Instructions for Using ResearchMatch
University of Rochester

To review the University of Rochester's official guidance on using ResearchMatch.org, visit the University's Using ResearchMatch.org webpage.

About ResearchMatch:

ResearchMatch.org is a national registry that connects researchers with volunteers interested in participating in IRB-approved health research studies. Please note:

- Volunteers cannot be recruited solely to populate a researcher's own recruitment database or registry.

- ResearchMatch is intended only for health-related research, not for political polling or market research.

- Studies must have at least one health-related outcome to qualify.

Important Update: For studies submitted in Click IRB on or after July 1, 2025, a one-time fee will apply if you plan to use ResearchMatch for recruitment. This fee covers the creation of a contact message for your study and the preparation of materials for IRB review. You can find the current fee schedule on the CRC's Apply for Support page. For questions or additional details, email researchhelp@urmc.rochester.edu.

Getting Started with ResearchMatch:

If you plan to use ResearchMatch to recruit participants and a fee is applicable, please follow these steps:

1. Submit a CRC Application.

2. Indicate that Recruitment Services are needed on the application form.

3. A CTSI staff member will follow up to guide you through the next steps, which are outlined in this document.

Note: You will need to provide a University account # (GR or OP) for billing purposes.

If you have questions about the fee or process, please email researchhelp@urmc.rochester.edu.

Registering as a User on ResearchMatch:

There are two levels of access available:

- **Feasibility Access:** Allows you to search the ResearchMatch database to view aggregate counts (approximate) of volunteers who meet your study's eligibility criteria.

- **Recruitment Access:** Allows you to search the ResearchMatch database to determine the exact number of volunteers who meet your study's eligibility criteria, as well as:

    o View non-identifiable demographic details of potential volunteers.

    o Send an IRB-approved recruitment message directly to volunteers.

How to Register

1. Visit the ResearchMatch [page for researchers](#).

2. Click "Join as a researcher!" and follow the instructions. You must use your University email address.

3. Complete user registration in one sitting—the system does not save progress.

4. Check your email for a verification link to finalize your account.

5. Once verified, log in to access your Dashboard and click "Start Searching" to begin a volunteer search.

Note: Upon registration, you will automatically receive Feasibility Access. To gain Recruitment Access, you must submit a CRC Application if a fee applies and obtain IRB approval for your study. You can enable Recruitment Access by adding your study to ResearchMatch after you have secured IRB approval.

Securing IRB Approval for Recruitment Access

To enable Recruitment Access for an existing study:

1. Download and complete the *ResearchMatch Request Form* from the University's [Using ResearchMatch.org webpage](#).

    o If a fee applies to your study, you don't need to complete this step. CTSI staff will draft your contact message and provide you with a complete form.

2. Submit the completed form to your IRB for review and approval.

    o Be sure to list ResearchMatch as a recruitment method in your IRB application.

- Include the completed Request Form in the recruitment materials section.

3. If you haven't [registered](#) with ResearchMatch yet, do so now.

For help with your IRB submission, contact a University ResearchMatch Liaison (listed on your Dashboard) or email ResearchHelp@urmc.rochester.edu.

Registering a Study on ResearchMatch

To register a study for Recruitment Access:

1. Log in and click the green "add new study" button on your Dashboard.
   - **Important for Co-PIs:** Only the IRB-approved PI-of-Record should be listed as the PI. If you are a Co-PI, select "I am not the PI or Co-PI." The system will then prompt you to fill in the PI-of-Record's information.

2. Complete the study details and select Contact Type:
   - **Survey Only:** For studies collecting data through an electronic survey <u>only</u>
   - **Recruitment:** For studies involving additional activities (e.g., interviews, visits, diaries, phone calls)

   Note: The study #, study title, and PI name that you enter when registering your study must exactly match those listed on the IRB Letter of Approval.

3. Upload required documents:
   - **IRB Letter of Approval (PDF, max 37 KB) must include:**
     - Study title
     - Click IRB # or other unique identifying number
     - PI's full name
     - Approval and/or expiration date
     - Indication that the ResearchMatch Request Form was reviewed

   For exempt studies, upload the Letter of Exemption or review determination document.

   If there are multiple documents to support the required elements above, combine them into a single PDF before uploading.

   - **Contact Message:** Upload the completed IRB-approved *ResearchMatch Request Form* containing the contact message you'll send to volunteers.

