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Clinical Research Account Maintenance Checklist

The purpose of this checklist is to outline the mandatory processes to follow when maintaining a clinical research trial account. This is a 'best practice' operating procedure.

The contract, award agreement, and/or agency regulations specify the process for managing the account. This includes processes for routine invoicing that includes subject and administrative pass thru items.

- ☐ Study team logs in OnCore, study spreadsheet, and EDC.
  - Logs all subjects including Subject ID
  - Logs the visit dates once occurred and procedures performed.
  - Works with OnCore Support for issues if needed.

- ☐ Study team, department accountants and/or personnel, and PI attend a quarterly financial review meeting with Clinical Trial Post-Award team.

- ☐ Clinical Trial Post-Award reconciles study's accounts every 30 days for balance changes, invoicing, missing or unpaid payments, amendment updates, and sponsor/study team correspondence.