TRIALSNEST RESOURCE HUB PDF

Clinical trial patient communication checklist for research sites

A patient communication checklist for research sites managing clinical trial follow-up, consent-safe language, message timing, no-response paths, privacy boundaries, and handoffs.

How to use this checklist

Patient communication works best when sites standardize first response, follow-up cadence, approved language, privacy boundaries, and handoffs without overpromising study outcomes.

Quick checks

- [ ] Communication workflows should define first response, no-response cadence, appointment reminders, and close reasons.
- [ ] Messages should use approved, consent-safe language and avoid implying eligibility or enrollment.
- [ ] Coordinator notes and broad reports should avoid unnecessary patient-detail exposure.

Define the first response

- [ ] The checklist should define how soon a new inquiry is reviewed, who sends the first response, which channel is used, and what approved language should be included.
- [ ] The first response should explain the next operational step without implying final eligibility, medical advice, or guaranteed participation.

Standardize no-response follow-up

- [ ] No-response workflows should include cadence, maximum attempts, channel rules, opt-out handling, owner, and close reason.
- [ ] That structure keeps coordinators from either giving up too early or repeatedly contacting someone without a clear workflow boundary.

Prepare appointment communication

- [ ] For scheduled visits, the site should standardize confirmation timing, reminder timing, preparation instructions, reschedule handling, and who updates the recruitment record after the contact.
- [ ] Reminder workflows should be practical and respectful, with enough detail to reduce confusion without exposing unnecessary study or patient information in broad views.

Route questions to the right role

[ ] Some questions are operational, such as appointment timing or records status. Others may require investigator, study-team, privacy, or sponsor review.

[ ] The checklist should help coordinators route questions instead of improvising answers that belong outside the recruitment workflow.

Keep communication data useful and minimal

[ ] A site needs enough information to know what happened, who owns the next action, and when follow-up is due. It does not need broad reporting views filled with unnecessary message bodies or sensitive patient detail.

[ ] TrialsNest supports this operating model by keeping status, owner, blocker, and next action visible while preserving privacy-conscious workflow boundaries.

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