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Clinical trial monitoring visit recruitment readiness checklist

A monitoring visit readiness checklist for research site recruitment operations, including source history, queue status, records blockers, close reasons, communication logs, and sponsor questions.

How to use this checklist

Recruitment readiness for a monitoring visit means the site can explain source activity, queue status, follow-up actions, records blockers, close reasons, and current decisions needed.

Quick checks

- [ ] Prepare source activity, recruitment status, blocker categories, and close reasons before the monitoring discussion.
- [ ] Queue evidence should show ownership, next action, and timing rather than a disconnected spreadsheet snapshot.
- [ ] Sponsor or monitor questions should be captured as decisions needed with owners and due dates.

Prepare the recruitment story

- [ ] A monitoring visit may include questions about how recruitment is going, which sources are active, which leads are moving, and where the workflow is blocked.
- [ ] The site should be ready to explain source activity, queue status, prescreen movement, scheduled visits, stale leads, close reasons, and open decisions without rebuilding the story from scattered notes.

Review source and queue status

- [ ] The checklist should include active sources, paused sources, new inquiries, reviewed inquiries, records pending, scheduled visits, no-response records, duplicate records, and closed records by reason.
- [ ] Those fields help distinguish a recruitment problem from a documentation, routing, source-quality, or scheduling-capacity problem.

Check communication and follow-up evidence

- [ ] The site should be able to show that follow-up attempts, appointment confirmations, and no-response handling followed the expected workflow.
- [ ] This does not mean broad reports need message bodies. The useful evidence is status, timing, owner, channel category where appropriate, next action, and close reason.

Bring blocker decisions forward

- [ ] A monitoring visit is a good time to surface repeated blockers: records delays, unclear prescreen status, visit capacity, source mismatch, outdated materials, or sponsor decisions waiting outside the site queue.
- [ ] Each blocker should have a requested decision or next action so the discussion can move from observation to ownership.

Close the loop after the visit

- [ ] After monitoring, update the recruitment workflow with any agreed changes to sources, reporting cadence, follow-up rules, records process, or escalation paths.
- [ ] The checklist should turn monitoring feedback into operational updates rather than leaving it in meeting notes.

Educational resource only. This checklist does not replace protocol requirements, IRB-approved materials, sponsor instructions, investigator oversight, site SOPs, or authorized study-team decisions.