

Columbia University's

Optimizing Patient Engagement (OPEN) in Research Initiative

MyChart (Connect) Research Recruitment Messaging Contact Frequency Policy

Effective Dates: Established July 9, 2026; Finalized July 9, 2026

Purpose: To outline for all stakeholders the guidance and expected use of the Consent to Contact for Research (CCR) "Ok to Contact" Registry and detail the approved number of contacts to a patient.

Governance: This policy has been developed at the direction of the OPEN Initiative Executive Committee by the OPEN Initiative Implementation Task Force with input from leaders across EVPR (CTO, IRB), Privacy, Legal, Community, Communications, Clinical and Research operations.

Policy: This policy aims to promote the use of the CCR Registry via the MyChart (Connect) Research Recruitment Messaging function for direct-to-patient recruitment while not overburdening the patient with research contacts.

Research teams may use MyChart (Connect) Research Recruitment Messaging for one initial study invitation and two reminders within a 60-day period, as approved in their IRB protocol.

A patient may be contacted by two studies looking to recruit 500 or more participants in a 60-day (two-month) period. It is anticipated that a patient may receive up to 12 initial study invitations from studies recruiting more than 500 participants within a year.

A patient may be contacted by a study looking to recruit less than 500 participants at any time. This is intended to give patients access to disease-specific studies in a timely manner while not overburdening the patient with research contacts. For additional guidance on recruitment with special populations, please speak with the IRB or the OPEN Recruitment Manager.

Issued and Approved by the OPEN Initiative Executive Committee on July 9, 2026.