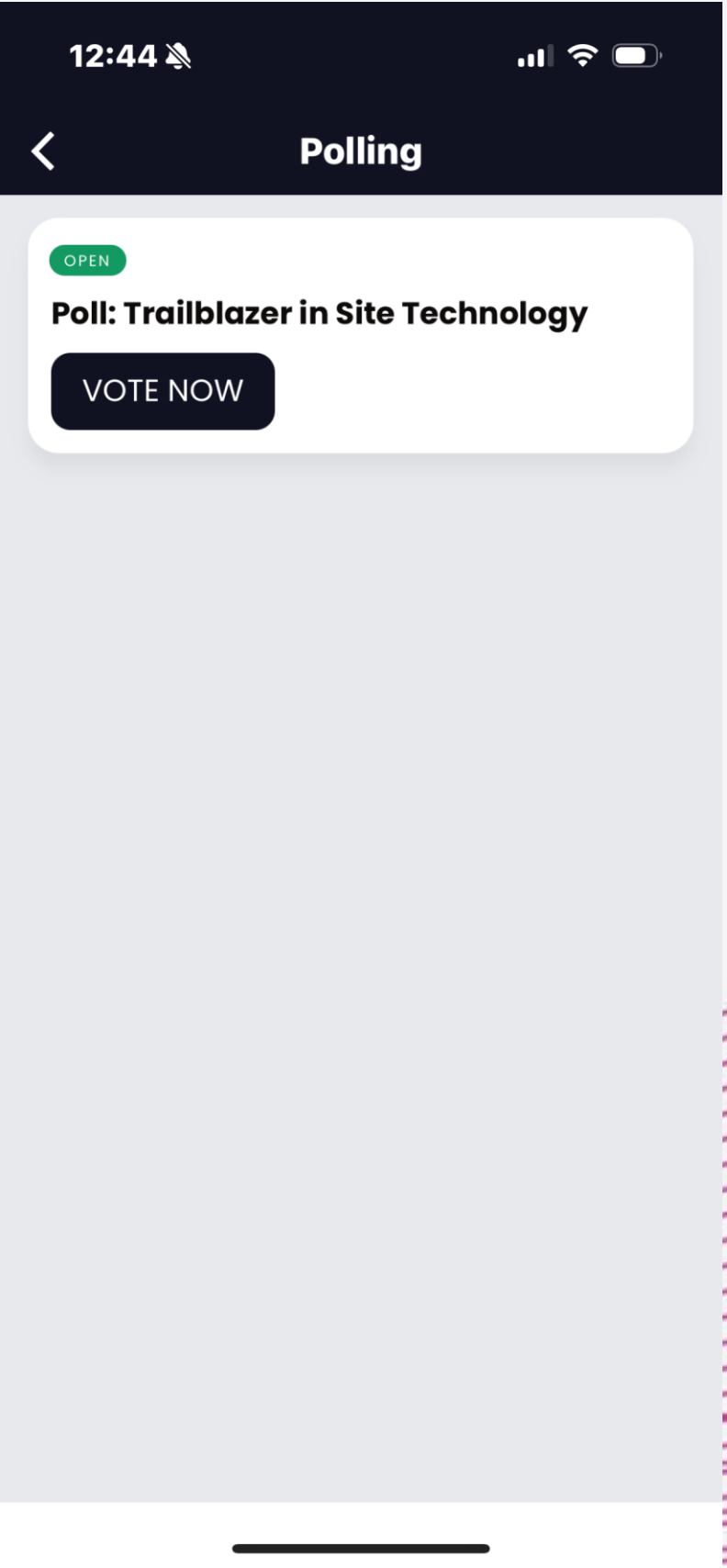


Site Tech Trailblazer Showcase

SCRS West Tech & Innovation Summit

Voting Process



Trailblazer in Site Technology Sponsor



DS **MEDIDATA**

Presented By





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CLINICAL TECH & INNOVATION

Site Solutions Summit™

The Future of Recruitment is Here

**Drive Community Engagement and Maximize Physician
Referrals to Research Sites with a Simple & Novel
Physician Referral eXchange (PRx)**

The logo for PRx, featuring the letters 'PRx' in a white, stylized, cursive font on a purple rectangular background.

Physician Referral eXchange

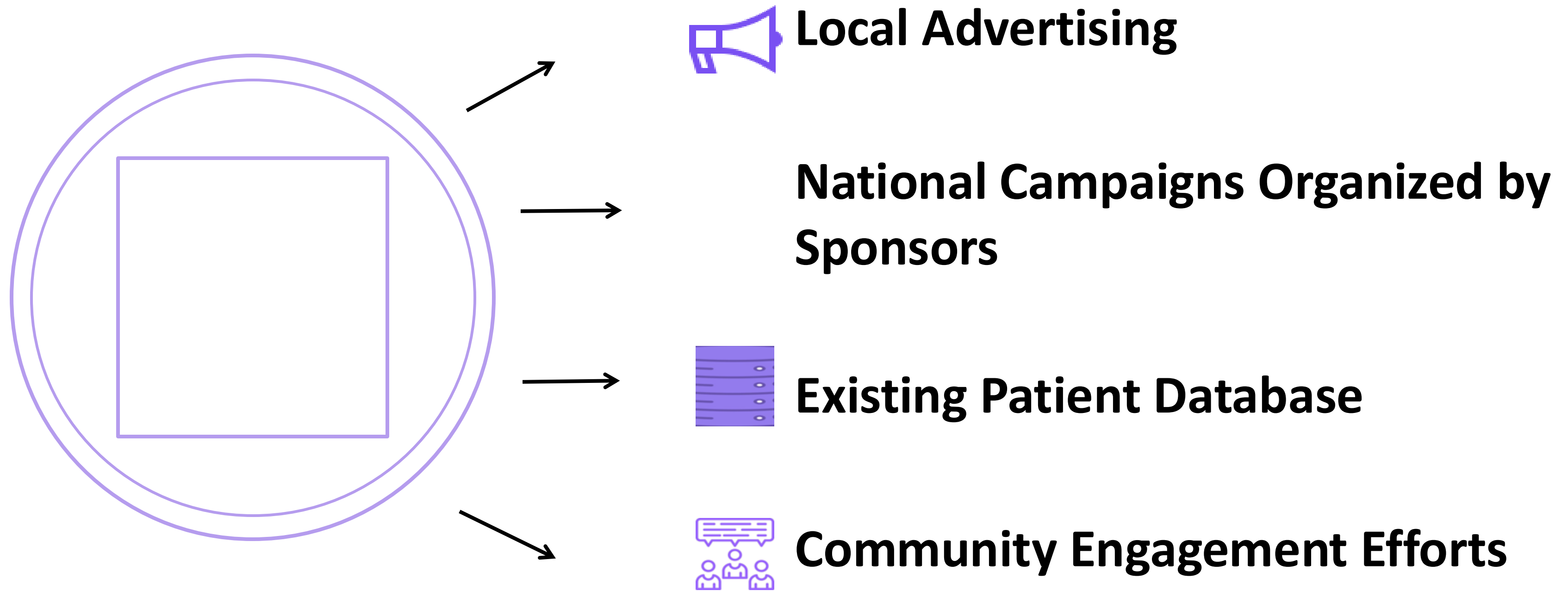
Dr. David Almeida MD MBA PhD
Vitreoretinal Surgeon & Clinician Scientist

