

Guidance

Completing the Schedule of Events Cost Attribution Template (SoECAT)

Introduction

Please read the following guidance before completing this template. More specific guidance is given on each tab within the template. You should seek support from your sponsor in completing the template and additionally, where appropriate and applicable (e.g. if your sponsor is non-NHS), from your lead NHS R&D Office. Where you intend to open NHS research sites in England, support is also available from your Lead Local Clinical Research Network (LCRN) and sign-off by a named [AcoRD expert](#) in your Lead LCRN is needed before submitting your funding application (your funder will advise on how and when to submit).

This SoECAT is designed to help appropriately attribute the costs associated with all **SITE LEVEL** activities at the time that application is made for research project grant/award funding. By site level we mean the costs that will be incurred by research sites, i.e. excluding costs incurred by the sponsor in managing the study, e.g. the cost of employing study managers, coordinators, monitors, etc.

The DH AcoRD guidance, which provides the basis for the transparent and consistent cost attribution on which this tool builds, should be consulted before completing this template and is available [here](#).

It is also recommended that you complete the AcoRD cost attribution training available [here](#) before completing the template.

Completing this tool

1. Completing the Study Information Tab

Further guidance is given within this tab in the excel template. **NOTE:** Key functionality within the tool is disabled until question 3 is answered.

2. Completing the Standard of Care, General Activities and Per-Participant Arm tabs

Further guidance is given within each tab (guidance on the per-participant tabs is given on the Arm1 tab only but applies to all per-participant Arm tabs).

Each tab is set out as a Schedule of Events. A standard list of procedures and investigations is provided, and may be selected from drop-down menus as follows:

2.1. How to select activities

- 1 Check to see where the activity appears on the 'List of Activities' tab. (If it doesn't appear, follow guidance on adding activities.)

| List of Activities | |
|----------------------------|--|
| Area of Activity | Specific Activity |
| Participant Identification | Database search |
| | Eligibility check (exclusions) |
| | Mail-out |
| Study Set Up | Attendance at training |
| | Site Initiation Visit |
| Study Monitoring | Re-labelling and releasing of IMP batch (Usual staff hourly rate) |
| | IMP release by Qualified Person (QP), if required (QP actual hourly rate) |
| | Individual training sessions for handling and preparation of study therapy/radiopharmaceutical (usual staff hourly rate) |
| | Non-standard reporting of or additional company requested stock (Usual staff hourly rate) |
| Pharmacy General | Attend monitoring visit (PI) |
| | Attend monitoring visit (Research Nurse) |
| | Completion of remote monitoring form |
| | CRA-requested dedicated Pharmacy staff time to support monitoring |

- 2 Take a note of the 'Area of Activity'.

| List of Activities | |
|----------------------------|--|
| Area of Activity | Specific Activity |
| Participant Identification | Database search |
| | Eligibility check (exclusions) |
| | Mail-out |
| Study Set Up | Attendance at training |
| | Site Initiation Visit |
| Study Monitoring | Re-labelling and releasing of IMP batch (Usual staff hourly rate) |
| | IMP release by Qualified Person (QP), if required (QP actual hourly rate) |
| | Individual training sessions for handling and preparation of study therapy/radiopharmaceutical (usual staff hourly rate) |
| | Non-standard reporting of or additional company requested stock (Usual staff hourly rate) |
| Pharmacy General | Attend monitoring visit (PI) |
| | Attend monitoring visit (Research Nurse) |
| | Completion of remote monitoring form |
| | CRA-requested dedicated Pharmacy staff time to support monitoring |

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3

Go to the tab being completed, select the 'Area of Activity' from the drop-down list – do this before selecting the 'Specific Activity'.

General Activities

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This tab should be completed with site level activities that are NOT undertaken on a per-patient basis (e.g. activities and similar). All activities should be given a cost attribution, in line with the DH AcoRD guidance. <https://www.gov.uk/government/publications/guidance-on-attributing-the-costs-of-health-and-social-care-res>

The IRAS Reference Number cell autopopulates and should not be manually over-written.

| IRAS Reference Number: | | 0 |
|---|---|---|
| Area of Activity (Select this first) | Specific Activity (Drop down only present when Area of Activity selected first – if required option is not available please follow guidance in Non-tariff Costs tab) | Dur (Mir |
| | | Comple proc |
| Participant Identification | | Selecting A Use the drop select the cc Activity. |
| Participant Identification | | |
| Study Set Up | | |
| Study Monitoring | | |
| Pharmacy General | | |
| Study Close Down | | |
| Non Tariff Cost | | |

4

Select the 'Specific Activity' from the drop-down list.

General Activities

Guidance

This tab should be completed with site level activities that are NOT undertaken on a per-patient basis (activities and similar). All activities should be given a cost attribution, in line with the DH AcoRD guidar <https://www.gov.uk/government/publications/guidance-on-attributing-the-costs-of-health-and-social-car>

The IRAS Reference Number cell autopopulates and should not be manually over-written.

| RAS Reference Number: | | 0 |
|---|---|-----|
| Area of Activity (Select this first) | Specific Activity (Drop down only present when Area of Activity selected first – if required option is not available please follow guidance in Non-tariff Costs tab) | |
| | | Con |
| Participant Identification | Database search | |
| | Database search | |
| | Eligibility check (exclusions) | |
| | Mail-out | |
| | Non Tariff Cost | |
| | | |
| | | |

It is also possible to add procedures and/or investigations that are not present in the drop-downs

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2.2 How to add new activities

1 Go to 'Non Tariff Costs' tab and enter the new activities. Also select relevant activity type (investigation or procedure)

Non-Tariff Costs

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Where standard of care, general activities or per participant activities involve procedures and/or investigations that are not present in the drop-downs (please first check the List of Activities tab for the alphabetical list of what is included in the drop-downs) additional procedures and/or investigations may be added below. These non-tariff costs, once added below, will be selectable from the Specific Activity drop-down on all tabs, if 'Non Tariff Cost' is first selected in the Area of Activity cell for that row.

