Using MyChart for Research Recruitment





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- Requesting Use for MyChart Research Recruitment
- What the Patient Sees
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- Cost

MyChart and Research Considerations



What Is MyChart?

- MyChart is our online patient portal that facilitates patient interaction with our health system.
- Examples of patient abilities in MyChart include:
 - Schedule/reschedule/cancel appointments,
 - o Get test results,
 - Pay bills,
 - Ask their providers questions,
 - Review visit notes
- For our clinical researchers, a process has been established to reach patients using MyChart for research recruitment.

MyChart Research Recruitment Process Map



MyChart for Research Recruitment Considerations

- Number of potentially eligible MyChart users? **OSUWMC** patients will need to have a MyChart account.
- Are the inclusion/exclusion criteria readily available in IHIS? Criteria need to be captured in discrete fields.
- Is this study recruiting rare diseases? There needs to be a readily available population.

MyChart Research Recruitment Considerations

- Is the study active in IHIS? The study must be active in IHIS. Contact the Research Billing Office to begin the process.
- Do study team members have access to IHIS? They must have IHIS access to use this workflow.
- What happens if my study isn't approved to use MyChart recruitment? The CCTS Recruitment and Retention Office can provide other recruitment methods that may be suitable for you study.

Requesting Use for Research Recruitment with MyChart





Requesting MyChart for Recruitment

- The Process starts with the CCTS Recruitment and Retention Office.
- Go to <u>myccts.osu.edu</u>_create your project.
- The Recruitment and Retention Office will then ask for you to complete a REDCap survey that will help them determine if your study is suitable for MyChart for research recruitment.
 <u>go.osu.edu/mychartrequest</u>

Requesting MyChart for Recruitment

The REDCap survey will ask for the following:

- Your protocol and consent,
- Does the team have IHIS access?
- Recruiting healthy subjects?
- Describe population and attach evidence supporting availability and accessibility (you may use I2B2, slicer/dicer, reporting workbench to gather this information).

Requesting MyChart for Recruitment

Inclusion/Exclusion criteria-Be specific:

- Demographics: age range, gender, race, ethnicity
- Diagnoses (specify ICD10 codes if possible)
- Procedures (specify ICD10 codes or CPT codes if possible)
- Medications
- Lab results

This information will be used to pull the list of patients.

CCTS Decision

- If approved by the CCTS for MyChart Recruitment, the CCTS Recruitment and Retention Office will help you with your IRB submission.
- If not approved, the Recruitment and Retention office will offer other recruiting strategies.



Guidance and Message Template for IRB Submission for Use of MyChart for Research Participant Recruitment

MyChart for Recruitment Message for This Protocol---Template

PLEASE NOTE: We encourage you to contact <u>Mary.Becker@osumc.edu</u> or <u>Clara.Kalis@osumc.edu</u> with the Participant Recruitment and Retention Office at the Center for Clinical and Translational Science for assistance drafting the message for your protocol prior to IRB submission. Once IRB approved to use MyChart you will need to complete the remaining steps in the Guide to Obtaining IRB Approval to use MyChart for Research Participant Recruitment.

The message <u>must be under 1000 characters</u>. The message <u>SHOULD NOT</u> include identifiable contact information such as research team email addresses or phone numbers. This will help ensure that volunteers respond through the MyChart portal. Your message for which you are seeking approval should be placed in the blank area below the intro: "A computer generated search..."

The approved MyChart message will be routed to those patients who have been identified in your query through the Information Warehouse that fit your study inclusion criteria by an Honest Broker. They will receive an email notifying them that they have "A new research study to view" in their MyChart message file. Once they login to their secure MyChart they will be able to review the details of your message and express their interest or decline more information. A "Contact Me" response will send a notice to you inbasket in IHIS. If the volunteer clicks "Delete" or ignores the message, the researcher will not receive any information about the potential volunteer.

(Each message sent through MyChart is automatically introduced with the following message by the system.)

The Ohio State Wexner Medical Center is driven by our mission "to improve people's lives through innovation in research, education, and patient care." Your privacy and your health are most important to us. A computergenerated search found that you may fit the study described below. Unless you decide to click "Contact Me" for this research opportunity, no one conducting this study will know you have been contacted. You may be eligible for the following study:

You should discuss this research opportunity with your health care provider(s). If you would like to know more about this study, please indicate your interest by clicking "Contact Me".