President & CEO
ERIE RETINA RESEARCH

CASExGLOBAL



How do we currently enroll?



Why Are Trial Referrals Still So Complex?

Current methods:

- Too broad
- Often overlook daily care settings



Why not connect directly with local physicians who see patients that fit your trial demographics?

Solution: Physician Referral eXchange

- Branded for *YOUR* site
- Connect directly with community physicians
- Simple, Efficient & Easy referrals
- HIPAA compliant



*Position your site as a modern technologically advanced
research center*

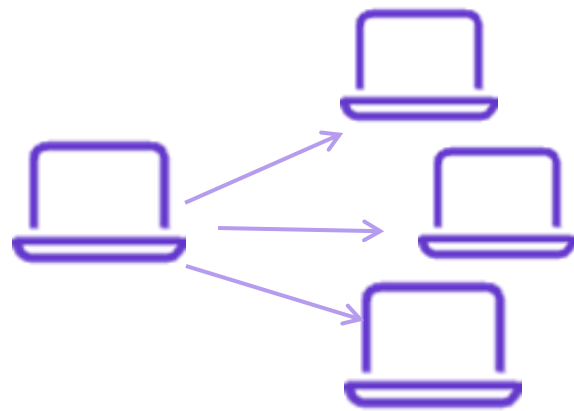


Your Research Site, Front and Center



Branding and Logo integration

Complete visual customization (Logo, Colors, Message)



