



Checklist Preparing For Clinical Research Visits At Home

Free Checklist Preparing For Clinical Research Visits At Home with AI customization. Industry-specific guidance for checklist preparing for clinical research visits at home. Build your checklist now.

Initial Planning Phase (2-4 Weeks Before)

- ☐ Review study protocol thoroughly
- ☐ Identify all visit requirements and procedures
- ☐ Create visit-specific checklist from protocol
- ☐ Coordinate with study team members
- ☐ Review budget and resource allocation
- ☐ Assess staffing needs for visit
- ☐ Plan visit schedule and timeline
- ☐ Identify potential challenges or barriers

Participant Preparation (1-2 Weeks Before)

- ☐ Contact participant to schedule visit
- ☐ Send pre-visit instructions and requirements
- ☐ Confirm participant's home address and directions
- ☐ Verify participant has necessary space for visit
- ☐ Discuss any special accommodations needed
- ☐ Remind about fasting or other preparations
- ☐ Confirm participant availability for full visit duration
- ☐ Arrange for caregiver presence if required

Regulatory Preparation

- ☐ Ensure current IRB approval
- ☐ Verify informed consent is up-to-date
- ☐ Check for any protocol amendments
- ☐ Review HIPAA and privacy requirements
- ☐ Prepare confidentiality measures
- ☐ Update regulatory binders
- ☐ Confirm insurance and liability coverage
- ☐ Review institutional policies for home visits

Supply Inventory & Organization

- ☐ Create master supply list from protocol
- ☐ Inventory all supplies and equipment
- ☐ Order any missing items

- ☐ Organize supplies by procedure
- ☐ Label all containers and bags
- ☐ Prepare backup supplies
- ☐ Check expiration dates
- ☐ Create supply tracking sheet

Equipment Preparation & Testing

- ☐ Test all electronic equipment
- ☐ Calibrate measurement devices
- ☐ Charge all batteries
- ☐ Prepare backup equipment
- ☐ Clean and sanitize equipment
- ☐ Pack equipment securely
- ☐ Create equipment checklist
- ☐ Prepare troubleshooting guide

Documentation Preparation

- ☐ Print all necessary forms (multiple copies)
- ☐ Prepare electronic data capture access
- ☐ Create source document templates
- ☐ Organize forms by visit procedure
- ☐ Prepare participant handouts
- ☐ Include extra blank forms
- ☐ Waterproof important documents
- ☐ Create documentation tracking log

Team Coordination

- ☐ Assign team member responsibilities
- ☐ Schedule pre-visit team meeting
- ☐ Review visit procedures with team
- ☐ Discuss contingency plans
- ☐ Confirm team member availability
- ☐ Share emergency contact information
- ☐ Plan communication during visit
- ☐ Designate point person for issues

Logistics Planning

- ☐ Plan travel route and alternatives
- ☐ Arrange transportation/parking
- ☐ Check weather forecast
- ☐ Prepare for different scenarios
- ☐ Plan visit timeline with buffers
- ☐ Coordinate specimen pickup/delivery
- ☐ Arrange for interpreter if needed
- ☐ Plan for pet management

Risk Management Planning

- ☐ Conduct risk assessment for home visit
- ☐ Develop safety protocols
- ☐ Create emergency response plan
- ☐ Identify nearest medical facilities
- ☐ Prepare incident report forms
- ☐ Review liability insurance
- ☐ Plan for adverse events
- ☐ Establish check-in procedures

Week of Visit Preparation

- ☐ Confirm visit with participant (48 hours before)
- ☐ Check all equipment functionality
- ☐ Review participant's recent data
- ☐ Pack all materials systematically
- ☐ Prepare day-of contact list
- ☐ Review weather and traffic
- ☐ Confirm team member readiness
- ☐ Send reminder to participant (24 hours before)

Day Before Visit

- ☐ Final equipment check
- ☐ Charge all devices overnight
- ☐ Pack vehicle with supplies
- ☐ Review protocol one more time
- ☐ Prepare paperwork packet
- ☐ Check emergency supplies
- ☐ Confirm with team members
- ☐ Set multiple alarms

Day of Visit Final Checks

- ☐ Review checklist one final time
- ☐ Confirm participant is ready
- ☐ Check traffic and weather
- ☐ Ensure all supplies are loaded
- ☐ Verify documentation is complete
- ☐ Test communication devices
- ☐ Brief team on day's plan
- ☐ Conduct final safety check

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