

## Recruitment of trial participants through patient portal messaging of electronic medical records

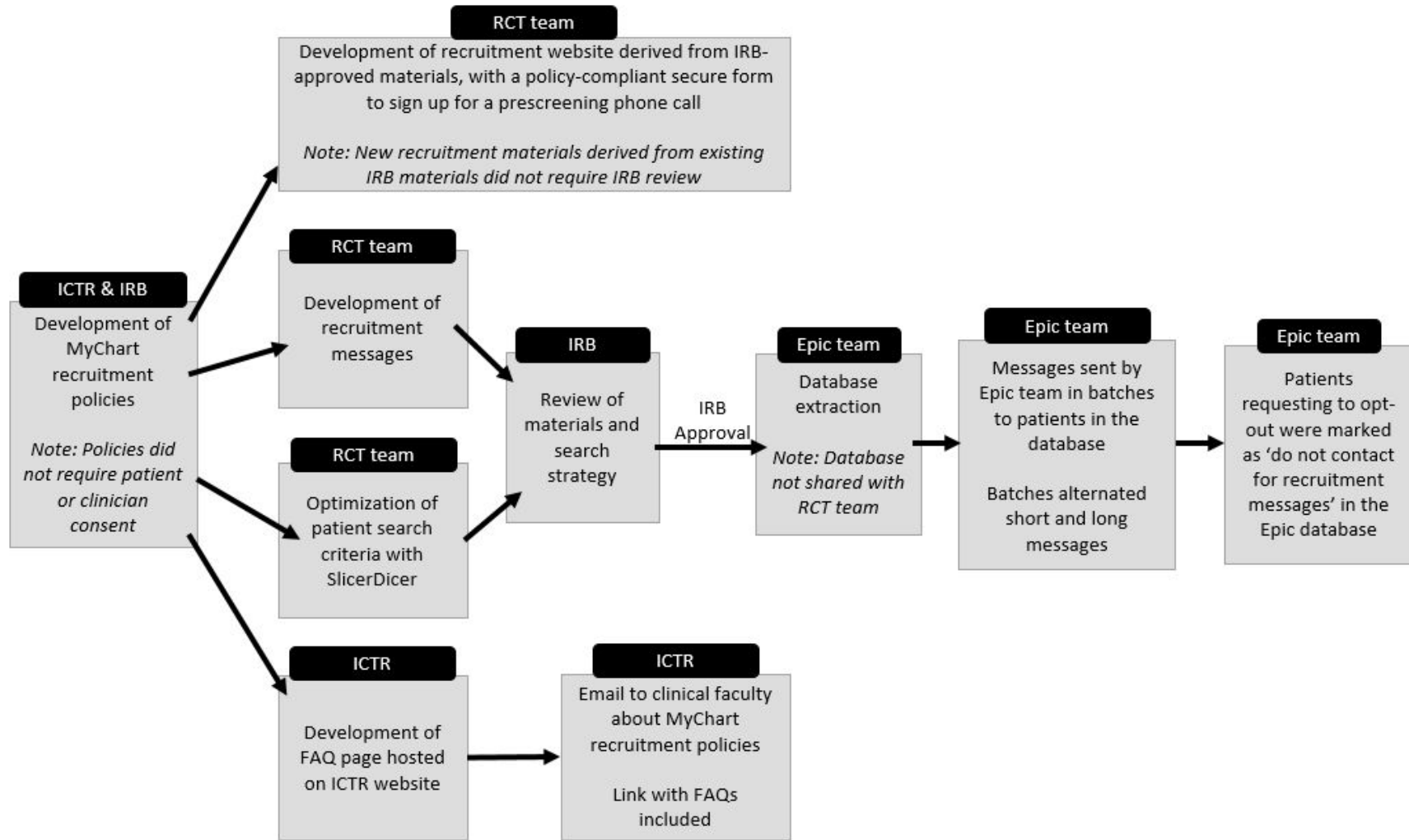
Timothy B Plante, MD MHS <sup>1</sup>, Kelly T. Gleason, RN PhD <sup>2</sup>, Hailey N. Miller, BSN RN <sup>2</sup>, Jeanne Charleston, BSN RN <sup>3</sup>, Kristen McArthur, BA <sup>4</sup>, Cheryl Dennison Himmelfarb, PhD RN ANP <sup>2</sup>, Mariana Lazo, MD PhD ScM <sup>5</sup>, Daniel E. Ford, MD MPH <sup>5</sup>, Edgar R Miller, III MD PhD <sup>5</sup>, Lawrence J Appel, MD MPH <sup>5</sup>, and Stephen Juraschek, MD PhD <sup>6</sup>

