

**As a recruiter I want to send out recruitment mails that already contain a link where subjects can pick a time slot for their appointment. This would save me a lot of work.**

- There already is the „Castellum Scheduler“ that allows participants to pick time slots for their appointments.
- However, the process currently requires some manual steps: Recruiters first have to send out recruitment mails. When they receive answers, they have to manually set the participation status to „participating“, and only then they can manually send the scheduler link back to participants.
- Studies can require more than one appointment.
- Not all participation criteria can be checked with automatic filters. Sometimes, additional criteria need to be checked manually before making an appointment.

**As a recruiter I want to have a pool of active and reliable test subjects. Therefore, I want to exclude inactive or unreliable test subjects from recruitment.**

- Test subjects are already excluded from recruitment if they have not given recruitment consent or if they have been blocked due to inappropriate behavior. Adding yet another system might be confusing.
- It is already possible to filter subjects based on date of last activity.
- There is already a reliability score, but it is purely informational and not used for filtering.
- If a subject is excluded using this mechanism, should the recruitment consent still count as a legal basis for data processing?
- Who should be allowed to exclude test subjects? How can abuse be prevented?
- Should this be a manual or automatic process?

**As a researcher I want to reuse existing data from a study, but amend it with my own questionnaire.**

- It is already possible to restrict recruitment to participants from a previous study.
- How can we safely combine pseudonyms from different studies? (without undercutting pseudonymization)
- There might be many different variations of this, e.g. combining data from multiple studies or reusing only parts of the existing data. How can we find a solution that is flexible enough for all of these cases?

**As a recruiter I want to enter new subjects into the database.**

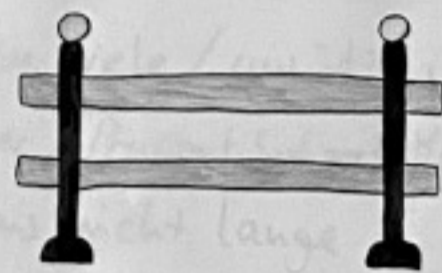
- Adding subjects to the database requires that you first check if they already exist (to prevent duplicates).
- Searching for and accessing personal data of any test subject in the whole database is only allowed for few trusted users (principal subject managers). Recruiters are typically restricted to (potential) participants of their studies.
- Maybe it is possible to somehow allow recruiters to check for duplicates without granting them full access to everything.

# NEW SUBJECTS IN DATABASE

How important & why ?!

X wichtig, weil...  
↳ viele Rechte notwendig

X Road block: Rechte...  
Road Blocks

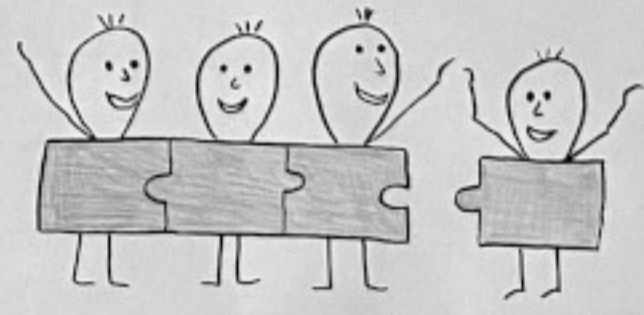


X next steps: + PSM legt neues Schema an, Rechte fällt dann  
weiter aus  
+ Duplicate Check on save: Automatische Check

Next Steps



Collaboration



1) • Häufiger case in der Forschung  
• Open Data / nachhaltig verwenden

2) • fehlende Berechtigung für alte Studie

3) • Berechtigungsübertragung aufordern / ertragen

4) • zweite Pseudonymisierung durch neue Liste  
• Doppeltes Pseudonym!

Ⓟ was ist mit denen, die keiner weiteren Studie zugestimmt haben (Setting Castellum)

# NEW SUBJECTS IN DATABASE

X Wichtig, weil: Duplikate verhindern → Qualitätssicherung  
↳ viele Rechte notwendig

X Roadblock: Rekrutierer sollen nicht zu viele / unnötig viele Rechte haben  
+ nicht zu viele Rekrutierer / Principal Subject Manager  
+ Rekrutierer bleiben meistens nicht lange

X next steps: + PSM legt neues Subject an, Rekrute fällt dann  
weiter aus  
+ Dubletten-Check on save: Automatischer Check

next steps: Filter / Flags is a start  
↳ Subject manager responsible  
for Database Hygiene  
- Mix of Automation + Manual  
Unresponsiveness counter (auto)  
↳ Automated "Last chance mail"

Problem: - Low response rates  
↳ A lot of "ghost" pp's?

Road block: We don't want to  
lose possible pp's

Next steps: Filter/Flags is a start  
↳ Subject manager responsible  
for Database Hygiene  
- Mix of Automation + Manual  
- Unresponsiveness counter (auto)  
↳ Automated "Last chance" mail

1. Very important for large-scale studies  
and for studies w/ multiple sessions

2. - Overbooking risk of time slots  
→ Need for automatic updating of (lab) calendars  
- No-show risk due to less personal contact  
→ Reminders + clear consequences for ppts

3. Adding conditions for automatic booking  
- # of slots per session  
Updating on calendars  
Email notification for study leaders

4.