

Site best practices

Best practices in focus

Consistent site practices are key to successful recruitment and patient engagement. As a reminder, here is some guidance that can help you streamline referral responses, strengthen communication, and maintain accurate records.

Integrating these steps into your daily workflows can lead to stronger enrollment outcomes and a better experience for both patients and sponsors.



Contact new referrals within 24 hours of receipt

50% of SubjectWell randomizations come from sites that contact new referrals within 24 hours.



Update patient dispositions/statuses in portal a minimum of once a week

Failure to update patient statuses may result in sites being paused from receiving any new referrals.



Have sites sign up to receive referrals via 3-way phone call with SubjectWell

Called a “warm transfer” — set warm transfer hours and contact information in your site portal.



Include detailed patient notes

We use information on contact attempts, patients “on hold,” and screen failures to track referral trends and make recommendations.



Try a variety of contact methods: phone, email, text

Sites can opt into the SMS feature in the site portal and text the patient directly from their profile.



Make a minimum of three contact attempts before finalizing a referral as “Could Not Contact”



Set your weekly referral limits or temporarily pause new referrals

Send an email to support@subjectwell.com with these requests.



Email support@subjectwell.com

For questions or to request a live Site Portal training from one of our site managers.