1. Department of Medicine, Larner College of Medicine at the University of Vermont, Burlington, VT
2. School of Nursing, Johns Hopkins University, Baltimore, MD
3. Department of Epidemiology, Johns Hopkins Bloomberg School of Public Health, Baltimore, MD
4. Johns Hopkins University School of Medicine, Baltimore, MD
5. Welch Center for Prevention, Epidemiology, and Clinical Research, Johns Hopkins University School of Medicine, Baltimore, MD
6. Department of Medicine, Harvard Medical School, Cambridge, MA

### Supplemental Figures

- Figure S1 – Overview of the implementation of the Patient Portal Recruitment strategy
- Figure S2 – Information from the MyChart Message Recruitment information page on the Johns Hopkins ICTR website.
- Figure S3 – Patient portal recruitment message variants
- Figure S4 – Informational email sent to Johns Hopkins faculty, staff, residents, and students about the patient portal recruitment campaign

Supplemental Figure S1 – Overview of the implementation of the Patient Portal Recruitment strategy\*



\*ICTR is the Institute for Clinical and Translational Research. IRB is the Institutional Review Board. RCT is the STURDY study team. Epic is the electronic health record that empowers the patient portal. Recruitment message development

**Supplemental Figure S2** - Information from the MyChart Message Recruitment information page on the Johns Hopkins ICTR website.<sup>10</sup>

Below are the responses to frequently asked questions by patients regarding how we use MyChart messages to link patients and research studies.

**Why did I receive this MyChart recruitment message?**

You have received this automated MyChart recruitment message because you have demographic characteristics such as age and gender and medical history information such as diseases or operations you have had in your digital medical record that met criteria for the related clinical trial.

**How did the researcher get permission to contact me?**

Researchers receive permission from the Johns Hopkins Medicine Institutional Review Board (IRB) to send automated MyChart recruitment messages to a group of patients who may be eligible for a study.

**Did the researchers of this study look at my medical record or know my name?**

No. The research team did not look at or gain access to your medical record. All of the MyChart recruitment messages are sent by the Johns Hopkins Research Participant Recruitment and Retention Program. This office has a small staff who know how to search our patient databases to find patients that might be eligible for a study.

**What happens if I ignore or delete this message?**

Your care at Johns Hopkins will not be affected if you ignore or delete this message. Your clinical care team will most likely not even know if you agreed to join the study. Please note that you may receive an automated MyChart recruitment message again unless you unsubscribe.

**How frequently will I get MyChart research recruitment messages?**

Our Johns Hopkins Medicine Policy is to limit messages to only one research invitation a month. There may be some circumstances where we exceed this limit but this is not our intention.

**What should I do if I don't want to receive these kinds of MyChart recruitment messages again?**

You can unsubscribe from future MyChart recruitment messages by emailing [Research\\_Recruitment@JHHS.edu](mailto:Research_Recruitment@JHHS.edu).

**Who should I contact with further questions about MyChart recruitment?**

Please call 443-304-7186 or email [research\\_recruitment@JHHS.edu](mailto:research_recruitment@JHHS.edu) if you have any further questions. We will be happy to hear from you.

