

The 10-Minute Monitoring Visit Prep Checklist

A QUICK PRE-VISIT SWEEP FOR A CALMER, MORE FOCUSED DAY

Use this quick sweep before you leave, log in, or open the first subject. Adapt every item to the protocol, monitoring plan, sponsor requirements, and your organization's procedures.

MINUTES 0-2

Lock in the visit basics

- ☐ Confirm visit date, type, scope, location, and planned hours.
- ☐ Confirm system access, travel details, and key site contacts.
- ☐ List the subjects, visits, or records expected to be reviewed.

MINUTES 2-5

Scan open work

- ☐ Review the prior follow-up letter and unresolved action items.
- ☐ Check aging queries, missing pages, and upcoming visit windows.
- ☐ Flag new enrollment, reconsent, and overdue data entry.

MINUTES 5-8

Set risk-based priorities

- ☐ Prioritize safety events, eligibility, consent, and deviations.
- ☐ Identify critical source, device/IP accountability, or missing files.
- ☐ Note anything requiring PI review or same-day escalation.

MINUTES 8-10

Build the day's game plan

- ☐ Write your top three outcomes for the visit.
- ☐ Prepare focused questions for the coordinator and PI.
- ☐ Choose an end-of-visit check-in time and capture next steps live.

FIELD NOTE

If everything is a priority, nothing is a priority.

Circle the three items that would create the greatest compliance or follow-up risk if missed.

MY TOP THREE OUTCOMES
