

General Recruitment Guide

This is a general guide to different recruitment options available to researchers. This guide will cover multiple options and give general information on what steps will need to be taken to receive the datasets. If you have more specific questions, please contact Nick Rudzianski (nicholas-rudzianski@uiowa.edu).

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RECRUITMENT POPULATIONS

STAR Registry

- Go to website, <https://icts.uiowa.edu/star-researchers>.
- Complete the Subject Request Form, https://icts.uiowa.edu/sites/icts.uiowa.edu/files/wysiwyg_uploads/Subject%20Request%20Form_2019.docx.
- Use the following form for inclusion/exclusion criteria, https://icts.uiowa.edu/sites/icts.uiowa.edu/files/wysiwyg_uploads/STAR%20Volunteer%20Registry%20form_2018.10.22%20%281%29.docx.
- You will also need to review and sign the user agreement form, https://icts.uiowa.edu/sites/icts.uiowa.edu/files/wysiwyg_uploads/User%20Agreement%20Form_2019_1.docx.
- If you have questions on how to utilize the registry, the cost and data available for search, or if you want to send in completed forms, contact Laura Temple, laura-temple@uiowa.edu.

TriNetX

- Contact Ashlee Wilson (ashlee-wilson@uiowa.edu) if needed to do training for TriNetX
- She can also get access to the TriNetX website set up
- Go to TriNetX website (<https://live.trinetx.com/>)
- Run Query to get desired population
- If you have a Healthcare ID, submit request through ESC (<https://service.healthcare.uiowa.edu>)
 - Once you go to the website above follow these steps:
- Click Service Catalog
- Sign in with Healthcare ID
- Click Research & Academic Computing
- Under the Clinical Research Data Warehouse heading, select 'Bio-Medical Research Data Request'
- Fill out the information and submit
 - If not affiliated with the hospital, enter request into I-CART (<https://i-cart.icts.uiowa.edu>)
 - Guidance on creating a request
<https://wiki.uiowa.edu/display/ICTSit/How+to+request+a+service+in+I-CART>
 - The Data Request service will be found under Institute for Clinical & Translational Science (on the left)
 - Select Biomedical Informatics Core
 - Select Bio-Medical Research Data
 - Select Add on the Request for Bio-Medical Research Data from Epic, Data Warehouse, etc.
 - Make sure to submit full IRB protocol if applicable
 - All requests require and MFK for submission, this will not be charged without receiving a cost estimate and signing to proceed
 - Share TriNetX query with appropriate ITS person
 - After submitted, they will create a Cost Estimate and send it out for review
 - If everything looks good, have the PI sign the Cost Estimate and send it back to ITS and they will pull the data
 - If you have a Healthcare ID, you will receive an email to access the data set
 - If not affiliated with the hospital, you will need to make arrangements to pick up the data in person

EPIC

- ICTS can run a report to find all patients at UIHC affiliated clinics to find who may be newly eligible based on study criteria
- Eligible patients then uploaded to a REDCap database
- Can be linked to study research record in EPIC by HCIS with the following variables
 - Pat ID (EPIC specific variable)
 - Golden Ticket Number (unique study ID)
 - Status (eligibility status – eligible, ineligible, declined, etc)
- EPIC research report can then be used to identify patients with upcoming clinic visits
- May be possible to send invitations through EPIC???

(This information is based on one specific study, hope to get more information from an upcoming Lecture Series event)

Voter Registry

- Need IRB approval
- Email to Jason Brubaker (jason-brubaker@uiowa.edu)
 - Provide eligibility requirements (see list of available variables below)
- After the dataset is ready, you will receive an email with a link to download the files, and a separate email with the necessary password

Format for EX-005 (voter history for last 5 elections of each type)