Short message (129 words)	Long message (219 words)
<p>In addition to providing medical care, physicians at Johns Hopkins conduct research with the ultimate goal of improving health. Hopkins researchers are looking for volunteers to participate in a research study, called STURDY, that tests the effects vitamin D supplements on the risk of falling. You are receiving this email because you might qualify for this study based on your age and geographic location.</p> <p>Is STURDY for you?</p> <p>If you answer YES to all 3 of these questions, you may be eligible:</p> <p>Are you age 70 or older? Are you afraid of falling or have you had a fall in the past year? Are you willing to take vitamin D pills?</p> <p>If STURDY seems right for you, or to learn more: Call (410) 281-1600 Email <a href="mailto:prohealth@sturdytrial.org">prohealth@sturdytrial.org</a> Visit <a href="http://www.sturdystudy.org">www.sturdystudy.org</a></p> <p>Sincerely,</p> <p>Daniel E. Ford, MD, MPH Vice Dean for Clinical Investigation Director, Institute for Clinical and Translational Research ICTR Research Recruitment Office</p> <p>Lawrence J. Appel, MD, MPH Principal Investigator of STURDY Protocol #: IRB00063914</p> <p>Participation in this study is voluntary. If you decide not to be part of the study, it will not change the medical care you receive. Please do not reply to this MyChart message. For more information and frequently asked questions (FAQs) related to research recruitment through MyChart, visit <a href="http://ictr.johnshopkins.edu/consulting/consulting-services/research-participant-and-community-partnerships-core/community-resources/become-a-research-participant/mychart-recruitment-messages/">http://ictr.johnshopkins.edu/consulting/consulting-services/research-participant-and-community-partnerships-core/community-resources/become-a-research-participant/mychart-recruitment-messages/</a>. To unsubscribe from all future MyChart research recruitment messages, please email <a href="mailto:research_recruitment@JHHS.edu">research_recruitment@JHHS.edu</a>. This message approved by Johns Hopkins Medicine IRB on February 13, 2017.</p>	<p>In addition to providing medical care, physicians at Johns Hopkins conduct research with the ultimate goal of improving health.</p> <p>One study that may be relevant to you is the STURDY study. STURDY is a research program conducted by the Johns Hopkins University and the National Institutes of Health (NIH) that tests the effects of 4 doses of vitamin D supplements on the risk of falling.</p> <p>Every year, 1 in 3 seniors fall, and falls can have devastating effects. Some researchers think that vitamin D may help prevent falls, but we don't know for sure.</p> <p>I wanted to personally invite you to consider joining STURDY as a volunteer participant. This is an opportunity to advance our scientific understanding of vitamin D and falls. You are receiving this email because you might qualify for this study based on your age and geographic location. Participation in this study is voluntary. If you decide not to be part of this study, it will not change the medical care you receive.</p> <p>If you are age 70 or older, afraid of falling or have had a fall in the past year, and are willing to take vitamin D pills, you may be eligible for STURDY.</p> <p>For more information or to contact us to see if you qualify: Visit <a href="http://www.sturdystudy.org/">http://www.sturdystudy.org/</a> Call (410) 281-1600 Email <a href="mailto:prohealth@sturdytrial.org">prohealth@sturdytrial.org</a></p> <p>Sincerely,</p> <p>Daniel E. Ford, MD, MPH Vice Dean for Clinical Investigation Director, Institute for Clinical and Translational Research ICTR Research Recruitment Office</p> <p>Lawrence J. Appel, MD, MPH Principal Investigator of STURDY Protocol #: IRB00063914</p> <p>Please do not respond to this MyChart message. For any questions about STURDY, please use the contact information above or on our website. For more information and frequently asked questions (FAQs) related to research recruitment through MyChart click here: <a href="http://ictr.johnshopkins.edu/consulting/consulting-services/research-participant-and-community-partnerships-core/community-resources/become-a-research-participant/mychart-recruitment-messages/">http://ictr.johnshopkins.edu/consulting/consulting-services/research-participant-and-community-partnerships-core/community-resources/become-a-research-participant/mychart-recruitment-messages/</a> To unsubscribe from all future MyChart research recruitment messages, please email <a href="mailto:research_recruitment@JHHS.edu">research_recruitment@JHHS.edu</a>. This message approved by Johns Hopkins Medicine IRB on February 13, 2017.</p>

\*The URL for the FAQ page moved since this message was sent and can be viewed at

<https://ictr.johnshopkins.edu/community/community-involvement/mychart-recruitment-messages/> and on the Internet Archive (August 2, 2017 snapshot) at <https://web.archive.org/web/20170802143440/https://ictr.johnshopkins.edu/community/community-involvement/mychart-recruitment-messages/>

**Supplemental Figure S4** - Informational email sent to Johns Hopkins faculty, staff, residents, and students about the patient portal recruitment campaign\*

*To SOM faculty, staff, residents and students*

Discovery has always been a core mission for Johns Hopkins. Through Epic, we now have the ability to better match patient characteristics with research study eligibility criteria. For the next several months, a committee organized by the Institute for Clinical and Translational Research (ICTR) will be piloting a new approach to invite patients to participate in research studies through MyChart. You may hear from your patients that they have received a research invitation through MyChart to join a study. If a patient asks you questions about the research invitation, there is no expectation that you discuss any of the details of a study. We hope you would communicate to patients general support for research studies at Johns Hopkins and remind them to access the research person included in each research invitation.