If you no longer wish to receive any MyChart research opportunities, please click on this link below to unsubscribe. http://go.osu.edu/MyChartUnsubscribe

Publications supported by the OSU CCTS must cite the CTSA Grant number (UL1TR002733) and by law, be submitted to PubMed Central. For instructions, review the NIH Public Access Policy on the CCTS <u>website</u>



Documents Prepared for the IRB

The researcher then receives a draft message for their study from the Recruitment and Retention Office, along with *A Guide to Obtaining IRB Approval to Use MyChart for Research Participant Recruitment.*

THE OHIO STATE UNIVERSITY CENTER FOR CLINICAL AND NU ATICINIAL SUCEINC A Guide to Obtaining IRB Approval to Use MyChart for Research Participant Recruitment 1) To utilize MyChart for Recruitment an active IRB approved protocol is required. The study protocol and IRB application or exemption must reference the use of MyChart for participant recruitment. 2) To obtain IRB approval to use MyChart for recruitment a) Complete the IRB application (initial review or amendment/changes) b) Follow the submission instructions Attach the document entitled, "Guidance and Message Template for IRB Submission for Use of MyChart for Research Participant Recruitment" to your application. This document will contain the information needed by the IRB: i) The description of MyChart for Recruitment, ii) And, the study message that the researcher will be using to contact MyChart users. The Recruitment Message for MyChart should contain the specific message for the protocol. It is best to seek advice from one of the CCTS Recruitment and Retention Staff (Mary.Becker@osumc.edu or Clara:Kalis@osumc.edu) for best practices of writing a MyChart message. d) Include the use of MyChart for Recruitment in your IRB application as a recruitment strategy. i) "I am requesting the use of MyChart for participant recruitment on this protocol." Indicate that you want a partial waiver of HIPAA research authorization since you will be ii) reviewing the chart of those that agree to be contacted about the study. e) Specify the following: i) All the PHI that is required for the study - e.g.: MRN, MyChart User or Not, Phone number, Home Address, Email Id, Contact Info, Demographics, Medication, Labs, Any Dates of interest etc. You must include the following: living patients, active MyChart user, patients seen within the last year. ii) The conditions/eligibility criteria to identify cohort. iii) A list of MRNs (obtained through IW) will go directly to an Honest Broker/Research IHIS team (Nicole Rutledge) and the Research IHIS team will use the identified MRNs to send messages via MyChart. iv) (Only) For the Patients who said "Contact Me" (accepted) the medical record will be viewable by study v) Script (written or spoken) to be the used for communications through MyChart with interested patients f) List all team members who will be authorized to recruit for the study using MyChart as investigators or key personnel on the protocol study team. 3) Once IRB approval obtained for use of MyChart a) Make sure that the study is listed as active in IHIS. If not or if you are unsure. Contact research.billing@osumc.edu to have you study set up. b) Once IRB approved, submit an Honest Broker Data Request Form which can be obtained at: Research Data Request Form. Please be sure to attach your IRB approved MyChart recruitment message document. Research Informatics Services (RIS) team within BMI provides triage. Questions, contact RIS at CCTS-IWRequests@osumc.edu c) The completed Honest Broker Data Request Form will go to HBOC for approval, once approved BMI will create reports and can automate the report with the desired frequency (monthly, weekly etc.). i) This automated report will be sent directly to Research IHIS team ii) Research IHIS team will use reports to send MyChart Research Recruitment messages to patients on behalf of the research team d) Only after a patient agrees to be contacted will a Researcher be able to communicate with them i) Once Patients agrees to be contacted, Research team should initiate contact with patient through MyChart using the IRB approved script e) The requestor is eligible to receive the PHI data of all patients who agrees to be contacted.

IRB Submission

- Complete the IRB application, whether initial review or amendment.
- Include the use of MyChart for recruitment in your IRB application as a recruitment strategy, as well as information and documents provided by the CCTS Recruitment and Retention Office.
- MyChart for Recruitment should be included as part of your HIPAA waiver.

IRB Submission

- Attach the document entitled "Guidance and Message Template for IRB Submission for Use of MyChart for Research Participant Recruitment" to your application. This will contain information needed by the IRB including:
 - MyChart for recruitment description
 - Study message that the researcher will be using to contact MyChart users
 - Additional language that must be attached to each message

(Each message sent through MyChart is automatically introduced with the following message by the system.)

The Ohio State Wexner Medical Center is driven by our mission "to improve people's lives through innovation in research, education, and patient care." Your privacy and your health are most important to us. A computergenerated search found that you may fit the study described below. Unless you decide to click "Contact Me" for this research opportunity, no one conducting this study will know you have been contacted. You may be eligible for the following study:

You should discuss this research opportunity with your health care provider(s). If you would like to know more about this study, please indicate your interest by clicking "Contact Me".