1. VOTER_ID
2. FIRST_NAME
3. MIDDLE_NAME
4. LAST_NAME
5. NAME_SUFFIX
6. COUNTY_REGN_DATE
7. LAST_UPDATED_DATE
8. OLD_ID
9. PHONENO
10. HS_NUM
11. HS_SUFFIX
12. PRE_DIR
13. STREET_NAME
14. STYP_CODE
15. POST_DIR
16. UNIT_TYPE
17. UNIT_NUM
18. ADDR_NON_STD
19. CT_CITY
20. CT_ST_STATE
21. ZIP_ZIP_CODE
22. ZIP_PLUS
23. MAIL_ADDR_LINE 1
24. MAIL_CITY
25. MAIL_STATE
26. MAIL_ZIP
27. MAIL_ZIP PLUS
28. VOTERSTATUS
29. PARTYCODE
30. GENDER
31. BIRTHDATE
32. COUNTY
33. FEDERAL
34. CONGRESSIONAL
35. STATEWIDE
36. STATE_SENATE
37. STATE_HOUSE
38. JUDICIAL
39. PRECINCT

40. COUNTY_SUPERVISOR
41. COUNTYWIDE
42. TOWNSHIP
43. CITY_COUNCIL_WARD
44. CITY
45. COMMUNITY_COLLEGE_DIRECTOR
46. COMMUNITY_COLLEGE
47. SCHOOL_DIRECTOR
48. SCHOOL
49. SANITARY
50. AGRICULTURAL_EXTENTION
52. SOIL_AND_WATER
52. WATER
53. FIRE
54. LAND
55. LAKE
56. LOSST_CONTIGUOUS_CITIES
57. RECREATIONAL
58. RURAL_IMPROVEMENT_ZONE
59. SEWER
60. LIGHT
61. MISCELLANEOUS

University Mass Email

- Figure out who you want to send to, staff, faculty, students, etc?
- Created and submit email to IRB for approval
- Complete online Request for Mass Email form,
<https://apps.its.uiowa.edu/massmail2/beans/public.action>
 - “To” field is just the group you are sending to, ex: UI Faculty, All Staff, etc.
 - “From” field is the name of the study
 - “Reply To” field is the contact person for the study
 - The email text and Subject must match exactly what was approved by IRB
- Print the “Your request has been submitted” page
- Print the Approval and fill out the Approval Form,
https://its.uiowa.edu/sites/its.uiowa.edu/files/wysiwyg_uploads/ApprovalForm-MassEmailRequest.pdf
- Send the above two forms along with the IRB approved email that will be sent to the correct location per the Approval Form
 - For Research Recruitment, you will send to the Human Subjects Office, 105 HLHS, or fax at 335-7310

Mediacom TV/Digital Advertising

- Go to OnMedia website to request a quote, <http://www.onmediaadsales.com/order-now>.
- They are able to produce an ad if necessary, will give quote on how much that would cost to produce
- Will give general price for running ad
- OnMedia has an account set up with the UI, you will need to get a quote for the cost which can then be passed on to create a purchase requisition for the service.
 - Will need to give a general budget for how much you want to spend on the actual advertisements along with the cost for the video, if applicable
- If having them create the ad
 - They will set up a meeting to discuss what you'd like in the ad
 - Will then create a script and send that on for editing/approval
- Will need to give details on when/where the ad will run
 - Locations (Cedar Rapids, Iowa City, etc)
 - Channels it will run on
 - What times/days of the week you'd like the ad to run
 - They will send a schedule with that information, when approved, the ads can start

Facebook Advertising

- Through the Institute for Clinical and Translational Science at the UIHC
- Contact person, Anna Doyle, anna-doyle@uiowa.edu
- They can create an ad to use
 - Would need to provide basic information for the ad
 - Region you are looking to recruit from
 - Budget for the ad campaign
 - Time period for ad to run
 - Need a website/phone number for contact info
 - Demographics
 - Age
 - Gender
 - Race/Ethnicity
 - Etc.
- They will respond with a document detailing the plan
- When approved, will work with them on best method for payment

