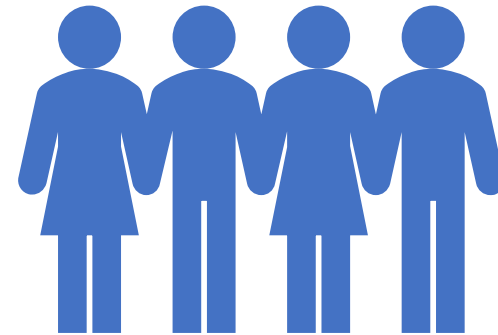


UTSW Research Participant Recruitment Services

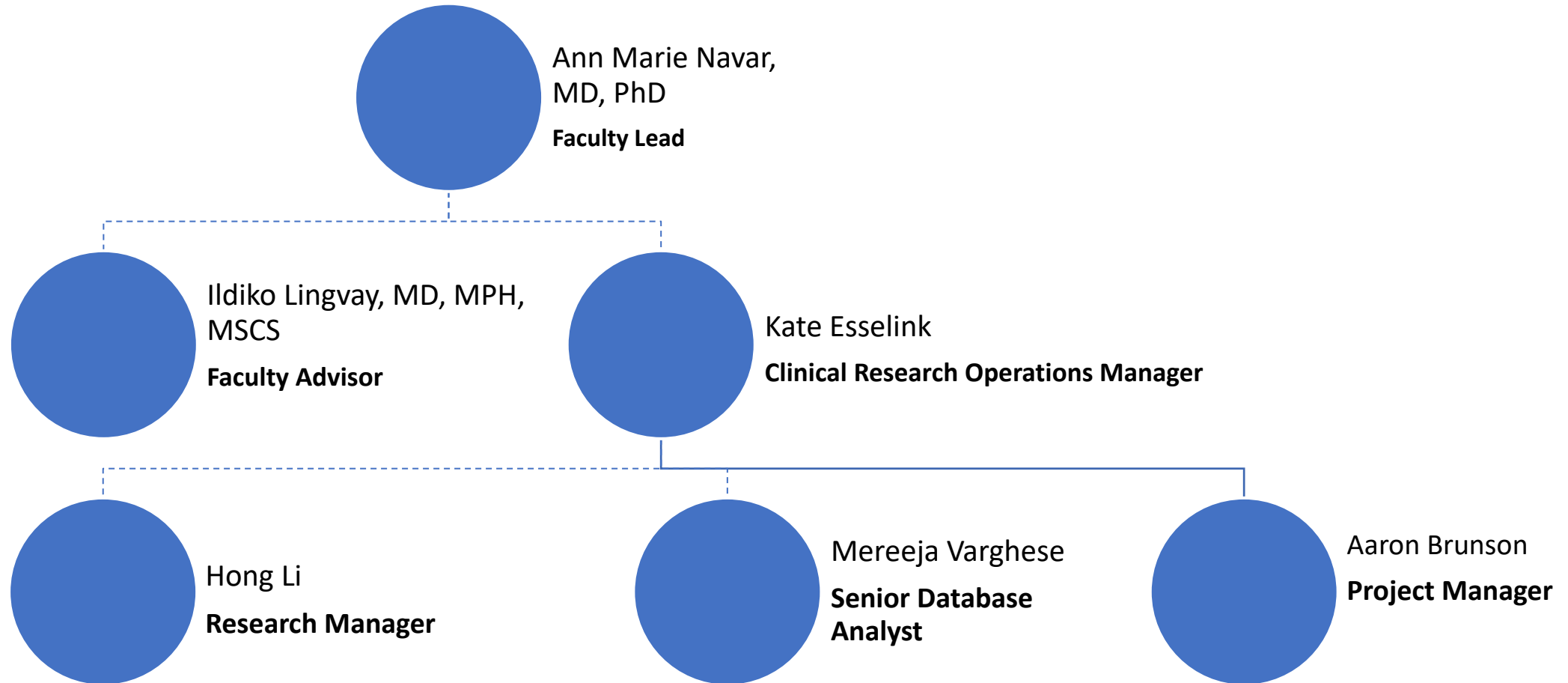
Kate Esselink

Kathleen.Esselink@utsouthwestern.edu

Office of Clinical Research, UTSW



Who We Are



Presentation Overview

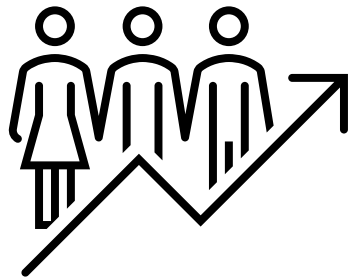
- Which patients can I recruit (opt-out)?
- How do I do feasibility analysis or get preliminary counts?
- How do I obtain an identified patient set for recruitment?
- How can I use MyChart for recruitment?
- Other services



This discussion applies to UTSW data only.



What is Opt-out?

- In 2019, UTSW became an opt- out institution for research recruitment.
- Anyone who has an encounter with the health system is eligible to be contacted to participate in a research study unless they opt-out.
- Patients who opt-out can still be contacted by providers directly involved in their care.



Expands the pool of potential research participants!

MyChart Research Preference

 Your Menu  **UTSouthwestern**
Medical Center

Research Studies

Participation Preferences ^

May we contact you about opportunities to participate in research studies?
You can choose how to be contacted in [Communication Preferences](#).




OK to contact Do not contact Undecided **Default**







Last updated: Feb 17, 2022 10:22 AM

Create a profile to let us know the types of research you may be interested in.

[Create profile](#)

MyChart Research Preference Profile



 Your Menu  COVID-19/Flu Scheduling  Messages  Visits  Request Rx Renewal 

Research Preference Profile

Would you consider participating in research studies as a healthy volunteer?
Many studies also need healthy volunteers for comparison purposes, so you don't necessarily have to have a condition to help researchers.


Which areas of research would you be most interested in?
Select all that apply.

- Allergies & Immune System
- Blood, Heart, & Circulation
- Bones, Joints, & Muscles
- Brain & Nervous System
- Cancer
- Child Health
- Diabetes
- Digestive System & Liver
- Drug/Alcohol/Substance Dependence
