



### Background

Administrative workflows supporting PRMS and IIT Committee operations were largely managed outside OnCore CTMS, relying on manual email-based processes, tracker updates, and document handling. This resulted in fragmented communication, transcription burden, and inconsistent documentation across stakeholders.

### Challenges

- Manual email generation and tracking across multiple committees
- Unstructured PI and stakeholder responses via email
- High administrative burden for synthesis and documentation
- Inconsistent formatting and loss of detail in summaries
- Significant time required for meeting preparation and reporting

### Solutions & Methods

- Designed standardized MS Forms for PI input
- Built Power Automate workflows for PRMS processes
- Automated Word template population, PDF generation, and SharePoint storage
- Integrated Excel trackers as central data source
- Embedded structured response requirements to reduce variability

### Outcomes

- Eliminated ~1–2 weeks of manual administrative work per cycle
- Improved accuracy and consistency of committee documentation
- Increased PI response standardization and engagement
- Reduced fragmented email communication
- Enabled reallocation of staff time to higher-value initiatives

### Future Directions

- Integration with OnCore CTMS via API
- Expansion to additional PRMS workflows (DMT, inactive submissions, amendments)
- Continued cross-institutional knowledge sharing (AACI community)
- Enhanced logic, validation, and automation scalability

## Workflow Comparison: Manual vs Automated

Process Component	Without Automation	With Automation
Email generation	✗ Manual creation (~100+ emails/cycle)	✓ Automated templated emails via Power Automate
Recipient entry	✗ Manually entered per protocol	✓ Pulled directly from Excel tracker
Custom chair language	✗ Manually added each time	✓ Pre-stored in tracker fields
Response method	✗ Free-text email responses	✓ Structured MS Forms submission
Response format	✗ Unlimited text, attachments, email chains	✓ Character-limited standardized input
Data capture	✗ Manual review and synthesis	✓ Auto-populated into tracker
File storage	✗ Manual saving to folders	✓ Automatic PDF generation + SharePoint storage
Tracker updates	✗ Manual transcription	✓ Automated updates via workflow
Documentation consistency	✗ Fragmented and variable	✓ Standardized and uniform
Chair summaries	✗ Manual 1–2 line synthesis per protocol	✓ Structured outputs for review
Time burden	✗ Days per cycle	✓ Significantly reduced / near real-time processing

### Power Automate Workflow Types Simplified

#### 1. Automated Communications

- Triggered manually from Excel tracker
- Sends standardized emails to PIs, committees, and stakeholders
- Incorporates protocol-specific or chair-approved custom language when needed
- Ensures consistent, templated communication across workflows

#### 2. Structured Response Capture

- Microsoft Forms replaces unstructured email responses
- Standardized, character-limited input improves clarity and consistency
- Responses are automatically captured in Excel trackers
- Reduces fragmented communication and missing information

#### 3. Document Generation & Archiving

- Word templates auto-populated from tracker or form inputs
- Outputs converted to PDF for formal recordkeeping
- Automatically saved to SharePoint and/or distributed via email
- Linked back to Excel tracker for end-to-end traceability



Figure 1: Cancer PRMC Accrual Monitoring Determinations Flow

### Impact

AI-assisted workflow automation transformed fragmented, email-driven committee operations into a standardized, scalable, and traceable system—reducing administrative burden while improving data integrity and communication efficiency.