

Research Screener Template

A participant qualification guide for UX researchers. Use this template to filter for the right participants before your study begins.

TIP

You can either run this template session-by-session and bring recordings within Looppanel OR paste this as a discussion guide within your study on Looppanel directly which will be automatically used to auto-transcribe, tag themes with AI, and find patterns across participants.

This PDF is editable. Click any shaded field to type into it — the highlighted placeholders are yours to rewrite. Prefer pen and paper? Print it and write on the lines.

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SECTION 1 — SCREENER DETAILS

Fill this in before publishing the screener.

Study Name

Researcher

Target Sample Size

e.g. 8 qualified participants

Screener Live Date

Recruiting Deadline

Incentive

e.g. \$75 gift card for 60-min session

SECTION 2 — PARTICIPANT CRITERIA

Define who qualifies before writing the questions.

Must-have criteria (qualifying):

Must-not-have criteria (disqualifying):

e.g. Employees of competitor companies, internal team members, anyone who has participated in research in the last 6 months

Nice-to-have criteria:

SECTION 3 — SCREENER QUESTIONS

Keep to 5 to 10 questions. Use neutral language. Do not reveal the research topic.

Q1

What is your current job title or role?

NOTES

Q2

Which industry does your company operate in?

FOLLOW-UP PROBES:

- Options: [List relevant industries + Other]

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Q3

How long have you been in your current role?

FOLLOW-UP PROBES:

- Options: Less than 6 months / 6 to 12 months / 1 to 3 years / More than 3 years

NOTES

Q4 How often do you [relevant behavior or task]?

FOLLOW-UP PROBES:

- Options: Daily / Weekly / Monthly / Rarely / Never
- Disqualify: Rarely / Never

NOTES

Q5 Which of the following tools or products do you currently use? (Select all that apply)

FOLLOW-UP PROBES:

- Options: [List relevant tools]
- Disqualify if: Uses competitor product only

NOTES

Q6

Have you participated in a research study or user interview in the last 6 months?

FOLLOW-UP PROBES:

- Options: Yes / No
- Disqualify: Yes

NOTES

Add your own qualifying questions here. Replace or remove any that don't fit your study.

SECTION 4 — DISPOSITION GUIDE

How to handle each outcome after reviewing responses.

OUTCOME

WHAT IT MEANS AND WHAT TO DO

Qualified

Meets all must-have criteria, no disqualifying answers → Invite to schedule

Waitlist

Meets most criteria, missing one nice-to-have → Keep in reserve

Disqualified

Fails any must-not-have criterion → Send polite decline

DECLINE MESSAGE

Hi [Name], thank you so much for your interest in our research. Unfortunately, we're not able to include you in this particular study as we've reached our quota for your profile. We'll keep your details on file for future studies. Thank you again for your time.



 Looppanel

You found the right people. Now skip the grunt work.

Bring your sessions into Looppanel to auto-transcribe them, tag themes with AI, and find patterns across participants — in minutes, not weekends.

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