

## Interactive Costing Tool (iCT) Site Status Change

The following updates to the iCT were requested by a number of stakeholders across Industry, LCRN and site groups:

- The 'View Details' button is confusing
- Companies should be able to **preview site costs** before releasing to Site Representatives
- There needs to be the option to **remove** a Site iCT
- There should be a way to **indicate** when the review of site costs has been **completed**
- There should be a way to '**lock down**' site costs but also an option to be able to **amend**

In response, we have developed the following:

1. A new 'Actions' column separate to the Site Costs column to make it clear what users need to do

| PARENT ORGANISATION                             | LCRN                           | RTS IDENTIFIER | SITE COSTS                    | ACTION                                       |
|---|--------------------------------|----------------|-------------------------------|--|
| Non-NHS Activity in Yorkshire and Humber        | NIHR CRN: Yorkshire and Humber | DT_YH_LCRN     |                               | <a href="#">CREATE</a>                       |
| NHS SOUTH EAST LONDON CCG                       | NIHR CRN: South London         | 72Q            | <a href="#">View and Edit</a> | <a href="#">RELEASE TO SITE</a>              |
| NHS SOMERSET CCG                                | NIHR CRN: South West Peninsula | 11X            | <a href="#">View and Edit</a> | <input type="checkbox"/> Complete            |
| LEEDS AND YORK PARTNERSHIP NHS FOUNDATION TRUST | NIHR CRN: Yorkshire and Humber | RGD            | <a href="#">View</a>          | <input checked="" type="checkbox"/> Complete |

- Previously 'View Details' would create the Site iCT **and** allow Site Representatives to access this at the same time
- This change now splits these two actions so that creating the Site iCT and giving Site Representatives access can be done separately
- The actions now available for Company Representatives will be:
  - Create
  - Release to Site
  - Complete

2. The ability for Company Representatives to preview site costs before releasing to Site Representatives

- Clicking 'Create' copies the Study iCT (and any open comments) as happens currently when clicking 'View Details' but the Site iCT is not automatically released to the Site Representatives
- After this, the Company Representatives can select 'View and Edit' under Site Costs to preview the Site iCT and choose whether they want to carry on with a site review and make any site specific amendments required

- Once happy to proceed, the Company Representative selects the 'Release to Site' button so Site Representatives have access to the Site iCT
- If the Company Representatives realises further amendments are required to activities at the Study-level, they can remove the Site Costs by using the bin icon and make any amendments that need to be made to the Study iCT before it is released to the site
- Site Representatives will only have the option to 'View and Edit' site costs once the Company Representative has selected 'Release to Site'

Company Representative view:

| PARENT ORGANISATION                             | LCRN                           | RTS IDENTIFIER | SITE COSTS               | ACTION  |
|---|--------------------------------|----------------|--------------------------|---|
| Non-NHS Activity in Yorkshire and Humber        | NIHR CRN: Yorkshire and Humber | DT_YH_LCRN     | <div>CREATE</div>        |   |
| NHS SOUTH EAST LONDON CCG                       | NIHR CRN: South London         | 72Q            | <div>View and Edit</div> | <div>RELEASE TO SITE</div>                              |
| NHS SOMERSET CCG                                | NIHR CRN: South West Peninsula | 11X            | <div>View and Edit</div> | <div><input type="checkbox"/> Complete</div>            |
| LEEDS AND YORK PARTNERSHIP NHS FOUNDATION TRUST | NIHR CRN: Yorkshire and Humber | RGD            | <div>View</div>          | <div><input checked="" type="checkbox"/> Complete</div> |

Site Representative view:

| PARENT ORGANISATION                             | LCRN                           | RTS IDENTIFIER | SITE COSTS               | ACTION  |
|---|--------------------------------|----------------|--------------------------|---|
| Non-NHS Activity in Yorkshire and Humber        | NIHR CRN: Yorkshire and Humber | DT_YH_LCRN     |                          |   |
| NHS SOUTH EAST LONDON CCG                       | NIHR CRN: South London         | 72Q            |                          |   |
| NHS SOMERSET CCG                                | NIHR CRN: South West Peninsula | 11X            | <div>View and Edit</div> | <div><input type="checkbox"/> Complete</div>            |
| LEEDS AND YORK PARTNERSHIP NHS FOUNDATION TRUST | NIHR CRN: Yorkshire and Humber | RGD            | <div>View</div>          | <div><input checked="" type="checkbox"/> Complete</div> |

