



HUMAN RESEARCH PROTECTION PROGRAM

—
TEXAS TECH
Research & Innovation

ResearchMatch User Guide



ResearchMatch is a tool that is used to connect participants to researchers to take part in their **Health-Related Research** studies. This is not a suitable recruitment tool for research that is not health related.

Options for Research Match Use

Feasibility Access allows the researcher to view aggregate data regarding the ResearchMatch population. To register with feasibility access, please use an institutional email address when registering (e.g: jane_doe@ttu.edu). Feasibility access allows the researcher to determine if the available participant pool will meet the needs for the study.

Recruitment Access allows the researcher to contact volunteers via the ResearchMatch recruitment platform about their TTU IRB-approved study.

Researchers will identify ResearchMatch as a recruitment method in the TTU IRB protocol.

The contact message sent through ResearchMatch must exclude direct contact information for the researcher and the research team.

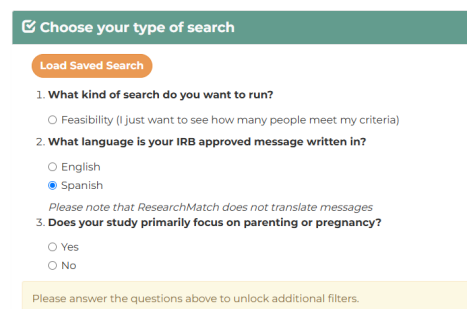
To register a study for ResearchMatch recruitment access (ability to recruit ResearchMatch volunteers), the researcher must:

- Have an active research study that has been approved by TTU IRB
- Be the Principal Investigator (PI) or an individual who is authorized to recruit for a TTU IRB-approved study on behalf of the study PI at a participating institution.
 - If the requestor is not the PI, their name, email, and phone number must be provided to the ResearchMatch Liaison
- An electronic copy of the current TTU IRB letter of approval citing that this study is active and approved by the TTU IRB
 - This document must include a valid TTU IRB expiration date or documentation of exemption

Managing and Messaging Participants Through ResearchMatch

Searching for participants through ResearchMatch is done with search filters. Use of the search filters within ResearchMatch feasibility and recruitment searches allow for targeted recruitment of study participants.

**Please carefully consider the parameters of the study and how to best use the ResearchMatch filters **



The screenshot shows a web interface for ResearchMatch search filters. At the top is a teal header with a magnifying glass icon and the text "Choose your type of search". Below this is an orange button labeled "Load Saved Search". The main content area contains three numbered questions with radio button options:

1. What kind of search do you want to run?
 - ☐ Feasibility (I just want to see how many people meet my criteria)
2. What language is your IRB approved message written in?
 - ☐ English
 - ☒ Spanish

Please note that ResearchMatch does not translate messages
3. Does your study primarily focus on parenting or pregnancy?
 - ☐ Yes
 - ☐ No

At the bottom, a yellow box contains the text: "Please answer the questions above to unlock additional filters."

For example, if the researcher is interested in recruiting breastfeeding women, they may only want to send their contact message to women of childbearing age. This can be done by limiting the upper age limit within the ‘age’ filter.

The search filters allow Researchers to utilize inclusion and exclusion criteria based on health condition-specific study criteria. Using ‘Set 1’ will populate Volunteers that have one **or** another health condition (for example, asthma **or** seasonal allergies) – this will make the set larger, since Volunteers will only need to have one of the listed conditions to be eligible. Using ‘Set 1’ and ‘Set 2’ will generate Volunteers that have **both** health conditions (for example, asthma in ‘Set 1’ **AND** seasonal allergies in ‘Set 2’), and will make the set smaller, as volunteers will need to have ALL the health conditions listed.

Demographic Filters

Additional demographic filters were added in March 2023 to allow volunteers to more fully describe themselves, including sex assigned at birth, gender identity, race, and ethnicity. Updates included:

- Combining race and ethnicity fields
- Adding new response options

While some Volunteers have responded to these new prompts, as of 2025 most have not yet updated their profiles. While searching for Volunteers to contact about the research study using the *Search Builder*, select the demographic filters that meet the study’s eligibility criteria with this in mind.

Demographic Filters

Use one or more methods provided to filter volunteers by your inclusion/exclusion criteria. Then continue to the next step.

