

UConn Health
Office of Clinical & Translational Research
Standard Operating Procedures

Title: Pre Budget Workbook Development Meeting (BWB)	
Relates to Policy: 14001-17;900-11	
SOP#: 1400-17	Version 1.0
Prepared by: J. Kulko	Original date: 12/29/2017
Approved by: J. Kulko	Date approved: 12/29/2017

Purpose and Applicability:

To ensure that charges in the BWB are correctly identified, coded and added to the pre-packet BWB with input from the necessary input from the PI and research team.

Background and Significance:

Prior to the implementation of this series of SOP's there was no policy or procedure mandating the requirement for a formal pre budget development meeting including the PI and the research team. This process ensures that the delineation of medical procedures and the identification of the correct payor are identified and certified as correct before the BWB is developed.

Scope:

A Pre Budget Workbook Development meeting is necessary for all clinical trials that produced JDH and or UMG charges and/or are funded by an outside organization.

Responsibilities:

It is the responsibility of the staff in OCTR to schedule a Pre- Budget Workbook Development meeting all appropriate clinical research/trials as described in scope.

It is the responsibility of the PI to ensure that all research staff working on the study, including the PI attends the budget initiation.

It is the responsibility of research staff to supply all charges needed to develop a BWB

It is the responsibility of OCTR to include all of these identified charges and designate the correct payor with input from research team.

It is the responsibility of the PI to sign the Budget Attestation form at the completion of the process. (See form)

Procedural Steps:

Staff in OCTR will set up meeting when research team notifies us of new clinical research/trial that will need a BWB.

PI will attend the meeting and ensure that all research staff who will work on the project will also attend

PI will sign off on "Budget Attestation Form" at the completion of the process.

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This budget will be used to negotiate the clinical trial budget with the sponsor

Changes and or corrections to the budget will be brought to the attention of the OCTR staff before the final budget has been negotiated.

Revision date:	Revised by:
Reason for revision:	
Date revised version sent to archives & current revision version # advanced:	