TrialsNest

AUDIT SCORECARD

Site Recruitment Workflow Audit Scorecard

Printable

SEO resource

A practical scorecard for finding where patient interest slows before screening.

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 Score area 1: Intake clarity

Score 1-5

- [ ] Every inquiry has study, source, status, owner, consent context, created date, and next step.
- [ ] Low score signals: unowned form exports, inbox-only tracking, unclear study interest, missing source, or manual cleanup.
- [ ] The first step is obvious before the lead starts aging.

Notes

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

02 Score area 2: Review and readiness

Score 1-5

- [ ] Prescreen answers, broad fit signals, missing records, review status, and scheduling readiness are visible together.
- [ ] Low score signals: records requests, coordinator notes, and eligibility questions live in separate systems.
- [ ] The team can tell which patients are ready for review and which need another step first.

03 Score area 3: Follow-up and reporting

Score 1-5

- [ ] Follow-up attempts, response timing, reminders, stale thresholds, and next steps are visible by stage.
- [ ] Sponsor reports come from the live workflow and include movement, blockers, source quality, scheduled visits, and next steps.
- [ ] The report changes behavior instead of only summarizing old data.

Notes

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