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# Clinical Research Enterprise (CRE)

## Standard Operating Procedures

### Monthly CRE Fiscal Analysis Reporting

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**Version:** 1.0

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**Approval:** Approved By 

*Electronically signed by: Thomas  
Patrick Frazier  
Reason: I am the approver.  
Date: Jan 25, 2024 11:12 CST*

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#### Purpose

The purpose of this SOP is to provide a description of the responsibilities and expectations of the CRE monthly fiscal analysis reporting process

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#### References

- PI Report Roles/Responsibilities Spreadsheet
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#### Scope

This SOP applies to all member of the CRE staff.

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#### Allowable Exceptions

This SOP is meant to be followed without deviation.

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### I. Roles and Responsibilities

#### a. Director of Clinical Research

- i. Assist with any issues escalated, attend meetings and answer any questions related to overall CRE structure/finances

#### b. Research Nurse Manager (Contracts/Finances)

- i. Prior to Meetings: Compile and review all Fiscal Analysis reports and send to collaborators mid-month for the previous month
- ii. During Meetings: Drive meeting and present reports
- iii. After Meetings: Follow up as necessary

c. Research Nurse Manager (Coordination)

- i. Prior to Meetings: For both industry and federal reports, complete columns labeled Status, Consented, Enrolled, Most Recent Enrollment, Enrollment Goal, and Comments/Concerns and add new studies prior to the 15<sup>th</sup> of each month
- ii. During Meetings: Answer any questions related to study coordinator performance and/or recruitment and retention concerns
- iii. After Meetings: Follow up as necessary

d. Research Nurse Manager (Grants Management)

- i. Prior to Meetings: Prepare post-award reports on all federal, foundational, and non-profit study finances prior to 15<sup>th</sup> of each month
- ii. During Meetings: Answer any questions related to federal, foundational, or non-profit project finances
- iii. After Meetings: Follow up as necessary

e. Business Officer II

- i. Prior to Meetings: Pull all award downloads for all collaborators and AR aging report, update columns labeled Account #, Study, Sponsor, PI, Oracle Balance, Oracle End Data, Outstanding Funds, AR Aging, Monthly Effort to be Applied, and Modified Balance, Move any studies ready to close to second tab; and add new studies as they startup prior to the 15<sup>th</sup> of each month
- ii. During Meetings: Answer any questions related to pending invoices and provide follow up to previously identified issues
- iii. After Meetings: Follow up as necessary