SCRS
Society for Clinical Research Sites

AI Quick Start Guide for Clinical Research Sites

What Is AI?

AI is a tool that helps you generate, summarize, organize, and improve information faster. Think of it as a very knowledgeable assistant - not a decision-maker.

THINK OF AI AS:

- A drafting assistant
- A brainstorming partner
- A research aide
- A workflow helper

DO NOT THINK OF AI AS:

- A replacement for human judgment
- A source of regulatory decisions
- A substitute for quality review
- A place to enter confidential data

AI Guardrails For Clinical Research SIte

DON'T:

- Upload protected health information (PHI)
- Upload confidential sponsor documents unless approved
- Copy and paste AI responses without review
- Assume AI is always correct
- Use AI to make medical decisions

DO:

- Remove patient identifiers (PHI) before using AI
- Review all AI-generated content before sharing
- Verify regulatory, medical, and protocol-specific information
- Follow your organization's policies and approved tools
- Use AI to create first drafts, summaries, checklists, and workflows

Better Prompts = Better Results

Use this formula:

Role + Task + Context + FormaT

"You are a clinical research coordinator. Create a participant visit checklist for a Phase III obesity study. Include screening, baseline, and follow-up visits. Present as a table."

The more context you provide, the better the output.

Quick starters:

- "Summarize these meeting notes into key decisions and action items."
- "Create a checklist for [process] at a clinical research site."
- "Rewrite this email to be professional, concise, and collaborative."
- "Build a step-by-step workflow for [task]."
- "What questions should I ask about [topic]?"

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5 Tasks To Try This Week

- Write a first draft of a document
- Build a workflow
- Create a checklist
- Draft an email
- Summarize a meeting

Quick Wins You Can Use Today

Meeting Summaries
"Summarize these meeting notes into key decisions, action items, owners, and due dates."

SOP Drafting
"Create a draft SOP for documenting protocol deviations at a clinical research site."

Email Writing
"Rewrite this email to be professional, concise, and collaborative."

Workflow Mapping
"Create a step-by-step workflow for participant recruitment from referral to randomization."

Training Materials
"Create a one-page training guide for new coordinators on informed consent best practices."

Feasibility Responses
"Draft a response explaining our site's experience recruiting obesity and Type 2 Diabetes patients."

Process Improvement
"Review this workflow and identify opportunities to reduce administrative burden."

Start small. Experiment often. Review everything. The sites that learn how to work with AI today will have a significant operational advantage tomorrow.