Care should be taken in selecting whether a manually entered item is a procedure or an investigation. Procedures do not have fixed costs but are calculated by the cost of the time taken by an individual employed at a specific payscale to undertake (i.e. if your non tariff cost item is a procedure you should not enter a cost for it below but instead provide answers under the 'Duration' and 'Undertaken By' columns in the relevant tabs). Investigations do have fixed costs, which include the associated staff time costs. Where your manually entered item is an investigation, you should provide the cost below.

It is acknowledged that actual costs will change both over time and between NHS organisations. Costs provided here, including staff time and grade estimates, can only be indicators. This is true also of the tariff costs incorporated into the tool.

| Activity | Activity Type | Cost (IF) |
|-----------|----------------------------|-----------|
| example 1 | Investigation | |
| example 2 | | |
| example 3 | Investigation Procedure | |

2 If the new activity is an investigation enter the associated costs

Non-Tariff Costs

Guidance

Where standard of care, general activities or per participant activities involve procedures and/or investigations that are not present in the drop-downs (please first check the List of Activities tab for the alphabetical list of what is included in the drop-downs) additional procedures and/or investigations may be added below. These non-tariff costs, once added below, will be selectable from the Specific Activity drop-down on all tabs, if 'Non Tariff Cost' is first selected in the Area of Activity cell for that row.

Care should be taken in selecting whether a manually entered item is a procedure or an investigation. Procedures do not have fixed costs but are calculated by the cost of the time taken by an individual employed at a specific payscale to undertake (i.e. if your non tariff cost item is a procedure you should not enter a cost for it below but instead provide answers under the 'Duration' and 'Undertaken By' columns in the relevant tabs). Investigations do have fixed costs, which include the associated staff time costs. Where your manually entered item is an investigation, you should provide the cost below.

It is acknowledged that actual costs will change both over time and between NHS organisations. Costs provided here, including staff time and grade estimates, can only be indicators. This is true also of the tariff costs incorporated into the tool.

| Activity | Activity Type | Cost (IF) |
|-----------|---------------|-----------|
| example 1 | Investigation | £20.00 |
| example 2 | | |
| example 3 | | |

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- 3** Return to the tab being completed and select 'Non Tariff Cost' from the 'Area of Activity' drop-down list – do this before selecting the 'Specific Activity'.

Per-Participant Activities (4)
This tab should ONLY be completed for the fourth arm of studies

IRAS Reference Number:

Number of Participants in Arm 4

| Area of Activity (Select this first) | Specific Activity (Drop down only present when Area of Activity selected first - if required activity is not shown - follow guidance above) | Duration (Months) |
|---|--|----------------------|
| | | Completed |
| Non Tariff Cost | | Completed |

- 4** Select the new 'Specific Activity' from the drop-down list.

Per-Participant Activities (4)
This tab should ONLY be completed for the fourth arm of studies

IRAS Reference Number:

Number of Participants in Arm 4

| Area of Activity (Select this first) | Specific Activity (Drop down only present when Area of Activity selected first - if required activity is not shown - follow guidance above) | Duration (Months) |
|---|---|----------------------|
| | | Completed |
| Non Tariff Cost | <div style="border: 1px solid black; padding: 2px;"> example 1 example 2 example 3 </div> | |

Once you have selected a procedure on any tab, you should provide in the 'duration' column an estimate for the time that activity will take, in minutes. For investigations the duration column will be greyed out and should not be completed, (procedure costs are calculated on the basis of staff time, whereas investigations have fixed costs). You should then choose a staff-type from the drop-down menu in the 'undertaken by' column. This should be completed both for procedures and investigations.

Next you should indicate when each activity will occur. For the standard of care tab, you may either manually enter an 'x' or select 'x' from the drop-down menus. In the General Activity and Per Participant tabs, you should indicate that an activity is to occur by ascribing to it a cost attribution from the drop-down menu in the appropriate cell/s. An activity might occur once, or more than once, and should appear in each column where it is planned to occur. Cells in columns where the activity will not occur should be left blank. Cost attributions should be as per the AcoRD guidance:

| General Activities | | | | | |
|---|---|-----------------------|-----------------------------------|------------------------|------|
| Guidance This tab should be completed with site level activities that are NOT undertaken on a per-patient basis (e.g. one-off set-up or close-down activities and similar). All activities should be given a cost attribution, in line with the DH AcoRD guidance. https://www.gov.uk/government/publications/guidance-on-attributing-the-costs-of-health-and-social-care-research The IRAS Reference Number cell autopopulates and should not be manually over-written. | | | | | |
| IRAS Reference Number: | | 0 | | | |
| Area of Activity (Select this first) | Specific Activity (Drop down only present when Area of Activity selected first – if required option is not available please follow guidance in Non-tariff Costs tab) | Duration (Minutes) | Undertaken by (Drop down only) | Site Set Up | |
| | | | Complete only for procedures | | |
| Participant Identification | Database search | | | | |
| | | | | Research Cost (Part A) | from |
| | | | | Research Cost (Part B) | |
| | | | | Service Support Cost | |
| | | | | Treatment Cost | |

3. Completing the Summary tab

Further guidance is given within the summary tab in the template.

END OF GUIDANCE

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