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Clinical trial delegation log checklist for recruitment workflows

A recruitment-focused delegation log checklist for aligning coordinator tasks, backup coverage, investigator review, records follow-up, and sponsor-facing updates at a research site.

How to use this checklist

Delegation planning should connect documented responsibilities to the real recruitment work of intake, prescreening, records follow-up, scheduling, and reporting.

Quick checks

- [ ] A delegation log should match the work coordinators actually perform in the recruitment queue.
- [ ] Backup coverage matters for intake, records, scheduling, no-response follow-up, and sponsor updates.
- [ ] Recruitment tasks should have clear escalation paths when a decision belongs outside the coordinator queue.

Start with the recruitment task list

- [ ] A delegation log is most useful when it reflects real work. For recruitment, that includes inquiry review, prescreening support, records request tracking, chart review routing, scheduling coordination, participant communication, source review, and sponsor updates.
- [ ] The checklist should compare documented responsibilities against the operational workflow so a coordinator is not expected to complete tasks that were never assigned or trained.

Name primary and backup coverage

- [ ] Every recurring recruitment task should have a primary owner and backup owner. Backup coverage is especially important for new inquiries, time-sensitive records follow-up, appointment confirmations, and stale-lead review.
- [ ] Without backup coverage, vacations, clinic days, and staff transitions can quietly turn active interest into stale records.

Separate coordination from clinical decisions

- [ ] The checklist should make clear which tasks are coordinator workflow tasks and which require investigator, sub-investigator, sponsor, or study-team review.
- [ ] That boundary protects the team from using the recruitment queue as a substitute for final eligibility, medical oversight, or protocol-required review.

Match training to assigned work

- [ ] If a person is assigned to prescreening support, records workflows, recruitment source review, or sponsor reporting, the site should confirm training, SOP access, study materials, escalation contacts, and system access before the task begins.
- [ ] A good checklist also asks whether the assigned user can see only what they need for their role and whether any access should be removed after reassignment.

Review delegation when the workflow changes

- [ ] Delegation should be revisited when a new recruitment source opens, a coordinator changes, a protocol amendment changes prescreening expectations, a visit schedule changes, or sponsor reporting requirements shift.
- [ ] The recruitment workflow and delegation documentation should tell the same story about who owns each next action.