

Optimize Staffing in Phase I Environments with Intelligent Scheduling

REAL-TIME CLINICIAN & STAFF SCHEDULING



OmniComm[®] Innovation Forum 2018
eClinical Solutions for Life[™]

momentum
scheduling[®]

About Bio-Optronics

Bio-Optronics

We are a leading healthcare information technology company founded in 1985, focusing specifically on clinical practice and research workflow optimization.

Our Mission

To develop and deploy software products and services that help healthcare professionals improve efficiency, quality, patient safety, staff satisfaction and financial performance.



CLINICAL TRIALS

The only Clinical Trial Management System (CTMS) that cuts out the complexity in clinical trial software with tools designed to work for clinical trials.

CLINICAL TRIAL SOFTWARE



MEDICAL STAFF & PHYSICIAN SCHEDULING

Fast, automated, and accurate physician and medical staff scheduling for healthcare organizations and specialties of all sizes.

STAFF SCHEDULING SOFTWARE



PATIENT WORKFLOW

An advanced software suite designed to improve patient safety and increase quality of care for VA and surgical facilities.

PATIENT WORKFLOW SOFTWARE

*Offices in Rochester, NY, USA
and Coppet, Switzerland*

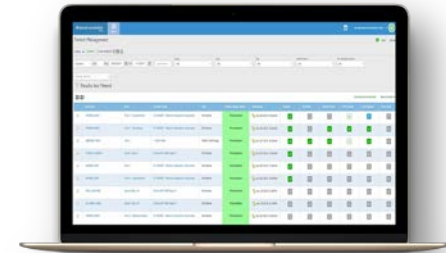
Extensive Clinical Trial Experience

o Best-in class CTMS

- o Most extensive financial, study and subject management functionality in the industry
- o Most widely used CTMS by sites in the world, currently managing over 40,000 studies
- o Enables compliance with HIPAA, 21 CFR Part 11

clinical conductor®

Run the world's best research



o CTMS integration with EMR's, EDC's & more

- o Fast deployment and adoption of CTMS with no disruption of existing activities
- o Existing integration with TrialMaster EDC

OmniComm®
eClinical Solutions for Life™

Epic

Complion™

REDCap™
Research Electronic Data Capture

HURON

Study
Start-up



Study
Management



Subject
Management



Finance
Management



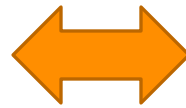
Reporting

Examples of Clinical Trial Customers



Expanding Study Expertise to Phase 1

The strategy... Integrating existing intelligent scheduling with OmniComm TrialOne EDC



Introducing intelligent on-demand scheduling of clinicians and staff

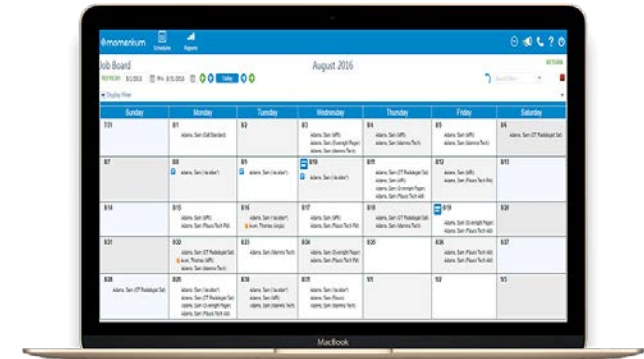
- **Equity & fairness of assignments** (distribution by Full-Time Equivalent [FTE])
- **Reduced scheduling task time** (focus on patient care)
- **Fast decisions & schedule adjustments** (using real-time analytics & reporting)
- **Reduced physician burnout** (less turnover = less cost of replacement)
- **Increased scheduling efficiency** (more appointments = more revenue)

Optimizing Staffing in Phase I Studies

How Phase 1 differs from other phases for scheduling:

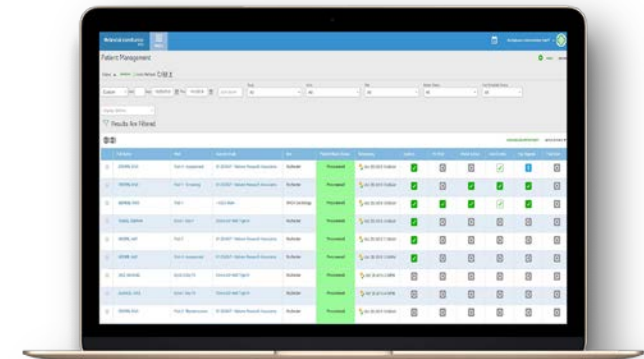
1) Phase 1 Trial Environments (Momentum Scheduling)

