

# Primary Study Coordinator Study Hand-off

URCC #:	Transfer Date:
Current SC:	New SC:
PI:	Current DM:
Study CRO/Monitor: Email:	EDC:
Medical Monitor: Email:	Central Lab:
Safety Reporting:	Imaging Portal:
Shadow Chart Location:	IWRS:
	Other Database:
	Sponsor Devices:

	<p>Delegation Request, sent by a manager. Send updated delegation log to CRO/Monitor introducing new SC with the planned transfer date. Request all database/portal access to new SC.</p>
	<p>Confirm new SC has all database/portal access needed.</p>
	<p>Share patient visit invites with new SC to shadow during patient visits.</p>
	<p>Share patient tracker, review each patient (status, treatment, visit frequency, upcoming visit needs, upcoming visit dates)</p>
	<p>Ensure OnCore is up to date. Correct patient status, re-consents needed, etc</p>
	<p>Review where the shadow charts are housed. If they need to be moved, assist with boxing charts up and scheduling a courier. Ensure all study documents/forms/paper have been sent to the data manager or handed off to new SC if incomplete.</p>
	<p>Update all research tabs. Share research tab smartphrases and flowsheet locations, ensure these are updated to the latest protocol version.</p>
	<p>If the study is Open to Accrual, review the screening process. (pre-consent approval/slot requests? IWRS system for randomization? Who to submit eligibility packet to/turnaround time, etc)</p>
	<p>When the last PI oversight meeting? Anything outstanding? When is the next PI oversight scheduled?</p>
	<p>When was the last Monitor Visit? Any outstanding findings? When is the next Monitor Visit?</p>
	<p>If the study is an IIT, review last DSMC and when is the next one due. If the study has ever been audited and when. Is there an OHSP Audit scheduled/due?</p>
	<p>Save all email communications regarding the study/patients to the shared/box drive. Clean up shared/box drive folder.</p>
	<p>Study machines and devices. (tablets, EKG machines, syringe pumps, etc) where they are housed, how to use them, sign in (if applicable)</p>
	<p>Any sponsor invites shared (monthly meetings/safety update calls, etc)</p>

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	Schedule hand-off meeting. Invite; new SC, DM, DM/SC manager, study techs.
	Review any pending outstanding items, tip/tricks, other items:
	Make the clinic team and sponsor team aware of the study transfer.
	Additional Notes:

Previous SC Signature:	Date:
New SC Signature:	Date: