

# Portfolio360 – “It All Started with a Spreadsheet”

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## 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.

## Portfolio360 in Review

Clinical Trials Revenue

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

**Program Portfolio Summary**

Accrual Filters Framework Filters Financial Filters

	Phase 1 or 2	Phase 3	Cooperative %	IIT %	Revenue FYTD Var	Revenue FYTD Var%
Framework Goal	80%	20%	10%	20%	CT Revenue > Forecast	
Current framework	78.82 %	21.18 %	14.62 %	29.56 %	\$5.53M	13.79 %

Expense/Revenue Ratio: **0.87**

Percent of studies on target: **43.84 %**

1.02 Average Current Accr...  
109.98 Average Accrual Goal: **297.89 %**

Monthly Accrual vs Goal: **297.89 %**

Weekly Prescreening: **206.68 %**

Weekly Accrual Vs Goal: **274.14 %**

Weekly Consent vs Goal: **244.15 %**

# of ineligible patients: **507**

Percentage of studies that have reached 25%, 50%, 75% or 100% accrual

	25%	50%	75%	100%
Achieved 25 %	48.06 %	33.89 %	24.64 %	12.11 %
Achieved 50 %				
Achieved 75 %				
Achieved 100 %				

MCC	Accrual Variance	Screen 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 %
20752	1.58	11.11 %	8/23/2021	2022-02-25		186	2022-07-23	2023-06-23	2024-05-22	2025-04-22
20963	10.36	42.86 %	12/15/2021	2022-03-01		76	2023-03-16	2024-06-14	2025-09-13	2026-12-14
21247	-2.38	50.00 %	3/31/2023	2023-09-14		167	2023-09-29	2024-03-30	2024-09-28	2025-03-30

**Portfolio Framework**

Phases Breakdown

Phase	Protocol Count	OTA	Phase %
Phase I, I/II, II	186	150	76.27 %
Phase III	45	36	19.07 %
N/A	11	9	4.66 %
<b>Total</b>	<b>236</b>	<b>195</b>	<b>100.00 %</b>

Sponsors Breakdown

Sponsor Type	Protocol Count	OTA	Sponsor Type %
Industry	123	91	52.12 %
Institutional	71	68	30.08 %
National	32	26	13.56 %
Externally Peer-Reviewed	10	10	4.24 %
<b>Total</b>	<b>236</b>	<b>195</b>	<b>100.00 %</b>

Status Breakdown

Status	Protocol Count	Protocol Status %
OPEN TO ACCRUAL	195	9.10 %
SUSPENDED	41	1.91 %
<b>Total</b>	<b>236</b>	<b>11.01 %</b>

DT4 Breakdown

Data Table 4 Report Type	Protocol Count	OTA	Data Table 4 %
Interventional	236	195	97.12 %
<b>Total</b>	<b>236</b>	<b>195</b>	<b>97.12 %</b>

Inpatient

Inpatient	Protocol Count	OTA	Inpatient %
No	181	150	76.69 %
Yes	55	45	23.31 %
<b>Total</b>	<b>236</b>	<b>195</b>	<b>100.00 %</b>

Protocol Type

Protocol Type	Protocol Count	OTA	Protocol Type %
Treatment	195	195	97.99 %
<b>Total</b>	<b>195</b>	<b>195</b>	<b>97.99 %</b>

Sponsors Breakdown

Status	OPEN TO ACCRUAL	SUSPENDED	Total
Sponsor Name	Protocol Count	Subject Accrual	Protocol Count

## Solutions and Methods

- Reports now synched in One Dashboard.
- 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.