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
   c) 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.
         (1) 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 and 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."
      ii) Indicate that you want **a partial waiver of HIPAA research authorization** since you will be 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.
         (1) 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 team.
      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

THE OHIO STATE UNIVERSITY

CENTER FOR CLINICAL AND
TRANSLATIONAL SCIENCE

research.billing@osumc.edu to have your 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) The Research IHIS team will send a minimum of 20% of the identified MRNS messages per query results. Batch sizes will be no larger than 2,500, and no smaller than 50.

    (1) If less than 50 MRNs identified, a messaging plan can be discussed.

e) 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

f) The requestor is eligible to receive the PHI data of all patients who agrees to be contacted.