

ARTIC PC WPD Opportunistic recruitment

Working Practice Document Number: 2

Version Number: V.1

Effective Date:

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	Date: <i>2/9/16</i>

Review date:

Review History

Version No.	date	amendments
1	30/08/2016	New document

Review date 01 Sept 2017

1. Introduction, Background and Purpose

Patient recruitment is an important aspect of the work of sites and research funding is often linked to the recruitment of patients into research projects achieved by each participating site.

Sites do an increasingly good job of finding patients for research studies by using their ever improving computer systems. However there are some research projects that by their nature do not recruit well by carrying out a database search and then mailing study information to patients. These studies may be in subject areas that are not easy to run searches electronically, such as early disease processes. Or the study may be seeking to recruit participants from a population that do not typically respond to written information sheets. Or such studies require patients to be recruited opportunistically, with study information first being provided when they present at their appointment.

There are some systems/approaches that a site can put in place to improve patient recruitment into these studies.

2. Abbreviations

See CRN Primary Care Glossary of Terms and Abbreviations.

3. Scope

This work Instruction provides guidance to all staff seeking to recruit participants to NIHR portfolio studies. 'Site' refers to general practices, Trust services or other teams that have agreed to identify and / or recruit participants into studies.

4. Responsibilities

All staff are responsible for undertaking recruitment procedures in line with ICH GCP, the study protocol and using ethically approved documents and methods.

5. Procedures

The key to successful opportunistic recruitment is the engagement of the whole site team. This will lead to more participants being recruited than if only a single practitioner at a site is looking to recruit participants.

5.1 Administrator

Where a site assigns an 'administrator' with responsibility for ensuring that research projects run well, there is better patient uptake into studies. Administrator duties could include:

- Ensuring approved study posters are on notice boards at the site. That the approved advert for the study is posted onto the site website and included in site newsletters with a point of contact for more information.
- Ensuring that a short summary of the study with inclusion and exclusion criteria is laminated and put in all consulting rooms.
- Preparing study packs which include the patient information letter, letter of invitation and return envelope so they are available in each of the consulting rooms and that they are topped up regularly. The administrator liaises with the researcher if more packs are needed.
- Providing feed back to all of the recruiting practitioners on the study recruitment target and how recruitment at the site is going. Emails could be sent once a week or a target chart can be devised to be put up in the staff room to remind staff that they are still recruiting to the study.

- Checking lists of booked patients, in advance, (eg those coming to Post-natal or Immunisation Clinics) to enable practitioners to approach those who meet criteria (e.g. those who are already attending with specified condition).

Once a site is aware that a study recruits participants opportunistically the site team should devise a workflow chart to help the staff (from receptionists through to practitioners) identify potential participants. This may be via such routes as prescribing and referrals to relevant specialists.

5.2 Site Meetings and internal communication at a site

Having a person at a site acting as a research project Champion (practitioner or administrator) can really help with dissemination of vital information about a study.

Another effective strategy is for the research lead practitioner or administrator to contribute a 'research section' at a site / team meeting on a regular basis. This section will update staff about ongoing research projects, including giving feedback on recruitment targets and numbers of patients recruited by the site. This briefing may also include information about the study and the recruitment strategies that the site is using. This serves to inform staff of a project in case a patient asks about it. Due to the competitive recruitment nature of some studies it is not recommended that the research briefing is used to consider new projects as the site recruitment phase may have passed.

Setting local deadlines at a site with the aim of reaching the recruitment target can help sites focus for relatively short periods on a project and recruit to target.

For some studies it may be more convenient to identify the patients within one clinic and then invite them back to a separate clinic to consent them to the study (this may not be possible for all studies).

5.3 Pop-ups and tagging of patient notes

A site may wish to explore the use of pop-ups/tags which can be applied to the notes of patients who have been mailed study information. By doing this a practitioner can ask such patients if they have responded to the invitation letter and take the opportunity to talk about the study if appropriate.

5.4 Posters/ flyers and advertising:

Sites can only use ethically approved information i.e. a site is not permitted to design its own poster in order to highlight a study. If you would like a poster/advert ask the researcher for this. CRN: Eastern can advise the study team on eye-catching study materials that advertise the study. Public and patient groups can also advise on the language used in such posters.

Posters can also be used to advertise the study in patient waiting areas on electronic display boards and on the site website. Promotional posters with tear off slips with the recruiting practitioner telephone number or business cards/flyers with the name of the study and the number for interested patients to call can also be helpful.

5.5 Receptionists

It is often useful to display study posters at reception. A notice can be applied to the poster asking patients to ask reception for a participant information sheet if they are interested. Receptionists play an important part in opportunistic recruitment as they can be instrumental in referring patients to the team members trained in the study procedures and they can give out the patient information sheets. Receptionists can also flag a study to patients when they are phoning to book appointments.

5.6 Telephone contact

It is not appropriate to contact patients by telephone to find out their view on a research project after you have mailed them unless the Research Ethics Committee has approved this contact. See WI 04 Contacting potential research participants by phone

6. Patient notes

It is important, in the case of opportunistic recruitment, that any approach to a patient about a study is marked in the patient's notes, which includes their response. This will stop multiple approaches to the same patient.

7. Related SOPs, Work Instructions and Reference Documents

7.1 SOPs

None

7.2 Work Instructions

Informed consent Minors#1

7.3 Reference Documents

ICH Good Clinical Practice (GCP)

CRN Primary Care Glossary of terms and Abbreviations