TRIALSNEST RESOURCE HUB PDF

# Clinical trial recruitment source launch checklist

A checklist for research sites launching new recruitment sources, including routing, approved language, duplicate handling, attribution, ownership, quality review, and shutdown criteria.

### How to use this checklist

Every new recruitment source should launch with clear language, routing, attribution, ownership, duplicate handling, quality review, and stop criteria.

## Quick checks

- [ ] Do not launch a source until routing, owner alerts, and source attribution are tested.
- [ ] Approved language, referral expectations, and patient handoff boundaries should be clear before outreach begins.
- [ ] Source quality should be reviewed by movement and readiness, not only by raw inquiry count.

## Confirm approved language and expectations

- [ ] Before a source launches, confirm the approved recruitment language, study description, contact path, privacy boundary, and what the source is allowed to say about the study.
- [ ] The source should not promise eligibility, enrollment, compensation, medical benefit, or a specific appointment outcome unless the approved materials support that language.

## Test routing before volume arrives

- [ ] The checklist should verify where inquiries land, which fields arrive, whether source attribution is captured, who gets notified, how duplicates are detected, and what happens if a record is incomplete.
- [ ] A test inquiry before launch is often the simplest way to catch broken routing while there is still time to fix it.

## Set ownership and service levels

- [ ] A source launch should include first-response expectations, owner assignment, backup coverage, no-response cadence, and escalation criteria.
- [ ] If a new source creates volume but no ownership rule, it can make the queue look busier while producing slower patient follow-up.

## Measure quality by movement

- [ ] Source quality should be reviewed through response rate, prescreen completion, records readiness, scheduling movement, screen-failure patterns, close reasons, and stale risk.
- [ ] Raw volume is useful, but it does not tell the team whether a source is creating reviewable candidates or avoidable workload.

## Define pause and shutdown criteria

- [ ] Before launch, agree on when a source should be paused, revised, or stopped. Examples include repeated wrong-study inquiries, low response after follow-up, poor records readiness, high duplicate rate, or misleading source expectations.
- [ ] That makes source management an operating discipline instead of a monthly debate about whether volume feels good or bad.