

FINANCIAL MANAGER REVIEW PROCESS

FACTS Assigned Administrator for IDEATE assigns study to Finance Manager [IDEATE Analyst]

Finance Manager [IDEATE Analyst] performs FACTS/Micro Review in IDEATE Review of all Draft documents

- Financial Administration Tab-Checklist
- Attachments Tab – Protocol, Consent Form, other
- Funding Tab – CTA/Budget
- Procedures Tab - Compensation

Checklist – Determines MCA Required or MCA Not Required
CTA – Sponsor providing drug/device
Budget - Sponsor paying for protocol required clinical service
ICF – Cost Payment Section
Patient Injury Section

FACTS Micro Review IDEATE Approve

FACTS Micro Review IDEATE Revisions Required

Finance Manager completes a Qualifying Clinical Trial Analysis

If Qualifying IF MCA Required

Medicare Coverage Analysis [MCA] completed by BRANY

Peak Training for PI Completed

If NO – email PI Provide information regarding MCA training

Finance Manager Submits MCA to PI for review/signature

Finance Manager complete review of final documents for consistency