Instructions for Using ResearchMatch.org
University of Rochester

ResearchMatch.org is a website that researchers can use to recruit volunteers for IRB-approved research studies. ResearchMatch volunteers cannot be recruited for the purpose of populating a researcher's own recruitment database.

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

To use ResearchMatch as a recruitment tool, you must first register for user access. There are two levels of access:

- **Feasibility Access:** Search the ResearchMatch database to determine the aggregate number of potential volunteers that meet eligibility criteria for a study.

- **Recruitment Access:** Search the ResearchMatch database to determine how many potential volunteers meet eligibility criteria. View their individual, non-identifying demographic information. Send them an IRB-approved recruitment message.

Registering as a User on ResearchMatch

To register (for either level of access), go to the ResearchMatch website: https://researchmatch.org/researchers/. Click on "Register" and follow the instructions. You must use your University email address. The system will not save your information as you go, so complete user registration in one sitting, and remember to check your email for a verification link. When finalized, you will be able to log in and view your Dashboard where you can search for volunteers by clicking the "Start Searching" button.

Note: Upon registration, you will have Feasibility Access automatically. In order to receive Recruitment Access, you must first obtain IRB approval for a University of Rochester study. If your study does not have IRB approval, you can still perform feasibility searches. You may add an IRB-approved research study later (and receive Recruitment Access for it) at any time.

Securing IRB Approval

To receive Recruitment Access for a new or previously IRB-approved research study, follow the steps below:

1. Complete the *ResearchMatch Request Form*, which you can obtain from the University's Using ResearchMatch.org webpage. See subsection, "Recruiting Research Subjects."

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

Note: When completing or amending an IRB application, ensure that "ResearchMatch" is indicated as a recruitment method. You should include a copy of the completed *ResearchMatch Request Form* with the IRB application in the recruitment materials section.

3. If you have not already registered as a user with [ResearchMatch](), do so now.

For help completing the required *ResearchMatch Request Form*, or for assistance with anything related to using ResearchMatch, contact one of the University's ResearchMatch Liaisons (listed on your Dashboard) for a no-cost consultation. Alternatively, you may send an email to ResearchHelp@urmc.rochester.edu.

Registering a Study on ResearchMatch

To register a study for Recruitment Access, click the "add new study" button on your Dashboard.

Important for Co-PIs: Although ResearchMatch accepts Co-PIs, University of Rochester policy requires you to enter only the IRB-approved PI-of-Record's contact information. Therefore, when registering a study, if you are a Co-PI for that study, choose "I am not the PI or Co-PI." The system will then prompt you to fill in the PI-of-Record information.

For *Contact Type,* select one of the two options that applies to the study:

- **Recruitment:** Face-to-face visits involving clinical or observational interventions.

- **Survey Only:** Studies collecting data through electronic survey only.

Upload IRB Letter of Approval: Upload a single PDF that contains the following IRB-approved elements:

- Study title
- Study unique identifier number (IRB #, CLICK #, or other unique identifying number)
- PI first and last name
- Study approval date and/or expiration date (study must be active, current)
- Indication that the ResearchMatch Request Form has been reviewed

Typically, the IRB Letter of Approval contains all of these elements and is sufficient. For an exempt research study, upload the review determination document (often called the Letter of Exemption).

If there are multiple documents to support the required elements above, combine the documents into a single PDF and then upload that one file into ResearchMatch. The maximum file size is 37 kb.

After you submit the registration information for the study, an email will be delivered to the study's PI-of-Record for initial approval and then to one of the University's ResearchMatch Liaisons for review (a 2-step approval process). Once approved by a University ResearchMatch Liaison, you will receive an email from ResearchMatch (info@researchmatch.org) asking you to "Accept access for recruitment." Click "ACCEPT," and you now have Recruitment Access for the study.

Recruiting Volunteers

Click the "Start Searching" button on the Dashboard. Select the "Recruitment" radio button, and then select the specific study for which you are recruiting. Below that are several filters where you can add constraints around eligibility criteria for the study. After adding your filters, click the "Select Volunteers" button at the bottom right of the page. Next, you will enter the IRB-approved contact message (from the study's IRB-approved *ResearchMatch Request Form*).