- Ears, Nose, & Throat

Participation Preferences

Your preferences will help us let you know about research opportunities that might interest you. Your care team might discuss additional opportunities with you.

Related Links

 Specify how you would like to receive MyChart notifications for research

HRPP Policies on Recruitment

[4.1- Identification and Recruitment](#)

[4.2- Guidance for Advertising to Research Subjects](#)

utsouthwestern.edu/research/hrpp/policies

These policies require methods, materials, procedures, and tools of recruitment plans to be described and approved



Feasibility Queries

- Feasibility assessments can answer questions for funding applications and site selection.
 - Do you have enough patients to meet your enrollment targets?
 - Where are these patients?
 - Do you have demographic diversity in your population?



Self-Service Tools to Identify Potential Participants



i2b2

<https://i2b2.swmed.edu/feasibility/>

 **SlicerDicer**



TriNetX

<https://live.trinetx.com/>

Tool	Data Source	Advantages
i2b2	Clinical Research Data Warehouse	<ul style="list-style-type: none"> • Additional data stored outside of Epic (ex: tumor registry)
SlicerDicer	Epic/Caboodle	<ul style="list-style-type: none"> • Easy to use • Self-contained in Epic • Allows you to search Epic generated registries
TriNetX	Clinical Research Data Warehouse	<ul style="list-style-type: none"> • Easy to use • Robust interface • Proprietary NLP of notes, some tests



Identified data can be obtained from all tools with IRB approval and a ClinDen request!

i2b2

- <https://i2b2.swmed.edu/feasibility/>

The screenshot displays the utCRIS Study Feasibility Query & Analysis Tool interface. The main window is titled "Query Tool" and shows a query named "(K2-Age-I A-Eso-(N1@10:23:11)". The query is structured into three groups, each with a "Dates", "Occurs > 0x", and "Exclude" column. The groups are connected by "AND" operators, and each group has a "one or more of these" button below it. The groups contain the following terms:

