CTO Clinical Trial/Research Financial Workflow

Clinical Trials Office Scope
- Industry AND IRB: Exempted, full board review, or exempt (including Post Award PI initiated)
- All non-disclosure agreements (NDAs)
- All confidential disclosure agreements (CDAs)

Review CTA
- Negotiate Terms
- Execute CTA

Develop MCA, Budget Template, Payment Terms, ICF (review Payment/Injury/Cost)
- Negotiate Budget
- Provide high level cost summary

Create Velos Record
- Create InfoEd Record

Study Team Input Required for: MCA/Budget/CTA/etc.
- See Clinical Trial Process for a more comprehensive list of responsibilities

Yes

Post-award Financial maintenance
- Salary allocation; monthly financial review; Clinical Billing; Invoice Payments; Procurement, etc
- See Clinical Trial Process for a more comprehensive list of responsibilities

Participant
- Remuneration
- Participant Research Billing Workflow

Post-award Financial maintenance
- Invoicing; AR Follow-up; Reporting; Hosting monthly meeting with department; Journal Entries; General compliance oversight

PI Initiated or non-industry funded

Clinical Trial Process
- Managed by:
- Industry Sponsor Initiated Human Subjects

Sponsored Programs Administration (SPA)
- Government agency and foundation funded
- Industry AND basic science/non-human research
- All material transfer agreements (MTAs)
- All data transfer agreements (DTAs, DUA)
- All sub awards

Participant Service/Item/Intervention
- Grant/award preparation & submission
- Post-award maintenance

Research FIN. (FR)

Sponsored Programs Administration (SPA)