ResearchMatch will email your message to all of the potential volunteers that you have selected. Within that email, individuals can choose to release their contact information to the study team. (The aggregated response rate to your recruitment message will be displayed on the Dashboard.) If an individual grants permission, their personal contact information will be available within the secure ResearchMatch system. Simply click on the study IRB # on the Dashboard to view the list of volunteers who would like to be contacted about participation. Click the "contact info" link next to each name to view that volunteer's contact information. Y*ou are responsible for managing any identifiable contact information for each volunteer.*

Important Note: Only study staff included in the IRB-approved application may be engaged in research activities such as contacting potential volunteers and obtaining consent to participate.

Updating the Enrollment Continuum: To the right of the volunteer list is the Enrollment Continuum. This allows you to track the contact status of each volunteer. Volunteers that you check as "NOT ELIGIBLE" will receive a system generated email from ResearchMatch letting them know they are not eligible for that particular study. Please keep the Enrollment Continuum updated, as this is the only way the University can collect data for reporting and improvement initiatives.

Automatic Survey Emailing (Optional)

ResearchMatch provides a convenience option that automatically sends an email to a volunteer (with a link to a prescreen survey or a research survey), if the survey was built in REDCap. There are different considerations based on *Contact Type*:

- **Recruitment:** For *Recruitment* studies, you have the option to include a link to an IRB-approved REDCap prescreening survey (created by the researcher). If included, after a volunteer agrees to release their contact information to the study team, ResearchMatch will automatically email the prescreen survey link to the volunteer. *The prescreen survey must ask for the volunteer's email* so you can match the prescreen responses (in REDCap) with the volunteers listed in ResearchMatch - and can update the Enrollment Continuum accordingly.

- **Survey Only**: For *Survey Only* studies, you can include an IRB-approved REDCap research survey that ResearchMatch will automatically send to volunteers after they agree to release their contact information to the study team. ResearchMatch will automatically update the Enrollment Continuum to "SURVEY SENT" when this happens.

Survey Only - Please Note: Survey responses will be stored in REDCap, but volunteer contact and demographic information lives on ResearchMatch. These systems do not interact. So unless conducting an anonymous research survey, it is recommended that researchers ask for one or more identifiers in their survey (like an email address) so you can reconcile who responded by comparing survey responses to your volunteer list in ResearchMatch.

If a researcher prefers to use a survey tool that is different from REDCap, like Qualtrics for example, they can individually email a survey link to a volunteer once the volunteer agrees to release their contact information. For surveys with many interested volunteers, ResearchMatch will allow you to export your list of volunteers so you can send a batch email with a link to the survey. When you export a list of volunteers, the status of those volunteers will automatically move to "SURVEY SENT" in the Enrollment Continuum. When batch emailing, please make sure you "Bcc" all of the volunteers. Do not place multiple volunteer email addresses in the "To" or "Cc" email fields. Sharing volunteer identifiers, like email addresses, with anyone other than study staff identified on the original IRB application is a violation of ResearchMatch policy and a breach of PHI under HIPAA. Please ensure that you maintain documents with volunteer identifiers within a secure system. It is recommended that you delete or destroy documents with volunteer identifiers when they are no longer necessary to complete the research survey study and/or analyze results.

Maintaining a Study

Your Recruitment Access for a study will last only as long as your study's IRB approval. The expiration of your Recruitment Access will mirror the expiration date listed on your IRB Letter of Approval. If no expiration date is listed, your Recruitment Access will expire 1 year after the listed approval date. If you are using ResearchMatch to recruit for an exempt study, the expiration date will be set for 5 years.

At the time of expiration, you will be required to upload the study's current IRB Letter of Approval (re-approval) or review determination document. To do this, visit your Dashboard and click the "[extend]" link underneath the expiring study's IRB #. Upload a single PDF, which contains sufficient evidence of IRB re-approval.

Note: ResearchMatch may send you automatic email notifications, stating that you have pending interested volunteers, to keep you informed about your user registration, or to let you know about expiring studies.

Personal Assistance with Using ResearchMatch

If you would like assistance with the IRB submission process, or if you need help using ResearchMatch to find volunteers, please contact one of the University's ResearchMatch Liaisons (viewable on the 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/

Free ResearchMatch Training for Researchers

A free webinar about how to use this University-supported recruitment tool is available for researchers (investigators and coordinators) the 2nd Thursday of every month from 3:00PM-4:00PM ET. Researchers can attend once and repeat the training as needed. To register, visit the University's [Using ResearchMatch.org webpage](). See subsection, "Getting Started."

If the Study Results in Publication

You should reference ResearchMatch and the CTSA program as follows:

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 <>.