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(s)

- Deaven Hough, deavenf@ufl.edu, 352-294-5959

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. Please contact your RM liaison for sample messages.

3. **Obtain IRB approval for your REDCap 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.”

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

Important!
If you are a proxy, the PI will receive 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 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.
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 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 clicking 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.

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