GLOBAL OVERVIEW
**Step 1:** Researcher (PI or coordinator) registers and provides information regarding IRB-approved protocol.

**Step 2:** Researcher can search registry with feasibility access (aggregate data) while recruitment request pending liaison review.
Step 3: Liaison receives access request. Approves request by setting expiration date to match IRB approval expiration.

Step 4: Researcher is notified of approval via email and can begin to search registry and contact potential matches for their study.
IN GREATER DETAIL - RESEARCHER REGISTRATION
Getting Started

- Step 1a. Go to this link:  
  www.researchmatch.org/researchers/
- Step 1b. Click Register
Select your institution. Your institution must be listed in order for you to register.
Follow site-specific instructions - they are specific to your institution and may have requirements that are not visible on the rest of the ResearchMatch site.

Before getting started, make sure you are ready to register as a ResearchMatch researcher.

To register a study for ResearchMatch feasibility access (ability to view aggregate data on the registry population), you must:

- Be affiliated with a participating institution in the ResearchMatch Network
  - If your institution is not on the list of participating sites within the available dropdown menu, you may not register to use ResearchMatch as a researcher at this time. The University of Demo is a participating institution.
- Provide your institutional contact information (e.g. use.edu email address)
- Create a ResearchMatch username and password

You will need to complete the entire registration process in one sitting. While registration only takes a few minutes, it will be expedited if you have the following readily available.

To register a study for ResearchMatch recruitment access (ability to recruit ResearchMatch volunteers), you must:

- Have an active research study that has been approved by your Institutional Review Board (IRB) Be affiliated with a participating institution
  - If your institution is not on the list of participating sites within the available dropdown menu, you may not register to use ResearchMatch as a researcher at this time. The University of Demo is a participating institution.
- Be the Principal Investigator (PI) or an individual who is IRB authorized to recruit for an IRB-approved study on behalf of the study PI at a participating institution.
  - If you are not the PI, you must provide the PI’s contact name, email, and phone number.
- An electronic copy of your current IRB letter of approval citing that this study is active and approved by the IRB and that use of ResearchMatch as a recruitment tool for this specific study has been IRB approved.
  - This document must include a valid IRB expiration date, PI's name, study title, and IRB number.
  - If your study is IRB exempt, you must provide documentation of this exemption. Documentation must include PI’s name, study title, IRB number, and date exemption was given. In the ResearchMatch system, IRB exempt studies will be granted a 5 year approval use status.

If you choose to exclude information that is not visible to reviewers, you may alter the visibility of any field.
Review and sign the Researcher Acknowledgment Form

RAF. Version 1. Last Updated: 9/20/09

DEMO UNIVERSITY

RESEARCHMATCH.ORG RESEARCHER ACKNOWLEDGMENT FORM

In order to utilize ResearchMatch, also known as the National Recruitment Registry Project, for the purposes of conducting a feasibility analysis or participant recruitment, I have read and acknowledged the following terms:

- I understand that my first point of contact is the Institutional Liaison associated with my university/center for matters related to ResearchMatch.
- In order to recruit potential research participants through ResearchMatch, I understand that I must have an active, approved IRB study throughout the entirety of my recruitment efforts and be either:

By typing your full name here and clicking "Accept" you:

- Agree that your registration information is correct and accurate;
- Are providing your electronic signature on this version of the Researcher Acknowledgment Form; and
- Agree to abide by the terms presented in this Researcher Acknowledgment Form.
Enter your basic contact information & create a unique username & password

Welcome / Researcher / Register Now

2 Tell us who you are.
Please enter your institutional contact information. You will also create your unique login information that will allow you to access your researcher dashboard and review all information related to your study and involvement in ResearchMatch.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
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</thead>
<tbody>
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</table>

<table>
<thead>
<tr>
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<th>Phone Number - Work</th>
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<table>
<thead>
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<th>Email Address Confirm</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To protect your ResearchMatch information, create a username and password that only you know.

Your Username

Password

Confirm Password

Strength: None

Select two security questions from the options below and type an answer that you will easily remember and be able to provide in the case you forget your password:

Security Question #1

Security Response #1

Security Question #2

Security Response #2

CANCEL NEXT
Feasibility access option – Clicking Next completes registration for feasibility access only.

Choose your preferred ResearchMatch access type.

Here you may request either feasibility or recruitment access. Feasibility access allows you to view and search aggregate data within ResearchMatch that may be helpful for designing a future study. Recruitment access requires you to submit information regarding your IRB-approved study (or IRB-exempt study) that you plan to recruit for through ResearchMatch which will be routed for review to your institution’s ResearchMatch Liaison. Please note that requesting recruitment access automatically enables you to have feasibility access.

To review your specific institution’s instructions for ResearchMatch access, please click here.

Are you requesting feasibility or recruitment study access?