Noon News

Submission process for research studies

- **Research study example**
Chocolate eaters are invited to participate in a research study where they undergo a dental exam and a blood draw. Compensation provided. Questions? Contact John Doe at john-doe@uiowa.edu or 319-356-0000.
- UI Health Care research study coordinators seeking volunteers may submit announcements to *Noon News* by emailing noon-news@uiowa.edu. It is important that coordinators request a study to be removed from the rotation by emailing noon-news@uiowa.edu.
- Those considered for publication must:
 - be 30 words or less
 - include the IRB approval stamp (with IRB ID number and expiration date)
- Studies are rotated by the last date published in *Noon News*; each appears approximately once a month.
- Please note *Noon News* reserves the right to make editorial judgments about all submitted items based on space availability and other discretionary factors that may affect publication of the announcement.
- All items submitted by SEIU and AFSCME must be approved by the UI Health Care Human Resources Department.

Latino/Hispanic

Proteus

- Works with Latino/Hispanic/Migrant workers
- Health Care Manager is Briana Reha-Klenske, brianark@proteusinc.net

Latinos Unidos of Iowa, Inc

- www.latinosunidosofiowa.org
- President is Lena Robison, iowalatina12@live.com
- Has contacts throughout Iowa with various Latino groups

Contacts at the University of Iowa

- Below are some faculty members who have worked on recruiting of Hispanic/Latino subjects while at the University of Iowa
 - Linda Snetselaar, linda-snetselaar@uiowa.edu
 - Jason Daniel-Ulloa, jason-daniel-ulloa@uiowa.edu
 - Lars Fuortes, laurence-fuortes@uiowa.edu

RECRUITMENT OPTIONS

Mailings

Envelope choice

Addressing – Hand written, labels, printed on by central mail

Printing options – In house, Printing Services

Stuffing – group in house, central mail

Decide if you want to have central mail clean address list

Use the File Envoy system to send in addresses to Central Mail -

https://printing.uiowa.edu/webprint/orders/departamental/fileform_envoy.asp

To be used for either Address Cleaning, or if central mail will be sending items that are stored there or will be delivered to them

Printing Services -

<https://login.uiowa.edu/uip/login.page?service=https://busserv.bo.uiowa.edu/PrintWebOrder/OffsetDigital.aspx>

- Print Type – normally digital
- Use Previous Job # if printing out items that are the same as previously submitted
- Quantity to Print – Total number of items to be printed
- Select Due Date (can qualify if it is firm or flexible)
- Proofs can either be sent by email, campus mail, we recommend always getting a proof in some form or another
- You can choose the representative you've been working with on other questions
- Choose a Name for the project
- Job Specifications
 - List each item that you want printed
 - For each item list the specific requirements
 - Paper size
 - Paper Quality
 - Ink
 - If to be stapled
 - If to be folded
 - Any misc instructions
- If you are mailing then select what address to deliver items to and that it will not include a mailing
- If Central mail sending
 - Select amount to be sent (most of the time will equal Quantity to Print from above)
 - Select date to be mailed
 - Bulk mailing requires XXX number to be sent, otherwise will be first class
 - If you have a mail code, you can enter it, other you will need a Req filled out
 - Enter any additional information
 - Upload addresses to send to
- Upload file(s) that you want printed
- Upload Req

Calling

Need to know

- length of survey
- number of surveys completed/subjects enrolled
- number of call attempts to be made
- when you want call attempts to be made (day time, night, weekend)
- time period for enrollment
- specific requirements for enrollment
 - gender
 - age
 - Hispanic/Latino
 - race
 - etc.

From these we will determine how many people would need to be hired to complete the process. We can provide general interview training and supervision

In Person

Working with clinics to have nurses, PAs, doctors or residents help get consents during clinic visits or hospital stays. This involved contacting the specific clinic or department at the UIHC to discuss the study and what is needed. You can contact Nick Rudzianski at nicholas-rudzianski@uiowa.edu to discuss what is needed and to consult on this process.