Group 1	Group 2	Group 3
(K21)Gastro-esophageal reflux (K22.7)Barrett's esophagus (E16.4)Increased secretion of	Age by Value > 7670.25	I AGREE

The interface also includes a "Navigate Terms" panel on the left with a tree view of categories like Beacon, Demographics, Diagnoses, Family History, Laboratory Tests (LOINC), Medications, Procedures, Provider, Social History, Tumor Registry - Full, Visit Details, and Volunteer Research Participant Registry. A "Workplace" panel shows folders for SHARED and kessel. A "Previous Queries" panel lists recent queries with their dates and user names. A "Query Status" panel at the bottom right shows the query is finished, took 449 seconds, and provides the patient set and number of patients for the query.

SlicerDicer

- In Epic
- Epic button --> Reports -
-> SlicerDicer
- If you do not have
access, email
Servicedesk

Slicer Dicer for Research


- Feasibility analysis- do we have enough patients for this research study?
- Patient set for retrospective chart review
- Patient set for prospective recruitment
 - MyChart recruitment messages
 - Phone calls, emails, in clinic recruitment (through Recruitment Dashboard)
- **Research Study Patient Associations** data model
 - Demographics, enrollment status, can be linked to the **Patients** data model







TriNetX




- Live.trinetx.com
- Email Kate Esselink or Aaron Brunson for access (UTSW only)



ADRIATIC Trial Connect Request | Observational Study - Agitation in Alzheim...



★ Unnamed  **250** PATIENTS **1** HCOS
Oct 11, 2019, 9:39 am. Teresa Bosler.
University of Texas Southwestern Medical Center.



 **Count Patients** 

 **Network** University of Texas Southwestern ... 
1 of 1 HCOs online


 **Population** ≥ 18 years, Any sex
3,087,849 patients on network  

MUST Have  

CANNOT Have  

Event 1A: This event occurred since 3 years ago  + Add Related Event 

G30	Alzheimer's disease	10,740
OR		
G30.9	Alzheimer's disease, unspecified	9,520
AND		
R45.1	Restlessness and agitation	11,960

 Create an event

MyChart Recruitment

i2b2, Slicer Dicer, TriNetX or programmer generated patient lists can be used to send secure MyChart messages to notify potential participants



Available Studies

Based on your medical record, you have been identified as potentially eligible for these studies. Click "I'm Interested" to notify the research team that you may want to participate in the study.

^ ASTHMA BRAIN AND COGNITION (ABC) STUDY

Description

Asthma Brain and Cognition (ABC) Study

UT Southwestern (UTSW) and Southern Methodist University (SMU) are collaborating on a study looking at the relationship between asthma, the brain, and cognition. Specifically, the influence of asthma on how people process information as they age.

The study is comprised of 3 sessions and participants will be compensated at the end of the two in-person visits. The first session is online (Zoom) and will include some initial cognitive tests. The session will last 1 hour and a half. The second session will include an in-person cognitive test at UTSW and will also last 1 hour and a half. Lastly, the third session will comprise of an MRI and blood draw at UTSW and will last 3 hours and 15 minutes.

