



WCG Velos eResearch

Financial Section

Sep 9, 2021



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Topic	Presenter
Introductions	Ron Thornton
Overview	Sonia Abrol
Demonstration	Sonia Abrol
Specific Questions	Sonia Abrol
Q & A	All

WCG Team



Ron Thornton

General Manager, WCG Velos



Sonia Abrol

VP, Product and Strategy



Charlie Eibeler

VP, Business Development, Institutions



Harry Chahal

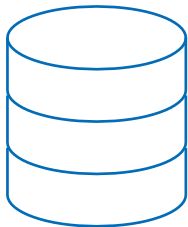
Sr. Director, Professional Services and Product Integrations

Outcomes Velos Customers can Expect from WCG Velos Strategic Partner of the Future



Best-in-class electronic platform

- Live across 30 research departments, with Epic Interfaces, data conversion in 4 months
- Consistent Processes



Clinical Integration Hub/Digital Health

- 5x increase in productivity
- 80% reduction in data entry time



Increased visibility and collaboration

- Network/partnership capable platform across 40 children's hospitals
- Source system across an enterprise of >22,000 studies



Scalable Growth and Continuous Improvement

- 120 physical locations
- 77,000+ studies; 97,000+ users

Accelerated Research



eResearch Enterprise Product Demonstration

WCG Velos eResearch - An Integrated Platform



Study Setup

- Protocol Definition
- Study Calendar
- Budget
- Coverage Analysis
- CRF Design
- Document
- Study Team
- Status Tracking
- Submission/ Review



Patient/ Subject Management

- Coordinator Portal
- Patient Profile
- Subject Status
- Consent
- Visit Tracking
- Deviation Tracking
- Participant Portal



Financial Management

- Charge Master
- Milestones
- AR/AP
- Invoicing
- Payment
- Reconciliation



Clinical Data Management

- EDC
- Validations
- Monitoring



Reporting and Reconciliation

- Canned Reports
- Special Needs
- Ad-Hoc Queries
- Actionable Intelligence



Leader Lucy

Director, Clinical Trial Manager, Supervisor



“It’s important to me to improve and sustain the organization I work for by balancing business, personnel, and patient needs.”

Cashflow Carl

*Director of Finance and Contracts,
Research Business Associate*



“Properly evaluating studies to see if they are worth taking on and then making sure we’re paid for those studies allows us to stay in business and help patients.”

