

# Instructions for Utilizing REDCap Recruitment Reports





The REDCap Recruitment Project for your study is now available. The “Data Return Form” should only contain data fields that have been approved in your IRB application. Please review the “Data Return Form” and let the Research Preferences Manager know if there are any data fields on this form that you do not have IRB approval to receive.

Below are instructions for utilizing this REDCap Recruitment Project 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”*

## Patient Cold-Contact Eligibility


### Record ID 4

Data Collection Instrument	Status
Data Return Form	 
Research Contact Form	 

Patients included on the “Data Return Form” 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 (image 1) and the ineligible fields will be marked “Yes” in the “Research Contact Form” (image 2).

*Image 1: record instruments display that the patient’s forms are locked, and the patient is ineligible for cold-contact*

### 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 2: Locked "Research Contact Form" indicates patient is ineligible for cold-contact

### Utilizing REDCap Reports

Filters and/or pre-built reports can be utilized to present patients with the fewest number of contacts first. It is suggested that you prioritize your recruitment using this approach and reaching out to patients with the fewest contacts first. We have provided a template report titled "Patients Eligible for Cold Contact" that is sorted in this way and also excludes patients who have already reached their limit of being contacted 3 times in 6 months.

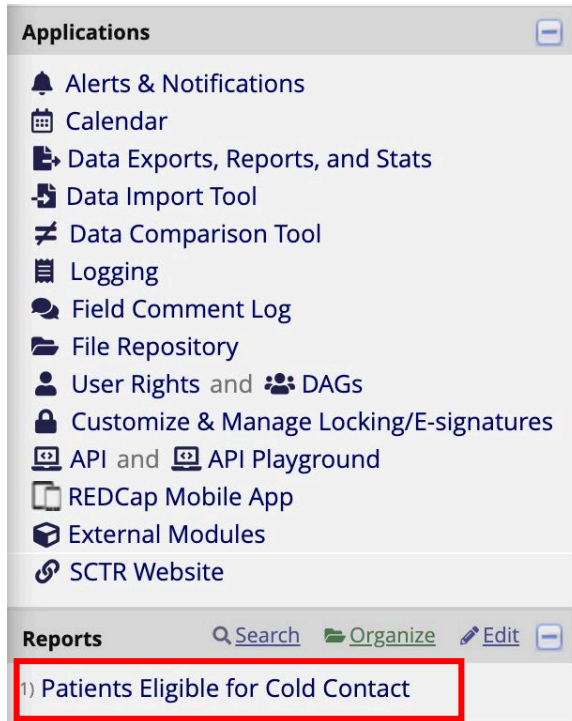


Image 3: Image indicating where "Patients Eligible for Cold Contact" report can be accessed

**Number of results returned: 2**  
Total number of records queried: 3  
Report execution time: 0.1 seconds

[Stats & Charts](#) [Export Data](#) [Print Page](#) [Edit Report](#)