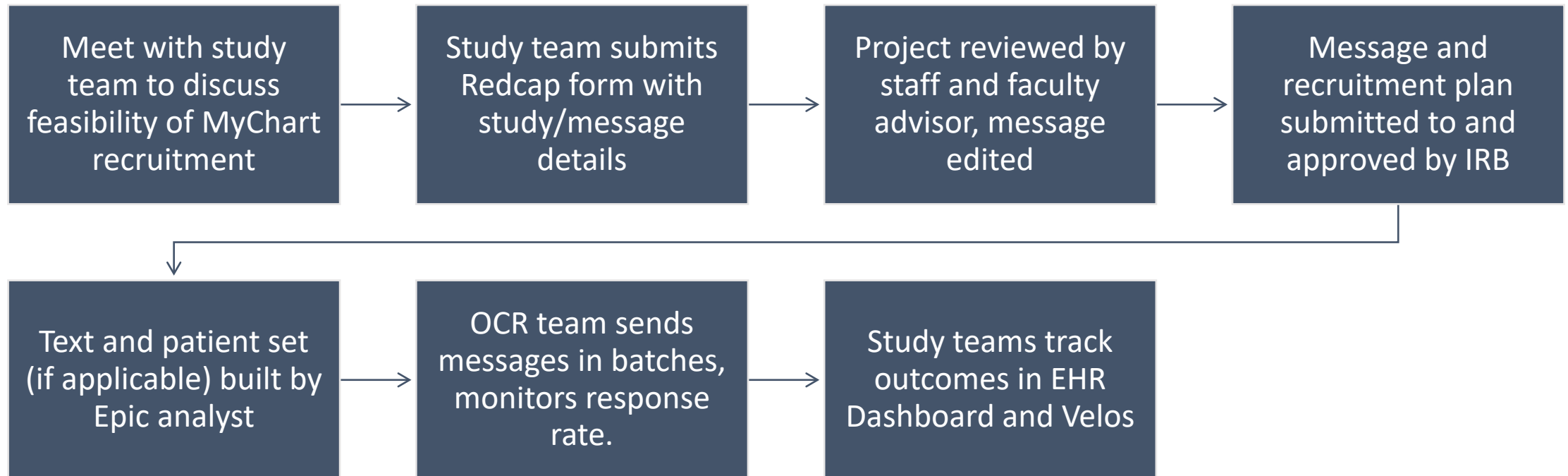
I'm interested

No, thank you

Active Studies

You are not enrolled in any research studies or your research studies are not visible in MyChart.

MyChart Recruitment Process



Message Review/Community Advisory Panel

- Team reviews message content for readability/acceptability
- Best practices developed through consultation with **Community Advisory Panel:**
 - Use bullets
 - Use inviting and explanatory language
 - Make it clear if it is a drug study or observational study
 - Appeal to the patient's sense of altruism
 - Include compensation but avoid promises. Ex: "you may be compensated **up to \$500**"

EHR Recruitment Dashboard

STU 002020-008 - Test Study Desc 7 View All Studies

Search Participants: Search Advance Search Clear Search & Filters

Filters

General Filters

Last Contact: -

Date Added: -

Query:

Study Status:

Starred:

Appointment Filters Change Custom Appointment Filters

Start/End Date: -

Location:

Provider:

MyChart:

MyChart Status:

Enrollment Status:

Message Status:

Filter by sex, race, ethnicity, age

Sex:

Race:

Ethnicity:

Research Preference:

Age Range: 18 - 100

Filter by MyChart status

[Bulk Update](#) Study Status: Update Show Column: None Query Notes Research Preference Request New Participants Export Participant List

MRN	First Name	Last Name	DOB	Sex	Race	Ethnicity	Study Status	Last Contact	Date Added	Next Appt
10000	Devon	Jamison	03/25/1960	F	WHITE	Non-hispanic	<input type="text" value="Please Select"/>	03/21/2017	02/27/2017	
225544	Misty	Berry	03/26/1978	F	WHITE	Non-hispanic	<input type="text" value="Please Select"/>	12/08/2022		
45454545	Maxine	Jamison	03/08/1952	F	WHITE	Non-hispanic	<input type="text" value="Potentially Eligible"/>			
545456258	CHRISTYE	Jamison	12/25/1965	F	WHITE	Non-hispanic	<input type="text" value="Potentially Eligible"/>			
7504125	BARRY	Jackson	10/19/1955	M	WHITE	Non-hispanic	<input type="text" value="Prescreen - Ineligible"/>	03/15/2017	02/27/2017	
7504597	BRANDON	Cassidy	04/07/1983	M	BLACK OR AFRICAN AME	Non-hispanic	<input type="text" value="Potentially Eligible"/>	04/12/2017	03/29/2017	
7504670	Debra	Debra	12/06/1960	F	HAWAIIAN/PACIFIC ISLANDER/UNKNOWN	Non-hispanic	<input type="text" value="Potentially Eligible"/>	04/12/2017	03/29/2017	

