666 Exton Commons
Exton PA 19341
(484) 879-426

EFPIA Reporting implementation at a Top 10 Pharma with Cresen Solutions' SpendMate©

Cresen Solutions was formed to provide distinct and qualified services to the life sciences industry. Our organization has a clear focus and mission to enable improved business outcomes through advanced technology solutions and analytical expertise. The leadership team is comprised of seasoned healthcare industry experts focused on enabling the technological advancements necessary in today's ever-changing healthcare landscape. Strong foundations in technology systems and solutions and the business acumen to enable predictable business results are keys to our success. Experience, quality, and innovation are the cornerstones of our team's capabilities and are applied to each engagement.

SpendMate© is a healthcare compliance transparency tool designed to streamline the end-to-end business process of transparency reporting. Like other offerings in the Cresen Solutions suite, SpendMate© was created in partnership with our life sciences and pharmaceutical customers. SpendMate© enables companies to meet the growing demand for transparency between industry and medical providers in the form of report preparation, generation, and submission, doing so cost-effectively, and it also easily scales with companies as they expand globally. Transparency reporting has complex requirements, SpendMate© excels in the way it enables healthcare companies to efficiently navigate these requirements.

All healthcare companies engage with medical professionals and organizations for various events and other engagements. Transactions from these interactions can include a service fee for speaking at an event, reimbursement of travel and accommodation expenses, and more. By law, or code, these transactions must be reported in each country where applicable and be made publicly available. Since the governing body can change based on the country or region, the reporting requirements also differ. Another layer of complexity includes intricate business rules that are used to evaluate which transactions are reportable or not. While these reports can be created manually, doing so can prove error prone and time-consuming for compliance teams. When dealing with large numbers of transactions, manually determining which are to be reported is both inefficient and is generally considered poor business practice.

SpendMate© simplifies the spend reporting process by providing the flexibility and scalability needed by our clients to meet the compliance demands of external entities. Recently, SpendMate's© reporting module was successfully implemented at a top 10 pharmaceutical company, providing greater control and configurability over their previous reporting solution. SpendMate© provides efficiency in form and function by having a user-friendly interface that is driven by a configurable business logic engine. This provides the ability to add or remove attributes and business rules at any time without impacting legacy data. The key versatility of SpendMate© lies within its fully customizable forms and templates, allowing Cresen Solutions to

666 Exton Commons
Exton PA 19341
(484) 879-426

tailor the data entry forms and reporting templates to align with the needs of each client. Using SpendMate's© end-to-end process, data can be imported from various engagement management systems, processed, validated, and reported using the built-in reporting module. When operating on a global scale across different countries, users and user permissions must be managed effectively. User roles within SpendMate© are broken into 3 categories, Administrative, Data Coordinator, and Data Entry. Administrative accounts have access to all data and functionalities within SpendMate© and also have the ability to perform system administration and configuration. Data-Coordinators can create and edit transactions and submit them for verification as well as generate country-specific spend reports. To add a layer of data security, Data Coordinators can be assigned to specific countries and will only have access to the assigned country's data and reports. Lastly, the Data Entry role can be assigned to vendors giving them access to specific forms to enter transactions for commercial and research engagements. Users and their roles can be quickly set up or adjusted by the admins, ensuring a quick transition during times of employee turnover.
Below in **Figure 1** is an architecture diagram that showcases the different aspects of SpendMate©.

