











### Site Coordinator Weekly Task List

The following is guidance for site coordinators to ensure attention to and completion of essential weekly project tasks after the site is launched. The days of the week are suggestions and should be adjusted to fit the needs of each site team in terms of number of coordinators, schedules, and site-specific capabilities. If you have questions or would like to review your weekly process with the CCC, please email [idnet@ucla.edu](mailto:idnet@ucla.edu).

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #add8e6; border: 1px solid black; margin-right: 5px;"></span> HCP list</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ffff00; border: 1px solid black; margin-right: 5px;"></span> Excel macro</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ff0000; border: 1px solid black; margin-right: 5px;"></span> Med rec</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #4b0082; border: 1px solid black; margin-right: 5px;"></span> PI meeting</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #0000ff; border: 1px solid black; margin-right: 5px;"></span> Interviews</li> </ul>	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #90ee90; border: 1px solid black; margin-right: 5px;"></span> Email invite</li> </ul>		<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #9370db; border: 1px solid black; margin-right: 5px;"></span> Facility form</li> </ul>	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #e61e90; border: 1px solid black; margin-right: 5px;"></span> E-mail reminder #1</li> </ul>	
	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #e61e90; border: 1px solid black; margin-right: 5px;"></span> E-mail reminder #2</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ff0000; border: 1px solid black; margin-right: 5px;"></span> Med rec</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #4b0082; border: 1px solid black; margin-right: 5px;"></span> PI meeting</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #0000ff; border: 1px solid black; margin-right: 5px;"></span> Interviews</li> </ul>	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ff8c00; border: 1px solid black; margin-right: 5px;"></span> Check surveys are done</li> </ul>	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #00ff99; border: 1px solid black; margin-right: 5px;"></span> Call/text reminder</li> </ul>	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #9370db; border: 1px solid black; margin-right: 5px;"></span> Facility form</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #00ff99; border: 1px solid black; margin-right: 5px;"></span> Call/text reminder</li> </ul>	<ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #00ff99; border: 1px solid black; margin-right: 5px;"></span> Call/text reminder</li> </ul>	

## **Legend:**

-  Obtain list of tested HCP and add to Recruitment Log (*See MOP Section 4.2*).
-  Enter HCP from Recruitment Log into Excel macro, who were tested during the particular week you are selecting HCP to invite to the project (*See MOP Section 4.4.2*).
-  Send e-mail invitation to the selected HCP on the “Final” sheet, and if necessary, any replacements for HCP who decline participation or are non-responsive 60 days after their test date (*See MOP Section 4.4.2*). Email invites can be sent throughout the week (as necessary) if it has been at least 14 days from the test date.
-  Send e-mail reminder to HCP who did not complete REDCap screening form (*See MOP Section 4.4.3*). Resend the original email invite for reminder #1 and #2.
-  Complete weekly facility form in REDCap (*See MOP Sections 5.6 and 7.4*).
-  Check REDCap reports (titled “Baseline Survey Overdue” and “Follow-up Overdue”) for any overdue Baseline and Follow-up surveys (*See MOP Sections 5.3.1 and 5.3.3*).
-  Review/Update Screening Log and call or text HCP who have not completed REDCap screening within 1 week of initial e-mail invitation. Check hospital admission logs to determine if non-responsive HCP have been hospitalized. (*See MOP Section 4.4.3*). The call or text reminders should be a continuous activity (i.e., to check the Screening Log and make sure that there is some response noted for those who are not enrolled) through 60 days from the test date.
-  Check for medical records that need verification or source documentation. Request medical records for participants who have outstanding request forms. For the obtained medical records, upload into REDCap and abstract/verify data results (*See MOP Section 5.7*). Be sure to also check on what documents are uploaded, ensure that they meet requirements for source documentation, and complete the verification form for each record.
-  Study staff is encouraged to meet with the site PI weekly to discuss project activities.
-  Facilitate, schedule, and conduct telephone or in-person interviews as needed with enrolled participants (*See MOP Sections 5.2.2 and 5.2.3*).