Screening Conversations

Northwestern University
NUCATS
Clinical and Translational Sciences Institute

Pre-screening is primarily intended to determine the eligibility of a participant and can be done in person, over the phone, or, in some cases, online.

Beyond simply finding eligible subjects, an effective pre-screening process can also help identify whether a potential participant will be a good fit for the study. You want to recruit subjects who will show up to scheduled visits, follow instructions by taking the study drug correctly, use any study devices appropriately, and complete all protocol-required activities.

Identifying the right participants is crucial for meeting your recruitment and retention goals; however, pre-screening can be inefficient if not implemented effectively and end up being more work in the long run. Remember, not all eligible subjects are going to be good subjects.

Tips & Talking Points for Screening Conversations

- Briefly introduce yourself by sharing your name and your role on the study team.
- Inform the prospective subject on the type of questions they will be asked in the pre-screening conversation. Specifically, you should mention that this discussion is intended to determine eligibility for the study and that some questions you ask them may be sensitive in nature.
- Respect everyone's time by telling the potential participant how long the call is expected to take and offer the option of completing the pre-screen at another time that might be more convenient.
- Provide the prospective subject a sense of autonomy: Let them know that they can stop the discussion at any time and offer to share a copy of the informed consent form for their review, electronically or via mail.
- Disclose all information about the study that is applicable to the potential participant to minimize future dropout rates. This includes the frequency of initial & follow-up visits, how long the visits may take, any time consuming or bothersome study activities (e.g. blood draws), and any expectations of the subject outside of the study visit (study journals, lifestyle changes, etc).
- Ask questions designed to determine eligibility and be sure to include all important inclusion/exclusion criteria. Decide if you will use direct or open-ended questions for each eligibility criteria. Be sure to practice asking sensitive questions using person-centered, destigmatized language (e.g. "Have you ever been tested for HIV?" as opposed to "Do you have HIV/AIDS?")
- Inform the potential participant of what the next steps will be and offer appointment dates and times for their informed consent conversation and first on-site visit.
- If the potential participant does not qualify, inform them what will be done with their information. Some sites keep information from potential participants on file for future study opportunities, but you should always ask first if they consent to have their information stored for future use.

Remember

Screening scripts and all study recruitment materials must be IRB-approved.

Follow Up

After pre-screening is completed, your site should have a procedure in place for following up with qualified potential participants to make sure they don't slip through the cracks. Ensure staff at your site understand who is responsible for contacting participants to schedule screening visits or who will be following up with potential participants who needed more time to consider participation. [Adapted from: Advarra]