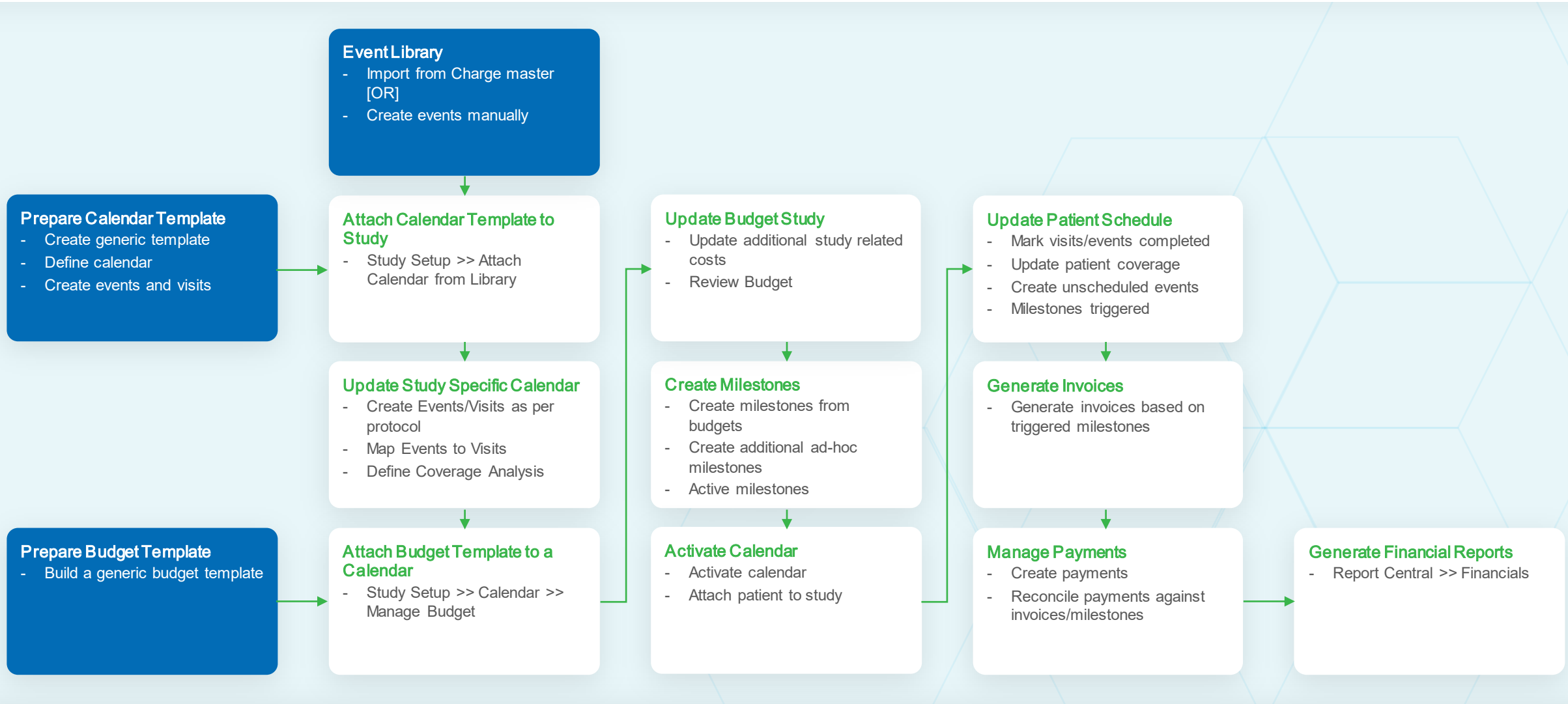
Patient-Focused Patricia

Study Coordinator



“Patients are my number one priority, and I do my best to devote as much of my time and energy to them as I can.”

