TrialsNest

DASHBOARD EXAMPLE

Patient Recruitment Tracking Dashboard Example

Printable
Workflow guide

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.

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

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.

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