

Patient Recruitment Source Quality Index

A printable index for scoring recruitment sources by response, prescreen completion, reviewable fit, records readiness, scheduled movement, and close reasons.

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 movement

Weight

- Score each source by response rate, prescreen completion, broad fit, records readiness, scheduled movement, stale rate, and close-reason usefulness.
- Avoid judging source quality by raw inquiry count alone.
- Keep final eligibility and enrollment decisions separate from source scoring.

Notes

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

02 Compare by site and study

Segment

- Review source quality by location, condition, visit schedule, and study type before changing source strategy.
- Look for sources that create high effort but little reviewable movement.
- Identify sources that work well at one location but not another.

03 Make a decision

Action

- Choose continue, revise, pause, change messaging, improve follow-up, or review a blocker pattern.
- Include source-quality notes in sponsor reports.
- Use the index as a demo scenario when evaluating recruitment software.

Notes

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