- Patient volume dictates staffing
- Patients brought in prior to full clinician schedule generation
- Schedule created using clinician competencies & credentialing
- Focus is on meeting the needs of patients and the volume



2) Later Phase Trials (Clinical Conductor CTMS)

- Patient appointments created based on clinician availability
- Classic style of patient scheduling



About Momentum

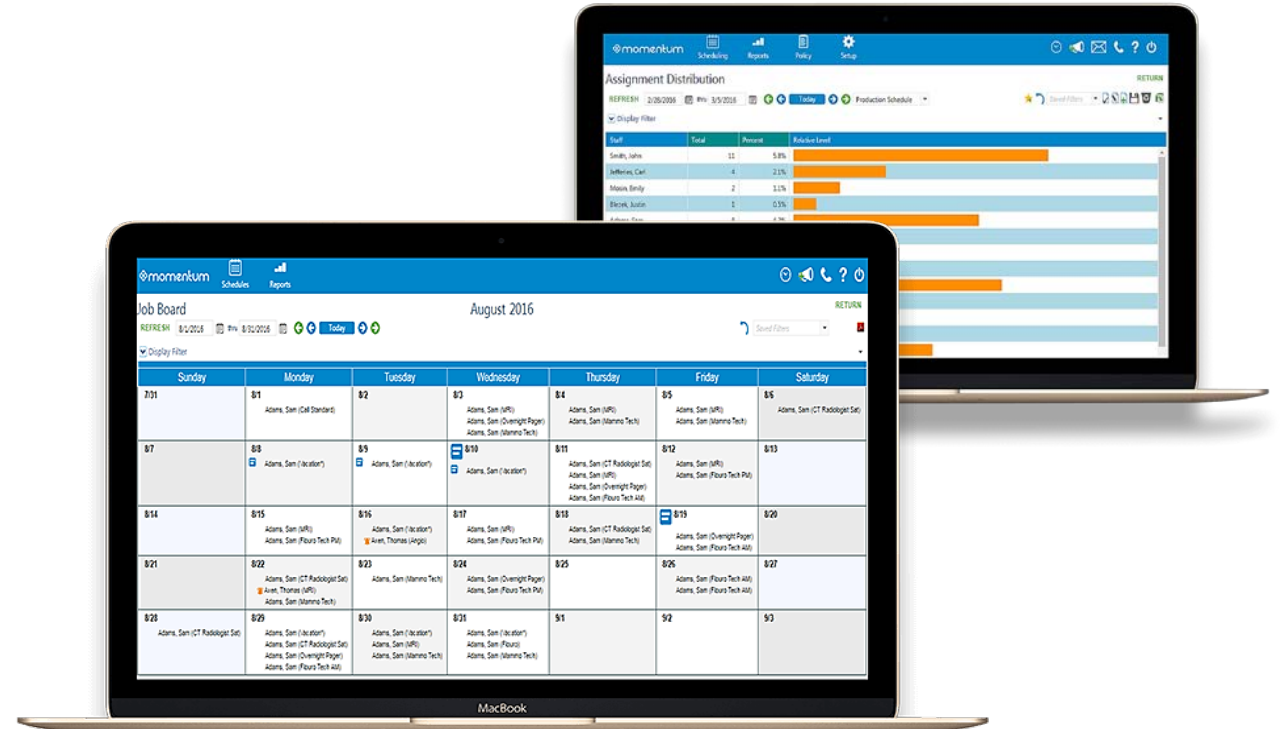
Web-based automated clinician & staff scheduling application

