Clinical trial visit scheduling readiness checklist

A scheduling readiness checklist for research sites moving patients from prescreening and records review into screening visit appointments.

How to use this checklist

Scheduling readiness depends on more than a willing patient. Sites need records status, review status, visit windows, staff coverage, patient logistics, and confirmation steps aligned before booking.

Quick checks

- [ ] Do not treat a patient as schedule-ready until records, review status, visit fit, and logistics are clear.
- [ ] Scheduling workflows should show the owner, next action, due date, and confirmation status.
- [ ] No-show prevention starts before the reminder call, with cleaner readiness checks and realistic appointment options.

Define what schedule-ready means

- [ ] A site should define the fields that make a patient ready for scheduling. Common fields include prescreen status, records readiness, review needed, visit type, visit window, required procedures, appointment duration, and coordinator owner.
- [ ] The definition should be operational. It should not imply final eligibility or enrollment, but it should tell the coordinator whether booking the next visit is appropriate.

Check records and review status first

- [ ] Before scheduling, the team should confirm whether required records are received, partially received, pending, not needed, or waiting for review.
- [ ] If investigator or study-team review is needed, that status should be visible before the coordinator offers appointment options.

Confirm capacity before outreach

- [ ] Scheduling readiness includes site capacity. Confirm available slots, staff coverage, room availability, procedure needs, visit length, required fasting or prep instructions, and any sponsor or protocol constraints.
- [ ] If the first available appointment is far away, the patient follow-up plan should reflect that instead of leaving the record in a vague pending state.

Capture patient logistics without overcollecting

- [ ] Operational notes may include preferred contact window, transportation concerns, language access needs, and confirmation preferences when appropriate for the site workflow.
- [ ] The checklist should avoid unnecessary sensitive detail in broad reporting views. Keep the operational signal visible while preserving privacy boundaries.

Use confirmation as a workflow step

- [ ] Scheduling is not complete when a slot is placed on a calendar. The workflow should show whether the appointment is offered, accepted, confirmed, needs reminder, rescheduled, cancelled, or missed.
- [ ] Those statuses help the site learn whether delays come from records, capacity, no response, visit burden, or reminder gaps.