If you no longer wish to receive any MyChart research opportunities, please click on this link below to unsubscribe. <u>http://go.osu.edu/MyChartUnsubscribe</u>

Publications supported by the OSU CCTS must **cite the CTSA Grant** number (UL1TR002733) and by law, be **submitted to PubMed Central**. For instructions, review the NIH Public Access Policy on the CCTS <u>website</u>



IRB Approval Obtained

- Once IRB approved, make sure that the study is active in IHIS***
 - MyChart for Recruitment cannot be used unless the study is active.
 - If you are unsure, contact <u>research.billing@osumc.edu</u> to verify.
- Make sure study team members who will be doing recruitment have IHIS access. If they don't, submit an eServices ticket requesting this for research.
- Complete the Honest Broker Data Request Form.

Data Request Submitted to HBOC



Data Request Submitted to HBOC

- HBOC is co-chaired by BMI and the IW with representation from key stakeholder groups.
- Key objectives of the Honest Broker are to protect patient privacy and promote research productivity and efficiency.
- Research Data Request Form is available at:
 - <u>https://ccts.osu.edu/</u> -CCTS or,
 - o <u>https://medicine.osu.edu/bmi</u> -BMI.
- Data Core team in BMI provides triage. Questions can be emailed to <u>CCTS-IWRequests@osumc.edu</u>.

Honest Broker Pulls Patient List



Honest Broker Pulls Patient List

- With approval, Research IT will create reports based on eligibility criteria provided by the researcher.
- Patient names will never be repeated, thus only one message is sent per patient for each study.
- Reports can be automated based on the desired frequency.
- Reports containing PHI are sent to the IHIS Research Analyst.

Research IT sends MyChart Message

Researcher contacts the CCTS With CCTS approval, documents prepared for IRB

IRB approval obtained

Request submitted to Honest Broker Honest Broker pulls the patient list based on eligibility criteria Patient list given to IHIS Research Analyst who sends the message

Research IT Sends MyChart Message

- The automated report is sent directly to the IHIS Research Analyst, who acts as the Honest Broker.
- IHIS Research Analyst will send MyChart Research Recruitment messages to patients on behalf of the research team.
- The message will not be sent to those who have opted out or who are not active in MyChart.
- The Research IHIS analyst will send messages to a minimum of 20% of the identified patients at a time.
 - \circ Batch sizes will be no larger than 5000 and no smaller than 50.
 - If less than 50 MRNs are identified, a messaging plan can be discussed.

MyChart Research Recruitment: Patient & Researcher Workflow



IHIS MyChart Recruitment Workflow

Patient creates a MyChart account and views email preferences Patient receives message in MyChart, decides interested or not interested If interested, researcher receives an In Basket message in a Research Recruitment folder

Researcher determines further eligibility contacts patient

IHIS MyChart Recruitment Workflow

Patient creates a MyChart account and views email preferences Patient receives message in MyChart, decides interested or not interested If interested, researcher receives an In Basket message in a Research Recruitment folder

Researcher determines further eligibility contacts patient

Patient receives MyChart Terms of Use that addresses research.

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MyChart

MyChart Terms of Use

(Updated July 8, 2020)

MyChart is an optional online service provided by The Ohio State University Wexner Medical Center ("OSU Medical Center"). MyChart helps you, as a patient of OSU Medical Center or another health entity who provides MyChart to its patients ("MyChart Related Organization" or "ORO"), to achieve personalized health care. A list of the current ORO(s) may be found on OSU Medical Center's web site.

MyChart is not intended for urgent communication. If you are in need of urgent medical attention please call your health care provider's office or call 911 in case of emergency.

Purpose of MyChart

The purpose of MyChart is to provide you with (1) access to selected portions of your medical records, such as basic laboratory results, summary medical history, visit history, and selected billing information, and (2) the ability to communicate with your health care provider. Some information accessed through MyChart may assist in providing medical, nursing or other professional services or advice. However, the use of MyChart is not a substitute for traditional medical advice, consultation, diagnosis or treatment.

Terms of Use

By using MyChart, you agree to use it in accordance with these Terms of Use and the applicable policies of OSU Medical Center, or the applicable ORO. These Terms of Use may change without notice. Your use of the new or modified Terms of Use means that you accept them. You agree to use MyChart appropriately and as it is intended. MyChart is provided for your convenience and its availability is not an entitlement, right or privilege.

