



How to Use ResearchMatch

Overview of ResearchMatch

ResearchMatch.org is an online recruitment platform that connects researchers with volunteers who are interested in learning about health-related study opportunities. It can be used as a recruitment tool to help streamline your recruitment process for a wide range of studies, including:

- Single and multisite studies
- Different study types (e.g., surveys, in-person studies, focus groups, remote-only studies, clinical trials, etc.)
- Different populations (e.g., pediatrics, Spanish-speaking, 'healthy' volunteers, etc.)

How to use ResearchMatch

1. Register as a researcher:

1. Set up your researcher account at <https://www.researchmatch.org/researchers/>
2. Confirm your organization is a participating institution by selecting your affiliation. If not listed, contact info@researchmatch.org for information.

Joining ResearchMatch as a researcher allows you to view aggregate registry data of volunteers that meet your study's criteria (*feasibility* access). To gain *recruitment* access to contact volunteers, the following IRB approval and documentation is needed.

2. Prepare documentation:

1. Have IRB approval to use ResearchMatch for a health-related study.
2. Have an IRB approved contact message* (not the same as an email). Your RM contact message cannot contain study team contact information or survey links and must be less than 2,000 characters.
 - Optional: include an approved REDCap prescreening (eligibility) survey.
 - If you are recruiting Spanish speakers, you will need an IRB approved contact message in Spanish.

3. Add your Study:

1. Log into your researcher dashboard and click the “*add new study*” button.
2. Complete the Researcher Request process.
 - Identify as the PI or Proxy (key study personnel on a study)
 - Enter Study Information, including uploading IRB approval letter
3. PI Approval: If you are a proxy, the PI will receive an email to approve your request to join the study.
 - The PI is not required to have a ResearchMatch account to approve a proxy.



- This is a 2-step process. First the PI must click “*Authorize Access*” in the body of the email and then is redirected to a ResearchMatch page to click “Yes” they are sure this proxy should have access.
- 4. Institutional Liaison Reviews Request
 - Your institutional liaisons will verify you have approval to use ResearchMatch and review your request for accuracy.
- 5. Researcher Self-Validates: Respond to the email from ResearchMatch to accept access to the database of volunteers.
 - This is a 2-step process. First, you must click “*Accept Access*” in the body of the email and then you are redirected to a ResearchMatch page to click “*Accept*” again.

4. Identify your cohort:

Every study has its own set of inclusion and exclusion criteria. Help increase your odds of “finding the right match” by sending your message to volunteers that are likely to meet your study’s criteria.

Use of the search filters within ResearchMatch allows for targeted recruitment of study participants.

Please carefully consider the parameters of your study and how to best use the ResearchMatch filters, including:

#1 Search Type – use these filters to begin searching for volunteers. Select the language your IRB approved message is in (English or Spanish) and if your study focuses on parenting or pregnancy. Specify if your search is for *feasibility* (aggregate numbers only) or *recruitment* (contacting volunteers).

#2 The Location Filters – use this filter to focus in on a geographic location. If your participants must travel to you for study visits - use the *Distance to Institution* filter. Use the *state* filter to choose one or more states that apply to your study’s inclusion criteria.

#3 The Demographic Filters - Start with the basics by choosing the *age*, *sex*, *race* and *ethnicity* of your participants. Use the *BMI* filter if looking for participants who are obese. If smoking is an exclusion, choose ‘no’ under *smoking status*.

Example: *If your study is recruiting breastfeeding women, you may only want to send your contact message to women of childbearing age. Do not send the message to men. Volunteers get fatigued and withdraw from RM when they are contacted about studies they do not meet the basic criteria for.*

#4 The Health Condition and Medication Filters

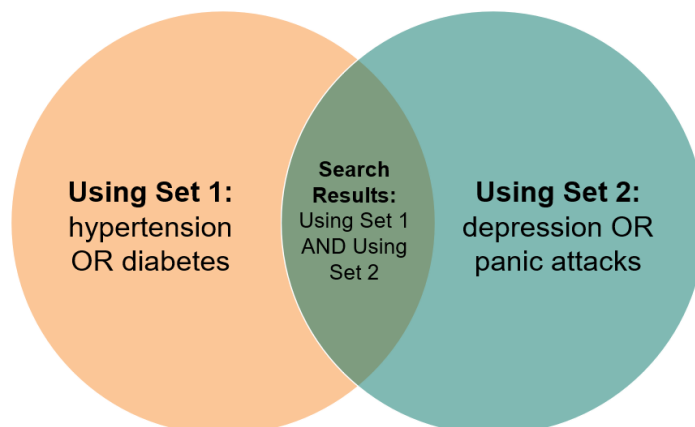
Like Google, ResearchMatch uses the logic model operators ‘OR’, ‘AND’, and ‘EXCLUDE’.

To begin, click on *Set 1*, *Set 2*, and *EXCLUDE*, and let these powerful filters do the work for you!

Set 1 uses OR (‘show me people with high blood pressure OR diabetes’)

Set 2 uses AND (‘show me people with high blood pressure AND diabetes’)

EXCLUDE is your power helper ('exclude people from this group that report having cancer')



Helpful Tip! Start small when sending out a contact message! Start off by sending out a few messages, then return and send some more. Consider which study criteria to use, as well as a prescreening survey which may further characterize volunteers.

5. Add a REDCap eligibility survey

To further refine your volunteer pool, you can add an eligibility survey along with your IRB-approved message. Interested volunteers who say 'yes' to your contact message will then be re-directed to this REDCap eligibility survey. Their responses will be in your REDCap database, so be sure to ask for identifiers and remember to **always** have your survey IRB approved!

Questions?

- [Log in](#) to ResearchMatch and access educational materials on your dashboard, including YouTube videos and tip sheets.
- **Email** us at info@researchmatch.org or contact your local liaison. Liaison contact information can be found on your researcher dashboard.
- Register to attend a free training webinar for a live demo and Q&A session!