Important Update: In 2023 the volunteer registration prompts for race, ethnicity, and gender were modified. While some volunteers have responded to the new prompts, most have not. Volunteers are now asked for their sex assigned at birth and gender identities. Race and ethnicity are combined into one question. Volunteers can choose all response options that apply. Volunteers may further choose to refine their race and ethnicity with additional information on their nation of origin. Choose the fields that meet your criteria with this in mind.

Tip! Send messages in small batches and return as needed. Once volunteers release their information to you, you will see their full responses and pronouns used (if provided).

add

remove

Age criteria:

Race and Ethnicity criteria: **new**

Important: Race and ethnicity are combined into one question. Volunteers can choose all responses that apply. Volunteers may choose to further refine their race and ethnicity by providing additional information on their nation of origin (e.g., if a volunteer selected Asian as their race/ethnicity, they may additionally select Chinese, Filipino, Indian, etc. or none of these as their nation of origin).

How to use this filter:

1. Cast a wide net: Select top-level, race and ethnicity options to include all volunteers that have provided this information.
Example: If you select Asian, ResearchMatch will include volunteers that checked Asian only or selected Asian as well as other options.
2. Refine your search: As an alternative to selecting an entire race and ethnicity group, you may use the (+) symbol to view and choose specific nation(s) of origin within a given category. Note: if a volunteer has NOT indicated a nation of origin, they will only be searchable at the level of race and ethnicity, if provided.
Example: Instead of selecting Asian, if you select Chinese and Filipino, ResearchMatch will include those volunteers that have indicated Chinese and/or Filipino as a nation of origin in their profile.

☐ American Indian or Alaska Native **?**

☐ Asian **+**

☐ Chinese

☐ Filipino

☐ Indian

☐ Japanese

☐ Korean

☐ Pakistani

☐ Vietnamese

☐ None Of These

☐ Black, African American, or African **+**

☐ Hispanic, Latino, or Spanish **+**

☐ Middle Eastern or North African **+**

☐ Native Hawaiian or other Pacific Islander **+**

☐ White **+**

☐ None of these fully describe me

☐ Include people who selected more than once race

add

add

add

add

add

add

add

add

add

add

Sex Assigned at Birth criteria: **new**

Gender Identity criteria: **new**

Transgender status: **new**

BMI criteria:

Height criteria:

Weight criteria:

Twin/Triplet status:

Tobacco use:

Veteran status:

Parental Participation Filter

During the sign-up process, Volunteers are asked if they would like to be contacted about studies related to being a parent. This question was added in order to help fine-tune the volunteer eligibility pool. This filter helps to prevent contacting Volunteers that have told ResearchMatch they do not wish to receive messages around being a parent.

If a Researcher's study involves parental issues, please have them check the **YES** box. This will narrow the search to **ONLY** include Volunteers that wish to be contacted about studies related to being a parent.

Total number of volunteers found after filters applied:
(see below for summary details)

7,817

Choose your type of search

[load previous search criteria]

1. What kind of search do you want to run?

☐ Feasibility (I just want to see how many people meet my criteria)

☒ Recruitment (I'm ready to recruit and want to contact individuals) (4 Studies)

Select your IRB approved study :

☒ IRB # OPT123 - testing survey only opting in and out

☐ IRB # SPANISH_Opt_out - new survey only study no messages sent

☐ IRB # 2468 - Demographic Updates 2023

☐ IRB # March142023 - March142023

2. What language is your IRB approved message written in?

☒ English

☐ Spanish

Please note that ResearchMatch does not translate messages

3. Does your study primarily focus on parenting or pregnancy?

☐ Yes

☒ No

Recruitment Messaging is completed via research match. Researchers will craft a message to be sent to participants following the following guidelines:

- Must be under 2000 characters
- Cannot contain any links, other than RedCap Surveys for gathering additional inclusion/exclusion criteria from participants
- Cannot contain any contact information including but not limited to:
 - Phone numbers
 - Email addresses
 - Websites or embedded surveys
 - Or any other Direct contact information for anyone on the study team

The message crafted should only contain the study information, because ResearchMatch includes their own text surrounding the message:

A research team with **Texas Tech University in Lubbock, TX** believes you might be a good match for the following study:

STUDY MESSAGE WILL APPEAR HERE

If you are interested in this study and having the research team contact you directly, please select the "Yes, I'm interested" link below. By clicking the "Yes, I'm interested" link, your contact information will be released to the research team. If you select the "No, thanks." link or do not respond to this study message, your contact information will not be released to the research team.

