

CTFS GrantPlan's Protocol Ingestion

An AI-powered capability that streamlines protocol interpretation and accelerates clinical trial budget creation — helping sponsors and CROs move faster from study design to negotiation-ready budgets.

Why it matters now

A large portion of clinical trial budgeting happens before a budget even exists.

Teams must first interpret complex protocols, extract relevant activities, and translate them into structured budget inputs — a process that is time-intensive, inconsistent, and prone to rework.

As study complexity increases, this manual effort becomes harder to scale. Delays at this stage can hold up negotiations, impact timelines, and introduce downstream inefficiencies across the financial lifecycle.

From protocol to budget — without the manual setup

Protocol Ingestion changes how budgets are built by removing the most time-intensive step: translating the protocol into a workable starting point.

Instead of manually interpreting study details, structuring activities, and mapping codes, teams can begin with a structured, AI-generated foundation that reflects the protocol itself.

Within CTFS GrantPlan, users can upload a protocol and automatically extract study details, procedures, and visit schedules — mapped into a standardized budget framework. What was previously hours of manual setup becomes a first-pass, review-ready budget, enabling teams to move directly into validation and refinement.



The result is not just faster budget creation, but a more consistent and scalable starting point across studies.

Key capabilities:



Uploading protocols directly into GrantPlan



Automatically extracting study details, procedures, and visit schedules

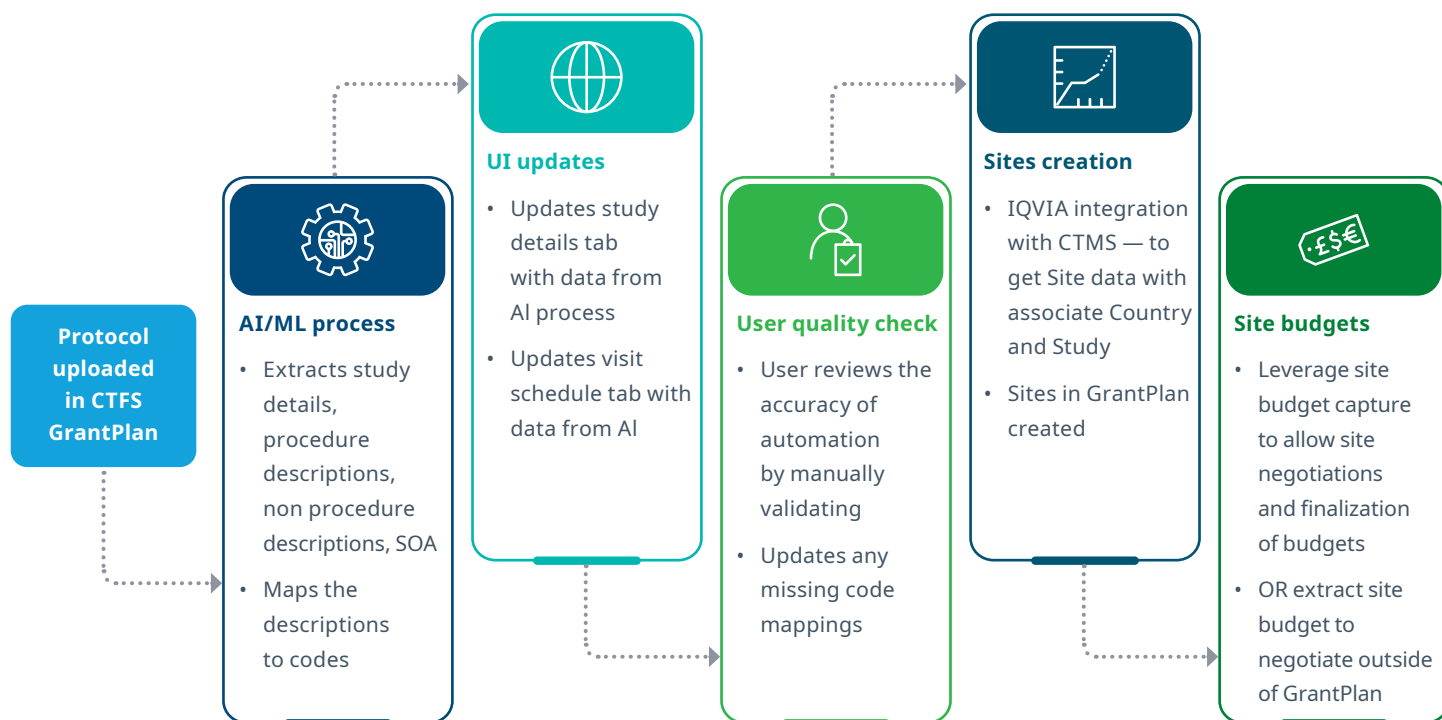


Mapping content to standardized activity codes



Generating an initial budget for validation and refinement

End-to-end CTFS GrantPlan workflow powered by automation



What this enables for sponsors and CROs

By shifting effort away from manual setup, CTFS GrantPlan's Protocol Ingestion allows organizations to focus on the parts of budgeting that drive real value.



Faster path to negotiation-ready budgets

Reduces the time required to interpret protocols and build initial budgets, accelerating progression into site negotiations and study startup



More efficient use of experienced teams

Frees budget builders from repetitive tasks, allowing them to focus on validation, strategic adjustments, and decision-making



Greater consistency across studies and programs

Standardizes how protocol data is interpreted and structured, helping reduce variability, errors, and downstream rework



Improved visibility across the financial lifecycle

Connects budgeting with contracting, payments, and forecasting within CTFS — supporting more aligned and informed decisions across teams



A foundation for continuous improvement

Incorporates feedback and learns over time, enabling organizations to improve accuracy and efficiency as usage scales

Expanding impact to research sites

While sponsors and CROs lead budgeting decisions, the impact of those decisions is felt most directly at the site level.

When budgets are delayed, unclear, or inconsistent, site negotiations become more difficult — slowing study startup and creating friction in site relationships.

By improving the speed and consistency of budget creation, Protocol Ingestion helps support clearer, more efficient financial interactions with sites. The result is a smoother negotiation process and a more predictable experience for sites participating in the study.



CTFS GrantPlan's Protocol Ingestion enables organizations to streamline budgeting, improve consistency, and accelerate study startup — while maintaining the human expertise required for confident decision-making. Connect with IQVIA to continue the conversation.