

**Practical, actionable solutions to drive compliance. Our tools help you to identify risks before major problems arise.**

## Risk Assessment & Planning

We bring significant experience in developing auditing and monitoring programs that optimize your available resources based on the greatest areas of risk. We can help assess your activities, products, geographies and the strength of existing controls.

## Monitoring Tools

Potomac can design a wide range of tools to support your live monitoring efforts, including:

- Detailed monitoring protocol
- Monitoring observation checklists

## Live Monitoring

Our experienced, knowledgeable monitors accurately assess interactions with HCPs in the field and contracted engagements.

- *Ride-alongs:* Sales Representative, Medical Scientist Liaisons, Field Reimbursement, Nurse Educators
- *Events:* Speaker Programs, Speaker Training, Advisory Boards, Conventions and Exhibits

## Retrospective Reviews

Our team performs manual and automated data and documentation audits as an extension of your monitoring team.

*Transactional audits:*

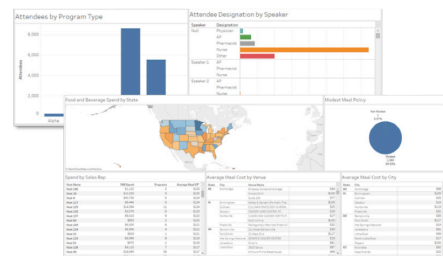
- T&E entries
- Speaker programs, grants, and other events
- Aggregate Spend data

*Records review:*

- Call notes and field coaching reports
- Email, chat, and social media

## Dashboards and Data Analytics

Potomac uses Tableau to build custom dashboards to monitor aggregate data. We can efficiently analyze any quantitative policy using existing, client-supplied data (e.g., Speaker Program and/or Aggregate Spend data). Our analyses benefit both the Compliance and Commercial functions by providing real-time insights.



## Reporting

We develop action plans that are ready to implement and address the root cause of the underlying conduct.

Question	Response
1. Was promotion of the product consistent with the approved promotional materials?	Yes
2. Did the representative provide, or attempt to provide, fair balance?	Yes
3. Were Package Inserts (PIs) made available to the HCPs?	Yes
4. Were all of the promotional materials utilized approved and free of off-invoice materials?	Yes
5. If applicable, were offers and provisions of educational items consistent with company policy including relevant documentation requirements?	N/A
6. If applicable, did discussion of potential grants and/or charitable contributions adhere to company policy?	N/A
7. If meal was provided, did it conform with company policies?	N/A