- o Request Management sub-system

- o Time-Off / Work – Don't Work
- o Swapping / Job Board

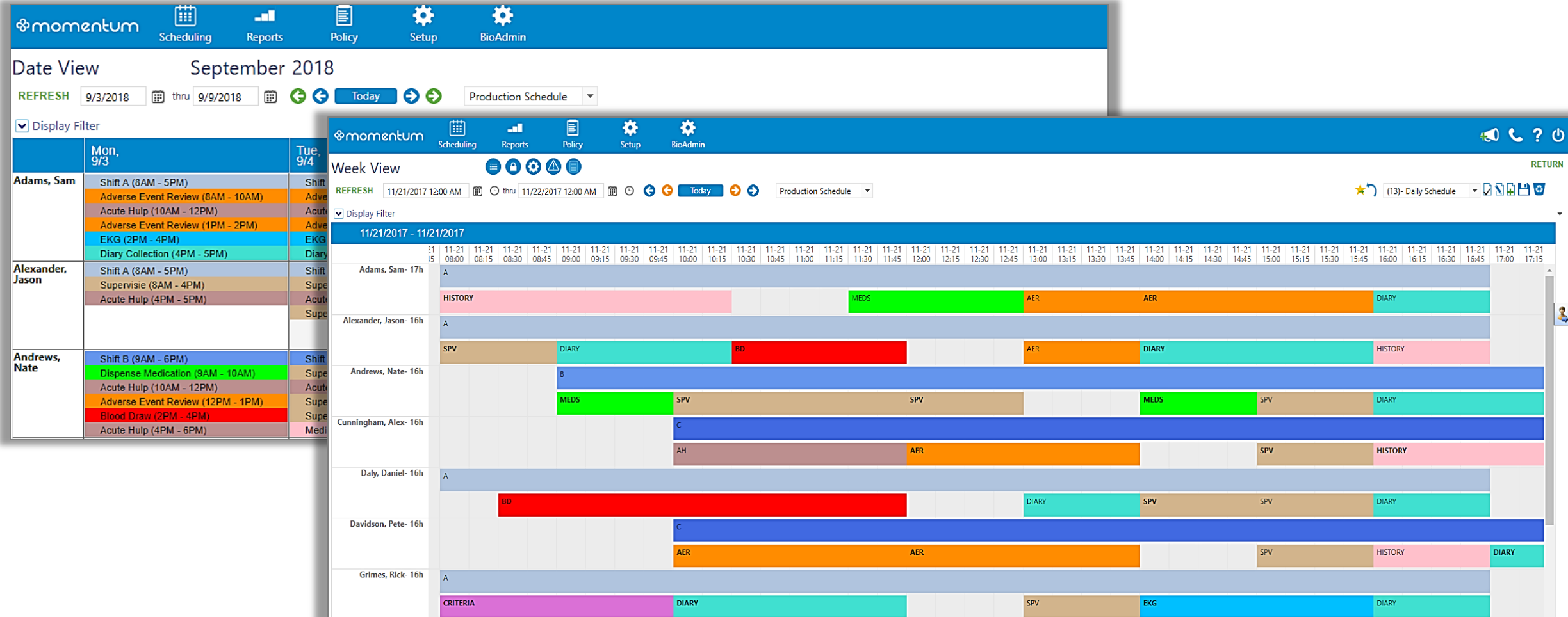
- o HR Components

- o Contract / Hours compliance
- o Fiscal Period reconciliation



About Momentum

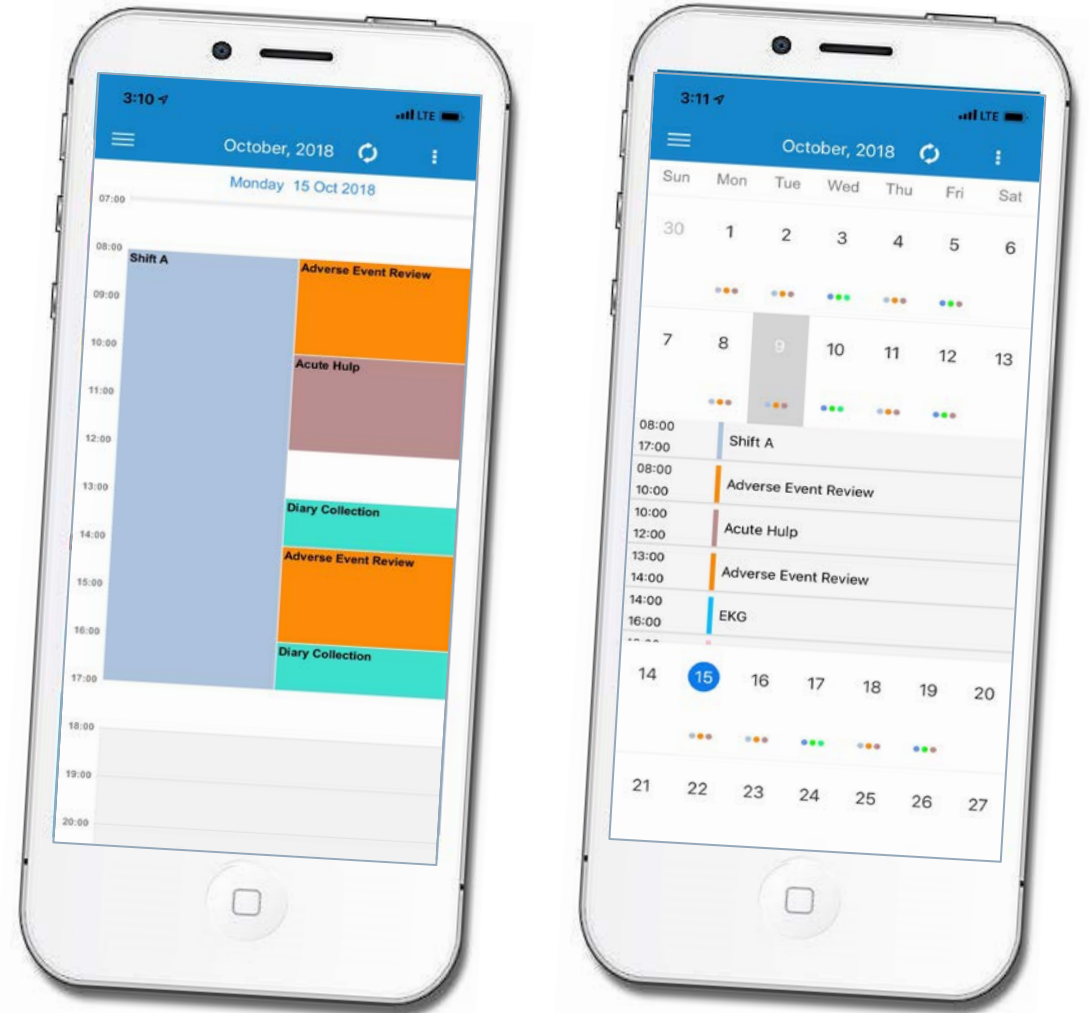
- Instant viewing monthly, weekly or daily



