

How To Use ResearchMatch

Step 1: Prepare to Use ResearchMatch

Before adding your study to ResearchMatch, complete the following steps:

a. IRB Approval:

- Your study must receive IRB approval before using ResearchMatch as a recruitment method. The IRB application should explicitly state that ResearchMatch will be used for recruitment.
- **Prepare IRB-Approved Contact Messages:**
 - Researchers must submit ResearchMatch contact messages to the IRB for approval. These messages are sent through the platform to potential volunteers.

Recruitment access can only be granted once:

- You are ready to begin participant recruitment
- You have IRB approval to use ResearchMatch
- You have IRB approval for both required contact messages (initial contact message and recruitment message)

Please refer to the provided examples for guidance on preparing the [initial contact message](#).

Important guidelines for the contact message:

- Must be fewer than 2,000 characters
- Cannot include study team contact information
- Cannot include survey links
- Must allow volunteers to decide whether they want to learn more about the study

Optional:

- If recruiting Spanish- or Chinese-speaking participants, an IRB-approved translated message is required

b. Set up researcher account on [ResearchMatch](#)

During registration:

- Select **Pace University** from the list of institutions.
- Electronically sign the Researcher Acknowledgement Form.
- Enter your contact information.
- Select your level of access (see below). ResearchMatch offers two levels of access:
 - **Feasibility Access**

This level allows researchers to view aggregate data about the ResearchMatch volunteer population. It can be used to assess whether there are enough potential participants who meet your study criteria before beginning recruitment.

 - Does **not** allow you to contact volunteers
 - **Does not require IRB approval**
 - Useful for study planning and determining feasibility
 - Recruitment Access

This level allows researchers to search for and contact registered volunteers.

 - **Requires prior IRB approval**
 - Requires IRB approval to use ResearchMatch as a recruitment method
 - Requires IRB approval for both contact messages (initial contact and recruitment message)

Recruitment access should only be requested when you are fully ready to begin participant recruitment.

Step 2: Add your study

Once your account is created and you have the appropriate access:

- a. [Log in](#) to ResearchMatch and follow the instructions on your researcher dashboard
- b. Upload your IRB approval letter, including the IRB expiration date (required for recruitment access)

- c. Your study request will be reviewed by the institutional liaison and your Principal Investigator (PI)
- d. After approval, you will receive an email from ResearchMatch asking you to confirm and activate access

Once access is activated, you can begin searching for potential participants (if you have recruitment access).

Step 3: Search for Volunteers and Send Messages

ResearchMatch allows researchers to search for volunteers using several filters:

a. Geographic Filter

Identify volunteers within a specific location, useful for in-person or regional studies.

b. Demographic Filters

Refine searches based on:

- Age
- Gender
- Race or ethnicity
- Body Mass Index (BMI)
- Smoking status

Tip: Only contact volunteers who meet basic study criteria to avoid volunteer fatigue.

c. Health Condition and Medication Filters

Use logical operators:

- OR – any listed criteria
 - Example: high blood pressure OR diabetes
- AND – all listed criteria
 - Example: high blood pressure AND diabetes
- Exclude – removes specific groups
 - Example: exclude volunteers who report having cancer

Additional Training and Support

Researchers can access training materials and instructional videos through their ResearchMatch dashboard. Researchers can register (registration zoom link does not work) in advance for a training session which is conducted by ResearchMatch on the 2nd Thursday of every month at 1 pm ET by emailing info@researchmatch.org.

For questions related to IRB approval or using ResearchMatch at Pace University, contact:

Lindsey Lee

Coordinator, Human Research Protection Program (HRPP) and Grants

Phone: (212) 346-1459

Email: llee2@pace.edu