

CHICKEN SOUP FOR THE BUSY COORDINATOR

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Pre-Screening Processes – Whose Responsibility?

Scenario

Upon seeing a research recruitment poster in the clinic, Cindy (a potential research participant) contacted Alice (the Clinical Research Coordinator for the study) to express her interest in participating.

Alice conducted a pre-screening questionnaire via a phone call to confirm her eligibility.



What are Pre-Screening Activities?

- Activities conducted to identify potential participants prior to informed consent, screening or enrolment.
- Providing a general overview of study and/or conduct pre-screening questionnaire
- Conducted via phone calls, brief in-person communication
- Identification of potential participants includes reviewing database or medical records



Who can conduct pre-screening?



Although the **Principal Investigator** is responsible for the overall conduct of the research study, research activities such as pre-screening can be delegated to **other study members**.

Ethical Requirements

Have you performed the following?

1. Obtained approval from DSRB to conduct pre-screening activities

Pre-screening activities are part of participant selection and recruitment process. Although consent is not required, make sure this recruitment strategy is approved by DSRB by providing the following:

- Describe the pre-screening activities in the study protocol submitted for DSRB review
- Specify the inclusion and exclusion criteria
- Specify pre-screening tools used e.g. questionnaire, checklist, etc.
- Provide script used for telephone communication (if any)

2. Obtained approval for review of database or medical records

According to applicable institutional procedures. (E.g. from Custodian of database, Head of Department)

3. Maintain a list of all potential participants approached for the study

Regardless of whether they have signed the informed consent form.

4. Document pre-screening activities

Using PCR 509-007 Subject screening and Enrollment log.

References: PCR SOP 501-C02
Subject Recruitment and Screening

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**Disclaimer: All characters appearing in this article are fictitious. Any resemblance to real persons is purely coincidental. Best practices may differ between institutions. Readers are encouraged to follow their institution's policies/guidelines relating to the above scenarios/case study.*