About Momentum

- o Instant viewing on mobile too...

*See your TrialOne generated
on-demand schedules
any way you want*



About Momentum

- Assignment monthly, weekly or daily with instant schedule equity for fast adjustments

momentum Scheduling Reports Policy Setup

Assignments by Month

REFRESH Year: 2018 Today Production Schedule

Display Filter

Staff	Total	Average	January	February	March	April	May	June
A Johnson	65	5.42	12	12	14	11	3	
Martinson	6	0.5	2	0	2	2	0	
Lisa	45	3.75	7	7	5	8	8	
Janet	92	7.67	17	13	15	16	16	
A Durakovic	5	0.42	0	2	0	2	0	
Dana	1	0.08	0	0	0	0	0	
Katie	56	4.67	5	3	4	3	8	
M Durakovic	34	2.83	6	6	6	5	7	
Kelsey	6	0.5	2	3	0	0	0	
Linder	8	0.67	0	2	2	2	0	
MDA	3	0.25	0	0	1	0	1	
J Martinson	36	3	5	5	6	6	10	
Average	27.64	2.3	4.43	3.86	4.43	4.29	4.36	
Total	387	32.25	62	54	62	60	61	

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momentum

Scheduling

Reports

Policy

Setup

Assignment Equity

REFRESH

1/1/2018

thru

6/30/2018

Today

Display Filter

Report Type: Staff: Staff Group: Role: Role Group: Role Layer: Day of Week: Options: Sort Staff: Sort Role: Equity Threshold

BY ROLE

All

All

All

All

All

All

5 items checked

Staff Name

Role Name

2.0

Role	Equity Calculation Type	Total	Archer, Sterling	Bliss, Chartfield	Daly, Tim	Davison, Pete	Fazio, Nick	Kane, Lana	Krieger, Algernop	Stauber, Rebecca	
Call	Assignments	181	27	27	26	21	27		26	27	
Staff Name	Start Date	End Date	Actual Assignments	Actual	Target	Actual (%)	Target (%)	Equity Scores	Equity Goals		
Archer, Sterling	1/1/2000		27	27	26.62	14.92 %	14.71 %	101.44 %	100		
Bliss, Chartfield	1/1/2000		27	27	26.62	14.92 %	14.71 %	101.44 %	100		
Daly, Tim	1/1/2000		26	26	26.62	14.36 %	14.71 %	97.68 %	100		
Davison, Pete	1/1/2000		21	21	21.29	11.60 %	11.76 %	98.62 %	80		
Fazio, Nick	1/1/2000		27	27	26.62	14.92 %	14.71 %	101.44 %	100		
Krieger, Algernop	1/1/2000		26	26	26.62	14.36 %	14.71 %	97.68 %	100		
Stauber, Rebecca	1/1/2000		27	27	26.62	14.92 %	14.71 %	101.44 %	100		

