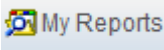
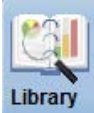



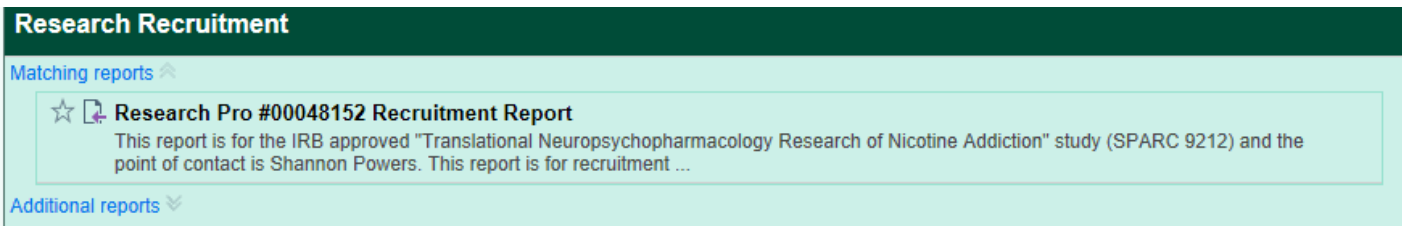
Instructions for Utilizing Epic Recruitment Reports

The Epic Recruitment Report for your study is now available. This report should be used only by IRB approved members of the research study. Below are instructions for utilizing this Recruitment Report for **“cold-contact” recruitment**. Cold-contact recruitment is defined as contacting any patient who does not have a clinical relationship with the Principal Investigator (PI) or Co-Investigators (Co-Is) in this study.

**Please note: These instructions do not apply when you are contacting clinical patients of the PI or Co-Is. If there is a clinical relationship between the investigators and the patient contacted, the number of contact attempts and “Opt-Out” preferences do not apply, and contact should NOT document that contact on the “Research Contact Form”*

Accessing Your Epic Recruitment Report

- Locate the Report in My Reports Activity
 1. On the Epic toolbar, locate and click the  button.
 2. On the left side of the screen, click the  tab.
 3. In the search field on the top of the screen, Type **“Research”**.
 4. Locate the **Research: Pro #XXXXXXX** (Pro number for your study) report, and hover over it.
- Run the Report
 5. Click the  button that appears on the right side of the report.



6. You can click the star to the left of the report name to set it as a “favorite” report in your library.
- Review the Report
 7. The report will complete and return results for all patients who meet the above criteria. The columns displayed, are those approved for your Research Data Request.
 - *If you believe there is an error with your displayed columns, please contact Epic Research (epicresearch@muscedu)

Patient Cold-Contact Eligibility

Along with your recruitment report, you have also received access to your study's REDCap Recruitment Project. Utilization of this REDCap project is necessary for determining a patient's eligibility for cold-contact recruitment. Please follow the steps below to determine if a patient from your Epic report is eligible for cold contact.

- Access your REDCap Recruitment Project Template
- Click "Add/Edit Records" from the left-hand column on your screen (image 1)



Image 1: Displays location of Add/Edit Records in the REDCap Recruitment Project

- Click the green "Add New Record" button (image 2)

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

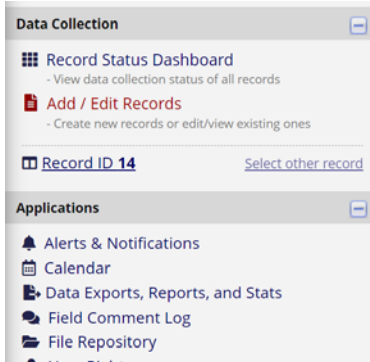
NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 13

Choose an existing Record ID

Image 2: Displays location of "Add new record" button

- Click the "Data Return Form" radio button (image 3)



Record "14" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Legend for status icons:

- Incomplete
- Incomplete (no data saved)
- Unverified
- Complete
- Many statuses (all)
- Many statuses (mixed)

NEW Record ID 14

Data Collection Instrument	Status
Data Return Form	<input type="radio"/>
Research Contact Form	<input type="radio"/>

chester_5G
Internet access
Unidentified network
No Internet access

Image 3: Displays where to select the "Data Return Form"

- Enter the MRN of a patient from your Epic Recruitment Report into the “PATIENT_MRNR” field on the Data Return Form (image 4) and click the “Save and Exit Form” button.



Image 4: Displays image of “PATIENT_MRNR” field in the Data Return Form

- Wait about a minute and then refresh your internet browser. If you see the “lock” icon displayed under the Research contact form (image 5), this patient is NOT eligible for cold-contact.