Easy Sharing

Build recognition and trust

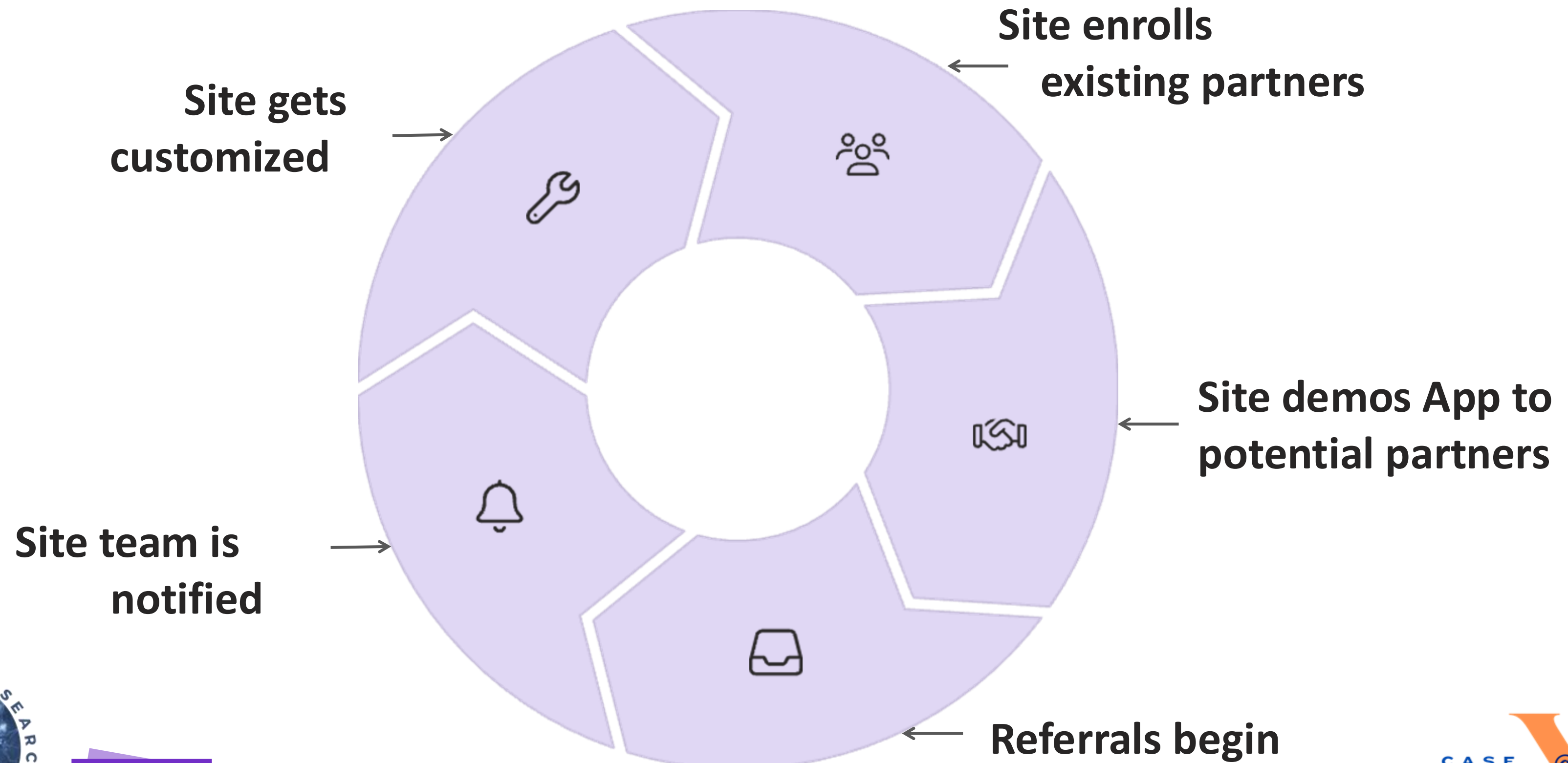


Adaptable to any specialty or research focus

All medical disciplines and trial types



Activate Your Network, Amplify Your Reach



Referring a Patient in Minutes, Not Hours



Log in securely



Select site/trial



Upload documents



Submit with one click



Physician Referral eXchange In Action



Clinical Trial / Retina Scheduling Form

I recommend the following patient to be screened for a clinical trial at Erie Retina Research.

Date of Visit

Date

Patient's Full Name *

First Name

Last Name

Date of Birth

Date

Address *

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Country



Drive Recruitment, Enhance Engagement, Improve Forecasting



30% Increase in Referrals

100% Better Forecasting

↑ Stronger Community

★ Enhanced Reputation

Erie Retina
Research saw a
30% increase in
new patient
referrals

Thank You / Questions?

Scan to Learn More



Get instant access to more information about the
Physician Referral eXchange



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GOT SMARTSHEET?

How Sanford Research Streamlined
Study Start-up Using Smartsheet



Society for Clinical Research Sites

SANFORD[®]
HEALTH

SPEAKERS



Camille Parker
Research Project Manager
Sanford Health Clinical Research



Sara Deelstra
Clinical Research Manager
Sanford Health Clinical Research

FACULTY DISCLOSURE

In compliance with ACCME Guidelines, I hereby declare:

I do not have financial or other relationships with the manufacturer(s) of any commercial services(s) discussed in this educational activity.

Camille Parker, Sanford Health Clinical Research

Sara Deelstra, Sanford Health Clinical Research



INNOVATION – SMARTSHEET

FileAutomationFormsConnections

SCRS pretend intake sheet

Sha

Grid ViewFilter

Arial10BBIU

Σ\$%&@.Q.QQ

	Study Name	Study Phase	Industry Study	Status	Oncology/Specialty	Sponsor	Therapeutic Area	Sanford PM	Physician	Send for Level 1 review?	Date sent for Level 1 Review
1	Blue Ridge BR-46--90	IV	yes	Study Startup Email sent	Oncology	Blue Ridge	Solid Tumors	Walter Skinner	Albert Hosteen	✓	03/13/25
2	Druid Hills 1AEB71	IV	no	Sent to PM for Review	Oncology	Druid Hills Group	Breast	Dana Scully	Margaret Scully	✓	03/13/25
3	Electravac 1121	III	yes	Site Selected	Oncology	Electravac	Lung	John Doggett	Knowle Rohrer	✓	02/26/25
4	Eurisko DF101364	III	yes	Study Startup Email sent	Oncology	Eurisko	Brain	Dana Scully	Alex Krycek	✓	02/05/25
5	Goodwin's J386	II/III	yes	Level 1 Feasibility by Managers	Oncology	Goodwin's	Lung	John Doggett	Knowle Rohrer	✓	01/21/25
6	Klemper ICARUS-747	I/II	yes	Study Startup Email sent	Oncology	Klemper Corporation	Gynecologic	Monica Reyes	Marita Covarrubias	✓	02/26/25
7	Nextow 7A	II	no	Level 1 Feasibility by Managers	Oncology	Nextow Genetics	Brain	Dana Scully	Alex Krycek	✓	02/09/25
8	Pinck 12148793	I	yes	HSD Approval	Oncology	Pinck Pharmaceuticals	Solid Tumors	Walter Skinner	Albert Hosteen	✓	02/09/25
9	Pinck 47	n/a	yes	Study Startup Email sent	Oncology						
10	Pinck 82517	I	yes	Leadership Review	Oncology						
11	Pinck CGB 1106	I/II	yes	Study Startup Email sent	Oncology						
12	Pinck ENGAGE	I/II	yes	Study Startup Email sent	Oncology						
13	Pinnacle D-503	III	yes	Scientific Review	Oncology						
14	Pinnacle Section10	I	yes	Sent to PM for Review	Oncology						

SANFORD
RESEARCH

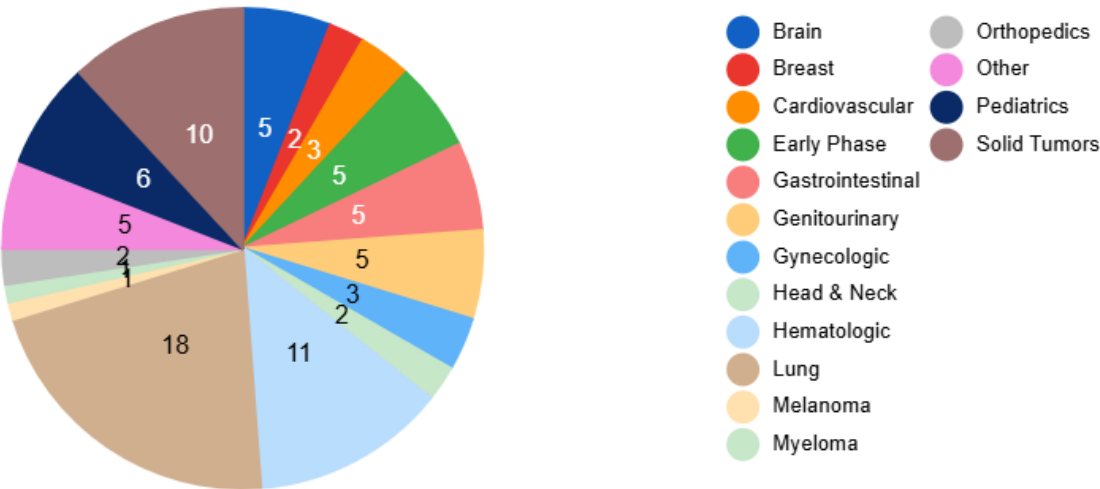
Clinical Research Director Dashboard

Study areas reviewed in 2025

2023 archived dashboard

2024 archived dashboard

84
Studies Reviewed



IMPLEMENTATION



One centralized location for all study information



Categorize & score incoming clinical trials based on feasibility and strategic fit