Financial Workflow

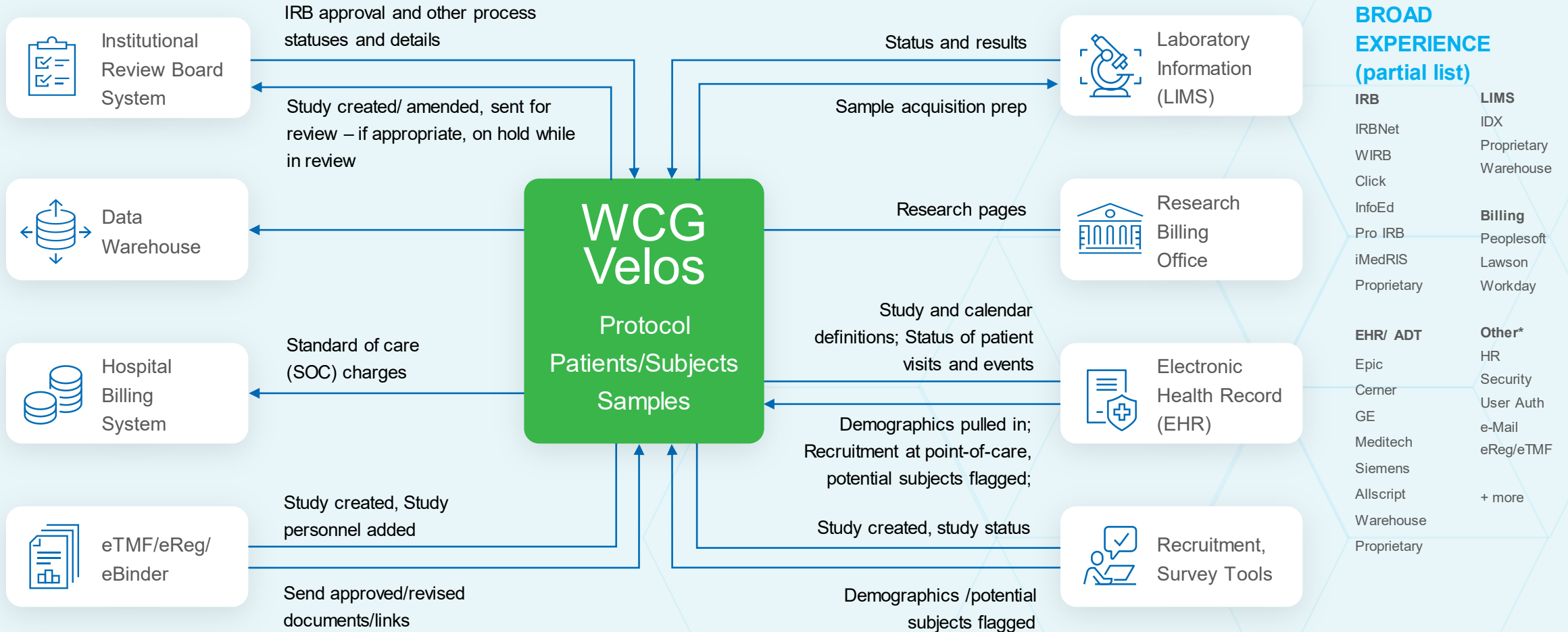




Interoperability

An Integration Ecosystem

Single source of truth decreases compliance risk, burden and duplicate data entry



