

ResearchMatch.org is intended for use for recruiting volunteers for IRB-approved research studies. Volunteers cannot be recruited for the purpose of creating a researcher's own recruitment database. For the University's guidance for using ResearchMatch, click [here](#).

To use ResearchMatch as a recruitment tool, you must first register for user access. You can register for either:

- **Feasibility Access:** Researchers use ResearchMatch to assess the availability of volunteers that matches the requirements for study eligibility. Results of a feasibility assessment are provided in aggregate, without individually identifying information; **or**
- **Recruitment Access:** Researchers search the ResearchMatch database to assess how many individuals meet eligibility criteria, to view non-identifying descriptions of potential matches, and to add the IRB-approved recruitment message to send to eligible individuals.

Registering as a User: To register for recruitment or feasibility access, go to the ResearchMatch website: <https://www.researchmatch.org/researchers/>. Click on "Register" and follow the instructions. You must use your University email address. Complete the registration process in one sitting or the entered information will not be saved. Upon registration, you will receive an email with your verification code to complete the registration process and have final access to *Your Dashboard* in ResearchMatch.

NOTE - If your study does not have IRB approval; you can still register for feasibility access. An IRB-approved research study can be added later at any time.

Registering a Study: To register a study for recruitment, the study's PI-of-Record or authorized proxy must submit sufficient evidence of having IRB approval (either RSRB or a Central IRB) for each University of Rochester study added to the system. To request a no-cost consultation for help in using RM or completing the required *ResearchMatch Request Form* (which contains the contact message you would like sent to matched, potential ResearchMatch volunteers), contact the University's ResearchMatch Institutional Liaison at ResearchHelp@urmc.rochester.edu.

NOTE - Although the ResearchMatch system accepts Co-PIs, University of Rochester policy requires you to enter only the IRB-approved PI-of-Record's contact information. Therefore, when adding 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 completion of PI-of-Record information.

Using the Recruitment Tool: To utilize ResearchMatch as a recruitment tool in your new or previously IRB-approved research study, follow the instructions below:

1. Complete the *ResearchMatch Request Form* (obtain from the University's ResearchMatch [website](#), see subsection - Recruiting Research Participant).
2. Submit the completed form to your IRB for review and approval.

When completing or amending the IRB application, ensure that "ResearchMatch" is indicated as a recruitment method. A copy of the completed *ResearchMatch Request Form(s)* must be attached with the IRB submission in the applicable recruitment materials section.

3. If not already registered with [ResearchMatch](#), do so now utilizing Recruitment Access.
4. In ResearchMatch, within your researcher dashboard, *add* the study.
 - There are two options for a study's *contact type*:
 - **Option A:** Recruitment: Face-to-face visits involving clinical or observational interventions; or
 - **Option B:** Survey Only: Studies collecting data through electronic survey only.

- Under “Upload IRB Letter of Approval,” upload one PDF file which contains the following IRB-approved elements:
 - Study title,
 - Study unique identifier number (IRB, protocol or other unique identifying number),
 - PI first and last name, and
 - Study expiration date.

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 one PDF and then upload that one file into ResearchMatch. The maximum file size is 37 kb.

5. Your submitted request for the newly added study will be routed to the study’s PI-of-Record for initial approval (a 2-step approval process) and then to the University’s Institutional Liaison for review. Once approved by the institutional liaison, you will receive a ResearchMatch email (address: info@researchmatch.org) with instructions to follow a 2-step self-validation process to finalize the recruitment access for this specific study. You can then begin using ResearchMatch to recruit potential volunteers.

Recruiting Volunteers: From *Your Dashboard*, choose the system’s *Find Volunteers* function, choose *Recruitment*, select the specific study and enter the study’s criteria in the search builder. You will also enter your IRB-approved **Contact Message** (indicated on the study’s IRB-approved *ResearchMatch Request Form*). The Contact Message (**maximum character length is 2000**) must not include any direct contact information (study team names, emails or telephone numbers) or hyperlinks/URLs. ResearchMatch will send your message to selected potential matches and individuals will have the option of replying yes, no, or not responding to the notification. The response rate to your recruitment message will be displayed in aggregate figures/charts on *Your Dashboard*. Please use the ResearchMatch study’s enrollment continuum to track progress of each interested volunteer. For further information, click [here](#).

Option A: For *Recruitment* contact type, researchers can indicate that an IRB-approved REDCap prescreening (eligibility filtering) survey will be sent to volunteers after the volunteer agrees to allow their contact information to be released to the researcher. The prescreen survey, created by the researcher, must ask for the volunteer’s email so the researcher can match responses with the ResearchMatch continuum. This “pre-screening” survey is delivered after the match is made and only if the volunteer agrees.

Option B: For *Survey Only* contact type, researchers can indicate that an IRB-approved research REDCap survey will be sent to volunteers after the volunteer agrees to allow their contact information to be released to the researcher.

Once a volunteer has authorized ResearchMatch to release their contact information to you, the volunteer’s personal contact information will be available. This may be indicated by receipt of an email stating that you have pending interested volunteers. You will be responsible for managing any identifiable contact information for each volunteer.

NOTE - Only study staff included on the IRB-approved application may be engaged in research activities to approach potential volunteers and obtain consent to participate.

Maintaining a Study: Your access to recruit via ResearchMatch will last only as long as your study’s IRB approval. The expiration date of your ResearchMatch access will mirror the expiration date of your study. At the time of your study’s expiration, you will be able to request a renewal with ResearchMatch by uploading a PDF document which contains sufficient evidence of IRB re-approval. If you are using ResearchMatch to recruit for an exempt study, the expiration date will be set for 5 years. At that time you will be required to upload the study’s review determination document (often called the Letter of Exemption) again.

NOTE - You will receive automatic email notifications from ResearchMatch to keep you informed of your user registration, volunteer interest, and study(s) status.

If you require assistance with this submission process, please contact the Institutional Liaison at ResearchHelp@urmc.rochester.edu

If you experience technical difficulties with the ResearchMatch.org website, go to <https://www.researchmatch.org/contact/>

Researcher Training: 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 3-4:00 pm ET. Researchers can attend once and repeat the training as needed. When registering, indicate ET time zone. To register, visit the University's ResearchMatch [website](#).

Should your study result in publication, you should reference ResearchMatch and the CTSA program as follows: Recruitment for the study <<included/was done>> 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 <<enter name of institutional review board >>.

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