4. After submitting your study:
   - There is a two-step approval process:

- The PI-of-Record will receive an email asking them to approve you as a study proxy.
- A University ResearchMatch Liaison will review your study submission.
- Once approved, you'll receive an email from 'info@researchmatch.org' prompting you to "accept access for recruitment."
- Click "ACCEPT" to activate Recruitment Access for your study.

Recruiting Volunteers in ResearchMatch

Starting a Volunteer Search

1. Log in and click "Start Searching" on your Dashboard.

2. Select the "Recruitment" radio button

3. Choose the specific study for which you are recruiting

4. Apply filters defining your study's eligibility criteria.

5. Click "Select Volunteers" on the bottom right of the page.

"Does your study primarily focus on parenting or pregnancy?" If your study involves infants, children, parents, or pregnant individuals, answer "Yes" to this question. This ensures that volunteers who have opted out of parenting-related studies are excluded from your search.

Sending Recruitment Messages

- After selecting volunteers, you will enter your IRB-approved contact message (from the *ResearchMatch Request Form*).

- ResearchMatch will email this message to those you have selected.

- Volunteers can choose to release their contact information to your study team.

- The response rate will be displayed on your Dashboard.

To view volunteers who opted in:

1. Click the study's IRB # on your Dashboard.

2. Click the "Contact Info" link next to each name to access their details.

Reminder: Only study staff listed on the IRB application may contact volunteers or obtain consent.

Tracking Volunteer Status: The Enrollment Continuum

- Located next to your volunteer list, the Enrollment Continuum helps track each volunteer's status.

- Marking a volunteer as "NOT ELIGIBLE" triggers a system-generated email informing them.

- Keeping this updated is essential for University reporting and improvement efforts.

Optional: Automatic Survey Emailing via REDCap

ResearchMatch can automatically email surveys to volunteers if built in REDCap.

- **Recruitment Studies**

    o Include a link to an IRB-approved prescreening survey.

    o After a volunteer releases their contact info, ResearchMatch sends the survey link.

    o The survey must collect the volunteer's email to match responses with ResearchMatch data.

- **Survey Studies**

    o Include a link to an IRB-approved research survey.

    o ResearchMatch sends the survey after a volunteer releases their contact info.

    o The system updates the volunteer's status to "SURVEY SENT" on the Enrollment Continuum.

Important: REDCap and ResearchMatch do not interact directly. To match survey responses with volunteers, include identifiers (e.g., email) in your survey. Weigh if the survey needs to be anonymous.

Using Other Survey Tools (e.g., Qualtrics)

- You may email survey links manually after volunteers opt in.

- For large groups, export your volunteer list and send a batch email.

    o ResearchMatch will update each volunteer's status to **"SURVEY SENT"** upon export.

Privacy Reminder

- Always use Bcc when emailing multiple volunteers.

- Never share volunteer email addresses with anyone outside the IRB-approved study team.

- Store identifiers securely and delete them when no longer needed.

Maintaining Your Study in ResearchMatch

Recruitment Access is valid only while your study's IRB approval is active.

- If your IRB letter includes an expiration date, access ends on that date.

- If no expiration date is listed, access expires 1 year after the approval date.

- For exempt studies, access lasts 5 years.

To extend access:

- Visit your Dashboard.

- Click "[extend]" under the study's IRB #.

- Upload a single PDF showing IRB re-approval or exemption.

Need Help?

- For help with IRB submissions or using ResearchMatch, contact a University ResearchMatch Liaison (listed on your Dashboard) or email: ResearchHelp@urmc.rochester.edu

- If you experience technical difficulties with the ResearchMatch.org website, please contact ResearchMatch.org via this web form: https://researchmatch.org/contact/

Training Opportunities

Tutorial videos are available on your Dashboard.

- A free live webinar is offered monthly:

  o 2nd Thursday of each month, 1:00–2:00 PM ET

  o Open to investigators and ResearchMatch proxies

  o Attend once or as needed

- To register:

  o Visit the University's Using ResearchMatch.org webpage (see "Get Training"), or

  o Log in to ResearchMatch, and under the Education section on your Dashboard, click "Register Here!"

Citing ResearchMatch in Publications

If your study results in publication, please include the following acknowledgment:

> Recruitment for the study <> was conducted via ResearchMatch.org, a national health volunteer registry that was created by several academic institutions and supported by the U.S. National Institutes of Health as part of the Clinical Translational Science Award (CTSA) program. ResearchMatch has a large population of volunteers who have consented to be contacted by researchers about health studies for which they may be eligible. Review and approval for this study and all procedures were obtained from <>.