DATA COLLECTION TOOLS

REDCap

- There is no charge for this service
- The REDCap platform is managed by the Biomedical Informatics group in the Institute for Clinical and Translational Science at the University of Iowa. Each study team member will be granted access to REDCap through a secure login by the study PI, study manager or their proxy.
- **Credentials:** Study team members log into REDCap using their University of Iowa HawkID and HawkID password. HawkID and HawkID passwords are never shared between individuals. External collaborators on the study are granted a HawkID and HawkID password at the request of the University of Iowa Study PI. HawkID and HawkID passwords follow the University of Iowa Password Policy. <https://its.uiowa.edu/hawkid/password>
- **Password Strength:** University of Iowa HawkID passwords must be a minimum of nine (9) characters long, using a combination of alphabetic, numeric, and special characters and cannot contain consecutive, repeated characters (e.g., aaaa11111) and cannot contain a string of characters that match previous passwords.
- **Two-factor Authentication:** REDCap supports Two-factor authentication using DUO. Two-factor authentication requires something that only the user knows, with a second factor, something only the user has in their possession, to provide strong identity verification.
- **Data Backups & Retention:** In the University of Iowa REDCap data platform, primary data is stored in an HCIS Data Center. Data backups are secured at a University of Iowa offsite Data Center. Physical system security includes two-factor authentication. Operating system security includes secure logins, firewalls, data encryption at rest, remote system logging and configuration and change management. Data backups are encrypted both in flight and at rest. Copies of data are replicated to the remote data center every 15 minutes. There are 100+ point in time copies of data available at any time. Disaster recovery is tested annually.
- Recommendation: Single-site and multi-site research studies
- Highlights
 - Secure and HIPAA-Compliant Electronic Data Capture Tool
 - Data hosted by UIOWA
 - Compatibility with mobile phones and tablets
 - Programmatic access via API
 - Single click de-identification for data export
 - Granular user permission scheme and data access groups
 - Flexible data export capabilities into a variety of formats
 - Flexible data import capabilities
 - Active REDCap Consortium composed of 400+ institutions world-wide
 - Available for use by UIOWA researchers and their external collaborators
 - Supports the use of data entry forms attached to a survey to enable research teams to securely collect data on survey respondents on forms that are tied to individual survey respondents
 - Supports longitudinal databases
 - Offers data quality checking capabilities
 - Intuitive interface to build data entry forms and surveys in a self-service model
 - In-person and webinar training classes offered by UIOWA
- Find information at <https://its.uiowa.edu/redcap>

Qualtrics

- No charge use for Students, Faculty, Staff, Researchers, IT Professionals
- Qualtrics is a web-based survey and data collection tool for creating and conducting online surveys. It can be used to conduct research, departmental surveys, academic surveys, etc. This tool is available at no charge to all Faculty, Staff and Students at The University of Iowa.
- External collaborators do not need to be granted a University HawkId.
- Recommendation: Administrative surveys and academic research
- Highlights
 - Compliance for HIPAA and FERPA
 - Enabled with HawkId for single sign-on
 - Compatibility for mobile phones and tablets
 - Support for 48 languages
 - Checking for ADA compliance
 - Robust collaboration capabilities
 - Group panels allowing longitudinal studies
 - Action-based triggers
 - Robust reporting tools
 - Integration with Salesforce
 - Programmatic access via APIs
 - Robust vendor support
- Find information at <https://its.uiowa.edu/qualtrics>

Teleform

- There is a per-image charge for processing Teleform paper forms.
- Recommendation: Paper based, single site and multi-site Administrative surveys and academic research
- A powerful, high volume information capture solution that is capable of processing thousands of paper or online forms per day. It replaces costly manual data entry with efficient paper-to-digital processing which reduces operational costs and increases productivity. Teleform works seamlessly with production-level scanners, fax servers and the Internet to capture, verify, process, and index data. It cleans and confirms data using business rules processing and database lookups. Its superior connectivity enables it to automatically send clean data, documents and attachments to multiple archive and retrieval systems, including existing applications and databases.
- Teleform Web Capture uses a rich internet application and standard TWAIN desktop scanners to allow remote users to more easily utilize the EPI resource core's Teleform paper document processing system. Remote users use Web Capture to process paper forms at their location, eliminating the need to send forms to the resource core to be processed. This allows for more immediate data collection results, real time verification and reduced shipping costs. The browser-based application is easily deployed at remote locations, and licensing is based on concurrent users.

