is also available to the Institutional Liaison in aggregate.

Step 16: After a Volunteer completes Step 8 (see below) and has responded "Yes," ResearchMatch will display their contact information in protocol's Manage Study page, accessible by the researcher. The name of each "Yes"-respondent is accessible here. Contact information may be extracted for the purposes of a mail merge.

Step 17: Researchers are asked to update the "Enrollment Continuum" which allows for them to 'track' where the "Yes" respondents are within their study (e.g. , did not contact, consent process, enrolled but did not complete, enrolled and completed). ResearchMatch will be capturing these data in aggregate in order to monitor the effectiveness of ResearchMatch in producing 'matches' between Researchers and Volunteers. Volunteers have consented to the collection of this information.

Volunteer Experience

Step 1: Volunteer whose profile was identified as a potential match for a protocol, receives an email from do-not-reply@researchmatch.org notifying them that they may be a possible 'match' for a study.

Step 2: Volunteers sees ResearchMatch logo and standard "header" language indicating that a researcher using ResearchMatch believes that they may be a good fit for the protocol listed below.

Step 4: Volunteer reads information regarding the study *(please note: this content is exactly what the researcher provides when entering in their IRB-approved recruitment language).*

Step 5: Below the protocol information, the volunteer will see a visible Green "Yes" button vs. a Red "No" button. These buttons are 'quick links' provided in the email message that allow ResearchMatch to know of the Volunteer's response to the message.

Step 6: The Volunteer is given directions that should they wish to be directly contacted with the research team affiliated with the study, they may select "Yes." Should they not be interested, they can select "No" or not respond.

Step 7: By selecting "Yes," the volunteer is routed to a ResearchMatch confirmation page where they are reminded that a "Yes" response is authorizing ResearchMatch to release their name, email, address and phone number to the research team associated with the given protocol and thus may be contacted by this study team directly through any of these mechanisms. By selecting "No," the volunteer is routed to a ResearchMatch page asking for them to share why, if they wish. Options will be provided.

Step 8: "Yes"-respondents wait to be contacted by research team. Please note that they will be reminded that even by responding "yes," this does not guarantee that the research team will contact them.

Note : All 'recruitment' messages routed from ResearchMatch.org will be from **do-not-reply@researchmatch.org** and contain a standard header & footer. The header will be an image with the ResearchMatch logo. The footer will contain reference for removing themselves from the ResearchMatch registry + general disclaimer.

ResearchMatch Standard IRB Submission Language

Introduction

The following should be added to your IRB submission in order to use ResearchMatch:

"ResearchMatch.org will be used as one of the recruitment tools for this research study/protocol. ResearchMatch Volunteers will be contacted through ResearchMatch.org. Included with this submission is a study recruitment message that will be sent to potential study volunteers. "

Basic information regarding ResearchMatch

ResearchMatch.org is a national electronic, web-based recruitment tool that was created through the Clinical & Translational Science Awards Consortium in 2009 and is maintained at Vanderbilt University. The Vanderbilt IRB provides oversight for ResearchMatch as a recruitment tool and this has been documented within the ResearchMatch IRB Letter of Understanding (available upon request). For more general information regarding ResearchMatch, please visit www.researchmatch.org or contact the Program Manager at info@researchmatch.org,

Researchers may use this tool for recruitment after registering basic contact information and details regarding his/her study with ResearchMatch and obtaining IRB approval for their study that contains ResearchMatch as a recruitment tool. A UIC ResearchMatch Institutional Liaison reviews the study information and evidence of IRB approval before approving the researcher's request for recruitment access.

After being granted recruitment access, the researcher will be able to search for appropriate matches among the non-identifiable ResearchMatch Volunteer profiles in the system. Once a list of potential matches (ResearchMatch Volunteers) is generated, an IRB-approved recruitment message about the study will be sent to potential volunteers through ResearchMatch. The study's recruitment message will be inserted into the standard ResearchMatch electronic notification that informs possible matched Volunteers that the researcher has identified them as a potential match for the study and provide information about the study. *The recruitment message will not include the study's direct contact information (e.g., email, phone) in ResearchMatch.*

Potential matching volunteers will have the option of replying yes, no, or not respond through a set of quick links available in this recruitment message. By responding yes, the Volunteer authorizes ResearchMatch to release their contact information to the researcher. This contact information of the "Yes"-responding ResearchMatch Volunteers will be made available to the researcher on the "Managing my Study" dashboard in ResearchMatch.

Recruitment Message to Potential Study Volunteers through ResearchMatch.org

ResearchMatch provides standard notification language that will be received by all ResearchMatch volunteers who may be a match for a given study. The specific message below should be used when seeking approval to use ResearchMatch and should be submitted with your IRB Application. Please note - the maximum number of characters for the study-specific information (in box below) is 800. The system will not allow messages longer than this.

A research team with the University of Illinois at Chicago in Chicago, Illinois, believes you might be a good match for the following study:

If you are interested in this study and having the research team contact you directly, please select the "Yes, I'm interested" link below. By clicking the "Yes, I'm interested" link, your contact information will be released to the research team. If you select the "No, thanks." link or do not respond to this study message, your contact information will not be released to the research team.

QUICK LINK OPTION: YES   QUICK LINK OPTION: NO

Thank you for your interest in ResearchMatch.