Real-Time Dashboards



Automated messages triggered

MASTER INTAKE SMARTSHEET

A screenshot of a web browser displaying the "Intake and Study Startup" form from Sanford Research. The browser's address bar shows the URL "https://app.smartsheet.com/b/form/cc04a490bb134186a7afb661b0df2a99". The top navigation bar includes links to various internal systems like RIT End User Site, ServiceNow, EPIC, OnCore, EDC, eReg, Software Installs, Velos, REDCap, Huron, CoRDS, Sharepoint, Smartsheet, Sanford Labs - Sioux..., Sanford Labs - Fargo, Toggl, Research Office Res..., WebEx Hub, and Other favorites. The form itself is titled "Intake and Study Startup" and instructs users to submit it to enter a study into the Intake and Study Startup sheet. The form fields include: "New Study *" (text input), "Sanford Project Manager *" (dropdown menu), "Sponsor *" (text input), "Therapeutic Area (CTMS Category) *" (dropdown menu), "Study Phase" (text input), "Who initiated this study?" (text input with a note "If this came from a physician, please write in their name"), "Industry Study *" (radio buttons for Yes/No), "Oncology or Specialty *" (radio buttons for Oncology/Specialty), "Is this grant funded?" (radio buttons for Yes/No/NCORP/MNCCTN/COG/CCDR study), and two checkboxes for "Check only if this is an MNCCTN study" and "Check only if this is an IIR study". The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 11:25:39 AM on 4/18/2025.

FEASIBILITY

The screenshot shows a web browser window with a Smartsheet update request form. The browser's address bar shows the URL: <https://app.smartsheet.com/b/updaterequest?ux=fsNLfPBaCfsLFamCQ59AXYrD0EfnRZ4w1eICIC-CM0w>. The browser's tab bar shows several open tabs, including 'intake sheet - Smartsheet.com' and 'Update Request - Intake and Study'. The browser's toolbar shows various icons, including a search icon, a star icon, and an 'Update' button. The browser's address bar also shows a list of bookmarks, including 'RIT End User Site', 'ServiceNow', 'EPIC', 'OnCore', 'EDC', 'eReg', 'Software Installs', 'Velos', 'REDCap', 'Huron', 'CoRDS', 'Sharepoint', 'Smartsheet', 'Sanford Labs - Siou...', 'Sanford Labs - Fargo', 'Toggl', 'Research Office Res...', 'WebEx Hub', and 'Other favorites'.

The Smartsheet logo is visible in the top right corner of the page. The main heading of the form is 'ACTION REQUIRED: Level 1 Feasibility Review for BMS CA244-0010 (IZABRIGHT-Lung01)'. Below the heading, there is a paragraph of text: 'A new study, BMS CA244-0010 (IZABRIGHT-Lung01, with a study phase of has been received and is ready for Level 1 review. This study was initiated by: Sponsor. Please select the "open request" button below and answer the feasibility questions within 2 business days. Any information currently available regarding the study is available in the Intake & Study Startup Smartsheet. A "yes" to any of these questions allows the study to move to the next level of review. Each question requires an answer.'

Below the paragraph, there is a note: 'Please note: If you receive an error message when trying to open the form, the form has already been completed by another manager.'