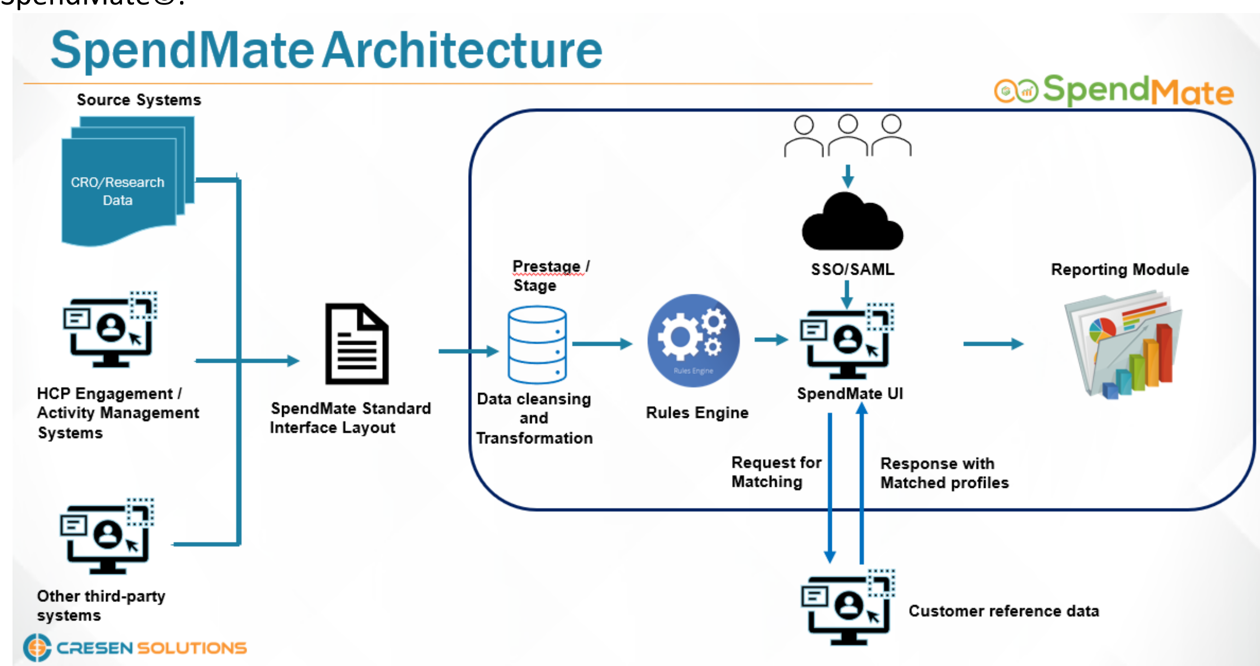

Figure 1: SpendMate© Architecture Diagram

One key area in which SpendMate© excels is through its various activity management system integrations, allowing SpendMate© to receive a constant flow of data in relation to new events and other engagements between healthcare companies and medical professionals and organizations. The data received from these activity management systems is then cleaned and transformed before being displayed. To streamline the user's access to SpendMate©, single sign-on integrations are supported but not required. Users can review and validate the data within SpendMate© and use its built-in reporting module to generate spend reports specific to each country.

666 Exton Commons
Exton PA 19341
(484) 879-426

To ensure the accuracy of medical professional and organization customer records, SpendMate© has a partnership with Veeva Open Data and can integrate with other third-party vendors that maintain customer reference data to match the unique customer profiles. SpendMate© can be configured to send a request to a client's customer master using an API call, and the returned match responses will be displayed for the user to select the matching customer profile. Additionally, SpendMate© supports automatic matching of the customer profiles if certain unique identifiers are present, such as the NPI number or other local identifiers. If duplicate customer profiles exist, SpendMate© has the added functionality of merging and unmerging customers to address these issues.

One of the key features of SpendMate© is its reporting module, which supports the European Federation of Pharmaceutical Industries and Associations (EFPIA) reports, European Local Law reports, and U.S Centers for Medicare & Medicaid Services (CMS) reports, Patient Organization (PO) reports, and other country specific reports (Brazil, Colombia, etc.). Given that the healthcare compliance landscape is constantly evolving with new regulations and requirements being implemented, it is important that SpendMate© can adapt to these changes. As reporting templates and business rules change, the reporting module allows for easy configuration with very little or no development effort. The reporting module also gives users the option of multi-language report generation at the country level. One of the input parameters to generate a report is the start and end dates, giving users the choice on the time-frame for their specific reporting output. For example, SpendMate's© reports can display monthly, quarterly, and yearly transactions, or even those within specific date ranges.

Interactions between healthcare companies and medical professionals and organizations can occur in a multitude of ways. For that reason, SpendMate© allows our clients to determine which interactions are reportable and not reportable through business rules using mappings at the country and report type level. The same approach is applied to professional types, for example, a nurse might be reportable in Norway, but not in Switzerland, this can be easily handled through the mapping configurations of each country. For the purposes of validation, a validation file is automatically generated along with each report, following the same input parameters selected on the UI. Within the validation file are two key columns; if the transaction is included on the report and if not, the reason why it is excluded. The validation file can be used to quickly determine why certain transactions are missing from the disclosure report based on the reasoning provided. Users can also quickly adjust the mapping configurations to rectify the issue, if needed. SpendMate's© reporting module can also generate reports in different currencies and various numeric formats. SpendMate© offers users the choice of prepending or appending a currency code to the amount as per their requirements.

The size of compliance teams can vary, therefore, SpendMate© allows for the saving of generated reports within the application. Saved reports can be accessed by everyone on the compliance team thereby reducing the need to constantly regenerate new reports. Reports from prior years can be maintained within the tool and are available for any updates or if a refreshed report is needed. Lastly, SpendMate© has an extensive audit trail capability that includes archiving/audit information on who generated which report, when it was generated, what the

666 Exton Commons
Exton PA 19341
(484) 879-426

input parameters were, et cetera, allowing the compliance team to keep track of historical information and effectively respond to audit and exception inquires.

In conclusion, SpendMate© is designed to simplify compliance transparency reporting on a global scale by supporting healthcare companies through every step of the process. SpendMate's© ability to adapt paired with its flexibility allows our clients to thrive in the ever-changing landscape of compliance reporting. To learn about our support of European local law reports, see our whitepaper. To gain access to our compliance website, a centralized location for country specific compliance information, please email us at info@cresensolutions.com. To learn more about Cresen Solutions and its other Flagship products, MonitorMate© and EngageMate©, we encourage you to visit our website at https://cresensolutions.com/. On this website, you will also find our free PowerCMS tool, a dashboard that allows you to analyze the Open Payments data in a unique and innovative way. Sign up for free and get a taste of what Cresen Solutions can do for you and your compliance team.