The use of MyChart for recruitment requires IRB approval, and extensive care is taken to protect patient privacy. To safeguard patient privacy, PIs and research teams will not be able to see PHI as part of this new process. In a recent survey, we assessed what patients think about MyChart research invitations; 90 percent of surveyed patients agreed that invitations to join research studies are an appropriate use of MyChart. Patients can always opt out of receiving future research invitations through MyChart. We plan to limit research invitations through MyChart so a patient does not receive more than one invitation every 30 days.

If you go to this [website](#), you will be able to see the list of studies that are using MyChart recruitment and the “Frequently Asked Questions” available for patients.

There are two studies currently recruiting through MyChart:

- 1) [The STURDY Trial](#): This trial is studying the effects of vitamin D supplements on falls in older adults.
- 2) [Clinical Trial of Air Cleaners to Improve Indoor Air Quality and COPD Health](#): This trial aims to determine whether an air cleaner intervention to improve home air quality will improve respiratory symptoms, quality of life and lung function and reduce the risk of exacerbations in former smokers with COPD.

If you have questions about this process, please email [research\\_recruitment@jhhs.edu](mailto:research_recruitment@jhhs.edu) or call 443-304-7186.

Daniel E. Ford, M.D., M.P.H.  
Director, Institute for Clinical and Translational Research  
Vice Dean for Clinical Investigation  
Johns Hopkins University School of Medicine

\*The URL for the FAQ page moved since this message was sent and can be viewed at <https://ictr.johnshopkins.edu/community/community-involvement/mychart-recruitment-messages/> and on the Internet Archive (August 2, 2017 snapshot) at <https://web.archive.org/web/20170802143440/https://ictr.johnshopkins.edu/community/community-involvement/mychart-recruitment-messages/>

Recruitment of trial participants through electronic medical record patient portal messaging: A pilot study

Manuscript ID: CT-19-0052.R1

Funding Information: U.S. Department of Health and Human Services >  
National Institutes of Health >  
**National Center for Advancing Translational Sciences**  
UL1TR001079

U.S. Department of Health and Human Services >  
National Institutes of Health >  
**National Institute on Aging**  
5U01AG047837-04









Plante, Timothy Blake  Save  Plante, Timothy Blake (proxy)


Submitting Author:

*primary affiliation*

- University of Vermont Larner College of Medicine  
360 S Park Dr Suite 206B Colchester Vermont 05446  
United States

Authors & Institutions:

-  [Plante, Timothy Blake](#)  
proxy  
 <https://orcid.org/0000-0001-9992-9597> ✓
  -  [Gleason, Kelly T](#)  
proxy
  -  [Miller, Hailey N](#)  
proxy
  -  [Charleston, Jeanne](#)  
proxy
  -  [McArthur, Kristen](#)  
proxy
  -  [Dennison Himmelfarb, Cheryl](#)  
proxy
  -  [Lazo, Mariana](#)  
proxy
- University of Vermont Larner College of Medicine  
360 S Park Dr Suite 206B , Colchester, Vermont 05446  
United States
  - School of Nursing, Johns Hopkins University  
Baltimore, Maryland  
United States
  - School of Nursing, Johns Hopkins University  
Baltimore, Maryland  
United States
  - Johns Hopkins University Bloomberg School of Public Health ✓ - Department of Epidemiology  
Baltimore, Maryland  
United States
  - Johns Hopkins University School of Medicine  
Baltimore, Maryland  
United States
  - School of Nursing, Johns Hopkins University  
Baltimore, Maryland  
United States
  - Johns Hopkins University School of Medicine  
Baltimore, Maryland  
United States

 [Ford, Daniel](#)  
[proxy](#)

 [Miller, Edgar](#)  
[proxy](#)

 [Appel, Lawrence](#)  
[proxy](#)

 [Juraschek, Stephen P](#)  
[proxy](#)

- Johns Hopkins University - Medicine  
733 N. Broadway Suite 115 , Baltimore,  
Maryland 21205  
United States

- Johns Hopkins University School of  
Medicine - Welch Center for Prevention,  
Epidemiology, and Clinical Research  
Baltimore, Maryland  
United States

- Johns Hopkins - Medicine  
2024 East Monument St , Baltimore,  
Maryland 21205  
United States

- General Medicine & Primary Care  
Boston, Massachusetts  
United States

Contact Author  
(populates the  
##PROLE\_AUTHOR\_..#  
# e-mail tags):

Save

Current Contact Author:  
Plante, Timothy Blake  
([proxy](#))

Running Head: RCT Patient Portal Recruitment

Keywords: Clinical trial ✳, Randomized controlled trial ✳, Recruitment methods ✳, Electronic  
medical records ✳, Patient portal messages ✳