Track enrollment statuses

EHR Recruitment Dashboard- Appointment Filters

Custom Appointment Filters for study STU 002020-008 Help

Custom 1: ✕ Custom 2: ✕ Custom 3: ✕

Location	Department Name
<input type="checkbox"/> Allergy, Immunology & Pulmonary Clinic	ALLERGY
<input type="checkbox"/> Allergy, Immunology & Pulmonary Clinic	PULMONARY SPECIALTY CLINIC
<input type="checkbox"/> Bariatric Surgery Clinic - THD	THD BARIATRIC SURGERY
<input type="checkbox"/> Bariatric Surgery Clinic - THD	VASCULAR SURGERY - THD
<input type="checkbox"/> Bariatric Surgery Clinic - THD	VASCULAR SURGERY LAB - THD
<input type="checkbox"/> Clinical Heart & Vascular Center	CARDIOLOGY
<input type="checkbox"/> Clinical Heart & Vascular Center	SURGERY - VASCULAR
<input type="checkbox"/> Clinical Heart & Vascular Center	SURGERY - VASCULAR LAB
<input type="checkbox"/> Cystic Fibrosis Clinic	CF AND BRONCHIECTASIS CLINIC
<input type="checkbox"/> Dermatology Clinic	DERMATOLOGY

<input type="checkbox"/> ABDELHAMEID MD,DUAA
<input type="checkbox"/> BARNARD PA,AINSLIE LOUISE
<input type="checkbox"/> BECK MD,KRISTEN
<input type="checkbox"/> CHAMSEDDIN MD,BAHIR
<input type="checkbox"/> CHONG MD,BENJAMIN FRANKLIN
<input type="checkbox"/> CRUZ MD,PONCIANO DALMACIO
<input type="checkbox"/> CURTISS MD,PAUL MICHAEL

Create custom groups of clinics/providers for in-person recruitment

Groups can then be filtered on main patient list page.

Pathway for Use of Recruitment Dashboard

1

Add Recruitment Dashboard to your IRB protocol

2

Query Slicer Dicer/i2b2/ or request a custom patient list

3

Request dashboard access (with IRB approval)

4

Receive filterable patient lists, updated daily, for recruitment.

Additional Tools/Recruitment Science

- A/B testing messages: Does message content/extras influence willingness to “learn more”?
- Improving patient selection beyond standard data elements: Immediate screening
 - After “I’m Interested” – pop up questionnaire developed to ask about data we cannot find in chart
- Healthy volunteer registry
- Incorporating AI to improve data elements that can be searched

Non-Patient Recruitment

Office of Community Health and Research Engagement

- Community Advisory Panel- can review recruitment strategy, materials, etc.
- HealthStreet- community screenings and events.
- Community Research Registry



ochre@utsouthwestern.edu

Resources

[Book a recruitment or feasibility tool consult](#)

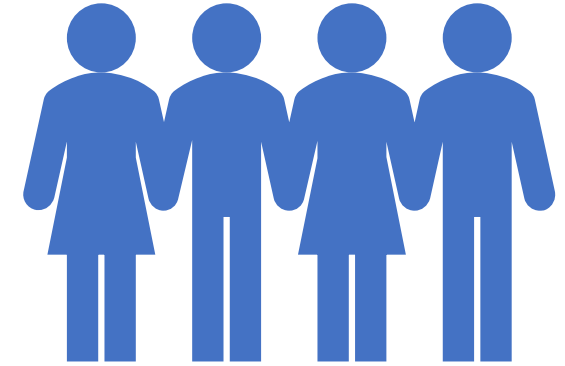
[OCR Research Participant Recruitment Website](#)

[MyChart Recruitment TipSheet](#) (utsw only)

[SlicerDicer TipSheet](#) (utsw only)

Thank you!

Kathleen.Esselink@utsouthwestern.edu
[Bookings Link](#)



UT Southwestern
Medical Center™
CTSA Program

Questions?

Thank you for attending.

We'd love to hear your feedback. We invite you to provide your evaluation of Research Matters and of the Human Research Protection Program.

Visit: <https://ais.swmed.edu/redcap/surveys/?s=3PRJFCFJJW>

