How to Register as a Researcher

1. Access ResearchMatch and create an account by selecting “Register Now” on the Researchers page.

2. Select either ‘Albert Einstein College of Medicine’ or ‘Montefiore Medical Center’ from the drop down list of participating institutions.
3. Enter your **institutional email** address (cannot use personal email account)
4. Record your ‘Verification Code’ upon receipt.
5. Review the **Site Instructions** and **Researcher Acknowledgement form** and consent acknowledgment by entering **ACCEPT** (all caps).
   - **Site Specific Instructions** – this document provides information regarding ‘Feasibility Access’ and ‘Recruitment Access’ to ResearchMatch for our institution, as well as contact information for our Institutional Liaison – the Liaison will be your first point of contact for any questions, etc.
   - **Researcher Acknowledgement Form** – This document is also site-specific and describes the guidelines that you as a researcher are expected to follow. Your privileges may be revoked if the guidelines in this document are not followed.
6. Enter your contact information, create a username and password, and choose your security questions.
7. You will be redirected to your ResearchMatch Researcher Dashboard with **Feasibility Access** only.
   - **Feasibility Access** allows 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 you are encouraged to experiment with this function.
Before you Register a Study

- **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."

- **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 a sample template.

- **Obtain IRB approval for your REDCap prescreening (eligibility) survey, if desired.**

- **(OPTIONAL) Please feel free to register as a volunteer at [www.researchmatch.org](http://www.researchmatch.org) and participate in other research studies!**

**How to Register a Study**

1. From your Researcher Dashboard select "**Add New Study**" and then confirm that this request meets our institutional requirements by selecting "**Next.**"

![Researchers Dashboard](image-url)

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. Enter all study information and upload the current IRB approval letter (with expiration date). This will entail selecting “Recruitment” or “Survey Only” under ‘Contact Type.’ At a minimum, the IRB approval letter should contain:
   o The IRB number of the study
   o The IRB expiration date of the study
   o Study title
   o Evidence that this study has been approved
   o First and last name of the PI

4. If you are not the PI and are registering the study as a proxy researcher, you will receive an email indicating that your request is being routed to the PI for approval.
5. The PI will receive an email and **must** complete a 2-step process:
   - The PI will select either **"Authorize (or Deny) Access"**
   - If **"Authorize Access"** is selected, the PI will be taken to the ResearchMatch web page to complete the 2nd step by selecting **"Yes"**

6. Once the PI approves, the institutional liaison will be sent a message to review and either 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

7. Following liaison approval, an email will be sent to you to self-validate via a 2-step process

Recruitment access will last as long as the study has IRB approval. Continuing approvals can be uploaded by selecting **"Extend Access"** on your dashboard.
**Important!**

As described above, if you are a proxy the PI will receive an email to complete a 2-step process in order to authorize your access to allow you to recruit for the study. The PI does not need a ResearchMatch account. Please note, that if the PI does not respond to both messages, the request will still be pending. See screen shots below.

These emails may be redirected to their junk or spam folders, so please ask the PI to check those folders, as needed. If the email needs to be resent to the PI, please contact your institutional liaison.
**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.
How to Search for Volunteers

1. From your Researcher Dashboard, select the “Start Searching” button within the ‘Search for Volunteers’ section.
2. Choose “Recruitment” as the search type and then select your study.
3. Choose the appropriate Location and Demographic filters of your target population to define your cohort.
4. Specify Health condition(s) by typing in the health conditions you’d like to search. (ResearchMatch uses Boolean Logic, which can be tricky! If you have any questions, please contact your liaisons.)
5. Specify the appropriate Medication filters.
6. Once you have selected your desired filters and optimized your search click on “Select Volunteers.”
7. Select “Save your search” and assign this search a title. Saving recruiting searches allows 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.

How to Select/Contact Volunteers

1. The ‘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). Identify 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.
2. After you have identified who you would like to send your contact message to, enter the IRB-approved contact message. You must certify that you are sending only IRB-approved language and excluding URLs (links to the study website) and direct study personnel contact information within this message.
3. If you plan to use a pre-screening survey (REDCap) you may enter it during the messaging stage.
4. 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.
5. Select “preview message.”
6. Once you select the “preview message” button, you will see a sample of what the volunteer will receive in their inbox. If the volunteer clicks “Yes, I’m interested”, their contact information will appear in your volunteer continuum. If they do not reply, or they select “No thanks”, their contact information will not be visible.
7. If contact message is correct, click “send message.”
Please note, you will receive a mock contact message similar to what the volunteers receive; 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 in the affirmative to your contact message they will be identified on your enrollment continuum dashboard and you will be able to see their contact information and contact them directly. Be sure to move them along the enrollment continuum once you have contacted them again. Researchers will receive automated emails from ResearchMatch notifying them if there are Volunteers that require follow-up and are flagged as “action required.” (researchers should remember to regularly update their Enrollment Continuum and Volunteer status). Please note that you can export your contacts here which will enable you to see phone numbers. You will able to see more information by exporting than by simply selecting “contact info” in the continuum.

You have **2 DAYS** to move volunteers from the red column (action required) to the yellow column (contact in process). Then, you have **14 DAYS** to move the volunteer from the yellow to the green column (final outcome).

**Do not** begin to reach out to volunteers until your team is prepared to receive and respond to interest in a timely manner. You will receive a ‘Researcher Reminder’ email informing you of in-process contacts awaiting your action.

Once you move a prospective volunteer into the ‘Final Outcome’ category within the continuum (one of the green categories below), an email will be sent to notify them that they are no longer eligible for the study.
**Additional ResearchMatch Tools:**

**Researcher Training** – Monthly ResearchMatch researcher training sessions (typically the 2nd Thursday of the month at 3p ET) are available to help you stay up-to-date on new system features and functionality and share best practices with colleagues. To register for this training select the following link: [ResearchMatch Researcher Training](#)

**You Tube Videos:**
[How to Perform a Search for Volunteers](#)
[How to Add a Study and Contact Volunteers](#)