About Momentum

o Quick analysis of hours and time off

momentum Scheduling Reports Policy Setup

Hours Count

REFRESH Weekly Date Range Fiscal Period 11/1/2017 thru 11/30/2017 Production Schedule Dominant

Display Filter

Staff Name

Fiscal Year: (2017 - 2018)

Week# 44 (11/1/2017 - 11/4/2017) Week# 45 (11/5/2017 - 11/11/2017)

	Scheduled	Non-Work	Scheduled + Non-Work	Goal	(Scheduled + Non-Work) - Goal	Scheduled	Non-Work
Bienusa, Kelly	16:00	0	16:00	24:00	-8:00	8:00	0
Burse, Connie	22:00	0	22:00	20:00	2:00	34:30	0
Ehlenfeldt, Kelly	0	0	0	0	0	0	0
Flickinger, Kayla	24:00	0	24:00	20:00	4:00	40:00	0
Goddard, Ashley	16:00	0	16:00	30:00	-14:00	32:30	0
Hansen, Diane	16:00	0	16:00	20:00	-4:00	38:00	0
Hjelmstad, Jennifer	16:00	0	16:00	24:00	-8:00	40:30	0
Horn, Patty	16:00	0	16:00	30:00	-14:00	40:00	0
Kobliska, Danelle	16:00	0	16:00	24:00	-8:00	40:30	0
Kropuenske, Shelby	24:00	0	24:00	24:00	0	40:00	0
Lemke, Cindy	8:00	16:00	24:00	24:00	0	24:00	0
Melton, Stephanie	16:00	0	16:00	20:00	-4:00	41:00	0
Mertens, Debbie	0	0	0	0	0	0	0
Mevisen, Kariline	16:00	8:00	24:00	28:00	-4:00	40:30	0

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momentum Scheduling Reports Policy Setup

Time-Off Summary 2017

REFRESH Filter by: Yearly Dates Year: 2017 (This Year)

ADD NEW ADJUSTMENT RETURN

Display Filter

Staff Staff Group Show Time Off Types Show/Hide: All Radiologist 5 items checked Abbreviate Sta

Staff Name	Vacation Usage	Pending Approval	Conference Usage	Pending Approval	Day Off Usage	Pending Approval	No Call Usage	Pending Approval	Personal Time Usage	Pending Approval
MA	24d / 46d	0d	21d / 23d	0d	0d	0d	2d	1d	0d	0d
HB	7d / 38d	0d	13d / 23d	0d	0d	0d	0d	0d	0d	0d

Allowance Type	Usage	Pending Approval
Vacation	7d / 38d	0d

Date	ID	Time Off Block	Time	Source	Counts As	Counts As Reason	Notes
7/31/2017	488706	Full-Day		Production Assignment	1.00 (1.00) Days		
8/1/2017	490065	Full-Day		Production Assignment	1.00 (1.00) Days		
8/2/2017	490082	Full-Day		Production Assignment	1.00 (1.00) Days		
8/3/2017	490101	Full-Day		Production Assignment	1.00 (1.00) Days		
8/4/2017	490124	Full-Day		Production Assignment	1.00 (1.00) Days		
12/28/2017	520009	Full-Day		Production Assignment	1.00 (1.00) Days		
12/29/2017	520010	Full-Day		Production Assignment	1.00 (1.00) Days		

Page Size: 10

7 items in 1 pages
92 items in 10 pages

Why Momentum was chosen for TrialOne integration

- o Simplified UX
 - Modern and easy to use interface
 - Require less training with a faster transition period
- o Equity and real-time Reporting
 - Automation of equitable scheduling with real-time reporting
- o Most sophisticated scheduling algorithm
 - Internationalized, with more scheduling scenarios and the capabilities
- o Superior Services Included
 - Deployment teams configure it for the way you work
 - Technical Account Manager assigned to ensure success during and after deployment
 - Prompt and reliable support included with subscription

What Momentum TrialOne integration means



Automated scheduling from real-time TrialOne demand



Intelligent association with specific studies



Flexible shift length variability



Actionable reports from on-demand schedules

There's more...

- Mobile access to TrialOne demand generated schedules
- Automatic fairness with real-time equity ratings of all Phase 1 clinician schedules



How the integration will deliver



- TrialOne feeds Demand to Momentum
- Based on 'Rounds' needs determined by scheduled visits
- Shift length variable by time
- Momentum schedules adjusts in real-time based on demand from TrialOne's 'rounds' to be worked
- Assignments are associated with Study / Visit (part of V1 development)
- Shift length is variable following standard Momentum intervals

Thank you



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