**IConnect FAQs:**

**Research Team FAQ’s**

Study Listing Information

# **How do studies get added to the iConnect Study Listing?**

If IU is your IRB of record, we obtain information from IU IRB once a study is initially approved.

If your study is approved by another institution, you will need to reach out to the CTSI Recruitment team to get your study added.

You should contact the CTSI Recruitment Team if:

* Your study is deferred
* Your study listing status is not correct (e.g. your study is listed as *Open* for recruitment when it is actually closed)
* Your study is not listed on our site
* You do not have access to your study listing(s)
* You do not have a designated primary contact for the listing
* You need a team member(s) added to or removed from a study listing(s)
* You need to complete iConnect training

The initial study listing is created by the iConnect Team using your study information from KC Protocols using a standard template. We will notify you once this study page has been created. If you have not been trained on the iConnect system yet, we will send you a request to complete iConnect training so your account can be created. You will not be able to access your study listing until your training is complete.

# **What documents are used/needed to create a study listing?**

We use information from the study: Protocol, Informed Consent, recruitment materials such as flyers or other promotional materials that include user-friendly language. *Any information that is added to your listing must be IRB-approved before it can be posted publicly on the website.*

# **Why do we list research studies on the Indiana CTSI website?**

We list these studies because: 1) they highlight the types and quality of research that we are conducting here at the university to collaborators, potential partners, and the public and 2) they allow patients and the public to find studies for which they may be able to participate in if eligible.

Studies are listed to the public as:

* **Recruiting** = Actively recruiting study that is visible to the public and provides a contact form, and if created, a brief study screener.
* **Enrolling by Invitation** = Used for situations when potential volunteers are being recruited directly from specific settings such as hospital, clinic, or specific providers; however, participants cannot self-referral. This means that no contact form is available to the public. This status can also be used in order to redirect participants to a screener link (such as REDCap or Qualtrics), a website or phone number.

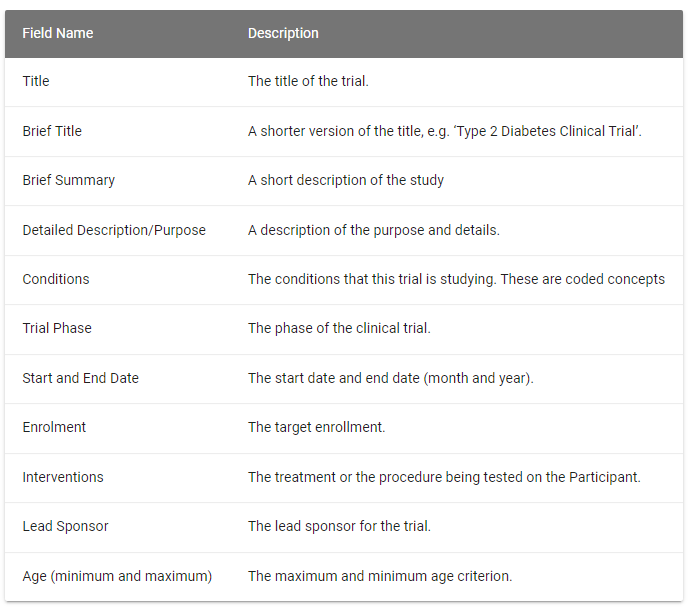
# **How do I add or remove my study from the study listing?**

If you would like your study to be added or removed from the study listing, please contact the CTSI Recruitment team at [inhealth@iu.edu](mailto:inhealth@iu.edu)

Creating a study page

# **What types of things can I put on my study listing?**

The following information is added to your study listing



In addition, you can add things such as videos, pictures, animations, tables, etc using HTML. If using videos such as the investigator describing the study, it is best practice to keep these videos short (2 minutes or less). Reach out to our team for guidance on how to do this.

# **How do I find pictures for my study listing?**

You can use an image that is associated with your study, such as an image from your flyer or promotional materials, or you can ask the iConnect Team to find a picture for you. IU employees have access to Adobe Stock via IU’s contract with Adobe Creative Cloud. Information on this license usage can be found at the UITS KB on Adobe Stock: <https://kb.iu.edu/d/bgqg>

# **How do I add a picture?**

When editing your study listing, you would select “Upload an image” from the bottom right corner of the form. The image should be a .jpg, .jpeg, or .png and a size of at least 640 by 360 pixels (horizontal).

# **What do the different study statuses mean?**

**Study Listing Statuses**

* **Recruiting** = shows up on public listing as “open” and means that it is actively recruiting, the information is visible to the public and an interest form is available
* **Not Recruiting** = use when studies are Closed/not actively recruiting/study listing is visible to the public, but interest form is hidden from public view
* **Under Review** = “Under construction”/temporary hold on recruitment/takes the study offline/listing is NOT visible to the public and is only visible internally
* **Enrolling by Invitation** = Used for situations such as recruiting in a specific hospital, clinic, or by specific provider/interest from is hidden from public view; can also use this status when wanting to redirect participants to a link to study screener, website or phone number

# **How do I create a prescreener?**

Prescreener is a feature in iConnect system that allows users to add a survey to the trial page which can filter out patients based on basic eligibility criteria. This feature is optimally used for filtering out participants by basic information (such as location/zip code, access to computer or smartphone, age, gender, race, etc) and should not be used to replace an actual full screener for eligibility. User can access the prescreener feature by opening the prescreener tab. User should create and set prescreener questions and branching logic using *inclusion criteria ONLY.* A prescreener should have 1- 5 questions maximum for optimal functionality. Find more information on creating prescreeners in the User Manual: <https://research.indianactsi.org/accounts/dashboard/manual/Inv_Prescreener/>.

