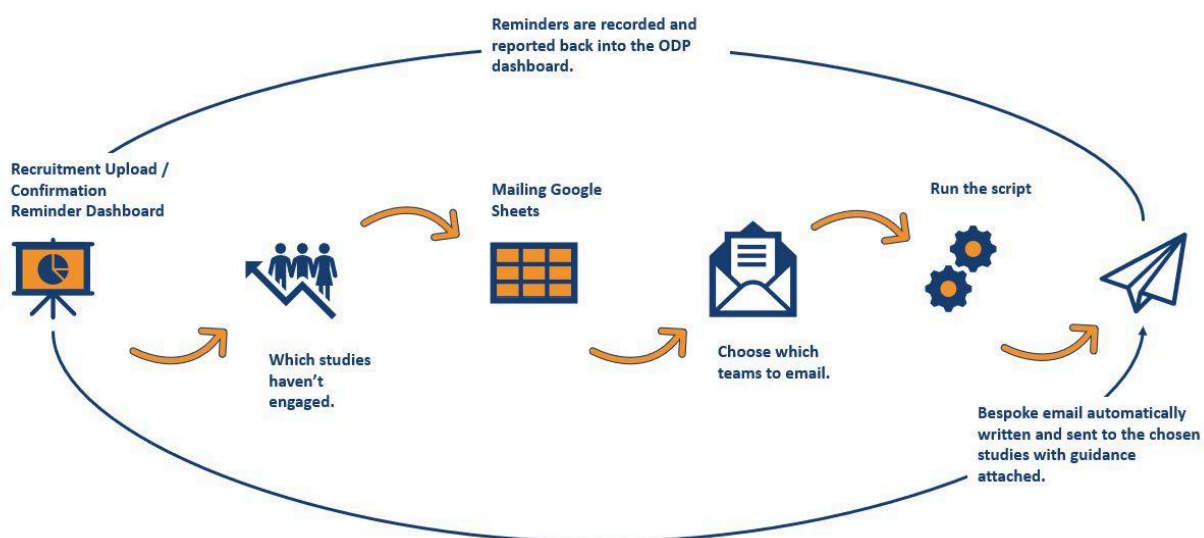


Recruitment Upload / Confirmation Reminder Streamline



Overview

Current Process

The purpose of the project is to streamline the way in which our local study support service to track the snon commercial Greater Manchester led studies that either need to confirm or upload their recruitment activity via CPMS.

The current process, previously actioned on a monthly to bi-monthly basis, included the use of the Recruitment Upload Support ODP Application (RUS) were in which the user must select the 'Most Recent Participant' tab, filter to select Greater Manchester as Lead LCRN, select non-commercial, open and last engagement date >30 days. The user would then download the table to excel, upload it to Google Sheets and set up a mail merge using the add-on 'Mail Merge with Attachments' and a draft email created in G Mail. This process is time consuming, as users must then filter the contact list before running the mail merge to remove any duplicate email addresses.



Current Process

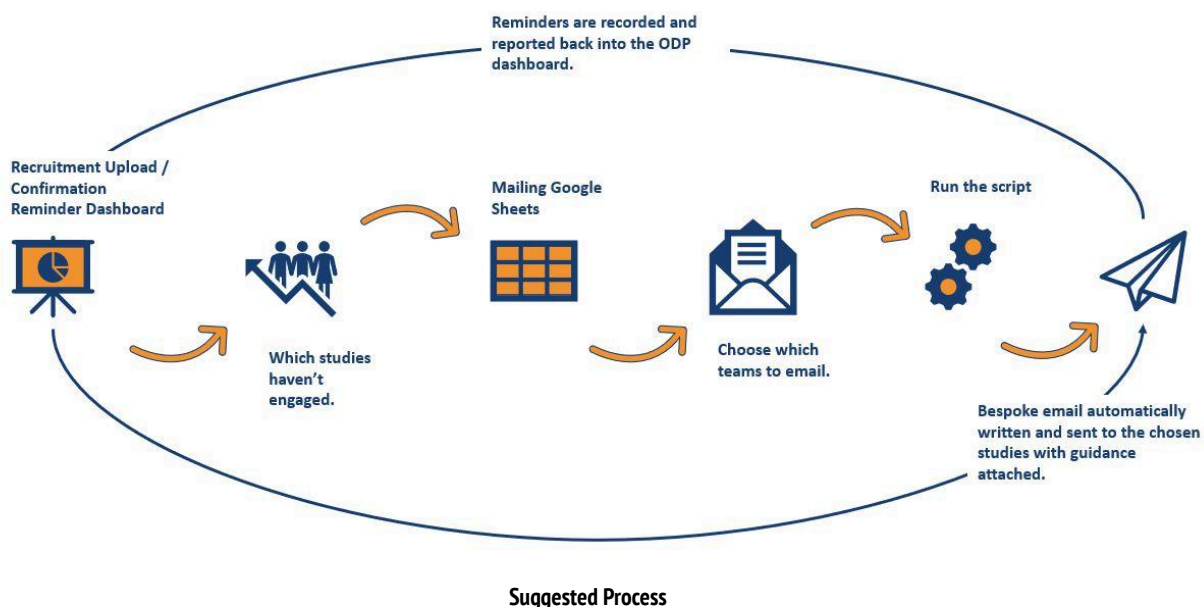
Suggested Improvement

Utilising the CRN Greater Manchester ODP application, the aim of this project is to develop a new recruitment upload / confirmation reminder tab. This simple tab will contain two hard coded tables, one will include the Greater Manchester led non-commercial studies that still require a manual recruitment upload. The second table will include Greater Manchester led non-commercial studies that have an LPMS upload route, and therefore require the recruitment data to be confirmed on a monthly basis.

Above each table there will be a text box, providing an explanation of the process. Below each table will be a link to a Google Sheet, a separate sheet for LPMS and Manual that has already been configured to send the appropriate email.

Users will simply need to download each table separately and copy and paste the contents of the table into the appropriate mail merge sheet. From there, the users simply need to tick which studies and RAC's they would like to contact in the send column and click the send email button.

A Google Script will then work in the background to produce the reminder email, customised to the Study ID, Study Name and RAC contact and send the email on the users behalf. For further information please see the infogram link: <https://infogram.com/1pnmqz609gkx5vtz7597zmldrnbm37w616l?live>



Development Goals

FY2019/20 Q4

- Work on Google Script to facilitate the sending of customised emails.
- Build the new Recruitment upload / confirmation reminder tab in our GM ODP App
- Write and ensure the instructions provided make sense to new users.
- Write Google Script to copy the list of emails sent to a master sheet.
- Link the master sheet to the ODP app, allowing the app to track the number of times studies have been contacted.

FY2020/21 Q1

- Process to go live for testing.
- Number of reminders sent vs levels of engagement will be measured through ODP.
- Feedback from both the recipient and user to be collected.

Delivery

We aim to develop the facility to do this in the later part of FY 2019/20 Q4, to ensure that the new function can be used to deliver recruitment upload and confirmation reminders in Q1 of the new financial year.

Feedback will be collected from both the CRN user and email recipient to aid further development.