

## Fairview Research Recruitment Mailing Guidelines

**Purpose:** To extend the opportunity to participate in research to patients across the Fairview system and to facilitate recruitment in research studies.

**Background:** HIPAA permits a healthcare organization to contact its patients to introduce research participation. It's called 'preparatory to research' work. Much of the research that occurs in Fairview is conducted by its partner, the University of Minnesota (UMN). To extend UMN research to its patients, Fairview Research Administration (FRA) developed a process where Fairview contacts its patients on behalf of UMN. This service is only one way to contact potential participants through the mail. If you are interested in pursuing other methods of recruitment, we recommend contacting CTSI's recruitment specialist at (612) 626-0355 or [ctsi@umn.edu](mailto:ctsi@umn.edu).

**Contact:** If you have questions or are planning to send a recruitment mailing through FRA, please contact [research@fairview.org](mailto:research@fairview.org) or (612) 672-7690.

---

### Who may use this service?

University of Minnesota faculty and Fairview employees conducting research at Fairview or UMN sites may utilize this service. The use of this recruitment method must be approved by the UMN IRB.

### How does it work?

In this process, Fairview is contacting its patients on the researcher's behalf. The study-specific IRB-approved recruitment letter is sent with a FRA cover letter in a FRA envelope.

With input from our patients, FRA developed parameters for the recruitment letters. The parameters listed below are intended to increase the effectiveness of the mailing.

- Only patients seen in Fairview will be contacted. Patients seen solely in UMP owned and operated clinics (e.g. Smiley's, Phalen) cannot be contacted through this process.
- The data set must be from Epic only, not a legacy system (e.g. FCIS).
- Researchers targeting sensitive populations cannot use this service, if you have questions or would like more information, please contact our office [research@fairview.org](mailto:research@fairview.org) or 612-672-7690.
- You may only send out a maximum of 250 recruitment letters in the initial mailing for any study.
- Patient must have been seen in Fairview within the past 2 years.
- The recruitment letter cannot be addressed to individual patients. It should instead be addressed to 'Patient' or 'Fairview patient'.
- If contacting patients under the age of 18, address the letter to "the parents or legal guardian of Fairview patient."
- Parent, legal guardian or emergency contact names and addresses cannot be used for recruitment purposes.
- No patients over the age of 80 will be contacted.
- The same patient cannot be contacted twice for the same study. If the IRB approved a serial mailing, please tell FRA in advance of sending any letters.
- The researcher cannot contact the patients directly. The patient must contact the researcher. For example, if patients are identified because they had at least one high blood pressure reading, the recruitment letter cannot state they are being contacted because they have a diagnosis of hypertension. The recruitment letter should state they are being contacted because they had at least one high blood pressure reading.

## Fairview Research Recruitment Mailing Guidelines

### How do I request a mailing?

*We strongly recommend contacting FRA first. This will allow us time to order supplies and will give us the opportunity to confirm your data request meets the requirements listed in this document.*

#### **Step 1: Request a data set**

FRA will only contact patients identified through the CTSI data request process. Please see the CTSI's data request website for more information: <https://z.umn.edu/clinicaldata>.

Keep in mind the data set will only contain the data requested. If you may want to narrow the patient list by clinic location, clinic location should be requested as an output field on your data request.

#### **Step 2: Finalize the mailing list**

1. Review the data set to finalize the mailing list.
2. Send the folder location and the IRB-approved recruitment letter to FRA and request a recruitment mailing. FRA will confirm the patient list aligns with the parameters stated above.

#### **Step 3: Request a mailing**

FRA collaborates with the [UMN Addressing & Mailing department \(A&M\)](#) to complete the mailings. The researcher's steps are in red.

1. **Call A&M at 612-626-0222 to set up an account and obtain a job number.** They will ask for a description of the service requested and the study billing account information.
  - a. **Discuss details of the mailing with A&M, including sending in batches.**
  - b. A&M offers a National Change of Address (NCOA) service. This compares the patient list against the national mailing address list to remove false addresses and update those that have changed. **Please consider this option as returned letters are not tracked.**
2. **Send the A&M job number to FRA.**
3. **Drop off the recruitment materials at A&M (2818 Como Ave, Minneapolis).**
4. FRA will send the mailing list and provide the Fairview cover letters and envelopes to A&M.
5. FRA will send an invoice for the Fairview supplies. The charge is based on materials (currently the cost per Fairview's cover letter and envelope is approximately \$1.00).
6. A&M will charge for their services, including postage, stuffing envelopes, etc.