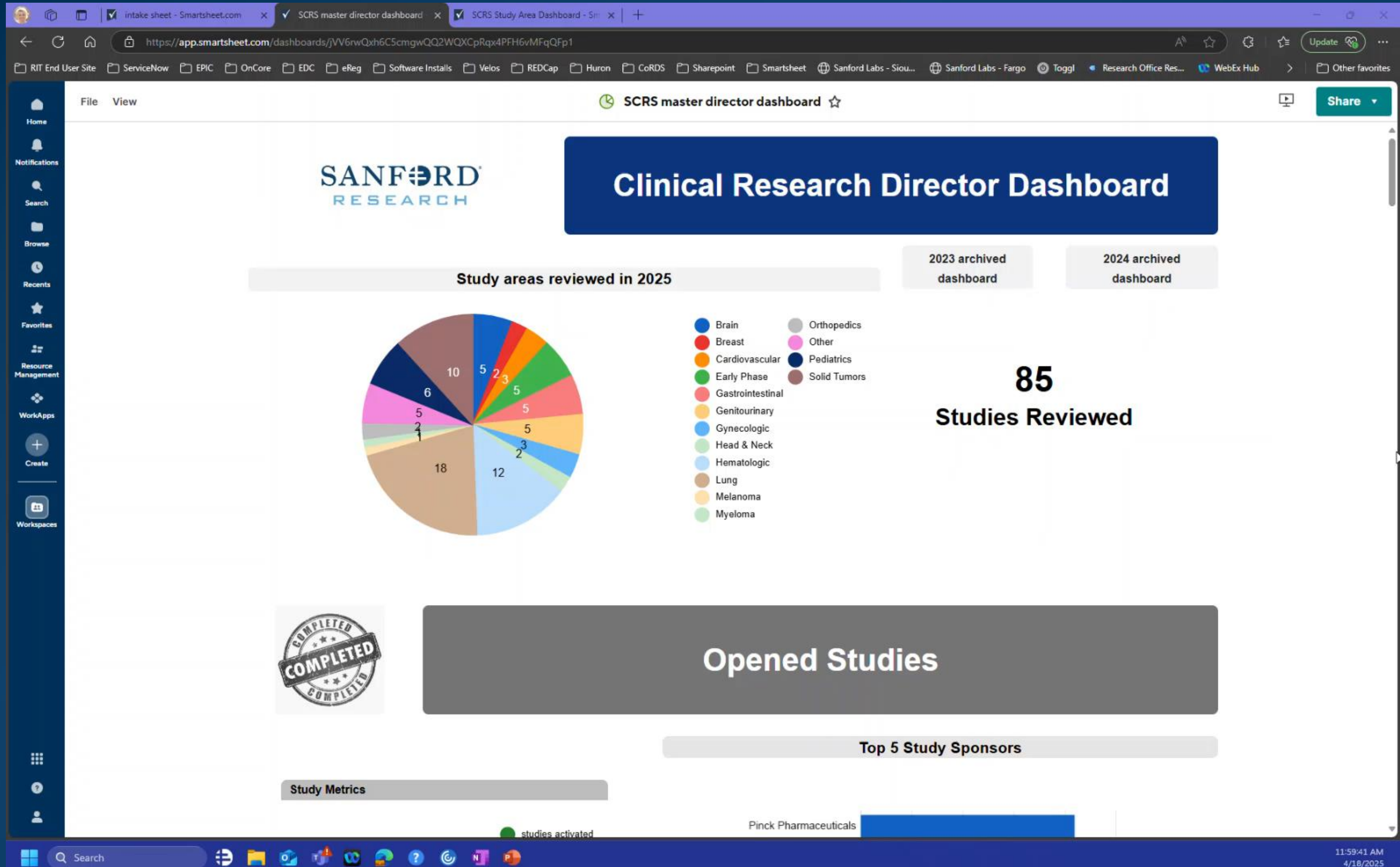
The form contains four input fields, each with a label and a dropdown arrow:

- Study Name**: The input field contains the text 'BMS CA244-0010 (IZABRIGHT-Lung01)'.
- Protocol Type (OnCore)**: The input field is empty.
- Department (OnCORE)**: The input field is empty.
- Therapeutic Area (CTMS Category)**: The input field is empty.

At the bottom of the form, there is a label 'Please select your name' and a blue button labeled 'Submit Update'.

The Windows taskbar is visible at the bottom of the screen, showing the Start button, a search bar, and several application icons, including Edge, File Explorer, Teams, Outlook, Word, PowerPoint, and a help icon. The system clock in the bottom right corner shows the time as 11:39:42 AM and the date as 4/18/2025.

