Welcome to ResearchMatch! We are delighted that you have chosen to use ResearchMatch as a recruitment tool for your study. Below you will find a few tips that will help make the registration and volunteer contact process as smooth and successful as possible.

Before you can begin using ResearchMatch (RM):

1. **Complete the Researcher Interest Form.** If you have not already done so please visit the ResearchMatch Researcher Registration webpage (www.researchmatch.org/researchers/register.php). On the left-hand toolbar select “Researcher Interest Form” and complete the required information.

2. **Contact your local ResearchMatch Institutional Liaison for site-specific instructions.** Children’s National’s Institutional Liaison is Jurran Wilson (JuWilson@childrensnational.org). Please e-mail him and he would be happy to guide you through the registration and approval process specific to Children’s National Health System. Also, he can work with you to coordinate a brief training session regarding ResearchMatch.

3. **Decide if you would like to use ResearchMatch for a feasibility assessment or for recruitment.** ResearchMatch allows Researchers to operate using two modes:
   - Feasibility - Allows Researchers to view aggregate data (e.g. demographic, proximity to institution, medical condition, etc.) that is de-identified to explore recruitment potential. *(Note: This does not require approval from the IRB or Institutional Liaison. You simply register and you’re all set!)*
   - Recruitment - Allows Researchers to send an introductory message to volunteers that meet your study criteria. If they accept your request, you will be sent their contact information.
The following steps are for recruitment tool only:

4. **Complete the Utilization of ResearchMatch as a Recruitment Tool Authorization Request.** This document sent to you by your Liaison may also be located on the CTSI-CN ResearchMatch website [https://www.ctsicn.org/researchmatch-researchers](https://www.ctsicn.org/researchmatch-researchers) website.

   - Complete the shaded text boxes on page one by clicking on them and entering information into the text forms.
   - Part of completing this document involves creating your introductory message. This message will be the first communication you will make with potential volunteers and is used to introduce yourself and share basic information about the study. *(Note: This message is limited to 800 characters and must not contain any form of contact information [e.g. study team names, e-mails, telephone numbers, etc.] ResearchMatch will automatically ensure that “Children’s National Health System” is provided in the message but will not allow you to proceed if any type of contact information is present.)*
   - Since you will need to obtain individual approval for each of your studies that will be utilizing ResearchMatch, a separate request form must be completed and submitted for each study. Although you can manage all of your studies in ResearchMatch with one account, each study must be submitted as an individual submission.

5. **Obtain PR & Marketing approval of your Introductory Message.** Once your ResearchMatch as a Recruitment Tool Authorization Request form has been completed please e-mail it to Ms. Michelle Tran (MTRAN@childrensnational.org). If modifications are required you will receive a reply with the requested edits. If approved, your reply will state your message has been approved and this will serve as your certificate of approval from PR & Marketing.

6. **Obtain IRB approval to use RM as a recruitment tool and for introductory message: A) Children’s National Health System IRB (IRBear) vs. B) Western IRB (WIRB)**

   - **A) IRBear - If your study uses only the Children’s National Health System IRB (IRBear) -** Where your study is in the IRBear study approval process will determine how you will obtain IRB approval for ResearchMatch. If you have not submitted your Initial study approval in IRBear, you may submit the ResearchMatch as a Recruitment Tool
Authorization Request form along with the materials of your new study and indicate that this recruitment method will be used. If your study has already received IRB approval and is active, you may submit ResearchMatch via a study amendment to add this recruitment method to your study.

• **Submitting as part of a new study:** In IRBear, complete all sections as you normally would. Once upon section 8.4 recruitment methods perform the following:
  1) Field 1.0 – Select “other”
  2) Field 2.0 – Type ResearchMatch
  3) Field 3.0 – Type “Yes” as an Introductory message has already been approved by PR & Marketing
  4) Field 4.0 – Upload the completed ResearchMatch as a Recruitment Tool Authorization Request form.
  5) Field 5.0 – Save the e-mail approval from PR & Marketing and upload

• **Submitting as a study amendment** – In IRBear select your study. From your left-hand toolbar select “New Amendment.” Once at the “Cover Sheet” form perform the following procedures:
  1) Field 1.0 – Select “Other”
  2) Field 2.0 – type “New recruitment method: ResearchMatch.”
  3) Complete the rest of the form based on information from your study.
  4) Advance to the “Detailed Description of Changes” form and complete.
  5) Advance to the “Final Page” and select the “Smart Form.”
  6) Once within the Smart Form follow the same instructions noted above in “Submitting as part of a new study.”