### 3. The ability to mark a Site iCT as 'Complete' to indicate that the review of the site costs has been completed

- There are two ways to mark a Site iCT as complete:
  - Select the 'Complete' checkbox in the Study Organisation table

| SITE COSTS               | ACTION  |
|--------------------------|---|
|                          |   |
| <div>View and Edit</div> | <div><input type="checkbox"/> Complete</div>            |
| <div>View</div>          | <div><input checked="" type="checkbox"/> Complete</div> |

- Select the 'Mark Site Review Complete' when viewing the Site iCT itself. This will check the 'Complete' box in the Study Organisation table when you go back to the Study iCT

## NHS SOMERSET CCG (11X)

[BACK TO STUDY ICT](#)
[MARK SITE REVIEW COMPLETE](#)

### Test Arm 1

Number of Open Comments: 0  
Per-Participant Cost: £14060.13  
(with Overheads and MFF)

### Setup & C

Number of Op

- This functionality is available to both Company Representatives and Site Representatives
- Once the Site iCT is marked as 'Complete', it becomes read-only to 'lock down' the site costs
- In the Site Costs column of the Study Organisations table, the link says 'View' rather than 'View and Edit' as you can no longer edit

|                           | RTS IDENTIFIER | SITE COSTS                    | ACTION                                       |
|---------------------------|----------------|-------------------------------|--|
| CRN: Yorkshire and Humber | DT_YH_LCRN     |                               |  |
| CRN: South London         | 72Q            |                               |  |
| CRN: South West Peninsula | 11X            | <a href="#">View and Edit</a> | <input type="checkbox"/> Complete            |
| CRN: Yorkshire and Humber | RGD            | <a href="#">View</a>          | <input checked="" type="checkbox"/> Complete |

- Within the Site iCT, the buttons to add/delete arms have been removed

[BACK TO STUDY ICT](#)

### Test Arm 1

Number of Open Comments: 8  
Per-Participant Cost: £12763.18  
(with Overheads and MFF)

### Test Arm 2

Number of Open Comments: 6  
Per-Participant Cost: £12763.18  
(with Overheads and MFF)

### Test Arm 3

Number of Open Comments: 0  
Per-Participant Cost: £0.00  
(with Overheads and MFF)

### Setup & Closedown

Number of Open Comments: 1

### No option to Add Arm

- Within individual arms, the buttons to add/delete/amend Activities, Visits and Occurrences have been removed

| Scheduled Activities   | VISIT SCHEDULE |  |  |  |  |  |  |  |  |  |  |  |  |  | COST BREAKDOWN |       |
|--|----------------|--|--|--|--|--|--|--|--|--|--|--|--|--|----------------|-------|
| All Participants (5)   |                |  |  |  |  |  |  |  |  |  |  |  |  |  |                |       |
| Consent for Genetic Sample                                       |                |  |  |  |  |  |  |  |  |  |  |  |  |  |                | TOTAL |
| Specimen Dispatch by post/courier                                |                |  |  |  |  |  |  |  |  |  |  |  |  |  |                |       |
| Electrocardiogram, routine ECG (PRG) with at least 12 leads, ... |                |  |  |  |  |  |  |  |  |  |  |  |  |  |                |       |

- You can still view open comments but will not be able to accept them




#### 4. The ability to change the status of a 'Complete' Site iCT to allow it to be amended

- After marking a Site iCT 'Complete', if a Company Representative or Site Representative realise there are changes that still need to be made or comments that they want to accept, they can simply uncheck the 'Complete' box in the Study Organisations table for the Site iCT to become editable

|                           | RTS IDENTIFIER | SITE COSTS                    | ACTION                                       |
|---------------------------|----------------|-------------------------------|--|
| CRN: Yorkshire and Humber | DT_YH_LCRN     |                               |  |
| CRN: South London         | 72Q            |                               |  |
| CRN: South West Peninsula | 11X            | <a href="#">View and Edit</a> | <input type="checkbox"/> Complete            |
| CRN: Yorkshire and Humber | RGD            | <a href="#">View</a>          | <input checked="" type="checkbox"/> Complete |

