

Patient Recruitment Tracking Dashboard Example

A printable structure for reviewing source, status, owner, blockers, and next actions.

How to use this worksheet

Bring this into a vendor demo, sponsor-site meeting, or internal workflow review. Check what is true today, circle weak spots, and use the score boxes to decide what needs attention first.

01 Action buckets

Visible?

- New inquiry, awaiting prescreen, coordinator review, contacted, records needed, scheduling-ready, scheduled, stale, and closed.
- Each bucket should answer what action is needed today, not only how many patients are in the funnel.
- Stale leads should be separated from active review so the team can work exceptions first.

Notes

Use this space for vendor questions, site blockers, or sponsor follow-up.

02 Owner and blocker columns

Complete?

- Every lead has an owner, last meaningful action date, status, blocker, and next step.
- Common blockers include no response, missing records, pending review, scheduling conflict, criteria question, and source mismatch.
- The dashboard should show which blockers repeat by study or source.

03 Sponsor-ready summary

Ready?

- Summarize movement since the last update: new interest, completed prescreens, reviewable patients, scheduled visits, and closed reasons.
- Separate source quality from site execution and protocol friction.
- Close with owner, next action, and decision needed before the next report.

Notes

Use this space for vendor questions, site blockers, or sponsor follow-up.
