Business Officer II

1. Effort
    a. Requesting Effort reports from CRE staff the last week of each month
    b. Reclass CRE staff by the 15th of the month
    c. Ensuring effort reports are certified at biannual certifications
    d. Work with Leigh to determine coordinator effort on Federal grants
    e. Ensure any late certification or recertifications are completed per UAB processes and policies

2. Study Account Management/Accounts Receivable
    a. Enter new studies into FBS and send out invoice for startups at contract execution
    b. Invoicing for study payments from FBS
        i. Startups
        ii. Annuals
        iii. Invoiceable items such as subject hotels and travel, Monitor Visits
    c. CREfinance inbox- checking and responding daily
    d. CREInvoice- checking and invoicing daily
    e. Oversight of deposits
    f. Saving wire transfer information/check deposit information in study folder- Financial Admin
    g. Applying payments to invoices in FBS
    h. Study audits as needed and at study close out
    i. Updating CREST with account string
    j. Requesting NCEs on industry projects
    k. Working to get CTO holds removed on study accounts
    l. Entering monthly journal entries for MOU payments

3. PI reports
    a. Update PI report template
        i. Award downloads for each Division/Department
        ii. AR from FBS
        iii. Outstanding effort amounts
    b. Following up on issues from previous report to ensure open action items are completed

Clinical Trials Administrator II

1. Accounts Payable
    a. Pays external bills (WCG IRB, LabCorp, etc)
        i. Sends any that need to be invoiced to the sponsor to Brian for invoicing
    b. Pays internal bills (IDS, HSF, MSO, lab, etc)
        i. Brooklyn assists with many of these bills, Bobby ensures bills are saved and paid
    c. Subject payments
        i. Stipends
        ii. Re-imbursements

iii. Greenphire
    1. Setup studies in Greenphire system
    2. Approve payments in Greenphire
    3. Add new users to the Greenphire

2. P Card/Purchasing
    a. Orders general office supplies—including coffee and printer supplies
    b. Orders study specific supplies (non-lab/CH20 clinic)
    c. Order computers and phones as needed (new staff, etc)
    d. Uber account management
    e. Reconciles P-Card in Oracle (uploads receipts into onbase and confirms acct)

3. Oncore Financials
    a. Enter Protocol related Financial items in Oncore
    b. Work with Lauren to enter subject related items
    c. Work with Brian/Sue Ellen/Sarah to get coordinators trained for roll out after new year (tentative March 2023)

4. Dashboard maintenance
    a. Continue to add on and build CREST as needed to make it a robust dashboard
    b. Continue to work on CREEL
    c. Consider an effort reporting log for coordinators?

<u>Project Manager I</u>

1. Manage CH20 Clinic
    a. Order supplies for the clinic space
        i. Bobby to assist as needed
    b. Stock rooms daily
    c. Frequent rounds of the clinic space during business hours
    d. Monitor cleanliness of clinic
    e. Write and Maintain Protocols for clinic
        i. Annual biomed check of equipment
        ii. Emergency protocol
        iii. COVID protocol (during surges)
        iv. Operating procedures for clinic space
        v. Others as needed
    f. Manage Redcap Database for reserving space in CH20 Clinic

2. Facilities- CH20 and CH19
    a. Work with DOM Facilities team to manage CH20 and CH19 space
        i. Submit work orders
        ii. Communicate building issues to Facilities, EVS, Security, etc as needed
    b. Manage shared space- including lab kit storage, drug storage areas, long term storage, 2nd floor CH20 lab
        i. Help coordinators locate space for storage of study items
        ii. Frequently check for boxes and mail that need to be connected to the right person

        iii. Manage room scheduling
    c. Working with Parking and Transportation
        i. Assist new staff with obtaining parking
        ii. Order new parking passes for lot 77 as needed
        iii. Troubleshoot parking issues
    d. Communicate important messages to all building occupants
        i. Coordinate monthly building meetings
        ii. Communicate with all areas about any building issues people need to know about

3. Liaison with other clinics and ancillary areas
    a. Assist Jane with pre-site visits that need to see other areas on campus
        i. Setup times with IDS, CRU, etc
        ii. Transport the study team to their appointment
    b. Setup studies in ancillary areas around campus
        i. Areas such as CRU, Radiology, CCTS lab, Tissue Procurement
        ii. Work with Jane/Sarah on Oncore submissions to communicate where procedures will be taking place
    c. Internal Bill Paying
        i. HSF
        ii. IDS
        iii. MSO
        iv. Lab bills

<u>Research Nurse Coordinator III</u>

1. Education
    a. Onboarding new CRE staff
        i. Establishing accesses as needed
        ii. Ensuring appropriate trainings occur
    b. Training of Fellows/Residents
    c. CPR classes as needed for CRE staff
    d. Develop and Maintain HealthStream curriculum on clinical research
    e. Compliance
        i. Re-educates faculty and staff as needed based on compliance concerns
        ii. Helps draft CAPA with regulatory

2. Pre-Selection Process
    a. CDA Submission to OSP
    b. Feasibility Questionnaires
    c. Pre-Site Visits
        i. Coordinated with Brooklyn for monitors needing to see ancillary areas
        ii. Loop in lead coordinator for the section if they are available to attend

3. Study Start Up Process
    a. Submit CTA to OSP for processing
    b. Update the applicable areas on CREST
    c. Oncore/CBR submission for drug studies

        i. Includes initial submission, completing billing plan, final calendar validation
    d. Study hand-off to coordinator
        i. Protocol Information Sheet should be completed and sent to coordinator with pertinent documents such as protocol attached
        ii. Coordinator will work with their CRC III or Sue Ellen to complete Powertrials validation and notify once complete
        iii. Jane will complete the final Oncore calendar review/validation

4. Ongoing Study Support
    a. CTA amendment submission to OSP for processing
    b. Educating staff on skills or processes that are new to them, as needed
    c. Helping with recruitment and retention plans, as needed
    d. I2b2 queries
    e. Build REDCap databases