Portfolio360 – "It All Started with a Spreadsheet"

Milijana U. Petrovic, Jeff Edelman, Jay Lebsack, Igor Krupitsky, Matt Davis, Hatem Soliman, MD, Lynn Burger, Michael Brechbuhler, Leire Dieguez, Marjorie Brelsford

Background

Prior State

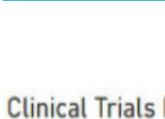
- Scattered, disconnected, and sometimes unavailable access to manage trial portfolios and clinical trials operation.
- Hours spent each month for Managers to pull, splice together data in Excel, and then review data.

Now

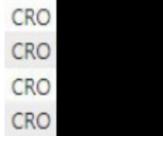
- A unified dashboard (built in PowerBI) that provides one stop shop for screening, consenting, accrual, financial, and scientific impact data for each disease program.
- Overall Trial Portfolio metrics available on demand for Senior Leadership as well.

Goals

- Build a single dashboard to measure daily Key Performance Indicators (KPIs) (accrual, financials, scientific impact)
- Provide visibility to leadership, Principal Investigators and CRMDs at any given time.
- Align KPIs and tracking of institutional/CCSG goals.



Management Gro





Framewo

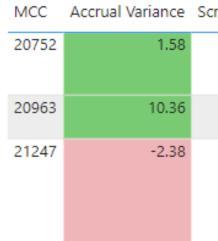
Current f

Expense/F

Weekly Pre

20

Percentag 48.06 % Achieve



Portfolio360 in Review

Revenue	FYTD Revenue	Revenue Month Forecast	EVTD Forecast	Povopuo EVTD Var	Revenue FYTD Var%
loop	PTID Revenue		PTTD Polecast	Revenue FTTD var	Revenue FTTD val %
	\$3,889,987.37	364,101.92	\$3,276,917.28	\$613,070.09	18.71 %
	\$3,141,712.93	361,028.27	\$3,249,254.43	(\$107,541.50)	-3.31 %
	\$5,890,590.65	347,954.01	\$3,131,586.09	\$2,759,004.56	88.10 %
	\$2,304,223.82	332,961.55	\$2,996,653.95	(\$692,430.13)	-23.11 %

jram P	ortfolio S	Summary	,		ļ		
Filters Fra	mework Filters Phase 1 or 2	Financial Filters Phase 3	Cooperative %	IIT %	Revenue FYTD Var	() Revenue FYTD Var%	
ork Goal	80%	20%	10%	20%	CT Revenu	e > Forecast	
framework	78.82 %	21.18 %	18 % 14.62 % 29.56 9		\$5.53M	13.79 %	
/Revenue Ration 0.87		ent of studies on targ	6 1.02 Ave 109	rage Current Acc	r 297	trual vs Goal	
rescreening	() Weel	dy Accrual Vs Goal	() Week	dy Consent vs Goal	() # of ineligi	ble patients 🛈	
06.68	8 %	274.14 9	%	244.15 9	%	507	
age of studies % red 25 %	33.89	%, 50%, 75% or 100% % ved 50 %	24.64 %	6 ed 75 %	12.11 % Achieved 10	0 %	

creen Failure Rate	Open To Accrual Date	First Enrollment Date	OTA To First Enrollment Days	Accrual within 60 days	Date 25 %	Date 50 %	Date 75 %	Date 100 %
11.11 %	8/23/2021	2022-02-25	186		2022-07-23	2023-06-23	2024-05-22	2025-04-22
42.86 %	12/15/2021	2022-03-01	76		2023-03-16	2024-06-14	2025-09-13	2026-12-14
50.00 %	3/31/2023	2023-09-14	167		2023-09-29	2024-03-30	2024-09-28	2025-03-30

MOFFITT (M)

⁻ hases Brea	kdown			Sponsors Breakdo	wn				Fiscal Year V
Phase2	Protocol Count	ΟΤΑ	Phase2 %	Sponsor Type		Count	ΟΤΑ	Sponsor Type %	is 2024
Phase I, I/II, II	180	150	76.27 %		•	123	91	52.12 %	is not Protocol Review & Reg
Phase III	45	36	19.07 %	Industry Institutional		71	68	30.08 %	Affairs, Protocol Support Office, Research Quality & Ec
N/A	43	9	4.66 %	National		32	26	13.56 %	Fiscal Year Month
Total	236	195	100.00 %	Externally Peer-Review	hed	10	10	4.24 %	is (All)
lotal	230	155	100.00 %	Total			195	100.00 %	Protocol Type is Treatment
Status Break	kdown			DT4 Breakdown					Protocol Status is OPEN TO ACCRUAL or SUSPENDED
Status	Protocol C	ount	Protocol Status %	Data Table 4 Report Ty	pe Protocol	Count	OTA	Data Table 4 %	Data Table 4 Report V
OPEN TO ACCF	RUAL	195	9.10 %	Interventional		236	195	97.12 %	Organization
SUSPENDED		41	1.91 %	Total		236	195	97.12 %	is Moffitt Cancer Center.
								57.12 /0	Madfield Internet and Direct
Total		236	11.01 %	-				51.12 /0	Moffitt International Plaza (MIP), Moffitt Magnolia (MC
Total		236	11.01 %	Inpatient				57.12 78	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO
		236	11.01 %		ount OTA I			57.12 78	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO
Protocol Typ				Inpatient Inpatient Protocol C		npatient	%	57.12 /0	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC
Protocol Typ			11.01 % Protocol Type %	Inpatient	181 150	npatient 76.69	%	57.12 /0	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All)
Protocol Typ Protocol Type				Inpatient Inpatient Protocol C No		npatient	% %	57.12 /	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All)
Protocol Typ Protocol Type Treatment	Protocol Count ▼	ΟΤΑ	Protocol Type %	Inpatient Inpatient No Yes	181 150 55 45	npatient 76.69 23.31	% %	57.12 /2	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long. MCC is (All) CRO is True
Protocol Typ Protocol Type Treatment Total	Protocol Count T195 195	OTA 195	Protocol Type % 97.99 %	Inpatient Inpatient No Yes	181 150 55 45	npatient 76.69 23.31	% %		(MIP), Moffitt Magnolia (MC) Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All) CRO is True Investigator Initiated
Total Protocol Type Protocol Type Treatment Total Sponsors Br Status	Protocol Count T195 195	OTA 195	Protocol Type % 97.99 % 97.99 %	Inpatient Inpatient Protocol C No Yes Total	181 150 55 45	npatient 76.69 23.31	% %	Total	(MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All) CRO Investigator Initiated is (All) Sponsor Name is (All)

Solutions and Methods

- Reports now synched in One Dashboard. \bullet
- Filters allow for review by Fiscal Year (FY) or calendar year, along with numerous filters for deeper drill down and analysis.

Refinements and Next Steps

- Portfolio360 is continuously validated to ensure accurate data reported.
- Refinements made as identified by CRMDs and Administrative Leaders.
- Currently accessing Moffit's data warehouse as source and bringing in data from systems beyond our CTMS.
- Finding new ways to share best practices in the use of the tool.