MERGE CTMS WORKFLOW

Admin Module

Step 1:
Add Essential Core Data
Sites, User Accounts, Medical History, Patient Statuses, Patient Flags, New Patient Defaults

Studies Module

Step 2:
Add Study Wizard
Build Study Definition, Study Sites, Procedures, Visits and Arms, Use Visits and Procedures Grid to Make Changes as Necessary

Step 2.1:
Q/A Study Entry
Reorder Procedures as Necessary, Check / Add Procedure Notes, Export Study Schedule to Excel to Q/A Study Entry

Step 3:
Add Study Custom Fields

Step 4:
Add Study Personnel
Identify and Associate CTMS Users and Study Providers

Step 5:
Upload Study Documents in Document Tracking

Step 6:
Build Study Budget
Build Study Budget, Identify Visit and Study Level Financial Items, Add Holdback(%) and Overhead(%) if applicable, Build Payables

Step 6.1
Q/A Study Budget
Export Study Budget to Excel and Compare to Sponsor Budget

Patients Module

Step 7:
Add and Enroll Patients
Demographics and Enrollment Info, Medical History, Patient Identification

Step 8:
Add Patient Visits:
Complete and Submit Visit Checklist, Update Patient Status, Update Enrollment Info as Necessary

Studies Module

Step 9:
Financial Activity Tracking
Assess Accruals, Holdbacks, Receivables and Payable Activity, Apply Payments, Create Invoices