- Feasibility
- Recruitment

Feasibility access does not require IRB protocol information but will allow you to view aggregate information regarding the ResearchMatch registry. You must be affiliated with the institution you have selected to have this access. Your site’s ResearchMatch Institutional Liaison reserves the right to remove your access at any time. By clicking ‘Next’, you will complete the feasibility access registration request.
Recruitment Access Option – Select if you are the PI or a Proxy researcher

Choose your preferred ResearchMatch access type.
Here you may request either feasibility or recruitment access. Feasibility access allows you to view and search aggregate data within ResearchMatch that may be helpful for designing a future study. Recruitment access requires you to submit information regarding your IRB-approved study (or IRB-exempt study) that you plan to recruit for through ResearchMatch which will be routed for review to your institution's ResearchMatch Liaison. Please note that requesting recruitment access automatically enables you to have feasibility access.
To review your specific institution's instructions for ResearchMatch access, please click here.

Are you requesting feasibility or recruitment study access?

- Feasibility
- Recruitment

Please select the best option that describes how your name is listed on the IRB approval letter for this study:

- I am the Principal Investigator or a Co-Principal Investigator
- I am not the Principal Investigator or a Co-Principal Investigator (e.g., Sub Investigator, NSF, other)
If you are the proxy researcher – include the PI contact information

Choose your preferred ResearchMatch access type.

Here you may request either feasibility or recruitment access. Feasibility access allows you to view and search aggregate data within ResearchMatch that may be helpful for designing a future study. Recruitment access requires you to submit information regarding your IRB-approved study (or IRB-exempt study) that you plan to recruit for through ResearchMatch which will be routed for review to your institution’s ResearchMatch Liaison. Please note that requesting recruitment access automatically enables you to have feasibility access.

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Are you requesting feasibility or recruitment study access?

- Feasibility
- Recruitment

Please select the best option that describes how your name is listed on the IRB approval letter for this study:

- I am the Principal Investigator or a Co-Principal Investigator
- I am not the Principal Investigator or a Co-Principal Investigator (e.g. Sub Investigator, MSP, other)

Please enter the contact information for this study’s Principal Investigator (PI) or one of the Co-Principal Investigators as it is listed on the IRB approval letter for this protocol. If you do not know this information, you may not be authorized to utilize ResearchMatch for this study.

PI First Name | PI Last Name | PI Phone
---|---|---
John | Smith | (380)980-3495

PI Email: kirelinn.scott@gmail.com
PI Email (confirm): kirelinn.scott@gmail.com
Add Study Information – please note that your site specific instructions are available within the "requirements" hyperlink. You may only upload one single document thus if your site requires multiple documents, you will need to merge these into a single file.
At the completion of the registration process, you will be routed to your personalized Researcher Dashboard. Concurrently, your request is forwarded to the PI for the study (proxy) or directly to the Institutional Liaison for your site (PI registration).
IN GREATER DETAIL - LIAISON ACCESS
Institutional Liaison - Responsibilities

- **Key task**
  - Providing daily management of researcher access requests
  - Ensuring that the site-specific instructions, your institution’s Researcher Acknowledgment Form and any other documents specific to your institution are current and accurate.
    - You can edit your site-specific instructions through your Liaison Dashboard
  - Serving as the primary point of contact for ResearchMatch queries at your institution
  - Responding to researcher questions about the resource
  - Collaborating with communications officers to promote ResearchMatch as a new registry to both volunteers & researchers.
    - Please note that ResearchMatch can provide you with ELECTRONIC templates and tools
  - Identifying colleagues to assist with promoting ResearchMatch as a new recruitment tool
  - Help build volunteer population within your state/region
  - Help enhance researcher involvement in using tool
    - Remember, researchers cannot access the registration page unless they have the following link: https://www.researchmatch.org/researchers/
  - Providing feedback to the ResearchMatch Program Coordinator
    - Current Coordinator - Lara Brotheim - Lara.brotheim@vanderbilt.edu - 615-936-1294
THE LIAISON DASHBOARD/TOOLS
Welcome / Network / Your Dashboard

Welcome Jane!

Thank you for your contributions to ResearchMatch as an Institutional Liaison at DEMO UNIVERSITY. This dashboard allows you to conveniently view new ResearchMatch access requests from researchers associated with your institution that require your review. Further, use the links on the menu on the left-hand side of the page to manage additional features of your institution’s researchers and studies involved in ResearchMatch.

**Volunteer Population**

![Graph showing volunteer population growth]

**Site Statistics**

- 188 total researchers
- 30 studies
- 8 yes respondents

**New Researcher Requests (27)**

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>IRB #</th>
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- [View Pending Approval Requests (20)]
Edit your site-specific instructions. These instructions are shown to researchers who identify themselves as from your site as they register on Researchmatch.org.

Welcome / Network / Your Dashboard

Welcome Jane!

Thank you for your contributions to ResearchMatch as an Institutional Liaison at DEMO UNIVERSITY. This dashboard allows you to conveniently view new ResearchMatch access requests from researchers associated with your institution that require your review. Further, use the links on the menu on the left-hand side of the page to manage additional features of your institution’s researchers and studies involved in ResearchMatch.