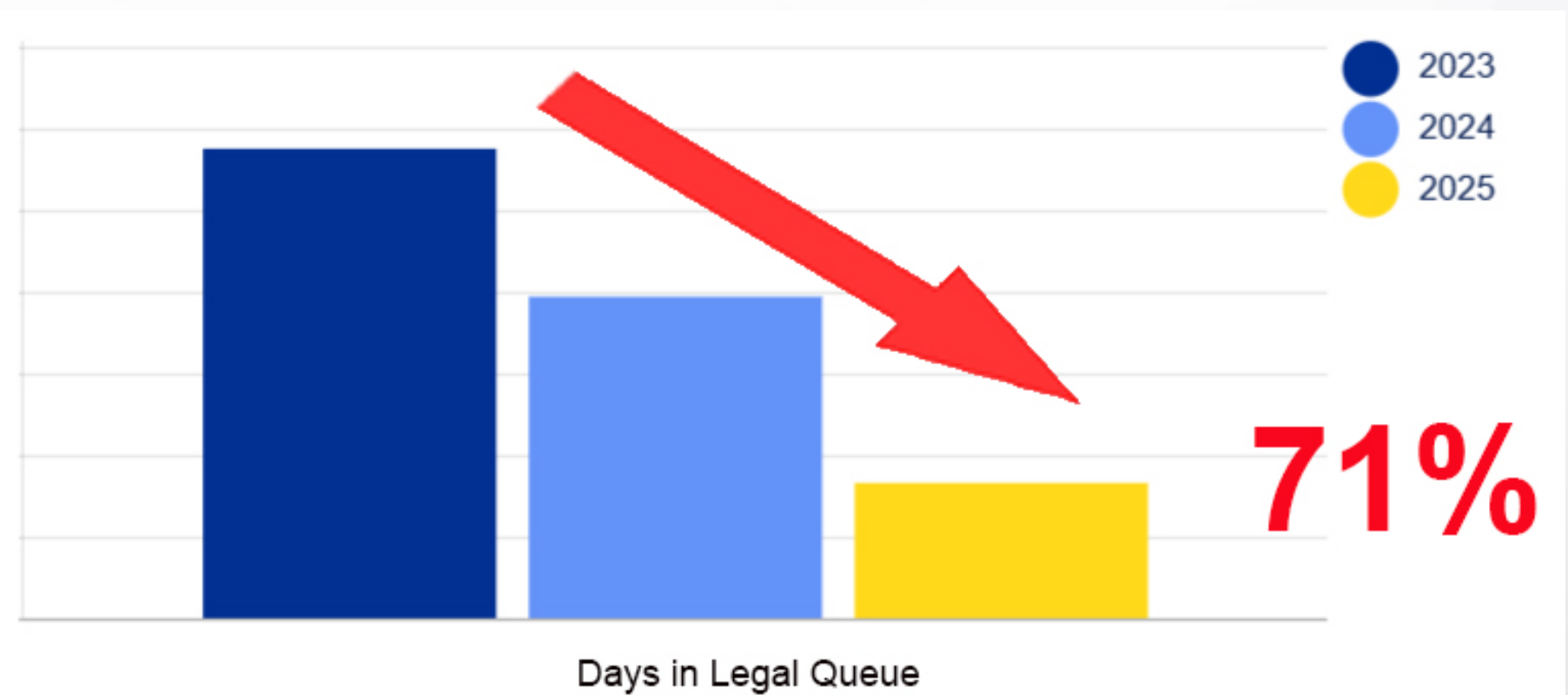
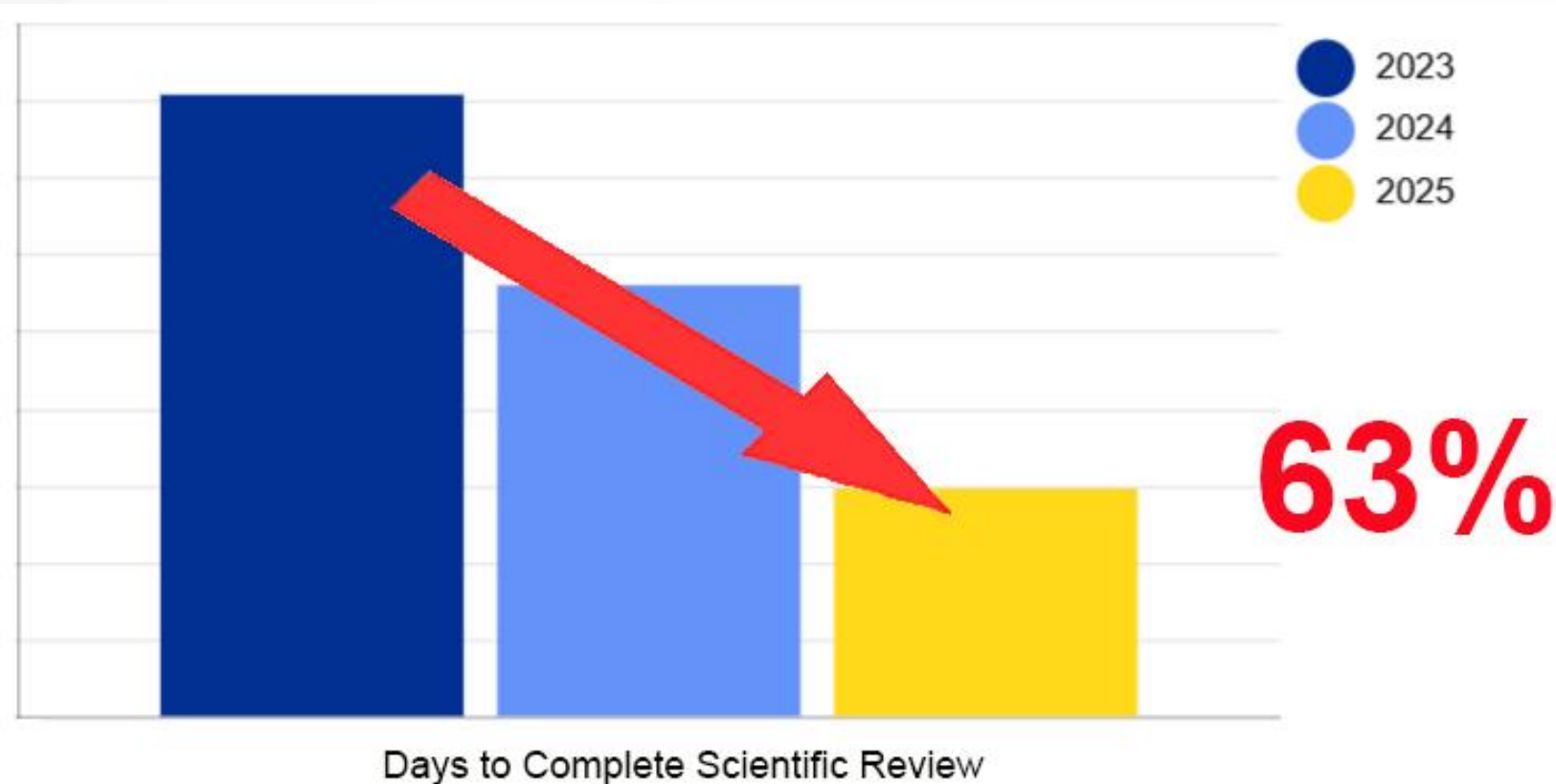
DASHBOARDS



OUTCOMES ACHIEVED

Improved Accountability & Efficiency

- Clear task assignments and tracking reduces delays in decision-making
- 63% reduction in days to complete Scientific Review (2023-2025)
- 71% reduction in days in Legal Queue (2023-2025)



WHERE WE ARE HEADED



Reduce study start-up timeline by
50%



Utilize Smartsheet to streamline
our protocol amendment process

QUESTIONS?

smartsheet?
got milk?
we got you.

smartsheet
THIS IS MILK



smartsheet
THIS IS NOT MILK



any other questions?



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From Excel Spreadsheets to SiteCentric