**Important!**

To obtain proper IRB documentation to reflect your study has been approved to use ResearchMatch and that your introductory message has been approved by the IRB, you must perform the following:

• **When submitting as a part of a new study or when submitting as a study amendment please perform the following:**
  1) While in the application workspace use the “jump to” tab to navigate to section 1.
2) Scroll down to question #12 titled “Does the sponsor require the Approval letter to contain specific references?”

3) Select the “yes” option and in the “add the required text here” type the following:

“Utilization of ResearchMatch as a Recruitment Tool Authorization Request (Dated: DD-MMM-YYYY) inclusive of the following:

1) General approval to utilize ResearchMatch for the above-mentioned study and
2) Approval of the Introductory Contact Message for the above-mentioned study”

4) Change the “DD-MMM-YYYY” to the date you completed the Recruitment Tool Authorization Form.

5) Complete the remainder of the IRB application and submit.

Example:

Once approved by the IRB you will be sent an IRB Approval letter that specifically states that ResearchMatch and your Introductory Message has been approved. The date of approval and expiration will be included on the letter.

- **B) WIRB** - If your study uses both IRBear (for the Authorization for Protocol Review by WIRB) and Western IRB, such as an industry study – Where your study is in the WIRB study approval process will determine how you will obtain WIRB approval for ResearchMatch. If you have not submitted your Initial study approval application in the WIRB Connexus portal, you may submit the ResearchMatch as Recruitment Tool documents along with the other materials you would normally submit. If your study has already received WIRB approval and is active, you may submit ResearchMatch via a study amendment to add this recruitment method to your study.

  - **Submitting as part of a new study:** In the WIRB Connexus portal, select the “Submission tab” and then select the tab titled “New Research.” Complete all sections as you normally would for any new submission. Once upon the section titled “Recruitment Materials” perform the following:
1) For question “Are you submitting any recruitment materials such as advertisements, websites, etc...” – Select “yes”
2) For question “Are you submitting revised versions of previously approved recruitment materials?” – Select “no”
3) For question “Are you submitting new recruitment materials” – Select “yes”
4) Within the comments text box type “ResearchMatch recruitment message for This protocol.” This should be followed by your typed ResearchMatch introductory message.
5) For question “Have any of these materials been previously approved by WIRB for another investigator or another protocol?” – Select “no”
6) For question “Are you submitting any recruitment materials that reference a website?” – Select “no”
7) Continue the remaining “Recruitment Materials” section and the remainder of the New Research application.
8) At the end of the New Research application, upload each of the following documents where indicated:
   1. ResearchMatch General Information Guide;
   2. Utilization of ResearchMatch as a Recruitment Tool Authorization Request;
   3. Copy of your e-mail approval from Children’s National PR & Marketing department; and the
   4. Master ResearchMatch IRB approval letter from Vanderbilt University IRB

   NOTE: All documents (except the PR & Marketing approval e-mail) can be found on the IRBear website under the Forms and Templates section.
9) Submit the entire application by clicking the “Submit” button. During the review of your study, the WIRB Review Board will also assess the use of ResearchMatch as a recruitment tool.

Once authorized by WIRB you will be sent a WIRB approval letter for ResearchMatch and your Introductory Message. The date of approval and expiration will be included on the letter.

- When submitting as a study amendment please perform the following:
  1) While in the WIRB Connexus portal, open the protocol workspace for the study that you would like to modify
  2) On the right side of the protocol workspace select “Add New Submission”
3) Complete steps 1-9 noted above in the “Submitting as Part of a New Study” for WIRB section.

Once authorized by WIRB you will be sent a WIRB approval letter for ResearchMatch and your Introductory Message. The date of approval and expiration will be included on the letter.

7. File documents related to the approval to use ResearchMatch and the Introductory Message into your study regulatory binder. This should include a copy of your completed ResearchMatch as a Recruitment Tool Authorization Request form, PR & Marketing approval e-mail, and IRB Approval letter.

8. Register as a volunteer at [https://www.researchmatch.org/volunteers](https://www.researchmatch.org/volunteers). What better way to get to know ResearchMatch than by taking part as a Researcher and a Volunteer! Although optional, this opportunity may assist you in better connecting with volunteers by increasing your awareness of the volunteer experience. (Note: If you would like to link your volunteer account with your Researcher account please contact [info@researchmatch.org](mailto:info@researchmatch.org)).
Congratulations! You’re almost there! So, you’ve made it through the hardest part. But how do you actually register as a Researcher?

