

# Automation Solution - UNITYdx

Tanvi Chaturvedi - Associate Director,  
PV Operations & Technology



## Essential Automation Solution Components- Technology

- Digital Monitoring of Safety Communications with site
- Tracking of Delivery Receipts and Acknowledgement Compliance
- Custom Configurations for Site Reminders and Email templates
- Complete Logical Separation of Sponsor (Customer) data
- Secure login using Multi-Factor Authentication
- Pre-Validated as per GAMP-5 guidelines
- Permission-based Access Control for Software Features, Read-only access
- 21CFR Part11 compliant Audit Trail Maintenance

## Solution Drivers

- High Volume Communication that requires Tracking
- Secure Communication, Complete Audit Trail and Tracking
- Highly Available Infrastructure – Secure, with Backup and Redundant Servers
- Configurable, Regulatory Compliant

## Service

- Simplified sync with Safety Systems via E2B R3 XML upload, EDI connection
- Automated assessment of Regulatory, Site and EC/IRB reporting timelines via Reporting Rules
- Detailed Compliance Reports with case-level and site-level as well as aggregated data presentation
- Custom Templates for Site Notifications and Reminders
- Cross-Reporting for multi-country trials
- Retrospective Reporting for New Sites joining a study
- Trial, Contact, Site and Product Masters for rapid integration with Safety and Clinical Databases

## Benefits of Automation in Safety Document Distribution

### Safety Document\* Distribution Solution for Clinical Sites

- Safety Document Distribution with Digital Tracking
  - Enhanced Compliance Tracking* - User-friendly dashboard with study/ site/ product-specific filters for data and reports
- Secure Transmission of Reports
  - Secure Transmission* - User-friendly dashboard with study/ site/ product-specific filters for data and reports
- Reduce Human Effort and Probability of Error
  - Greater process efficiency* - Automatic tracking and reminders, Cross-reporting, Retrospective reporting. Can be integrated with a CTMS for real-time updates

## About UNITYdx

Soterius offers its in-house tool SUSAR Notification , UNITYdx, which automates the sending and tracking of SUSARs to the Clinical Trial Sites. System integration and standardization allow UNITYdx to work with any standard safety database. Multi-channel communication hub ensures prompt, compliant, efficient, and secure communication between Clinical Trial sites, Safety Teams (CROs and Sponsors), and Clinical teams.

## Challenges in Manual Process of SUSAR Notification

- Lack of regulatory-compliant audit trails
- Maintenance of contact information on Excel prone to error
- Excel-based tracking prone to data integrity issues
- Multiple emails for 1 SUSAR in case of multiple studies at a Site.
- Super busy Sites and Investigators do not respond
- Institutional policies block email delivery notifications

# Implementation Strategies

- **Assessment**  
Evaluation of existing manual processes and identifying bottlenecks, inefficiencies, and key areas requiring automation
- **Requirement Mapping**  
Prepare a plan outlining milestones and resources needed for the transition and map the requirements to the automation software's feature list
- **Selection**  
Select the appropriate software to meet the requirements considering factors such as scalability, integration, and user-friendliness
- **Customization and Integration**  
Identify required configurations and customization, if any, for the software to ensure that it integrates into existing workflows
- **Implementation and Support**  
Select the appropriate software to meet the requirements considering factors such as scalability, integration, and user-friendliness
- **Monitoring and Optimization**  
Regular assessment of software performance, feedback, issue resolution, and optimization to maximize efficiency and effectiveness over time

# Implementation Strategies

- Regulatory Compliance: Prompt SUSAR communication; Inspection Findings
- Manual Process of SUSAR Reporting is prone to errors, inadequate documentation and lack of audit trails
- Automation enhances process efficiency, mitigates risks in ensuring compliance and saves time and effort
- Ensuring data security with robust measures to protect sensitive information related to SUSAR notifications
- Successful Implementation needs a partner with Safety, Validation and Quality Assurance Expertise
- Aim is to have a Robust, Efficient and Compliant Solution for SUSAR / Safety Document Communication

## Author



### Tanvi Chaturvedi

Associate Director,  
PV Operations & Technology

*12+ Years of Pharmacovigilance Experience  
Pharma and Clinical Research professional  
Managed PV Teams across ICSR and SAE  
Processing, Literature Management, EV  
Systems, Regulatory Reporting  
Current focus on Client Engagement, Product  
Development, Validation and Deployment*

## Our Services

Soterius offers full suite of Pharmacovigilance, Medical Affairs and Regulatory services.

- Clinical Safety Services
  - Case Processing, DSUR Authoring, Medical Monitoring, Medical Reviews, CSR Narratives Authoring, etc
- Post-marketed Pharmacovigilance Services
  - Case Processing, Aggregate Report Authoring, Risk Management Plan (RMP) & Risk Minimization, Global and Local Literature, etc
- Medical Affairs and Medical Writing
- Innovation & Technology Solutions in Pharmacovigilance and Medical Affairs

## Like This Blog?

[Share on LinkedIn](#)[Share on Facebook](#)[Share on Twitter/X](#)[Share on Email](#)

## Disclaimer

**The scenario described in this post is entirely hypothetical. It is not based on real-world patient data or individual case safety reports. All pharmacological mechanisms and regulatory references are cited to support discussion only. This post is intended to facilitate dialogue on signal detection and does not imply new safety findings, labeling recommendations, clinical guidance or clinical relevance.**

Soterius logo are trademarks or registered trademarks of Soterius in all jurisdictions. Other marks may be trademarks or registered trademarks of their respective owners. The information you see, hear or read on the pages within this presentation, as well as the presentation's form and substance, are subject to copyright protection. In no event, may you use, distribute, copy, reproduce, modify, distort, or transmit the information or any of its elements, such as text, images or concepts, without the prior written permission of Soterius. No license or right pertaining to any of these trademarks shall be granted without the written permission of Soterius (and any of its global offices and/or affiliates). Soterius reserves the right to legally enforce any infringement of its intellectual property, copyright and trademark rights.

Any content presented herewith should only be considered for general informational purposes and should not be considered as specific to the requirements of any particular organisation or for any specific purpose. Soterius, including its authors, presenters, and any affiliated individuals, does not make any representations or warranties about the completeness, reliability, appropriateness, relevance, or accuracy of the content presented here.

Please consult your physician/Health Care Provider for any matters related to health. No one should act on this information without specific professional advise.

 [connect@soterius.com](mailto:connect@soterius.com)

 [www.soterius.com](http://www.soterius.com)