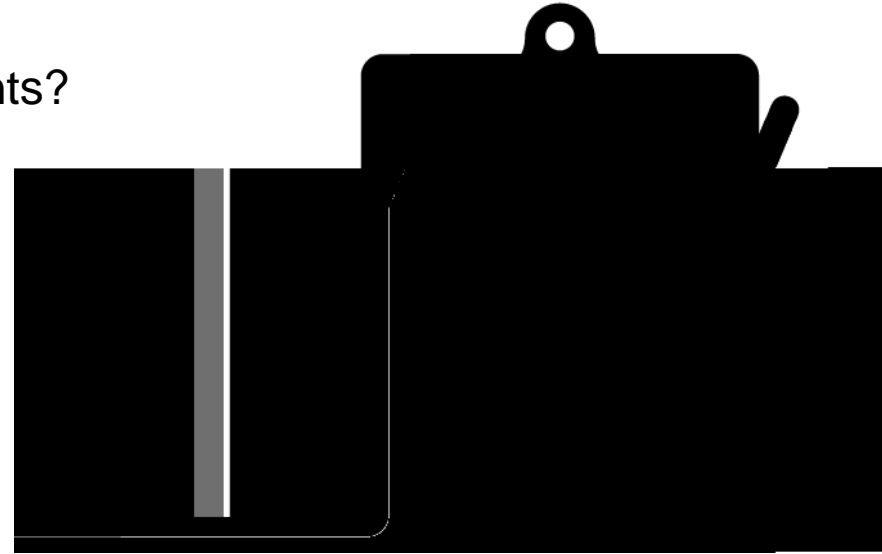# How the Embark Project Can Help Coordinators

SCORE August 2021

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Agenda

1. What is Advarra Participant Payments?

2. How can OCR services help?

3. OnCore/ IRB Integration

4. Embark Project Questions

Overview
Advarra (formerly Forte)

- The University purchased both **OnCore** and **Participant Payments** from Advarra

- These platforms are not mutually exclusive:

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What is Advarra Participant Payments?
Stipend Reimbursement

- A streamlined way to pay participants in a research study

- Less paperwork for the study teams

- The system contains reports and back up documents, as needed

- Allows participant to easily chose reimbursement method

Advarra Participant Payments
2 Payment Types

Reloadable Payment Card

- OCR will have cards on hand
- Only Name and DOB required
- Leave with payment in hand

Checking Account
(Direct Deposit / Paper Check)

- Participant enters in banking info
- Only Name, DOB and email required
- Payments received within 3 days

2-Part Approval Workflow

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- Training online through Advarra University

- Pay study participants in three clicks with automated stipends (regardless of chosen payment method)

- Make travel requests with in-app mileage calculations and receipt attachment uploads

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Advarra Participant Payments Roles
Training/ Responsibilities

- Training online through Advarra University

- Use the review queue to approve, modify or reject payments

- Track payments with built-in accounting and tax reports

- Eliminate check processing, even if the participant chooses the check option

Participant Record shared across multiple studies
Search Participant

- Participant record will be shared by all studies

- Only your protocols will be visible to you
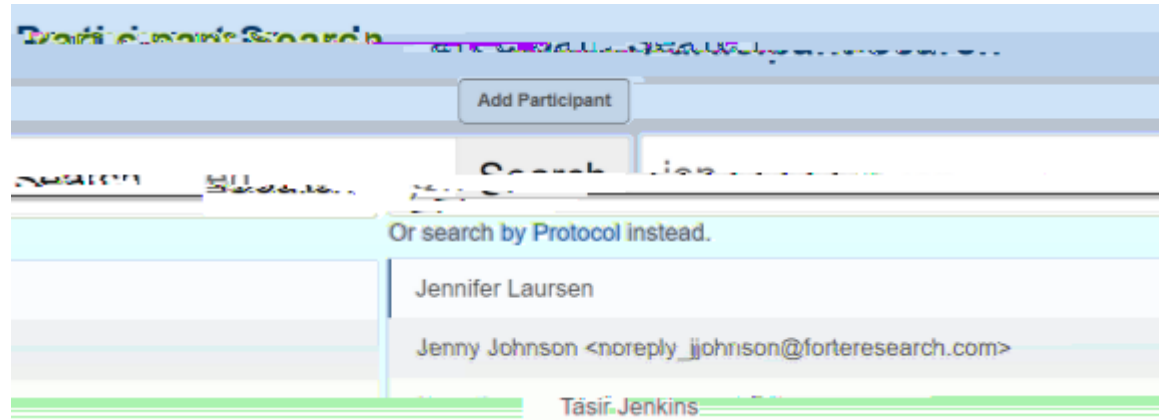
Lost / Stolen Card Procedure

1. Issue a new debit card.

2.

Advarra Participant Payments Fees

Fees to Grant/ FAO (not incurred by participant)

Debit Card Fee
- Initial one-time fee to activate - $1.50
- Cost per Reload (Transaction) - $0.80
- Card replacements* - $1.50

Checking Account
- Account Setup - $2.00
- Per Direct Deposit - $2.00
- Per Check Transaction - $2.00

*Department account (non-grant) will be requested

Project Set Up and Access to system
It is as easy as 1… 2… 3…4…

1. Review the Participant Payments informational website

   https://sites.mc.rochester.edu/urmc-clinical-research/embark/participant-payments/

2. Request project set up on this simple form:

   Participant Payments Project Request Form

3. OCR staff will send online training information to requested staff on form

4. Once training is complete, study team will be given access to Advarra/Forte Participant Payments and staff can pick up blank debit cards (located in Saunders Research Building)

Office of Clinical Research (OCR) Services
Overview

We hope to empower our clinical research teams to do more high-impact clinical trials that can advance clinical discovery and offer patients and community members more options and opportunities.

- Take some of the administrative workload off study coordinators/ study teams

- Faster approval of clinical trials

- Helping researchers create well-constructed, standardized budgets

- Monitoring study progress with OnCore

Office of Clinical Research (OCR) Services
Pre-Award work

- Help study teams asses the feasibility of proposed research

- Assist with confidentiality agreement submissions to IORA, feasibility surveys, discover tools and Shared Investigator Platform (SIP)

- Connect study teams with sponsors, CROs and industry sponsors

No fee for service

Office of Clinical Research (OCR) Services
Pre-Award work- Finance

- Creating a minimal protocol shell in OnCore and Calendar
  - Study team would complete the shell with the minimum footprint data and validate the calendar

- Creating Budget in OnCore

- Negotiating budget with sponsor (we work closely with study team)
  - We will negotiate the part of the CTA that speaks to the budget and ORPA will speak to the CTA language.

- Work with Research Compliance to get the study approved

    * Study team would go through the IORA process for signatures.

Office of Clinical Research (OCR) Services
Post Award Work

We offer a number of opportunities for refresher training of the OnCore System

Online through Advarra University

Personalized One on One

- Forgot how to update a protocol with current info? We can help!

- Need help with managing subject status/visits? Let us know!

- Need a refresher about creating an invoice? Reach out!

- Invoice the sponsor

- Track payments and linking back to the invoice

- Follow up on

Office of Clinical Research (OCR) Services
Post Award Work- Finance

- Life of study for each patient

- Review subject in eRecord and approving the charges

- Review the monthly statements and process them (optional)

- Available to discuss any clinical research needs

Office of Clinical Research (OCR) Services
Contact

For any OCR Service, please reach out to

Embark@urmc.rochester.edu

Want us to speak to your department leadership, please let us know!