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Research Administration

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Q&A

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Recruitment in Human Subjects Research at Emory

IRB Webinar

Thursday 11/14/24

Recruitment

- IRB Approval
- Medical Records
- Prior Research
- Research Pool Platforms
- Advertisements
- Social Media
- Resources
- Q and A

Recruitment and IRB Approval

Submit your recruitment plan and recruitment materials in the IRB submission.



14. Advertising, Recruitment, and Screening

Advertising and Recruitment Inventory	
1. Indicate which <i>advertising/recruitment materials</i> may be used	Included?
a. Physical advertisements (posting flyers, print advertisements, mailers)	<input type="checkbox"/> Yes <input type="checkbox"/> No
b. Digital advertisements (e.g., online posts or advertisements)	<input type="checkbox"/> Yes <input type="checkbox"/> No
c. Audio, video, or other multimedia advertisements (e.g., radio or television)	<input type="checkbox"/> Yes <input type="checkbox"/> No
d. Outreach messages or canned statements (e.g., listserv messages)	<input type="checkbox"/> Yes <input type="checkbox"/> No
e. Community presentations or engagements (tabling or speaking at events)	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Indicate what <i>general outreach methods</i> may be used	Included?
a. Use of Emory student research pools/programs (e.g., SONA)	<input type="checkbox"/> Yes <input type="checkbox"/> No
b. Non-Emory research recruitment platforms (e.g., Research Match, Prolific)	<input type="checkbox"/> Yes <input type="checkbox"/> No
c. Website or social media posts (e.g., paid web advertising, online groups)	<input type="checkbox"/> Yes <input type="checkbox"/> No
d. Referral-based recruitment (partners, external organizations, or providers identify and/or refer participants)	<input type="checkbox"/> Yes <input type="checkbox"/> No
e. Snowball-sampling (research participants provide referrals)	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Indicate what <i>targeted recruitment methods</i> will be used to contact participants	Included?
a. Contacting possible participants based on their employment, enrollment in a course, or other employment/educational membership	<input type="checkbox"/> Yes <input type="checkbox"/> No
b. Contacting possible participants based on their involvement in a prior research or recruitment protocol: <i>(list IRB submission IDs here)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
c. Contacting possible participants who were treated or seen by the study team	<input type="checkbox"/> Yes <input type="checkbox"/> No
d. Contacting possible participants based on searchers of medical records, clinic schedules, or other administrative records	<input type="checkbox"/> Yes <input type="checkbox"/> No

Recruitment Methods Narrative

1. General Recruitment Overview

General Recruitment Overview: Expand upon the methods indicated under questions 1 and 2 the Advertising and Recruitment Inventory. In this summary, include the following:

- **Indicate all locations where recruitment materials will be shared or posted**
- **Indicate the next steps to be taken by potential participants.** For example: Will they need to open a link/QR code to access a study website, complete a sign-up survey, send an email to the study team, make a phone call, etc.?
 - If there is an interest form/sign-up survey is included, upload a copy of this form to the submission under “Local Site Documents” #2.
- **Identify any partner groups or organizations** that will assist with recruitment and describe the scope of their involvement.
- **Distinguish any differences in how study sub-groups are recruited.** For example: will the intervention and control groups be targeted with through different platforms or methods?
- **Note:** All recruitment materials must meet the IRB’s [guidelines for advertising and recruitment](#). All materials should be uploaded to the [eIRB](#) submission under “Local Site Documents” #2.

2. Specialized Recruitment Requirements

Specialized Recruitment:

- **If recruiting using social media platforms or advertisements:** Review [this guidance](#) and insert all of the required elements of the Social Media Management Plan in this section.
- **If recruiting using existing research platforms:** Describe how these platforms will be used and any parameters used to identify or connect-with eligible participants.
 - **If using Research Match:** Insert the required Research Match template language into this [section](#)
- **If relying on referrals (e.g., provider referrals, snowball-sampling, etc.):** Identify what who will be asked to refer participants. Describe how referred participants and the research team will be connected.

3. Targeted Recruitment Details

1. **Targeted Recruitment:** In this sub-section, provide details on any methods in which potential participants will be directly contacted by the study team.
 - **If using classroom enrollments, rosters, declared majors or other administrative academic data** to identify or contact potential participants:
 - **Describe what records will be used** or obtained to contact potential participants.
 - **Describe the process for outreach** to potential participants, including who is responsible for contact, the method of contact, etc.
 - *Note: [FERPA](#) most-likely applies to studies using these recruitment methods.*
 - **If utilizing existing recruitment protocols, sign-up lists, or contacting participants of another study** to recruit potential participants:
 - **List the relevant protocols/studies** to be used along with the organization overseeing the protocol and IRB study IDs (if local to Emory)
 - **Describe the existing participant details** to be used or obtained in order to contact potential participants
 - **Describe the process for outreach** to potential participants, including who is responsible for contact, the method of contact, etc.
 - **If using medical records, clinic schedules, or other HIPAA-protected information** to identify and contact potential participants:
 - **Describe what records will be used** or obtained to contact potential participants
 - **Describe the process for outreach** to potential participants, including who is responsible for contact, the method of contact, etc.
 - *Note: “cold calling” patients is not permitted, [per IRB guidance](#)*
 - *Note: Use of HIPAA-protected information for to identify or recruit potential participants prior to their consent requires a [Partial Waiver of HIPAA Authorization](#). Ensure that your responses in the “HIPAA Applicability and Waivers Requested” section of [eIRB](#) reflect the need for this waiver.*

