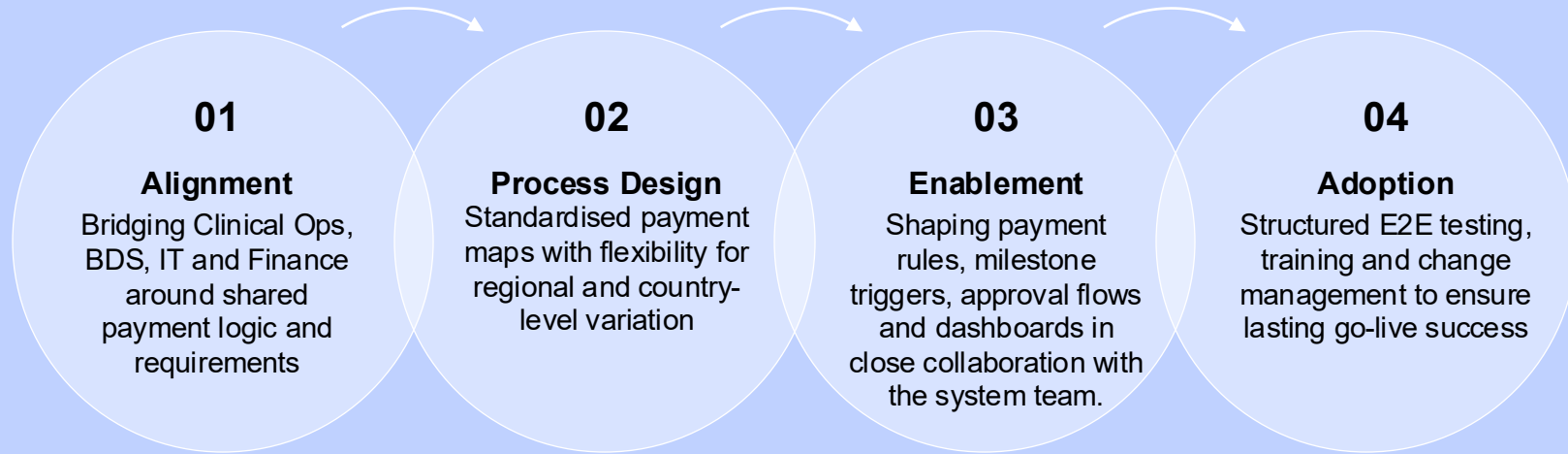


# From complexity to control: how we help sponsors implement site payments in Veeva



## **Streamlined payments**

All site payment processes brought in-house, reducing delays and improving payment accuracy across studies.

## **Enhanced collaboration**

Stakeholders from Clinical Ops, Finance and IT aligned around a single end-to-end process, reducing silos.

## **Readiness for change**

Teams equipped with the process clarity and structure needed to support technical migration and integration activities.

# Best practices we bring to every engagement



## Design for regional variation early



- **Map country deviations upfront:** Payment rules, reconciliation logic and country-specific requirements must be defined before CTMS configuration begins.
- **Avoid costly retrofits:** Changes to payment logic post-configuration create rework across rules, testing and approval flows



## Treat cross-functional alignment as a deliverable



- **Bring the right people to the table:** Clinical Ops, Finance, IT and BDS all have stakes in payment logic - misalignment discovered late is expensive to resolve.
- **Alignment is as critical as the tech:** The best Veeva configuration fails if the business has not agreed on the underlying process it supports.



## Test edge cases, not just happy paths



- **Standard UAT scripts miss the hard cases:** Partial visits, screen failures, protocol amendments and early terminations expose gaps that routine testing will not catch. Involve end-users.
- **Test multi-currency and multi-region:** Country-specific payment amounts, currencies and tax rules all need end-to-end validation across the full study scope.



# What that looks like in practice

## → The Situation: Payments Outsourced, Platform Disconnected

- A global pharma sponsor launched Veeva Clinical Operations across EMEA, APAC, LATAM and Americas.
- With Veeva's payments module not yet available, payment processing was handed to a CRO as an interim measure.
- Data sat in two separate systems - a legacy EDC and Veeva Clinical - with no integration between them.
- The sponsor had no real-time visibility into payment status, budget accruals or site reimbursement timelines.

## → The Challenge: Bringing Payments In-House Across multiple Regions

- With Veeva Payments now available, the client needed to take back full ownership of the payment process from the CRO.
- Data had to be reconciled and migrated from both the legacy EDC and Veeva Clinical into a single unified flow.
- Processes needed to work across EMEA, APAC, LATAM and Americas — each with different country rules and requirements.
- Timely, compliant site payments were critical to maintaining site engagement and study momentum globally.

## → Our Solution: End-to-End Programme Support Across People, Process & Platform

- Facilitated cross-functional workshops with Clinical Ops, BDS, Finance and IT to align on end-to-end payment logic and requirements.
- Designed standardised payment process maps with country-level flexibility, providing the business blueprint for system configuration.
- Defined and documented the payment rules, milestone triggers, approval flows and reporting needs that shaped the Veeva CTMS build.
- Drove end-to-end testing, collaborated with the training team on go-live content, and hosted forums and spotlight sessions to embed adoption.