#### 5. The ability for Company Representatives to Delete a Site iCT at any stage of the review process

- This is done individually per Parent Organisation by clicking the bin icon next to the relevant Site iCT

| PARENT ORGANISATION                             | LCRN                           | RTS IDENTIFIER | SITE COSTS                    | ACTION   |
|---|--------------------------------|----------------|-------------------------------|--|
| Non-NHS Activity in Yorkshire and Humber        | NIHR CRN: Yorkshire and Humber | DT_YH_LCRN     |                               | <a href="#">CREATE</a>   |
| NHS SOUTH EAST LONDON CCG                       | NIHR CRN: South London         | 72Q            | <a href="#">View and Edit</a> | <a href="#">RELEASE TO SITE</a>               |
| NHS SOMERSET CCG                                | NIHR CRN: South West Peninsula | 11X            | <a href="#">View and Edit</a> | <input type="checkbox"/> Complete             |
| LEEDS AND YORK PARTNERSHIP NHS FOUNDATION TRUST | NIHR CRN: Yorkshire and Humber | RGD            | <a href="#">View</a>          | <input checked="" type="checkbox"/> Complete  |

- A warning pop-up will appear to confirm this decision

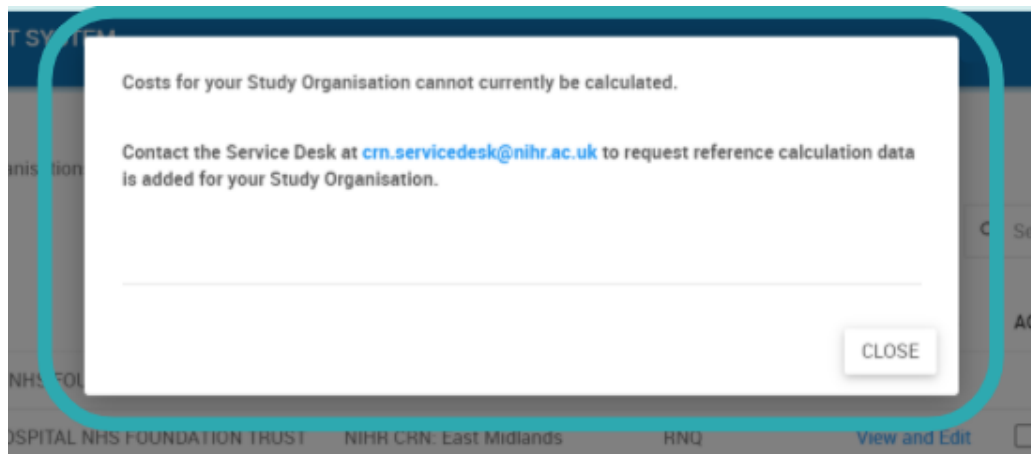
- A Site iCT can be deleted in any status: before or after it has been made available to the site and once it has been marked complete
- Please be aware that, upon deleting, any site specific changes (such as the acceptance of comments or editing of activity) already made on each Site iCT will be lost and could interfere with any ongoing negotiations at a site level

#### Benefits:

- Greater flexibility in the use of the tool
- The ability to 're-release' a Site iCT (by deleting and creating again) when an amendment is made in a Study-level iCT so that these changes will also be reflected in the Site iCT. Rather than having to update each Site iCT with the same amendment individually

#### Bonus:

- If the reference data necessary to calculate Indirect costs, Capacity Building and Market Forces Factor (MFF) for an Organisation are missing, an information pop-up appears



- This replaces the error page that was previously displayed that forced users to go back to the CPMS homepage

**From 8th December 2021 these changes will be live in CPMS.**

If you have any questions please contact [holly.wren@nihr.ac.uk](mailto:holly.wren@nihr.ac.uk) or [phillip.good@nihr.ac.uk](mailto:phillip.good@nihr.ac.uk)

#### Accessibility:

The above screenshots are intended as system guidance. If you require further support, or the same information in an alternative format, please contact [holly.wren@nihr.ac.uk](mailto:holly.wren@nihr.ac.uk)