

# Referral Tracking

PhoneScreen provides online solutions for tracking the progression of patients' status from referral to enrollment. By managing site-level data, our system ensures sites follow up with potential subjects in a timely fashion while our comprehensive report suite provides sponsors with real-time enrollment analysis. Clients may utilize study branding and establish milestones specific to each protocol

## Site Solutions

Our online portal allows sites to view new call center referrals, along with their screening and responses, immediately after screening for rapid follow-up and appointment scheduling. Sites are able to add site identified patient information in a unified database to illustrate overall enrollment success. With simple navigation and a user-friendly interface, sites have the ability to include details results of communications and study visits.

## Sponsor Solutions

The referral tracking suite can be accessed through the study website or PhoneScreen's HIPAA-compliant portal. Project teams can actively monitor enrollment performance across all sites. With a top level view of referral history, including pending, enrolled and disqualified records, under-performing sites can be quickly identified allowing the sponsor to reallocate resources as needed. By providing a summary of total patient screen fails, sponsors can identify hurdles and adjust inclusion/exclusion criteria.

PS	ID: Local	Referral Date	Source	Patient Status	Disqualification Reason
0420145113		4/11/2009	Internet Referral	Pending	
18	12392	4/3/2009	Radio	Enrolled	
22		4/3/2009	Radio	Non-Qualified	Excluded medical condition
28	028	4/3/2009	Radio	Non-Qualified	Excluded psychiatric condition
34		4/3/2009	Radio	Non-Qualified	Did not return call/ unable to reach
35	1297	4/3/2009	Radio	Enrolled	
64	030	4/3/2009	Radio	Non-Qualified	Unwilling to comply with washout

Each site's follow-up of referrals is easily monitored by our aging reports, which displays lag time between referral to site and the sites' first contact with the potential subject. By identifying sites that are falling behind, sponsors can reduce the chance of declining referral interest

**Call 877.246.2007 or go to [www.phonescreen.com](http://www.phonescreen.com) to learn more about developing a strategic partnership to support your patient recruitment, retention and compliance efforts.**



36-36 33<sup>rd</sup> Street  
Long Island City, NY 11106  
P: 877.246.2007  
[www.phonescreen.com](http://www.phonescreen.com)