Recruitment via Review of Medical Records



Medical Record Recruitment

- IRB approval
- Partial HIPAA Waiver (PHW)



Options to Contact



Treating team



Through the treating team



MyChart Patient Opt-In Pilot
(limited roll out through CTSA)

Recruitment through Patient's Provider



inform patient of your study and
contact information



get permission from the patient
and document in medical
record



Provide written permission to
contact

MyChart Pilot

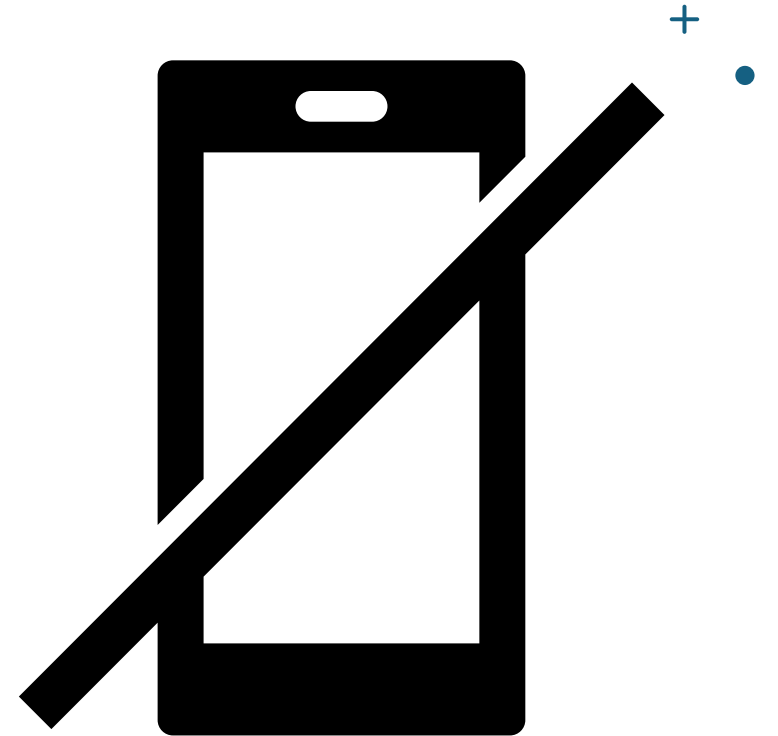
Prior IRB approval

Patient Opt-In

Resource: [Georgia CTSA
Recruitment Center](#)

Cold Calling/Writing Not Permitted

- Exceptions: MyChart Pilot



Prior Research



Prior Research Recruitment

Prior study IDs

Organization overseeing prior research if not at Emory

Participant details

Outreach Process

Opt-in for future research in prior consent

Research Pool Platforms



Third Party Platforms



INDICATE HOW
PLATFORM WILL BE
USED



PARAMETERS TO
IDENTIFY/CONNECT



COMPENSATION
DETAILS



DATA SECURITY

Research Match



A REGISTRY OF INDIVIDUALS
WHO HAVE EXPRESSED INTEREST
IN JOINING RESEARCH STUDIES



REGISTER FOR RESEARCH
MATCH AT
[HTTPS://WWW.RESEARCHMATC
H.ORG/RESEARCHERS/](https://www.researchmatch.org/researchers/)



INSERT THE RESEARCH MATCH
LANGUAGE IN YOUR PROTOCOL



CTSA IS THE LIAISON FOR
QUESTIONS

Emory Department Research Pools

- [Sona](#)
- [Emory Goizueta Behavioral Lab](#)

Note:

- Add department-specific screening tools to each protocol
- Lists of ongoing clinical studies limited to the type of information in clinical trial registry listings like CT.gov can be posted without prior IRB approval

Advertisements



What to Include in Study Ads



RESEARCHER OR
RESEARCH FACILITY



PURPOSE



ELIGIBILITY CRITERIA
IN SUMMARY FORM



BRIEF LIST OF
BENEFITS



COMMITMENTS



LOCATION



CONTACT
INFORMATION

What **not** to Include in Study Ads



\$\$\$



Safe, effective, superior treatment



"free medical treatment"

Social Media Recruitment



Study Teams Need to Know



Terms of use



University Policies



Applicable Laws



Site's advertising, privacy, and
prohibited content policies

Social Media Recruitment

Do

Include social media plan in protocol

Utilize official Emory social media accounts

Do not

Use personal social media accounts

Screen participants

Social Media Plan Includes

- Social Media Sites
- Official Emory Accounts
- Public or Private Groups
- Acknowledgement of review and plans to adhere to terms of use
- Mock-up
- Landing page
- Targeting criteria
- Response plan
- Privacy and Security Plan
- Data collected

Resources and Q and A

Resources



[SOCIAL MEDIA
GUIDANCE](#)



[EMORY IRB
RECRUITMENT
GUIDANCE](#)



[GEORGIA CTSA
RECRUITMENT
CENTER](#)



[EMORY OFFICE OF
COMMUNICATIONS](#)

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IRB Webinar Feedback Survey



Questions and Contact Information



For study specific questions, contact the IRB analyst assigned to your study.



To find IRB staff contact information, go to our [website](#).



For general questions, contact irb@emory.edu.



For general reliance questions, contact irb.reliance@emory.edu.



For questions about reportable new information, expanded access etc., contact the [Education and Quality Assurance Team](#)