Dashboard Information

# **How do I find the Researcher User Manual for iConnect?**

The iConnect User Manual can be found in the navigation menu on the left hand side of the dashboard or by clicking <https://research.indianactsi.org/accounts/dashboard/mytrials/>. You must be logged into iConnect in order to gain access to it.

# **What is on my dashboard?**

Your dashboard contains a summary page which includes information about all of the studies assigned to you. It provides information on the:

* TRIALS: number trials (studies) in the database, how many of these are Active (recruiting and listed to the public) and the number Inactive (no longer recruiting)
* REFERRALS: total number of people who referred to your study, how many you indicated that you contacted, and the number you marked as “recruited.”
* MY TRIALS LIST: Lists the studies assigned to you, the number of views, referrals, and volunteers matched to each one. You can also “Edit” each of your study listings from this page.

# **What is the difference between referrals and volunteers?**

**My Referrals** are individuals who are self-referrals and have expressed direct interest in your study by submitting their contact information to you through your study listing(s). They are people whom you can respond to directly from your *My Messages* inbox in your iConnect dashboard. A referral record is updated whenever any changes to the record occur, such as updating patient status changes, adding notes, or when new messages are exchanged between the participant and the study team.

**Volunteers** are people who have a registered volunteer profile in All IN for Health and who have been matched to your study(s) by iConnect’s internal algorithm based upon their profile information. Study teams may receive the contact information to reach out to these matched volunteers by making a request through the CTSI Recruitment team.

Access to Volunteers

Volunteers may be viewed and/or contacted by study teams via two different methods: **Volunteer Search** or **Matched Search and Outreach**.

**Volunteer Search (Feasibility Search)**

* Manual search made by the user
* Based on the condition(s) selected/entered and is *not* directly tied to any study
* To be used primarily for cohort analysis only (I.e. feasibility searches) and *no*t for outreach purposes

From *My Dashboard*, click on *Volunteers* in the menu on the left-hand side. This will bring you to the *Volunteers Search and Outreach* feature. Here, the user may search by:

* *Health condition, treatment and/or keyword* (can either select from the pre-populated drop-down menu or can free type text in search box)
* *Location* (city, state, zip code)
* *Radius* (10 mile, 25 mile, 50 mile, 100 mile, 250 mile, or Entire World)

User may filter the search results further by adding (*Also Have*) conditions or removing conditions (*Don’t Have*).

User may use additional filter search features including:

* *Gender*
* *Age*
* *Race*
* *Ethnicity*
* *Volunteer Joined Registry Since Date*

*Sorting*

The user can also sort each column of the search results. Sorting items that have text (condition, location, gender, race ethnicity) will reveal results in ABC order. Sorting by *Condition* will show results in ABC order as they appear and were entered in the volunteer’s profile. Sorting items that have numbers (volunteer ID, joined date, age) will reveal results from lowest to highest or vice-versa.

*NOTE*: As long as the criteria used in the manual volunteer search is the same as the conditions that are currently listing in the study listing, then the volunteer search results will reveal the same results as the matched volunteer results (see *Matched Volunteers*)

**Matched Volunteers (Outreach Messaging)**

* Automated search made by the iConnect system
* Based on each study listing’s criteria and is directly tied to each study
* To be used primarily for sending outreach messages to matched volunteers

From *My Dashboard,* scroll down to *My Trials* to view the studies you are currently assigned to in the iConnect system. Identify a study you wish to view matched volunteers for in the list. On the far right-hand side under *Volunteers*, click on the “eyeball” icon to view a list of volunteers who match your specified study criteria based upon their profile information. Here you will be able to see the search criteria and a list of the matching volunteers identified from the system.

*The Volunteer Outreach* messaging feature is designed to allow researchers to contact volunteers who match studies that are IRB approved based upon their study(s) inclusion and exclusion criteria.

To contact volunteers via outreach messaging, you will click on the green *Contact Volunteers* button (*if the contact button is not green, you must filter your search results to less than 100 volunteers in order to send an outreach message*). You will then create your contact message and send it through iConnect to those matched volunteers. You will receive responses from interested volunteers who reply directly to your message in you’re *My Messages* inbox in your dashboard.

*NOTE:* Study teams are limited to contacting only 100 volunteers or less at a time and may need to adjust their search results to assist with filtering. The *Contact Volunteers* button will remain disabled until the threshold limit has been reached.

Account Information

# **What do I do if I forget my password?**

Single Sign-On (SSO) login, using university credentials, is available for Indiana University users that have existing iConnect accounts.

If you forget your password,

* click on the hyperlink titled “Forgot Password” which is located to the lower-right of the password input field
* Enter the email associated with your account and where you wantto receive the password reset link
* Open the link,
* Set up your new password
* Click on submit.

Now you can login back to the system with the new password successfully.

**For new research staff users** that have not created an iConnect account created, you will need to complete training prior to an account being created and access granted. For iConnect training, visit <https://ocr.iu.edu/iconnect/> and scroll to the bottom for the calendar, which contains hyperlinks for the training registration form on the specified days of training.

# **Can we create an account using our study team’s group account email?**

Yes, but you won’t be able to use the university Single-Sign On (SSO) so will need to have a special password assigned.

# **Can I have a volunteer account and a research account?**

Yes, but they can’t have the same email address. We recommend using your university credentials for your research account and a personal email address for your volunteer account. Our team can help you if you have issues.