

# PRE-VISIT CHECKLIST: Preparing For A Monitoring Visit

When preparing for a monitoring visit, here are a few tips to ensure you are prepared. Feel free to modify the list based on your protocol and/or directions from your study team.



**1 Contact Site** to agree on a day/time of your visit. Ask about any special on-site requirements especially as it relates to COVID-19.



**2 Update Your Study Team** (if required) regarding COVID-19 site requirements. Obtain approval, if needed.



**3 Book Your Travel** (airfare, hotel, rental car).



**4 Send Confirmation Letter** 3- 7 days prior to the visit.



**5 Pull Any Emails** and/or actions provided by the study team for you to address during your next visit.



**6 Check The Local Weather** so you can pack accordingly.



## Pull A Copy Of

- Your last Monitoring Visit Report.
- The last Follow-Up Letter.
- Your open Action Items.
- The site's Protocol Deviations, if any.
- The open Serious Adverse Event cases, if any.
- The current Interactive Voice Response System (IVRS) patient status report to show visit dates, patient status and drug assignments.
- The open Electronic Data Capture (EDC) queries and/or missing pages to be entered. Send a copy of these reports to your site prior to the visit to action before you arrive on site.
- Pull a copy of your Regulatory Binder document spreadsheet or similar document so you can reconcile the Regulatory Binder to the Trial Master File.