Content of MyChart

You and your healthcare providers control the content of, and are responsible for the information sent to MyChart. Information supplied in MyChart by you and your health care providers is entered into your medical record and may be used or shared with individuals as described by your hospital's Notice of Privacy Practices, and federal and state law or policy. The information in MyChart may contain sensitive information and you should take precautions to protect the confidentiality of the information. As a convenience, you have limited access to MyChart using mobile devices along with a mobile device application (i.e. iPhone). For full access to MyChart features and information, please access the webbased application using a web browser.

MyChart may send announcements of research opportunities to users who do not object to receiving these invitations. MyChart may offer links to medical web sites that are not a part of OSU Medical Center or other ORO. These web site links are provided for general information purposes only and we do not endorse and have not verified the accuracy of the information on these web sites. You should not rely on the information for purposes of treatment or diagnosis.

Information in MyChart may include treatment for physical and mental illness, alcohol and/or drug abuse, and/or AIDS (Ac-quired Immunodeficiency Syndrome), and/or may include results of an HIV test or the fact that an HIV test was performed. Psychotherapy notes will not be released without your authorization. Through your use of MyChart you agree to the release of information to MyChart unless you terminate your use of MyChart, provided notice is received prior to the release of information to MyChart. If you share information released to MyChart, it may no longer be protected by federal privacy rules, such as HIPAA.

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Researc Would you cor	Preference Profile 3 ider participating in research studies as a healthy volunteer?
Many st	es also need healthy volunteers for comparison purposes, so you don't necessarily have to have a condition to help researchers.
Yes	No
Continue	ancel

Research Preference Profile Please review your responses. You may select any question to modify an answer.					
Question	Answer				
Would you consider participating in research studies as a healthy volunteer?	Yes	/			
Save Back Cancel					

Research Studies 5	Ċ;
Your Studies	
Your currently enrolled studies are typically listed below but some studies may not be listed.	
Back to the home page	

Communication Preferences

Choose how you would like to receive MyChart notifications. You can manage your settings for push notifications on your mobile device.

		Email	Text	Call	Mail
~	Appointments Alerts and notifications about upcoming or past appointments.		—	Ø	பீ
~	Messages Receive updates from your healthcare organization.				1
^	Health Click to collapse Notifications when new information is available about your care.	6/6	0/1		
	Document to Sign (i)		\smile		
	Health Maintenance Reminder (i)				ഫ്
	Medical Document Request				
	Prescription (i)				
	Research Study Invitation				
	Test Result		You will b	e contact	ed via Email fo
	Receive a daily summary between 8-10 AM on a business day				

• If the patient opts out of the email, the research invitation will get through to the MyChart account, but an email will not alert the patient.

Cor	mmunication Preferences				
Choo	ose how you would like to receive MyChart notifications. You can manage your settings fo	r push notifications o	n your m	obile de	vice.
		Email	Text	Call	Mail
~	Appointments Alerts and notifications about upcoming or past appointments.			Ċ	ſ
~	Messages Receive updates from your healthcare organization.				1
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	Medical Document Request				
	Prescription (i)	~ @			
	Research Study Invitation	Jer-			
	Test Result		/ou will n	ot be con	tacted via
	Receive a daily summary between 8-10 AM on a business day				

- If patients elect to receive email notifications for research study invitations, they will receive an email message if they are found to be potentially eligible.
- The research recruitment message now has a link that takes you to the research study page.
 - This process is new and results in more interest from patients when they can easily click the link in the message from the email.
 - Patient interest increased close to 10% with email link.

IHIS MyChart Recruitment Workflow

Patient creates a MyChart account and views email preferences Patient receives message in MyChart, decides interested or not interested If interested, researcher receives an In Basket message in a Research Recruitment folder

Researcher determines further eligibility contacts patient

MyChart Message

- Patient-facing message appears in their MyChart account, along with a study description and investigator picture.
- Patients can indicate 'I'M INTERESTED' or 'NO, THANK YOU.'
- Researcher will not be notified of patient declines.



MyChart Message

Patients may also view the message on their cell phone via the MyHealth app.



MyChart Message

- Only after a patient agrees to be contacted will a researcher be able to communicate with them.
- The research team should initiate contact using the IRB approved script for interested patients.
- IRB application for recruitment should specify if follow up is done via MyChart or if the researcher is approved to call patient.

Recruitment Questionnaires

New with the November 2022 update, pre-screening questionnaires can be added to MyChart messages to further determine qualifications.



Recruitment Questionnaires

These can also be completed in the Ohio State MyHealth app.



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MyChart Research Recruitment Researcher IHIS Perspective



IHIS MyChart Recruitment Workflow

Patient creates a MyChart account and views email preferences Patient receives message in MyChart, decides interested or not interested If interested, researcher receives an In Basket message in a Research Recruitment folder

Researcher determines further eligibility contacts patient

Researcher Receives In Basket Message

The message appears in the In Basket located in the Research Recruitment Folder.