QUICK LINK OPTION: YES

QUICK LINK OPTION: NO

Thank you for your interest in ResearchMatch.

The following are some examples of study-specific recruitment messages:

Example #1:

The XXXXXXXXXXXXXXXXXXXX Study

This study looks at how personal and family medical history, lifestyle, and genetics affect a person's risk for common diseases and response to prescription medications. Study participants will receive information about their personalized risk for many conditions including diabetes, obesity, rheumatoid arthritis, and many different cancers at no cost. Genetic counseling will also be available to participants in this study. You may be eligible for this study if you:

- Are 18 or older
- Have a diagnosis of high blood pressure (hypertension) or congestive heart failure
- Have a valid, private email address
- Willing to provide a saliva sample for genetic testing
- Willing to complete online health questionnaires and periodic follow-up surveys

- Willing to attend a one-hour information/enrollment visit to learn more about the study and provide informed consent.
-

Compensation is provided upon study completion.

Example #2:

You can help researchers learn more about stages of memory loss in Alzheimer's disease.

You may qualify if you are:

- A man or a woman experiencing memory loss
- Age 40-85
- Have Alzheimer Disease in family history

What is involved if you take part in this study:

- An initial screening visit (about 2 hours)
- Monthly online memory tests
- Taking an FDA-approved study medication

Participants will be compensated for their time.

Note: All 'recruitment' messages routed from ResearchMatch.org will be from do-not-reply@researchmatch.org and contain a standard header & footer. The header will be an image with the ResearchMatch logo. The footer will contain reference for removing themselves from the ResearchMatch registry and a general disclaimer.

Follow Up Contact

Researchers are able to set up an **auto-contact rule** for 30 days that allows ResearchMatch to automatically search the database for specific search criteria and send a contact message if any new Volunteer meets those criteria. Researchers like this rule because it means they do not have to sign into ResearchMatch every day and run a new search – ResearchMatch does this for them. The rule expires after 30 days but can be re-set every 30 days as long as the Researcher is still enrolling Volunteers in their study. This auto-contact feature is not available for Survey Studies.

The auto-contact rule is not the same as the overall study expiration. The Researcher sets up the auto-contact rule for 30 days at a time. Creating a study contact rule means that ResearchMatch will automatically search the database for specified search criteria and send a contact message if any new Volunteers meet those criteria. The rule expires after 30 days but can be re-set every 30 days if the Researcher is still enrolling Volunteers in their study. The Researcher can reset the date or remove this feature under *Manage Auto Contacts*.

The **Enrollment Continuum** is a tool for Researchers that keeps track of Volunteers that have been contacted and expressed interested in the study (see image of Enrollment Continuum here).

Enrollment Continuum

Please update the status of the volunteers listed in the **Action Required** column below. Volunteers listed in the **Contact in Progress** column for more than two weeks also require action.

As you contact potential volunteers with additional study information, move each across the continuum. The eventual status of all volunteers should be reflected in 'final outcomes' columns. Volunteers want to hear from you. Please try to contact volunteers within a few days.

To find the language the volunteer was contacted in please select 'contact info' beside the corresponding volunteer or view the exported list of contact information.

By accessing shared contact information you agree to:

1. secure and protect using an encrypted device;
2. use only for recruitment outreach with the specific ResearchMatch study used to generate; and
3. destroy the information once outreach is completed.

If you choose to use this contact information in e-mail correspondence, do not use multiple e-mail addresses in the same message as this may allow potential volunteers to see unprotected contact information.

6 total volunteers have agreed to be contacted.

6 volunteers on current page (navigate pages below)

				ACTION REQUIRED	CONTACT IN PROGRESS	NOT ELIGIBLE	NO RESPONSE	VOLUNTEER DECLINED	NOT USED/STUDY FULL	NOT USED/OTHER	ENROLLED	REPORT VOLUNTEER
<input checked="" type="checkbox"/>	Testing, SPVOIB ⁶	contact info	health info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Vol, Dummy	contact info	health info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Optout, Testing	contact info	health info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	TestVol, Survey	contact info	health info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Testing, SPVOIB	contact info	health info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Volunteer Test, Spanish	contact info	health info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

It may be accessed by clicking on the TTU IRB approved study within the Researcher Dashboard. After a Volunteer responds that they are interested, they are put in the study's Enrollment Continuum, which contains their name and contact information. Researchers should regularly update their Enrollment Continuum. Researchers will receive automated emails from ResearchMatch notifying them if there are Volunteers that require follow-up in the "action required" category. Volunteers that are checked as "not eligible," "not used/study full, or "Not used/other" - receive a system generated email from ResearchMatch letting them know they are not eligible for that study. By completing this Enrollment Continuum, ResearchMatch can collect valuable data on how the system works.

