INSIGHT
Clinical Research Network

Recruitment and Retention Strategies for PCORnet Studies:
Learnings from INSIGHT CRN

INSIGHT CRN is committed to enhancing and improving our patient engagement and recruitment strategies to increase study enrollment metrics. We are in the process of conducting a full literature review of culturally appropriate recruitment and retention strategies to aid in this effort and will share this as well when it is complete. Listed below are the primary strategies for improving these metrics which can serve as a checklist and discussion items for other CRNs and their sites:

1. **Tailored recruitment methods**: Based on the study and study population, recruitment strategies vary depending on where that patient demographic tends to receive information most efficiently. Based on the study inclusion criteria, we evaluate age, demographic and lifestyle factors to determine appropriate recruitment strategies. Strategies include but are not limited to calling patients and leaving detailed voicemails, sending EHR patient portal messages, follow-up letters, and advertising on websites and in newsletters.

2. **Diversifying call times**: If by phone is the primary recruitment method, we attempt to call patients at different times of day and different days a week to ensure we can reach each patient at a time convenient for them. We track call attempts in REDCap instances. This tracker includes time/date of call, whether the patient was reached, whether a voicemail was left, and provides notifications for the study team to call back at a specified time.

3. **Increasing number of follow-up attempts**: We have increased follow-up attempts to the maximum for each study protocol to reach an eligible patient, each accompanied by a voicemail. We have also implemented follow-up calls and messages to patients who are considering enrolling. This method is based on appropriate IRB standards to improve recruitment without causing patient distress. Follow-ups are designed to best meet patient needs and adjusted based on noted reason for hesitancy to enroll. Depending on the patient needs, we evaluate who is best to follow-up whether it be research staff, research team clinician/PI, clinical team, or data team.

4. **More staff, more training**: We have hired additional staff to ensure flexible schedules to make calls in the morning, during the workday and after traditional work hours to meet the needs and schedules of potential subjects. Additionally, we are working on increasing training on recruitment and retention for current staff to maximize effectiveness of phone calls.

5. **A larger and more diverse patient population to recruit from:** As part of our effort to increase the size and representativeness of our patient population, we are always seeking additional patient cohorts to include in our INSIGHT central database. New patient cohorts may be new institutions, or sub-populations within our current institutions.