

Email Participant Recruitment Requirements

Purpose: The purpose of this document is to provide guidance on mandatory requirements for contacting participants for recruitment via email by research staff. These participants have opted-in to be contacted in their consent form for potential research opportunities.

Protected Health Information (PHI): Research staff who wish to recruit participants through the use of emails must ensure HIPAA privacy, security protections, and policies are adequately addressed for the use of PHI.

Requirements

Email Outlook option:

- 1) Emails must be sent from a UNMC/Nebraska Medicine Outlook account or other academic/medical institution account.
- 2) If multiple recipients are included on the same email, the blind copy email function must be used to prevent recipients from seeing the email address of another subject or potential subject.
- 3) Emails must contain minimal PHI related to study recruitment and is limited to the following:
 - a. Patient name
 - b. Email address
- 4) The subject line must clearly identify the institution and the purpose of the email.
Example: "UNMC Research Opportunity".
 - a. PHI or sensitive study information must not be contained in the subject line.
- 5) The sender of the email must be clearly identified as UNMC, Nebraska Medicine, or other academic/medical institution faculty/staff.
- 6) The email must include the confidentiality statement that is attached to all UNMC and Nebraska Medicine from Outlook.

Confidentiality Notice: This e-mail message, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply e-mail and destroy all copies of the original message.
- 7) The email will contain information for the participant on how to change their research recruitment option to be contacted and the contact information for the Registry Administrator.
 - a. The Registry Administrator is Emily Frankel. Please contact Emily at emily.frankel@unmc.edu or 402-836-9283

- 8) The sender of the email will be a central resource who has the ability to send and receive information from participants specific to research recruitment.
- 9) The reply back to sender will be set to return all replies regarding recruitment to the central resource and then forwarded to research staff if appropriate.
- 10) The recruitment email may only be sent to the participant a maximum of **three times** unless the patient has opted-out, in which case no further emails may be sent after the opt-out.
 - a. Subsequent recruitment emails must be sent **1 week apart**.
- 11) The identified participant email list generated by the Research Administrator is only valid for one month after generated.
 - a. Subsequent identified participant list must be re-run to validate the opt-in recruitment status.

Contact Emily Frankel for any questions at emily.frankel@unmc.edu or 402-836-9283