

Email Patient Recruitment Requirements

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

Protected Health Information (PHI): Research staff who wish to recruit patients 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.
- 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 "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 or Nebraska Medicine.
- 6) The email must include the confidentiality statement that is attached to all UNMC and Nebraska Medicine from Outlook.
- 7) The email will contain information for the patient on how to change their research recruitment option in the conditions of treatment form and the contact information for the Research Subject Advocate.
- 8) The sender of the email will be a central resource who has the ability to send and receive information from patients 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 patient 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 patient email list generated by the honest broker is only valid for one month after generated.

- a. Subsequent identified patient list must be re-run to validate the opt-in recruitment status.

Email encounter: One Chart Patient (Epic) option:

- 1) Emailing patients through One Chart Patient (Epic) requires the following:
 - b. Subject line "UNMC Research Opportunity".
- 2) Direct responses to Principal Investigator and/or Coordinator as applicable
- 3) The email will contain information for the patient on how to change their research recruitment option in the conditions of treatment form by contacting Patient Access Services at 402-559-4222.

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