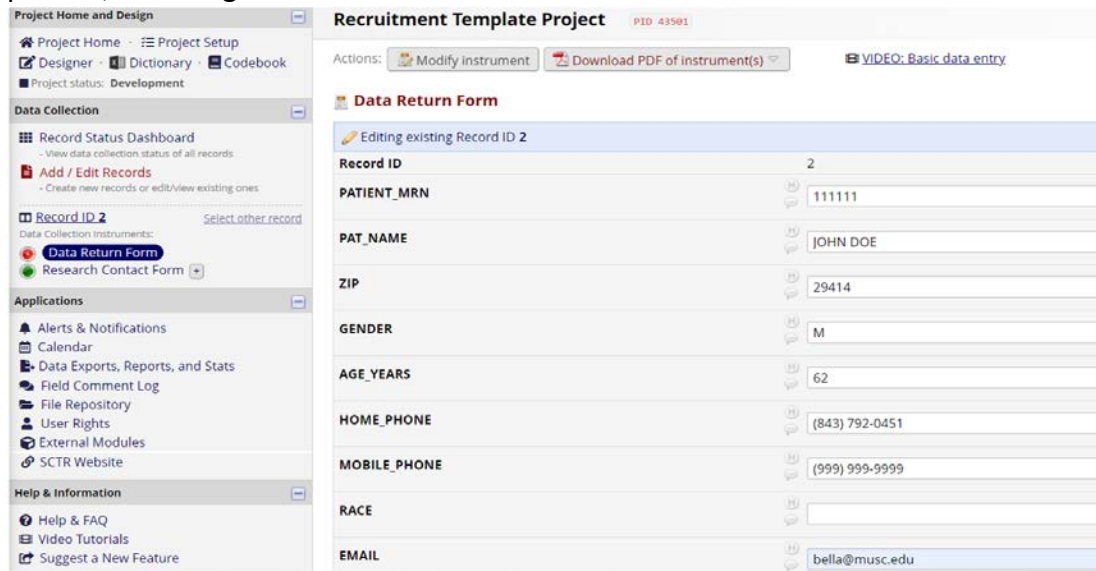
### Patients Eligible for Cold Contact

Record ID record_id	PCP_PROVIDER pcp_prov	VISIT_PRIMARY_PROVIDER prim_prov	Total times contacted total_contact
2	Test Provider 2	Test Provider	0
3	Testing Provider 4	Testing Provider 3	0

Image 4: Example of "Patients Eligible for Cold Contact" report

## Documenting Patient Cold-Contact

- From the report (image 4), click on the “Record Number” of the patient you are contacting to enter the “Data Return Form” (image 5) to review the data provided to you about that patient, including their contact information.

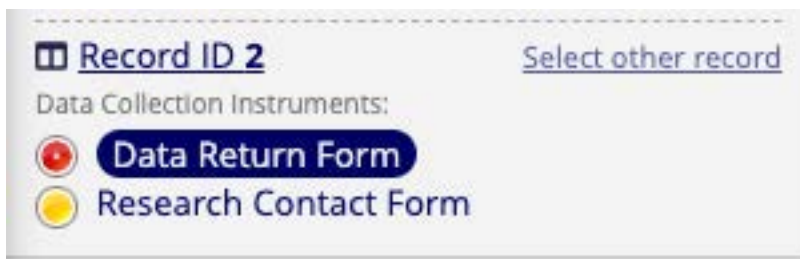


The screenshot displays the REDCap interface for a patient record. On the left is a navigation menu with sections: Project Home and Design, Data Collection, Applications, and Help & Information. The 'Data Collection' section is active, showing 'Record ID 2' and two instruments: 'Data Return Form' (selected) and 'Research Contact Form'. The main area shows the 'Data Return Form' for 'Record ID 2' with the following fields:

Field	Value
Record ID	2
PATIENT_MRNRN	111111
PAT_NAME	JOHN DOE
ZIP	29414
GENDER	M
AGE_YEARS	62
HOME_PHONE	(843) 792-0451
MOBILE_PHONE	(999) 999-9999
RACE	
EMAIL	bella@musc.edu

Image 5: Example of patient’s “Data Return Form”

- On the left-hand menu (image 6), 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 less than 3.



The screenshot shows the 'Data Collection Instruments' section for 'Record ID 2'. It features two radio buttons: a red one for 'Data Return Form' (which is selected) and a yellow one for 'Research Contact Form'. A link 'Select other record' is visible in the top right corner.

Image 6: Method of switching between “Data Return Form” and “Research Contact Form” within a patient record

Please complete the Research Contact Form (image 7) 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 <span>reset</span>
Did the study team contact or attempt to contact this patient?	<input checked="" type="radio"/> Yes <input type="radio"/> No <span>reset</span>
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 7: 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 8).

Record ID 2 successfully edited

### Record ID 2

Data Collection Instrument	Status
Data Return Form	
Research Contact Form	

Image 8: 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.

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."

Have you confirmed and read the participant the above text.

\* must provide value

The form includes two radio button options: "PATIENT OPT-OUT" (selected) and "Yes/No" (Yes selected). A "reset" link is visible on the right side of each section.

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