TrialsNest

BUYER WORKSHEET

Patient Recruitment Software Checklist

Printable
Workflow guide

A practical, printable checklist for research sites comparing recruitment platforms.

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 Intake and ownership

Score intake clarity

- [ ] Each inquiry captures study interest, source, patient location, communication consent, owner, status, and next step.
- [ ] The team can separate new, contacted, prescreening, records-needed, review-ready, scheduled, not-fit, and closed patients.
- [ ] Coordinators can tell who owns the lead without opening a separate spreadsheet or inbox.

Notes

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

Educational and operational resource only. TrialsNest does not provide medical advice, diagnosis, treatment, emergency care, or final clinical trial eligibility decisions.

02 Prescreening and records readiness

Score review readiness

- ☐ Prescreen answers, missing records, document requests, site review, and scheduling readiness stay visible together.
- ☐ Missing information creates a task or clear next step instead of becoming a buried note.
- ☐ The site can see which patients are ready for review and which need more information first.

03 Coordinator workflow and reporting

Score operating fit

- ☐ Coordinators can work follow-up, reminders, stale leads, appointment status, and team handoffs in one queue.
- ☐ Sponsor updates show movement, blockers, source quality, scheduled visits, and next steps without manual cleanup.
- ☐ Privacy notices, consent handling, role access, implementation effort, and support expectations are clear.

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