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## PURPOSE

The purpose of this Standard Operating Procedure (SOP) is to describe the collection and use of a research participant recruitment log by member institutions. These logs will provide useful feedback to the NACHO Operations Center regarding common reasons why studies are not accruing as expected as well as demonstrate active and unbiased recruitment efforts by individual sites.

## POLICY

All NACHO members will maintain a Patient Screening Log (PSL) to document recruitment efforts at the member site, and will share this information quarterly with the NACHO Operations Center (NACHO OC) for use in the Institution Activity Reports (See NACHO SOP "Membership Categories, Criteria and Standards").

## PROCEDURES

### I. Patient Screening Log Template

The NACHO Operations Center (OC) will provide the Patient Screening Log (PSL) template to all sites activated to enroll patients on NACHO supported research studies.

#### A. The log will contain the following information at a minimum:

1. Unique patient identifier (assigned by member institution)
2. Gender
3. Date of birth
4. Protocol for which the patient was evaluated
5. Date of screening evaluation
6. Whether the patient was eligible or not, and reason why not
7. Whether the patient enrolled or not, and reason why not

#### B. The member institution may decide to collect additional information on the log as necessary for use by the member institution.

### II. Submission Schedule

The PSL will be submitted to the NACHO OC quarterly, on February 25<sup>th</sup>, May 25<sup>th</sup>, August 25<sup>th</sup>, and November 25<sup>th</sup>.

- A. The member institution will send an electronic copy of the PSL to the NACHO OC by email to: [NACHO.OperationsCenter@stjude.org](mailto:NACHO.OperationsCenter@stjude.org)
- B. The member institution is responsible for maintaining the code that links the patient to the Recruitment Log if needed for routine audits of site performance.
- C. Patient identifiers should not be included on the log when submitted to NACHO OC.

## MAINTENANCE RESPONSIBILITY

The NACHO SOP Ad Hoc Committee is responsible for the annual review of this SOP. Suggested changes must be proposed to and approved by the NACHO Executive Committee.

## AUTHORIZATION

This SOP was developed by the SOP Ad Hoc Committee and reviewed and approved by the NACHO Executive Committee.



**NACHO STANDARD OPERATING PROCEDURES**

**Patient Screening Log**

Effective Date: 12/18/2018

Approved by: NACHO Executive Committee

Revised Date: NA

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**VERSION/REVISION HISTORY**

Approval Date	Version	Version/Revision Summary
12/18/2018	V 1.0	Original documentation/publication.

**Attachment:**



**Patient Screening Log**

Institution Name: \_\_\_\_\_ PI: \_\_\_\_\_ Screening Dates: \_\_\_\_\_ \*No patients screened \_\_\_\_\_

	A	B	C	D	E	F	G	H	I	J
1	Subject Number	Gender (M/F)	DOB	Screened for (select protocol)	Screen Date	Eligible? Y/N	If not, why? (select one)	Enrolled? Y/N, Date	If not, why? (select one)	Comments / Other
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
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14										
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16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										

\*Check if no patients were screened for this quarter only.

Never use patient MRN's on sheet.

Use the Comment section to provide clarification of answers.

PI Signature, Date \_\_\_\_\_