Volunteer Population

Site Statistics
188 total researchers
30 studies
8 yes respondents

New Researcher Requests (27)

<table>
<thead>
<tr>
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<tr>
<td>researcher anon</td>
<td><a href="mailto:gre@jefd.com">gre@jefd.com</a></td>
<td>22222</td>
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</table>
This is the key table that shows the recruitment access requests submitted by researchers affiliated with your institution that are pending YOUR approval. Please work with the other liaison(s) at your site to ensure that you are checking for these requests on a daily basis. As soon as you act upon a request, the researcher is notified of your decision by an automatic email from do-not-reply@researchmatch.org.
Welcome / Network / Your Dashboard

Welcome Janel

Thank you for your contributions to ResearchMatch as an Institutional Liaison at DEMO UNIVERSITY. This dashboard allows you to conveniently view new ResearchMatch access requests from researchers associated with your institution that require your review. Further, use the links on the menu on the left-hand side of the page to manage additional features of your institution’s researchers and studies involved in ResearchMatch.

More about this function – Managing Researcher Requests
This is the key page for managing your site’s researcher requests. Follow the steps outlined within this frame to approve or deny these recruitment access requests.
To **confirm** the request. Select yes and input the expiration date as is shown on the IRB letter visible in Step 1. The researcher will receive an auto-email that they have been confirmed and **MUST** accept this confirmation to be given recruitment access for this study.
Please note, after you confirm a request, it is moved from your dashboard to the Feasibility Researchers table that is accessible through your “feasibility researchers” menu option. They are temporarily routed there until the researcher acts upon the auto-email they received once you approved their request.
Example of auto-email that researcher receives once you ‘confirm’ their recruitment access request. Until they act upon this request (e.g. “self-validation), they will not have recruitment access for this study.

The researcher MUST click accept in order for their username & password to be enabled with the recruitment access for that study.
Researcher must confirm choice after making their selection within the auto-email from do-not-reply@researchmatch.org

Step 1. Open email and click ‘accept’

Step 2. Redirected to ResearchMatch site where you confirm your selection.
To deny the request. Select no and explain why you are denying the request. The researcher will receive an auto-email with this explanation.

Note this text here to see how it is shown to the researcher in the auto-email they receive when you deny the request.
Example of auto-email a researcher receives when you deny their recruitment access request.

Note that this is where the liaison reason for denying the request is visible to the researcher. The researcher can login to modify the request. If they do so, you can view this as a ‘resub(#)’ in your liaison dashboard.
Will I be notified if I have new requests?

- Currently, all liaisons at an institution will receive an automatic email from ResearchMatch noting that they have requests pending their liaison approval should there be any requests in this liaison dashboard as of 1 am EST.
Complex workflows
Proxy submits recruitment access request

PI receives auto-email to ‘verify’ PI verification email from do-not-reply@researchmatch.org

PI confirms

Message routed to liaisons ‘pending PI approval’ table

Access request routed to liaison dashboard to review

PI denies

Auto-email sent to proxy researcher notifying them of PI denial. They will not have recruitment access for this study. You can view this denied proxy request in your View Inactive/Denied researchers link

Liaison approves

Access request temporarily routed to Feasibility Only Researchers menu until proxy self validates

Auto-email sent to proxy notifying them to self validate

Proxy self validates

Recruitment access enabled for that study and researcher visible under Recruitment Researchers view

Liaison may ‘resend’ the verification email through their dashboard. View the ‘resend’ links in the appropriate locations of the liaison menu.
Proxy Recruitment Access Request – Pathway
Liaison Denial + Proxy Modification

Proxy submits recruitment access request

PI receives auto-email to ‘verify’ PI verification email from do-not-reply@researchmatch.org

Message routed to liaisons ‘pending PI approval’ table

Access request routed to liaison dashboard to review

PI confirms

Liaison denies + provides reason

Auto-email sent to proxy notifying them of denied access request + instructions to modify (if possible)

Proxy logs into account & modifies request.

Access request routed to Denied/Inactive Researchers Table (under Recruitment Researchers page)

Liaison may ‘resend’ the PI verification email through their dashboard. View the ‘resend’ links in the appropriate locations of the liaison menu.
PI Recruitment Access Request – Pathway
Liaison Approval

1. PI submits recruitment access request
2. Message routed to liaisons dashboard
3. Liaison approves
4. Auto-email sent to PI notifying them to self validate
5. PI self validates
6. Access request temporarily routed to Feasibility Only Researchers menu until PI self validates
7. Recruitment access enabled for that study and researcher visible under Recruitment Researchers view
8. Liaison may ‘resend’ the verification email through their dashboard within the Feasibility Researchers View until the PI self validates their approval.
PI submits recruitment access request

Message routed to liaisons dashboard

Liaison denies + provides reason

Access request routed to Denied/Inactive Researchers Table (under Recruitment Researchers page)

Auto-email sent to PI notifying them of denied access request + instructions to modify (if possible)

PI logs into account & modifies request.
QUESTIONS?

Contact info@researchmatch.org