Reporting Workbench Report

Reporting Workbench report can be run showing interested patients and recruitment questionnaire answers.

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esponses Submitted	Interested	Activated	Bourne, Thomas	28 y.o. 01/31/1994	Male	207539	FS Asthma Control and Treatme	ent Effectiveness St	Yes
arted But Not ibmitted	Interested	Inactivated	Research, Albert	57 y.o. 09/02/1964	Male	203496	FS Asthma Control and Treatme	ent Effectiveness St	Yes
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IHIS MyChart Recruitment Workflow

Patient creates a MyChart account and views email preferences Patient receives message in MyChart, decides interested or not interested If interested, researcher receives an In Basket message in a Research Recruitment folder

Researcher determines further eligibility and contacts patient

Researcher Contacts Patient

With the Research Recruitment folder open, the researcher can click Msg to Pt to send a message to an interested patient.

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Ar Research Participant PCP: William F Miser, MD Primary Cvg: Aetna/Aetna Gen	Research Study PAWS_Effects of Acetaminophen on Pain Stigmatization PACT_Prescription After Cesarean Trial	Response among Overweight or Obese Women Exposed to Weight M	nrollment Status tessaged In Study

MyChart Research New Features



New Features-June 2023

Recruitment questionnaire information can be found in the Participant Details section of the Research Studies activity beside MyChart Recruitment Status.

Research Studies	© 2	* ×
FS Asthma Control and Treatment Effectiveness Study Participant Details Status Status Effective Date Identified 11/22/2011 Active Start Date Active End Date MyChart Recruitment Status Recruitment Questionnaire Waiting for Patient Response Recruitment Questionnaire Woth Calendar No study visits	Study Details Study Type Study Code IRB# NCT# Study Division or Department Interventional 102 102 00704495 Internal Medicine Description Epic Medical Center is participating in a study of the efficacy of asthma treatment and control in patients currently being treated with a leukotriene modulator and/or sympathomimetic agents but are not using inhaled steroids. Patients in this study may be receiving a study medication or a placebo. If you have any patient care concerns potentially related to study, please contact the study team at x5- Stopp Physician Pulmonary, MD Principal Investigator Patient-Facing Area of Research Lungs & Breathing Links Clinical Trial Info # Documentation Adverse Events © Data Capture \$\$ Tasks	Code IRB# NCT# Study Division or Department 102 00704495 Internal Medicine participating in a study of the efficacy of asthma treatment and control in patients with a leukotriene modulator and/or sympathomimetic agents but are not using ts in this study may be receiving a study medication or a placebo. care concerns potentially related to study, please contact the study team at x5- monary, MD aligator Research
	o study visits Create a Timeline I™ Recruitment Nama Recruitment Que	ents I Data Capture 🗯 Tasks Questionnaire Status Not started

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New Features: June 2023

A new MyChart Recruitment Status filter in the Research Study Patient Associations data model of Slicer Dicer is now available to report on enrollments initiated by MyChart recruitment



MyChart Research Recruitment Outcomes



Metrics from Four Pilot Studies Using MyChart

Study	Patients Messaged	Replied Interested	Declined or No Response to Contact Reply	Not Eligible	Enrolled
VeraCept – Non- Hormonal IUD Study	+37,000	370	125	100	14
Liletta IUD study for Heavy Menstrual Bleeding:	2709	76	62	13	1
Spirituality, Religion, & Cancer Survey Study	+750	85	61	N/A	20
Postpartum Family Planning Study	258	7	5	1	0

Only 2 patients of the 40,000+ sent MyChart Recruitment Invitations have asked to stop receiving future invitations

Current MyChart Recruitment Patient Associations



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MyChart Recruitment Patient Associations-Top 10

Cogite Slicer Dicer

About Undo Redo Start Over Load Save As



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MyChart Research Recruitment Cost



Cost

- No charge for CCTS Recruitment and Retention Office services or for the IHIS Research Analyst sending messages.
- A fee is charged for the IW data pull.
 - Charge is variable based on inclusion/exclusion criteria.
- CCTS Vouchers can be used to cover the cost.

Cite and Submit

Publications supported by The Ohio State University Center for Clinical and Translational Science (CCTS) must cite the Clinical and Translational Science Award (CTSA) grant number (UM1TR004548) and by law, be submitted to PubMed Central. For instructions, review the NIH Public Access Policy on the CCTS website.

UM1TR004548