Building an End-to-End Research Platform by Sites, for Sites



Brian Hunter
VP – Contracts & Trial
Management



Florin Petrutiu
Chief Information Officer

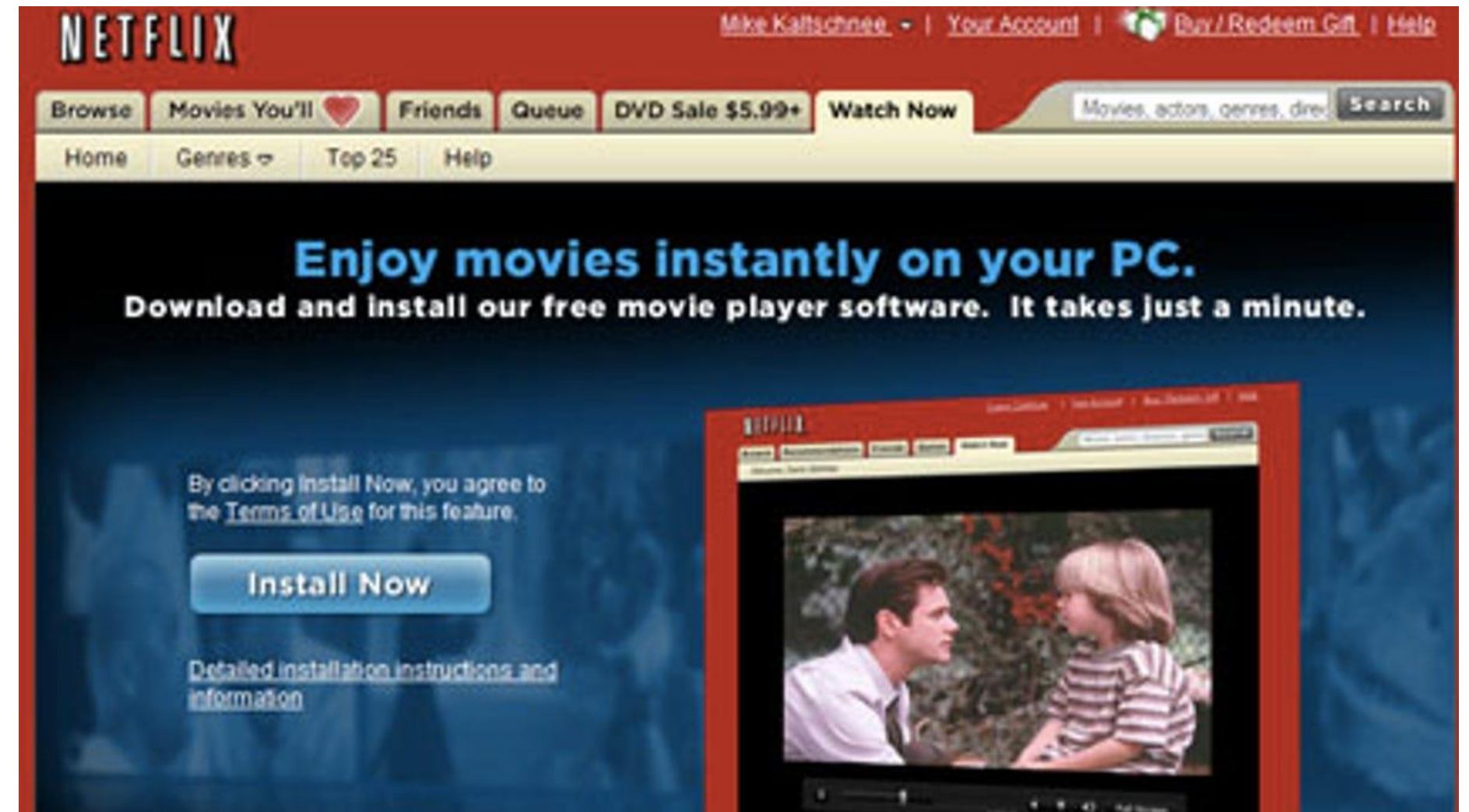




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2025



2007



Our Technology



2007



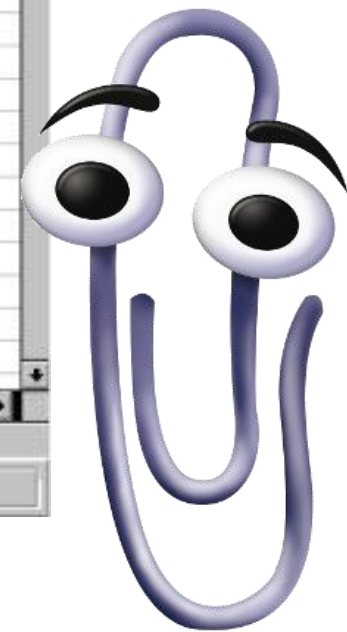
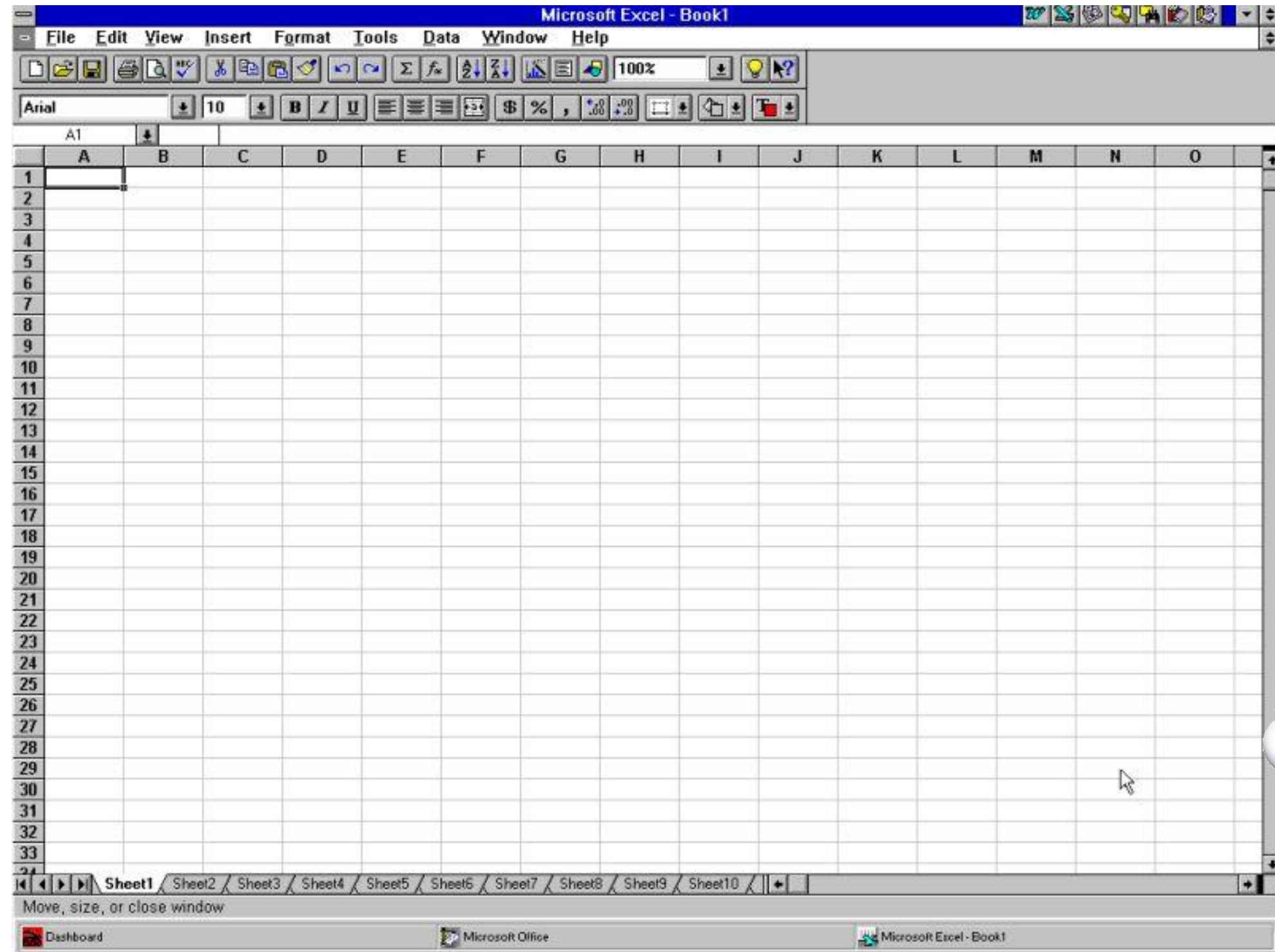
Our Technology