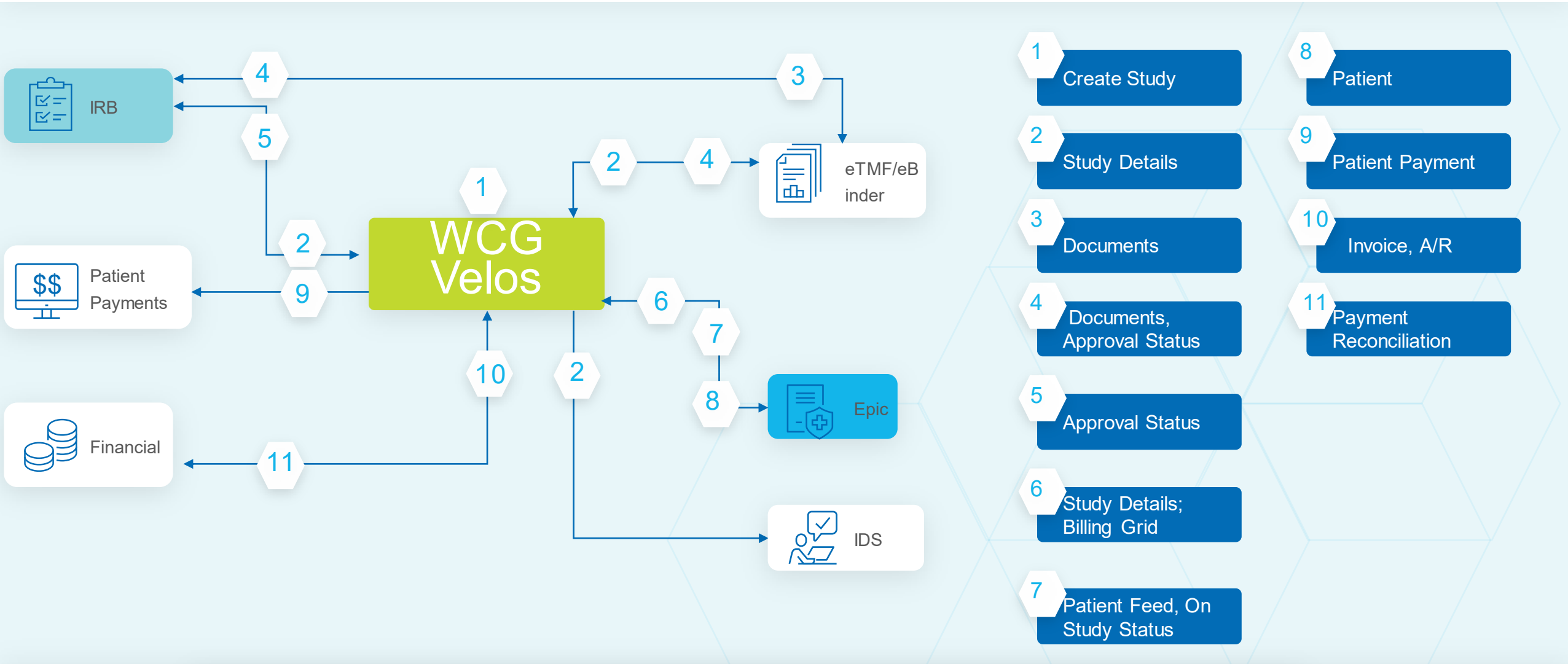
*Velos eResearch APIs



Key Integrations

Suggested: Integration Ecosystem

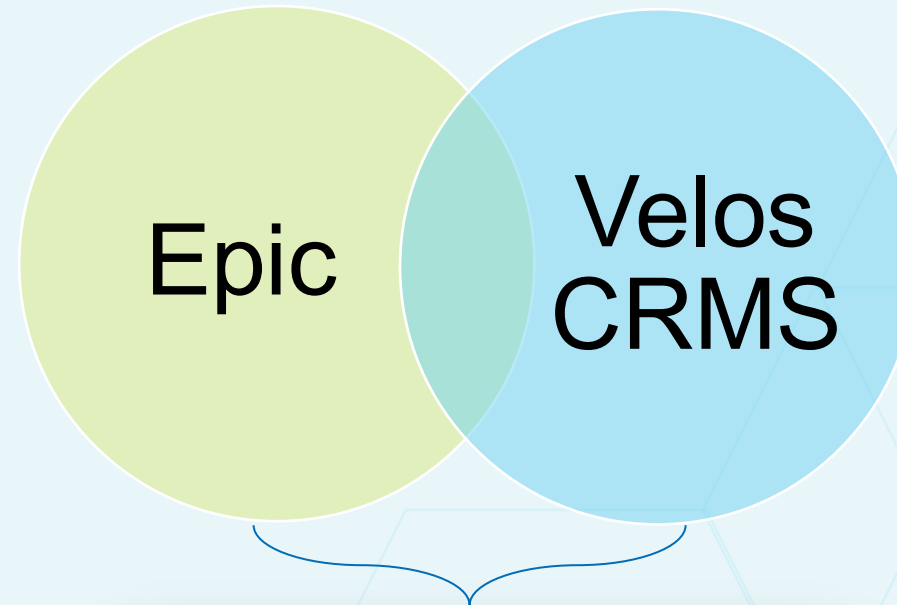
Single source of truth decreases compliance risk, burden and duplicate data entry



Best Practice: CTMS should have all studies, source of truth for all research data

Epic: Patient Centric

- Comprehensive management of a patient over time
- Patient Safety
- Clinical User Efficiency
- Research Billing Compliance
 - If Epic is billing system
 - Separate Charges



- Basic Study Information
- Participants on the Study
- Research Billing Modifiers

