

# SiteVault CTMS Implementation Plan: A Quick Guide

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To explore how CTMS implementation can transform site operations, let's step into the shoes of a fictional site leader.

Meet Dr. Julian Hayes, Director of the Cardiology Research Department at Veeva Medical Center. Like many research sites, his team excels at patient care and advancing science. However, their administrative processes create significant challenges. Doctor Hayes and his team currently struggle with:

## The Challenge: Operational Hurdles

- **Inefficient Patient Tracking:** Difficulty reporting exactly how many patients have been screened, randomized and completed across all protocols over the last 5 years.
- **Poor Financial Visibility:** We don't have a clear, real-time picture of outstanding payments from sponsors or the total dollars earned.
- **Unclear Workload Distribution:** It's hard to accurately measure the time and effort our staff dedicate to each study, making resource allocation difficult.

## The Solution: Adopt CTMS

To solve these problems, we will adopt **SiteVault CTMS**.

The primary goal is to have **all active and startup studies fully managed within the CTMS by the end of Q1 2026**.

We will measure success in two key areas:

1. **Financial Clarity:** A real-time view of all money earned, paid, and owed for every study.
2. **Operational Foresight:** A **6-month projection of all scheduled patient visits** for better planning.

# Foundational Setup

I've established a three-step plan to ensure we complete this project within our two-month timeline:

## Step 1: Prioritize Studies

We'll analyze our current study portfolio and implement CTMS in the following logical, phased order that works for us:

- 1. Study ABC: Small, recently completed study is perfect for our first entry. It will allow our finance specialist to master the **payment reconciliation** workflow and confirm past earnings against payments.
- 2. Study 123: As our most **active** trial, moving this study into the CTMS is critical for streamlining current invoicing and visit tracking. This is our top priority for ongoing revenue cycle management.
- 3. Study 456: This study has a finalized budget, making it ideal for **building a new trial from scratch** in the system.
- 4. Study XYZ & Study 789: These studies are in **startup**. We will build their shells in CTMS and will complete the budget and visit schedule sections as soon as those documents are finalized.

## Step 2: Define Roles & Responsibilities

Here are the key players and their defined roles in our new CTMS workflow:

- Dr. Julian Hayes (Director): Provides oversight, reviews final reports, and champions the project.
- Dr. Evelyn Reed (PI): Reviews and approves study-specific visit schedules and protocol-related details.
- Oliver Finch (Clinical Operations Manager): Oversees the day-to-day clinical tasks, reviews visit completion data, and ensures coordinators have the necessary resources.
- Ben Carter & Maria Flores, RN (Lead Study Coordinators): Build the study visit schedules, track patient visits, and manage study-level documents in the CTMS.
- Eleanor Vance (Financial Coordinator): Manages all financial aspects within the CTMS, including budget entry, invoicing, pass-through tracking, and payment reconciliation.

## Step 3: Task Delegation Matrix

Task	When to be Completed	Who Completes	Who Reviews/ Approves	Communicate when finished for the next step.
Create Study Visit Schedule	After selection and final protocol received	Lead Study Coordinator Assigned to Study	Oliver Finch (Manager)	Entire team in weekly Studies in Start Up email
Create Study Budget	Once Budget is final	Oliver Finch (Manager)	Eleanor Vance (Finance)	Entire Team in weekly Studies in Start Up email
Create Start Up Invoice	SIV and Contract Signed	Eleanor Vance (Finance)	Reviewed in Reports	Oliver Finch (Manager)
Complete Visits in CTMS	On Fridays after Visit	Study Coordinator conducting Visit	Reviewed in Reporting	Oliver Finch (Manager)
Generate Invoices	On 5th of month after accrual review with Director and Manager	Eleanor Vance (Finance)	Reviewed in Reporting	Summary email to Director and Manager
Reconcile Payments	On 25th of month pull bank statements	Eleanor Vance (Finance)	Reviewed by Danny Director	Applied totals and remaining totals summarized to Director
Pull Monthly Reports	1-5th of month	Dr. Hayes (Director)	Manager and Finance	Covered in meeting on 5th.

# Sample Phased Approach: A Plan in Action



This three-phase timeline demonstrates how the CTMS implementation plan will move from foundational setup in the steps above to full operational workflow.

## Phase 1: Establish the Foundation & Validate Financials (Approx. Weeks 1-4)

This initial phase focuses on team training and building confidence by testing the core financial and operational processes on a low-risk study (Study ABC).

- ✓ The entire team receives tailored training in specified areas.
- ✓ Lead Coordinators create the study schedule for Study ABC.
- ✓ Create the budget for Study ABC.
- ✓ The team completes visits and begins creating invoices and payments for Study ABC.
- ✓ We pull the first reports to identify missing data or outstanding sponsor payments.

Key Outcomes:

- **Proof of Concept:** The finance specialist successfully practices payment reconciliation to confirm past earnings against payments in the new system.
- **System Familiarity:** The team is trained and comfortable with basic CTMS workflows.

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## Phase 2: Expansion and Process Refinement (Approx. Weeks 5-8)

This phase rapidly expands the CTMS to our most active trials (Study 123 and Study 456) and refines the core processes.

- ✓ We create study schedules for Study 123 and Study 456.
- ✓ We finish any missing data identified for Study ABC.
- ✓ We create budgets for Study 123 and Study 456.
- ✓ We create study schedules for the startup studies, Study XYZ and Study 789.
- ✓ The team begins active cycle management for Study 123: completing visits, creating passthrough invoices, scheduling upcoming visits, and reconciling payments.
- ✓ We pull and review reports for all studies to identify data cleanup needs and opportunities for additional sponsor invoicing.

Key Outcomes:

- **Immediate Streamlining:** Gain real-time control over revenue cycle management for our top priority, active trial.
- **Operational Foresight:** Beginning to see a clear projection of scheduled patient visits for better planning.

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## Phase 3: Full Adoption & Strategic Oversight

In this final phase, full adoption is our focus. CTMS is our standard process, delivering our ultimate goals of financial clarity and operational foresight.

- ✓ **Standard Workflow:** Completing/scheduling visits, creating invoices, and processing payments for all studies becomes part of the standard, repeatable process, following the outlined responsibilities table.
- ✓ **Strategic Reporting:** The Director pulls and reviews reports monthly (1st-5th of the month) to drive strategic decisions.

Ultimate Goals Achieved:

- **Financial Clarity:** A real-time view of all money earned, paid, and owed for every study.
- **Operational Foresight:** A 6-month projection of all scheduled patient visits for better planning.