2007



Our Technology



2007

Our Technology



2007



Our Technology



Amy Schemer
Clinical Development
Director



Pat Brown
Investigator



Terrie Wood
VP of Quality



Carrie Lockwood
Director of Marketing



Johanna Garib
Revenue Management



Dan Kearney
CEO

2008



Biz

2009



Patient

2010



CTMS

2012



Finance

2014



Regulatory Ops

2015



Intelligence



2023

Platform Rebuilt from the



Jan 2024



SiteCentric Publicly

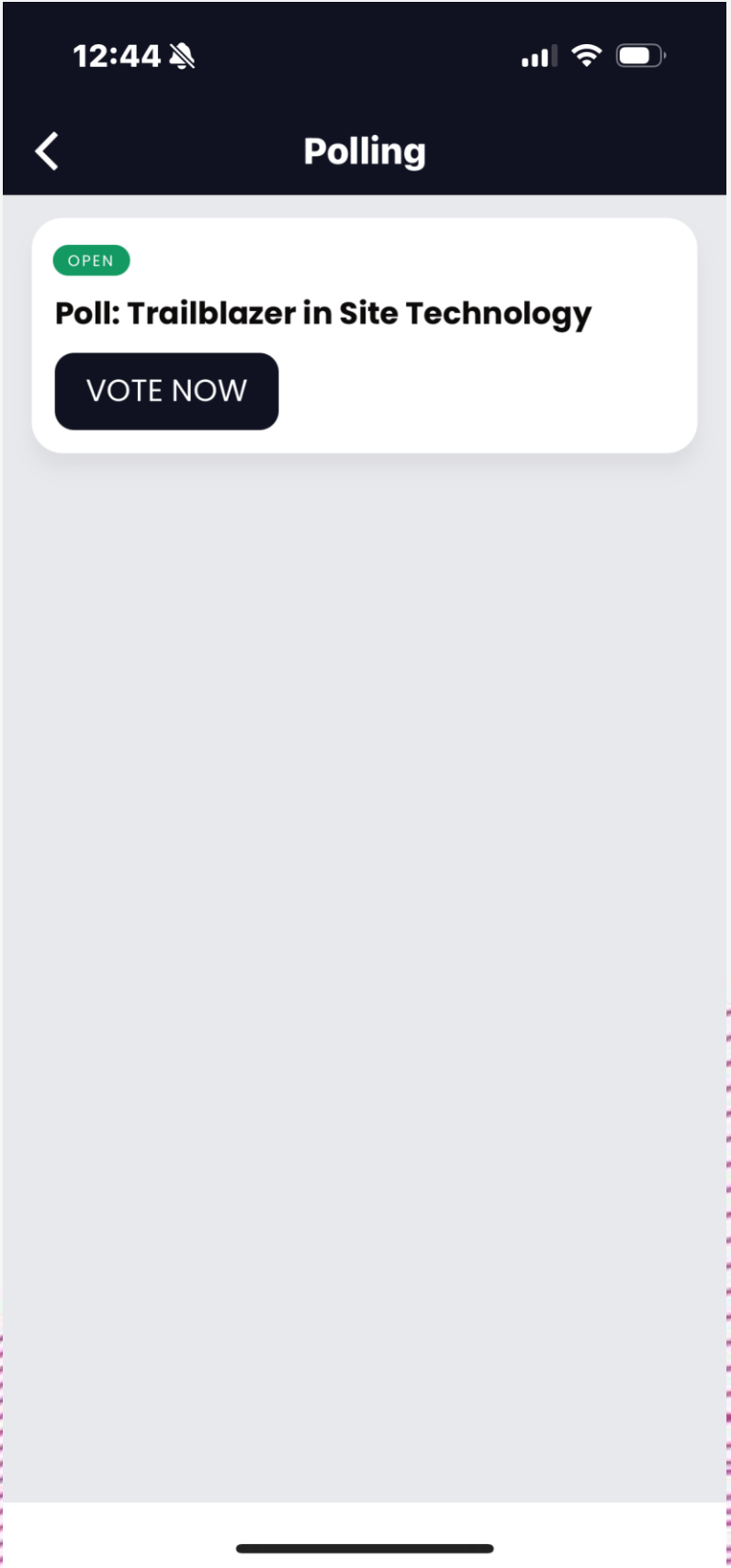


The saga continues at:
Booth #6

2025

Thank you!

Voting Process





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