edge

Q&A Coffee Sessions
with EDGE super users

Super User Q&A: April 2023

"The use of EDGE to record costs for commercial and non-commercial studies has been one of our greatest achievements. The use of this information allows us to ensure that we invoice all the activities we do in research and use this data for income distribution."

– Monica Serrano, Research Finance Manager, University Hospitals Dorset NHS FT

USER PROFILE

Name: Monica Serrano
Organisation: University Hospitals Dorset NHS Foundation Trust
Job Title: Research Finance Manager
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EDGE user since: 2014

01

How and why did you move into your current role within clinical research?
I arrived in the UK 12 years ago to study English. Although my education and career history in Colombia had been in finance and accountancy, supporting my English studies was more important than pursuing a "career" at the time, so I financed my studies through roles which allowed me time to continue learning. This led me to a position within the Estates team at the Royal Bournemouth Hospital I found the work and environment at the hospital really interesting. I subsequently became a Data Manager with the research team at RBH, later progressing to a Project Co-ordinator, and when the opportunity to work with the financial side of research became available, I knew it was a good fit for me.

02

What does your role as Research Finance entail on a typical day at UHD?
There is no typical day in my job, some days I will be in meetings with different departments or sponsor representatives; reviewing new study budgets, protocols, study manuals, CRF guidelines, meetings with members of the study team and the sponsor; reviewing various hospitals systems and study information to do reconciliation; comparing POs against EDGE finances to raise invoices and then income distributions. Processing travel expenses, training staff, etc. – every day is different, which I really enjoy!

03

What does the patient and research landscape currently look like at UHD?
Across our 3 hospitals we typically have 300-400 studies running, recruiting around 4000 participants per year. We take part in a healthy number of commercially sponsored studies.

04

You've been using EDGE for almost 9 years. How do you personally utilise EDGE in your daily role?
Within my current role I use the EDGE Finance facilities along with the EDGE Finance Tools developed by Stevie Barre and Mat Davis to invoice and reconcile the study finances to ensure that all outstanding activity payments are recorded and recovered. We also use attributes and workflows for study finance management/budget negotiation/reconciliation and reporting. I worked with Mat and Stevie to help develop the new Apportioning/Income Distribution

tools used in-house, which have now been shared with the EDGE community.

05
What is your favourite functionality to use in EDGE and why?
Obviously, the Finance features within EDGE are the most relevant to my daily role, but everything from recruitment data, study information, attributes, workflows, and notes come into play most days.

06
In what ways has your use of EDGE changed and evolved over the past 9 years?
As both my role and my organisation's use of EDGE have evolved over the years, so too, has my daily use of EDGE. From recording recruitment and generating basic reports for sponsor feasibilities responses, to using EDGE for most Research activities; saving main study documents, recording patient appointments, study costs, global calendar (annual leave, monitor visits, training sessions, etc.), workflows for various activities, attributes (to record local processes and discussion with various departments), assigning local study IDs, and more complex reports (to assess our finances, C&C, workload, etc.).

07
What are your/site's plans for using and developing EDGE over the next 12 months?
As well as watching the EDGE 3 Familiarisation videos from the EDGE team, we have also had internal sessions looking at EDGE 3. I'm looking forward to the improved finance facilities and invoice recording. I'm excited

to see what further development may come in future!

08
If you could offer one tip for new users working in finance management, what would it be?
Spend some time learning to get the most out of reporting in EDGE (or find someone (Mat) in your team to help you). There is often a need to combine different EDGE reports to be able to view the data in the most useful way – for example, comparing finance activity by specialty, PI, or division. I'm hopeful that greater flexibility in the finance reports will come in future EDGE 3 updates!

09
What is your "bigger picture?" That is, what do you find most fulfilling about your role?
Improving the processes that contribute to the financial sustainability and growth of Research at our Trust. Ultimately, continuing and increasing successful research allows us to offer better and broader treatment options for our patients.

10
Describe one of your team's greatest achievements:
The use of EDGE to record costs for commercial and non-commercial studies. The use of this information allows us to ensure that we invoice all the activities we do in research and use this data for income distribution. We are developing our use of this information for other purposes like staff capacity and distribution, schedule of assessments compliance, excess treatment costs etc.

11
One clinical research research superpower that you wish you possessed:
The power to do ten things at once!

12
One challenge that you think clinical research faces within finance management:
I think all NHS research organisations suffered financially during the pandemic and the recovery of commercial research has been slow – supporting one another and sharing ideas has never been more important.

13
One thing that people might not know about you:
My first business venture was exporting classic American cars from Colombia to Europe, then I moved into property development.

14
One thing that inspires you:
Coffee, especially Colombian coffee (the best 😊)

Interview by Ken Brackstone, Clinical Informatics Research Unit **k.brackstone@soton.ac.uk**