



# Home Visit Checklist For Study Nurse Conducting Clinical Research Visit

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## Pre-Departure Clinical Review

- ☐ Review participant's complete medical record
- ☐ Check recent adverse events or SAEs
- ☐ Verify current medications and doses
- ☐ Review last visit's findings and issues
- ☐ Consult with medical monitor if needed
- ☐ Prepare participant-specific questions
- ☐ Review any new safety alerts
- ☐ Check for protocol updates

## Clinical Equipment Verification

- ☐ Blood pressure cuff (multiple sizes)
- ☐ Digital thermometer with covers
- ☐ Pulse oximeter with new batteries
- ☐ Stethoscope (cleaned and functioning)
- ☐ Penlight for assessments
- ☐ Measuring tape for wound/edema
- ☐ Weight scale (calibrated)
- ☐ Emergency medical supplies

## Medication Assessment & Management

- ☐ Review study drug accountability
- ☐ Count remaining medication
- ☐ Check storage conditions at home
- ☐ Assess compliance/adherence
- ☐ Review administration technique
- ☐ Check for side effects
- ☐ Document concomitant medications
- ☐ Provide medication education

## Comprehensive Health Assessment

- ☐ Obtain complete vital signs
- ☐ Perform targeted physical exam
- ☐ Assess cardiovascular status

- ☐ Check respiratory function
- ☐ Evaluate neurological status
- ☐ Examine skin integrity
- ☐ Assess pain levels
- ☐ Review systems comprehensively

## Laboratory Specimen Procedures

- ☐ Verify fasting requirements met
- ☐ Confirm participant hydration status
- ☐ Use proper venipuncture technique
- ☐ Collect specimens in correct order
- ☐ Label immediately at bedside
- ☐ Store at appropriate temperature
- ☐ Document collection details
- ☐ Arrange laboratory transport

## Adverse Event Assessment

- ☐ Review any new symptoms
- ☐ Assess severity and relationship
- ☐ Document onset and duration
- ☐ Evaluate need for medical care
- ☐ Determine if SAE criteria met
- ☐ Complete AE forms thoroughly
- ☐ Report SAEs within timeline
- ☐ Provide symptom management

## Participant Education Topics

- ☐ Review study procedures
- ☐ Reinforce medication instructions
- ☐ Discuss warning signs to report
- ☐ Provide dietary guidance if needed
- ☐ Review activity restrictions
- ☐ Educate on symptom management
- ☐ Confirm emergency procedures
- ☐ Answer all questions thoroughly

## Home Environment Assessment

- ☐ Evaluate medication storage area
- ☐ Check for safety hazards
- ☐ Assess fall risk factors
- ☐ Review emergency access
- ☐ Verify refrigeration if needed
- ☐ Check lighting adequacy
- ☐ Evaluate workspace for procedures
- ☐ Document environmental concerns

## Clinical Documentation Requirements

- ☐ Complete all CRFs accurately
- ☐ Document vital signs immediately
- ☐ Record physical exam findings
- ☐ Note any protocol deviations
- ☐ Complete medication logs
- ☐ Document participant education
- ☐ Sign and date all entries
- ☐ Ensure source documentation

## Emergency Preparedness

- ☐ Know participant's emergency plan
- ☐ Have MD contact readily available
- ☐ Carry emergency medications
- ☐ Know route to nearest hospital
- ☐ Have CPR certification current
- ☐ Bring emergency contact list
- ☐ Test communication device
- ☐ Review emergency procedures

## Quality Clinical Care

- ☐ Maintain sterile technique
- ☐ Follow universal precautions
- ☐ Ensure participant comfort
- ☐ Protect participant privacy
- ☐ Use therapeutic communication
- ☐ Demonstrate cultural sensitivity
- ☐ Maintain professional boundaries
- ☐ Advocate for participant needs

## Post-Visit Clinical Follow-up

- ☐ Review findings with study team
- ☐ Report critical values immediately
- ☐ Update medical monitor on concerns
- ☐ Schedule follow-up if needed
- ☐ Send specimens to laboratory
- ☐ Complete clinical notes
- ☐ Update participant's care plan
- ☐ Document in regulatory binder

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