While using the Enrollment continuum is not a required task for Researchers, it is a recommended guideline and resource for researchers. ResearchMatch allows researchers to **flag invalid Volunteer accounts**. If researchers know from their encounters with a Volunteer that the Volunteer provided false information in their ResearchMatch account, they can “flag” them and ResearchMatch will review further. This helps to ensure a legitimate, reliable, and accurate database of ResearchMatch Volunteers.

Please note this feature is not meant to report a non-compliant Volunteer or to share study-specific information with ResearchMatch. For example, please do not flag a Volunteer because they have not responded to a researcher’s communications or have not completed a study procedure or survey.

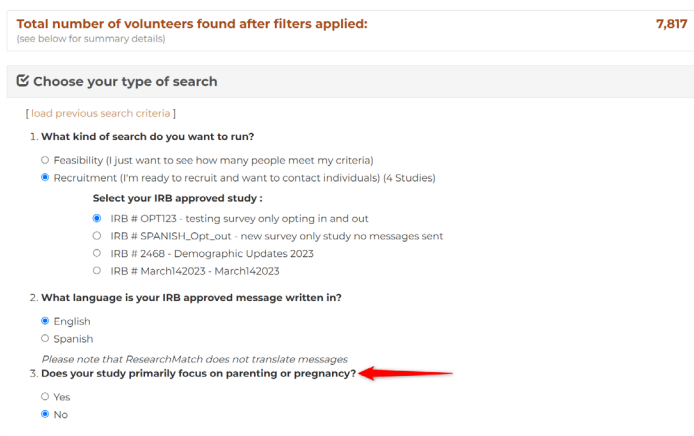
When researchers need to **Recruit large samples of Volunteers (>1,500)**, they may need to use different methods than traditional recruitment. ResearchMatch limits the number of Volunteers a research study can contact at a single time to no more than 1,500.

Studies recruiting a large and diverse sample of Volunteers, especially those

that do not have specific demographic criteria to limit the sample size, are encouraged to break their search by arbitrary parameters and contact volunteers in batches of up to 1,500 Volunteers at a time.

For example, one way to generate a smaller volunteer number is to break the search up by location (e.g., U.S. States). For the states that have over 1,500 eligible Volunteers, implement a second filter (e.g., age divisions – 18-25, 25-35, etc.) to reduce the number of eligible Volunteers displayed. Continue in this manner until the entire eligible volunteer population has been contacted. To help keep track of these various searches, Researchers can save each search under a different name.

It is recommended that Researchers update the Continuum for all the Volunteers who replied with ‘Yes’.



The screenshot displays the ResearchMatch search interface. At the top, a box indicates 'Total number of volunteers found after filters applied: 7,817' with a link to 'see below for summary details'. Below this is a section titled 'Choose your type of search' with a link to 'load previous search criteria'. The first question is '1. What kind of search do you want to run?' with two options: 'Feasibility (I just want to see how many people meet my criteria)' and 'Recruitment (I'm ready to recruit and want to contact individuals) (4 Studies)'. The 'Recruitment' option is selected. Below this is a section titled 'Select your IRB approved study :'. There are four radio button options: 'IRB # OPT123 - testing survey only opting in and out' (selected), 'IRB # SPANISH_Opt_out - new survey only study no messages sent', 'IRB # 2468 - Demographic Updates 2023', and 'IRB # March142023 - March142023'. The second question is '2. What language is your IRB approved message written in?' with two radio button options: 'English' (selected) and 'Spanish'. Below this is a note: 'Please note that ResearchMatch does not translate messages.' The third question is '3. Does your study primarily focus on parenting or pregnancy?' with two radio button options: 'Yes' and 'No' (selected). A red arrow points to the 'No' option.