WCG Velos eResearch CRMS

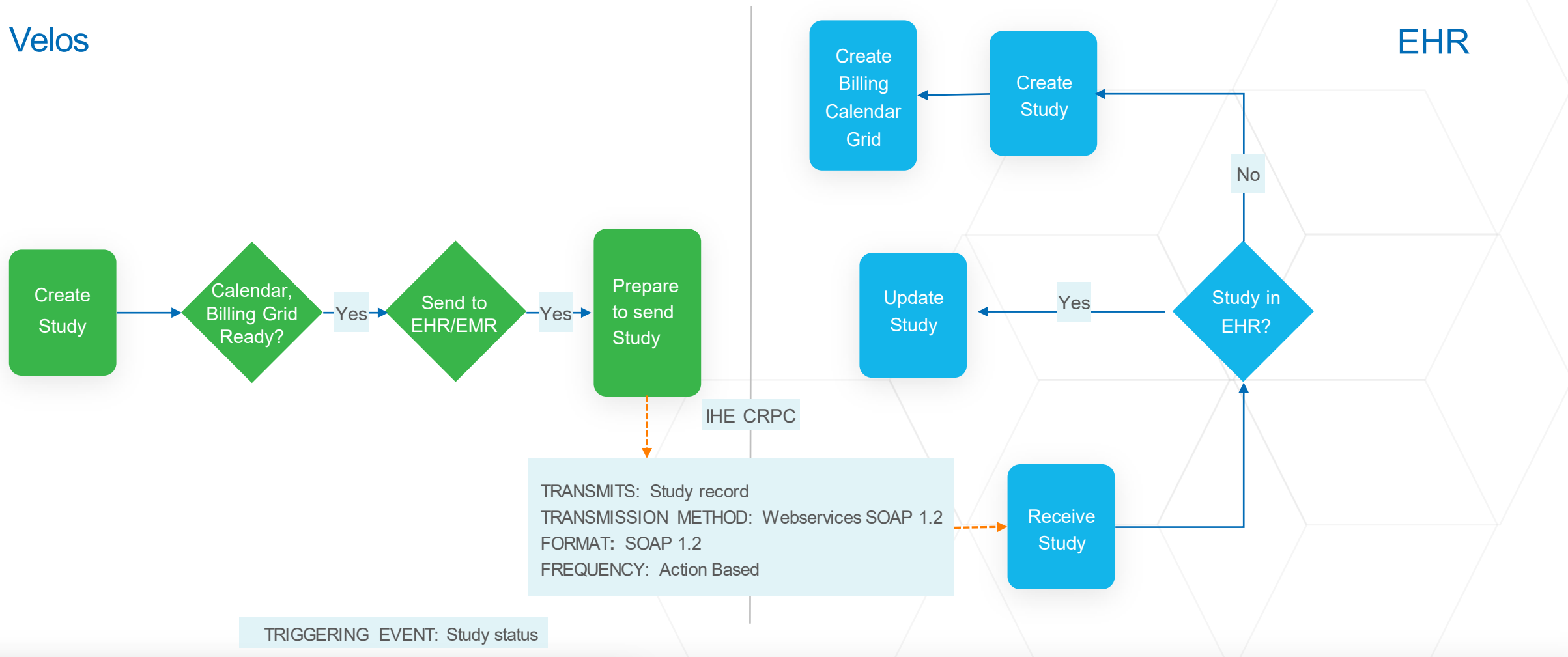
- Comprehensive management of a study
- Startup-Initiation
- Study Conduct
- Study Close-out
- Subject Protocol Compliance
- Investigator Protocol Compliance
- Study Financial Management

Integration with EHR/EMR: Study and Billing Grid



Velos

EHR



Next Step: Visit Completion from Epic > Velos

Integration with EHR/EMRs

Interface	Level	Description	Create/Update	Direction
Patient Demographics	Patient Level	The interface is based on the industry standards (ADT- HL7, related to patient demographics.	Create Update	EHR → CRMS
Research Study Record IHE-RPE	Study Level	The interface populates certain study characteristics, which are entered in the CRMS.	Create Update	CRMS → EHR
Patient Study Association/Disassociation IHE-RPE	Patient Level	The interface involves associating a patient to a study via a request to either system (EHR or the CRMS) to add a patient to a study.	Create Update	CRMS ↔ EHR
Study Calendar Record IHE-RPE-CRPC	Study Level	The interface defines Study Calendars built within the CRMS to support the management of the study (e.g. study compliance, billing/coverage analysis, data capture, etc.).	Create	CRMS → EHR
Patient Labs	Patient Level	The interface is based on the industry standards (ADT- HL7, related to patient lab tests.	Create Update	EHR → CRMS

Integration with Financial Systems (Future State!)



Velos eResearch

- Manage Charge Masters
- Define Calendars
- Define Billable Charges
- Define Payment Milestones
- Record Events/Statuses
- Create Invoice
- Create Payment Records

Financial Systems



Charges

All billable charges



Invoices

Send/receive invoice information



Payments

1. Receive payment information
2. Reconcile with Invoice

TRANSMISSION METHOD: File based
FORMAT: CSV
FREQUENCY: Configurable



Q&A



Thank you!

WCG

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