Data Collection Instrument	Status
Data Return Form	 
Research Contact Form	 

Image 5: Displays image of locked “Research Contact Form” indicating the patient is ineligible for cold-contact

- If the “Research Contact Form” is not in a locked state, you can click on the radio button beside “Research Contact Form (image 5) to open the data collection instrument.
- Patients are eligible to contact if the number included in the “Total times contacted” field is less than 3 (indicating that the patient has been contacted less than 3 times in 6 months). Patients who have already been contacted 3 times will have locked forms and the ineligible fields will be marked “Yes” in the “Research Contact Form” (image 6)

Research Contact Form

 **Instrument locked by kgk200@musc.edu** (Kathryn Kirchoff) on 01/11/2021 11:04am
The instrument "Research Contact Form" has been locked for record "1". If you have instrument-level locking/unlocking privileges, you may unlock this instrument at the bottom of the page.

Editing existing Record ID 1	
Record ID	1
Total times contacted	  <input type="text"/>
Ineligible	 <input checked="" type="radio"/> Yes  <input type="radio"/> No

Image 6: Displays that the patient's forms are locked, and the patient is ineligible for cold-contact

Documenting Patient Cold-Contact

- On the left-hand menu (image 7), click "Research Contact Form" when you are ready to contact the patient. Before contacting the patient ensure that the number in the "Total Time Contacted" field is still less than 3.



Image 7: Method of switching between "Data Return Form" and "Research Contact Form" within a patient record

- Please complete the Research Contact Form (image 8) in real-time as you contact/attempt to contact a patient. The form is a smart form and additional fields may populate as you are documenting the contact. Real-time entry is also imperative that the REDCap database can be updated for other study teams to ensure that patients do not exceed their contact limits.

Research Contact Form

Current instance:  1 



Editing existing Record ID 2	
Record ID	2
Total times contacted	<input type="text" value="2"/>
Patient has reached the max number of contacts in the current 6 month period	<input type="radio"/> Yes <input checked="" type="radio"/> No reset
Did the study team contact or attempt to contact this patient?	<input checked="" type="radio"/> Yes <input type="radio"/> No reset
Date of contact/attempted contact	<input type="text" value="26-05-2020"/>  Today D-M-Y
Method of contact	<input type="text" value="Phone"/> 

Image 8: Example of cold-contact documentation in "Research Contact Form"

- Once you have contacted or attempted to contact the patient please answer "yes" to the field "Did the study team contact or attempt to contact this patient?"

*Please note, that each study gets ONE contact/attempt to contact a patient. This includes speaking with the patient, leaving a voicemail, or sending ONE email/letter/MyChart message.

- Enter the “Date of contact/attempted contact” into the field.
- Next, select the applicable “Method of Contact”
 - *If contacting patients by phone, please be sure to use your IRB approved phone script
- Once you have completed the contact/contact attempt please hit “Save and Exit Form” to submit the “Research Contact Form”. You will then be taken back to the Data Collection Instrument list for the patient record (image 9).

✓ Record ID 2 successfully edited

Record ID 2



Data Collection Instrument	Status
Data Return Form	
Research Contact Form	

Image 9: Example of data collection instrument list upon completion of patient cold-contact documentation

Documenting a Patient’s Opt-Out Preference

If a patient states that they do not want to be contacted again about ANY research project at MUSC, please select the “PATIENT OPT-OUT” radio button on the “Research Contact Form” (image 9). A dialogue box will then appear and ask you to confirm the patient’s opt-out preference and recite quoted text. You can then select “yes” once you have confirmed their opt-out preference and recited the text.

If a patient expresses concerns with or has questions about MUSC’s opt-out recruitment policy and how/why they are being contacted, please provide them the contact information for the Research Preferences Manager.

The patient has indicated that they would like to opt-out from being contacted about potential research studies.

*Check this Box ONLY if the patient has voiced their preference to be removed from receiving ANY further contact about potential research studies.

PATIENT OPT-OUT

reset

Please confirm that the patient no longer wishes to receive future contact about ANY research studies they may qualify for. If they confirm, please state the following:

"We have now documented that you no longer want to be contacted about research studies you may qualify for and all reasonable efforts will be made to prevent this contact. Please note, that this does not prevent your doctors from discussing research studies with you when you are seeking clinical care. Also, should you change your mind and want to be contacted about research studies in the future, you can update your preference in MyChart."

Yes
 No

reset

Have you confirmed and read the participant the above text.

* must provide value

Image 9: Example of documentation of patient opt-out preference