



## Guidance for Sending Surveys via ResearchMatch

**If you are conducting a survey-only study** through ResearchMatch, be mindful to ensure that your study only includes participants who meet your eligibility criteria. It is important to screen potential volunteers before sending them the survey link. While ResearchMatch takes multiple steps to verify volunteer accounts, it is ultimately your responsibility to ensure that registered individuals are suitable for your study. Please note that ResearchMatch cannot guarantee the accuracy or validity of all registered individuals. Here are a few points to consider when screening individuals for your study:

1. **Review webinar:** Watch this Trial Innovation Network Collaboration Webinar for guidance on preventing and identifying invalid survey responses: [Online Screener and Survey Participants: The Good, the Bad, the Rogue](#).
2. **Use filters:** To screen before enrolling people into your survey, first use the filters to create a cohort of de-identified volunteers that meet the demographic and health requirements of your study. When first reaching out to potential participants, consider only sending your recruitment message and not including the REDCap survey link in this initial message.
3. **Review volunteer information:** Volunteers interested in your study message will release their information to you. Review this information and selectively send a survey link to those that meet your criteria.
4. **Create a private survey link:** Use a single response “private” link rather than a “public” survey link. (A public link may be taken more than once by the same individual or shared and taken by many people).
5. **If disseminating survey link through ResearchMatch:** When you insert your IRB approved REDCap survey link and ask ResearchMatch to

- disseminate it for you, you have bypassed your opportunity to screen individuals. For this method, insert an IRB approved REDCap survey? link.
6. **Utilize the REDCap 'save and return' option:** When ResearchMatch disseminates the survey for you, volunteers that say 'yes' are immediately directed to your survey. Use the REDCap 'save and return' option to allow volunteers to complete the survey later if they are unable to finish at that time.
  7. **Contact information and survey responses:** Interested volunteers release their contact information to you on ResearchMatch, while their survey responses are found on REDCap. Consider asking for identifiers in the survey.

**If your study is interventional**, determine whether sending a prescreening survey would help further identify the desired volunteer demographic. Consider sending both a recruitment message which describes the study and enrollment criteria as well as a pre-screening survey. To do so:

1. **Use filters:** Apply the location, demographic, health, and medication filters to create a cohort that may meet study criteria.
2. **Insert an IRB approved REDCap pre-screening survey link:** Ask the volunteers for information that they did not already provide in their profiles to elicit the information needed for screening.
3. **Contact information and survey responses:** Interested volunteers see the recruitment message and select to share their contact details. Then they are immediately redirected to the prescreening survey. Use the REDCap 'save and return' option to allow volunteers to complete the survey later if unable to finish at that time. Interested volunteers release their contact information to you on ResearchMatch, while their survey responses are found on REDCap. *Consider asking for identifiers in the survey.*