Checklist

STLCOP GSK COPD website: stlcop.edu/gsk

Steps BEFORE You Enroll Participants

Training

- ☐ STLCOP Webinar Training (<25 minutes)
  - Email Cheryl Hoffer, Project Manager, when completed
- ☐ CITI Program Training (6-8 hours)
  - Email certificate of completion to Project Manager
- ☐ GSK Training (<5 minutes)
  - Email Project Manager when completed

MHC

- ☐ Activate MHC CareMail account and create a new password
- ☐ View MHC CareMail webcast on study webpage

IRB

- ☐ Complete IRB Conflict of Interest Form
  - Email form to Project Manager
- ☐ Receive notice of IRB approval from Project Manager
  - CPI approval start date from Project Manager: _____

Steps DURING the Study

Preparing to enroll participants

- ☐ Generate "Report #1" (Patient/Participant tracking form)
  - Use template Excel spreadsheet (on study webpage)
  - Follow all instructions (on study webpage)
- ☐ Review report and identify potential participants
- ☐ Actively recruit participants (follow phone script on study webpage)
- ☐ Schedule study visit for potential participants

Conducting Study visit

- ☐ Obtain signed informed consent (give participant copy of signed document)
- ☐ Obtain authorization for release of medical information (give participant copy of signed document)
- ☐ Participant completes patient questionnaire
- ☐ Review participant questionnaire for completeness
- ☐ Inform participant of $10 check payment process
- ☐ Wrap-up study visit

Steps AFTER Study Visit

- ☐ Create PDF file of study documents (within 24 hours after study visit)
  - Signed informed consent
  - Authorization to release medical information
  - Participant questionnaire
- ☐ Send PDF file to STLCOP investigators via MHC CareMail (within 24 hours after study visit) and securely store originals in pharmacy
- ☐ Generate Report #2 (medication fill data)
  - Use template Excel spreadsheet (on study webpage)
  - Follow all instructions (on study webpage)
- ☐ Send Report #2 to STLCOP investigators via MHC CareMail
- ☐ After enrollment/data collection of all participants, mail (USPS) original study documents (informed consent, authorization to release medical records, and participant questionnaires)

Date of Project Manager site visit: _____