How to Standardize Studies for your Team

Benefits of Creating Structure Templates in Florence

- Easy to handle Excel spreadsheets
- Feasible to implement across the team
- Customizable for different scenarios
- Available to everyone creating new Studies or Folders
- Importable into Florence in *under a minute*

Step 1: *Examine your Current Structure*

Create a list of your current Study Binder Tabs/Structure. Think about:

- What works?
- What doesn't?
- What has your team always wished for?
- Where are your duplicative efforts? (For example: Is there a particular document that is filed in multiple places?)

Step 2: *Consider Access Control*

What should the following roles be able to see and do within your Study:

- Coordinators
- Investigators
- Other staff
- Monitors

How can you group documents into Folders or Binders according to shared or limited access? Consider a designated and restricted location for PII/PHI documents

Step 3: *Incorporate eBinders features*

Draft a proposed Structure in Excel:

1. Take advantage of specific eBinders capabilities to include in your structure:
    A. Placeholders [*]
        i. Which documents will be added to this folder?
    B. Tags [#]
        ii. What reports would be useful to run? (Activation, Startup, CVs, etc.)
    C. Due dates [!]
        iii. Save time by including them upfront
    D. Labels [^]
        iv. What reports are useful to run? (Study Type, Site, Department, etc.)
    E. Document Types [>]
        v. Save time by including them upfront
2. Compare to the Florence eISF Reference Model and adjust if needed