



# Checklist For Conducting Research Visits At Home

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## Pre-Visit Planning (1-2 Weeks Before)

- ☐ Confirm participant eligibility and consent
- ☐ Schedule visit date and time with participant
- ☐ Send confirmation email with visit details
- ☐ Prepare research protocol and materials
- ☐ Review participant's medical/research history
- ☐ Arrange transportation and plan route
- ☐ Prepare backup dates in case of cancellation
- ☐ Confirm all equipment is functioning properly

## Safety & Compliance Preparation

- ☐ Review institutional safety protocols for home visits
- ☐ Ensure valid professional liability insurance
- ☐ Update emergency contact information
- ☐ Prepare personal safety equipment (PPE if required)
- ☐ Review local COVID-19 or health guidelines
- ☐ Plan check-in system with supervisor/colleague
- ☐ Prepare identification badges and credentials
- ☐ Review participant's home safety assessment if available

## Materials & Equipment Checklist

- ☐ Research protocols and data collection forms
- ☐ Informed consent documents (multiple copies)
- ☐ Tablet/laptop for data entry
- ☐ Medical/research equipment (calibrated and tested)
- ☐ Backup batteries and chargers
- ☐ Sample collection materials if applicable
- ☐ Educational materials for participant
- ☐ Business cards and contact information

## Day of Visit Preparation

- ☐ Confirm visit with participant (call/text)
- ☐ Check weather and traffic conditions
- ☐ Charge all electronic devices
- ☐ Pack all materials in organized manner

- ☐ Dress professionally and appropriately
- ☐ Inform colleague of visit schedule and location
- ☐ Review participant's specific requirements
- ☐ Prepare parking/transportation payment if needed

## Upon Arrival Protocol

- ☐ Park in safe, legal location
- ☐ Text/call supervisor upon arrival
- ☐ Introduce yourself and show credentials
- ☐ Confirm participant identity
- ☐ Request permission to enter home
- ☐ Assess home environment for safety
- ☐ Find appropriate space for conducting research
- ☐ Ensure privacy and confidentiality

## During the Visit Execution

- ☐ Review study purpose and procedures
- ☐ Obtain/confirm informed consent
- ☐ Answer all participant questions thoroughly
- ☐ Follow research protocol step-by-step
- ☐ Collect all required data/measurements
- ☐ Maintain professional boundaries
- ☐ Document any protocol deviations
- ☐ Provide participant with study materials

## Data Collection Best Practices

- ☐ Use standardized data collection forms
- ☐ Double-check all measurements
- ☐ Ensure data completeness before leaving
- ☐ Secure sensitive information immediately
- ☐ Take detailed notes on observations
- ☐ Document environmental factors affecting research
- ☐ Obtain participant feedback on process
- ☐ Schedule follow-up visits if required

## Visit Conclusion Tasks

- ☐ Thank participant for their time
- ☐ Provide compensation if applicable
- ☐ Leave contact information for questions
- ☐ Confirm next steps in research process
- ☐ Ensure all equipment is collected
- ☐ Clean up any materials used
- ☐ Say goodbye professionally
- ☐ Text/call supervisor upon leaving

## Post-Visit Requirements

- ☐ Upload/enter data within 24 hours
- ☐ Complete visit documentation
- ☐ File expense reports if applicable
- ☐ Follow up on any participant concerns
- ☐ Report any adverse events immediately
- ☐ Clean and maintain equipment
- ☐ Prepare for next scheduled visit
- ☐ Update participant tracking system

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