**STEP 1:** Register as a Researcher at [https://www.researchmatch.org/?rm=childrensnational](https://www.researchmatch.org/?rm=childrensnational)

- Select your institution from the drop-down box on the right-hand side of the screen
- **Review Site Specific Instructions** – This document will give you information regarding feasibility and recruitment access to ResearchMatch for your institution, contact information for your Institutional Liaison – the Liaison will be your first point of contact for any questions.

- **Review and Accept the Researcher Acknowledgement Form** – This document is also site-specific and describes the guidelines that a researcher at your institution is expected to follow. After reviewing this document, type your name in the blank provided and click on ‘Accept.’ Your Institutional Liaison or the National ResearchMatch Program Manager may revoke your ResearchMatch privileges if the guidelines in this document are not followed.
• Complete the researcher registration process
STEP 2: Select your preferred ResearchMatch access type

NOTE: If you have not yet received IRB approval to use ResearchMatch as a recruitment tool and if your recruitment message is not yet IRB approved, you may only register for Feasibility Access at this time. Feasibility Access will allow you to view and search aggregate data within ResearchMatch but you will not be able to contact volunteers. Once you have appropriate IRB approvals, you will be able to register for recruitment access.

When registering for recruitment access, you will automatically have Feasibility Access while awaiting final approval from your PI and from your Institutional Liaison.
• **For recruitment access** – Select the best option that describes how your name is listed on the IRB approval letter. Even if you are not the PI, you may still register for recruitment access. ResearchMatch will email the PI requesting approval to grant recruitment access for the study. ResearchMatch recommends informing the PI so that he or she will be expecting the email from ResearchMatch.
STEP 3: Enter study specific information

Tell us about your study.
Please enter in information regarding the study that you wish to recruit for via ResearchMatch, including information regarding its IRB status and affiliation. This information will be routed for approval by your ResearchMatch Liaison upon completion or your study PI in the case you are entering information to recruit on their behalf. You will be notified via email on the outcome of your recruitment access request after it has been reviewed. Please note that you will have the opportunity to add additional studies or submit successful continuing review information via your researcher profile page.
Important!

You (and your PI, if you are a proxy) will receive an email from: Do-Not-Reply@researchmatch.org.
Please make sure that your email/spam filters are set to allow this message. All ResearchMatch generated emails will come from this address.

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From: do-not-reply@researchmatch.org
To: Letto, Laura
Cc: 
Subject: ResearchMatch: Thank you for registering as a researcher at researchmatch.org

Thank you for registering your study in ResearchMatch.org.

Your request has been routed to the Principal Investigator (PI) that you listed for this study. Your PI must authorize this access before it will be routed to your site’s Institutional Liaison for review and confirmation. You will be notified by email once your Liaison has reviewed your request.

Notification of future action: Please note that you will not have recruitment access until you click the accept link that will be available in the confirmation email should both your PI and your institutional Liaison approve your request. As such, please do not disregard any future messages from ResearchMatch.

What can you do until your request is reviewed?

1. View Researcher Dashboard tool: While you will be notified by email of action taken on your request, you may check the status of this request, add another IRB approved study, or contact your institutional Liaison at any time by logging into ResearchMatch with the username and password you created upon registration.

2. Search aggregate data: Until your Recruitment Access has been approved, you automatically have Feasibility Access and may view aggregate information regarding the ResearchMatch registry population.

3. Expedite your experience to search & contact ResearchMatch volunteers: If you have not yet received IRB approval to contact potential volunteer matches through ResearchMatch, we encourage you to submit the recruitment language you wish to use to your IRB. More details regarding the process of contacting Volunteers are available by accessing the Search Volunteers link from your researcher dashboard.

4. Help build the ResearchMatch population: Help spread awareness by posting a flyer (available via your dashboard) or sharing the www.researchmatch.org link with individuals who may be willing to join this registry.

Thank you once again for your interest in ResearchMatch.org. We hope this will prove to be a useful recruitment tool for the purposes of your research.

Best wishes,
ResearchMatch.org

Forgot your username and password? Recover it here.

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**STEP 4: View and Manage Your Sample 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.

If you have any questions, please contact your ResearchMatch Institutional Liaison.

Wishing you great success with your recruitment efforts,

The Children’s National ResearchMatch Team