Mike Mueller Teleform Services

Teleform form design

- Create and test collection forms and export procedures for Teleform paper forms.

Teleform forms processing

- Scan, verify and export data collected using Teleform paper forms.

DATA STORAGE

Use a database to store your data instead of using Microsoft Excel as a database.

- Excel provides limited methods to validate input, and these safeguards can be easily bypassed or ignored. This can result in compromised and inaccurate data due to manual errors, or failure to understand the impact of data values that are outside of the data domain for a given column, when analyzing the data. Databases can more efficiently restrict the type and scope of data flowing into the database.
- Excel has size limitations on column width (255 characters) and number of rows per sheet.
- Multiple people can access and update database at one time. Collaboration with Excel is more difficult. Even if multi-user editing is enabled for a spreadsheet, and it is stored on a shared network resource, the process is error prone and may result in people overwriting each other's work.
- Excel is not secure. Although Excel allows you to protect data with a password and Windows based permissions, it is extremely delicate and requires a deep understanding of Excel. Some of these features will not work if you have people using different operating systems or if you need access from other computers. Even a password protected Excel file is not secure; there are tools on the Internet that anyone can use to unlock a protected Excel file without knowing the password.
- It is time-consuming to create and maintain excel databases, especially compared to the alternatives.
- It is much easier to search for information with a database. A user can sort and organize data based on different queries, and unlike Excel, they do not need code to do it.
- There are many resources available for managing a database that are specifically built for the job.

Microsoft Access

- There is no charge for this service
- Recommendation:
 - Single-user, databases stored on College of Public Health network resources

Use as a front end to manage

CPH SQL Server

Manage by Mike Mueller

Cost: There is an hourly or percentage FTE charge for the following services.

Database Design

- Create efficient and flexible data structures to aid in the collection, dissemination, archival and analysis of research study data.

Dataset archival, retrieval

- Assist in the archival of research datasets
 - Document methodologies, data structure and retrieval strategies.
 - Assist with the conversion of a dataset's structure, if appropriate, to a structure more suitable for data archival and subsequent retrieval.
- Assist researchers and students in retrieving local and external archived datasets.
 - Assist with the conversion of a dataset's structure, if appropriate, to a structure more suitable for analysis.

College of Public Health SQL Server databases

- There is no charge for use of this service
- Recommendation: Multi-user, high availability databases with principle research study personnel primarily from within the College of Public Health.
- Database servers managed by College of Public Health personnel.
- High availability for multi user applications.
- Users manage data with SQL Server Management Studio, Microsoft Access or other database management packages.
- Data is accessible with Statistical packages like SAS, SPSS and others using ODBC interfaces.
- College of Public Health security plans and procedures can be found at <https://sharepoint.uiowa.edu/sites/cph/it-policies/IT%20Policy%20Plans%20and%20Procedures/Forms/AllItems.aspx>

University of Iowa ITS SQL Server databases

- There is no charge for this service
- Recommendation: Multi-user, high availability databases with principle research study personnel primarily from outside the College of Public Health.
- Database servers managed by University of Iowa ITS personnel.
- Data can be managed and accessed like CPH SQL Server databases, but easily accessible to campus groups outside of the College Of Public Health.
- University of Iowa security plans and procedures can be found at <https://itsecurity.uiowa.edu/university-it-policy>

HERCe Data Server

- The Health Effectiveness Research Center (HERCe) maintains a secure data server for researchers who are working with HERCe investigators.
- The HERCe server is monitored by CPH IT staff. It is not connected to any other network, and is housed in the College of Public Health Building.
- It is approved for storage of CMS and SEER data.
- For specific information on the security measures used for the HERCe server, please contact herce@uiowa.edu.
- There is a cost of 11.5 cents per GB to store data on the server.