



INNOVATION GUIDE

Veeva MedInquiry

Overview

Veeva MedInquiry streamlines the intake and fulfillment of medical information requests with comprehensive inquiry management capabilities.

Whether inquiries arise from a call center, email, website, or CRM, Veeva MedInquiry centralizes this information in a structured manner and ensures your teams are equipped to respond with accuracy, diligence, and speed.

This guide highlights the core features embedded in Veeva MedInquiry that'll optimize your end-to-end experience managing medical information processes.



Complete solution that supports the end-to-end medical inquiry management lifecycle.



Modern cloud-based system that evolves with changing business needs, minimizing manual processes with automation.



Connected to the wider medical ecosystem, with native integrations to Veeva CRM and a versatile API that connects other systems.



Tips & Tricks

CENTRALIZE INTAKE IN THE MEDICAL INQUIRY UI

Your call centers field large volumes of inquiries and it's important to capture those details quickly and efficiently. The dedicated medical inquiry user interface allows you to capture all aspects of a case in one place. This could include one or multiple requests by an HCP as well as what was provided in response.

The UI is completely dynamic, allowing you to toggle between different components to perform related tasks rather than navigating away. You can also customize objects and fields to further align the interface to your specific business requirements. For example, you can set up the page to capture adverse events or product quality complaints associated with the inquiry.

- Use the notepad sidebar to write down details of the case captured over the course of the conversation.
- Look up accurate, up-to-date HCP reference data from Veeva OpenData via a connection to Veeva Network, directly from the UI.

The screenshot shows the Veeva Vault Medical Inquiry UI. The top navigation bar includes 'All Cases', 'Search All Cases', 'Medical Inquiry', 'Medical Library', 'Inboxes', 'Cases', 'Contacts', 'Administration', and buttons for '+ Create', 'Save', and 'Save + Exit'. The main area is titled 'Medical Inquiry' and contains a 'Notepad' sidebar with a note from 'Dr Thompson Called 10:47am' detailing a patient's history and a request to reply to 'Mat_Ryan'. The main form fields include 'Response Contact' (Mat Ryan), 'Requestor' (empty), 'Assigned To' (empty), 'Case Priority' (Medium), 'Origination Channel' (Call Center), 'Country' (United Kingdom), 'Language' (English), 'Case Detail' (Case Request), 'Product' (Cholecap), 'Formulation' (empty), 'Classification' (On-Label), 'Request Details' (Please send Prescribing Information for Cholecap along with Clinical Study information), 'Preferred Response Method' (empty), and 'Request Category' (Dosing and Administration). A status bar at the bottom left shows '4723 Characters Left'.

MEDICAL INQUIRY UI

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Tips & Tricks

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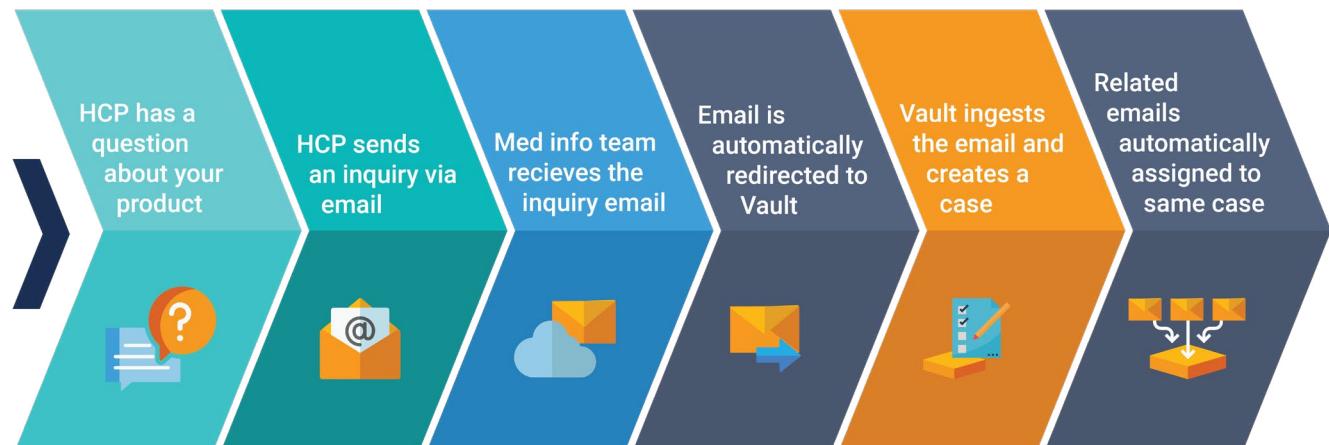
MAXIMIZE EFFICIENCY WITH INNOVATIONS IN AUTOMATION

Automation underpins many facets of Veeva MedInquiry product innovation. A number of capabilities leverage automation to simplify and streamline the work you do on a day-to-day basis. The benefit is twofold: Fewer clicks, less guesswork.

Automated Email Intake

Veeva MedInquiry automates the intake process for inquiry emails, drastically reducing the potential for error that comes with manual entry. When an HCP or patient sends an information request to a designated email address, that email is automatically redirected to Vault.

Once ingested, Vault creates a Case Request record with pertinent details from the inquiry so your team can immediately start building a response. Any future related emails – for instance, a follow-up email to a case response – are added to the same case so the user can see it all in one place.



Tips & Tricks



Automation in Response Generation

Best practices for constructing responses have evolved. Whether the nature of a question is straightforward or complex, Veeva MedInquiry ensures you're able to construct the best-fit response for the information requested.

When it comes to constructing the response, Veeva MedInquiry allows you to pre-define a set of templates it can use to automatically draft your response in an appropriate format, with the right documentation and supporting evidence included in the package.

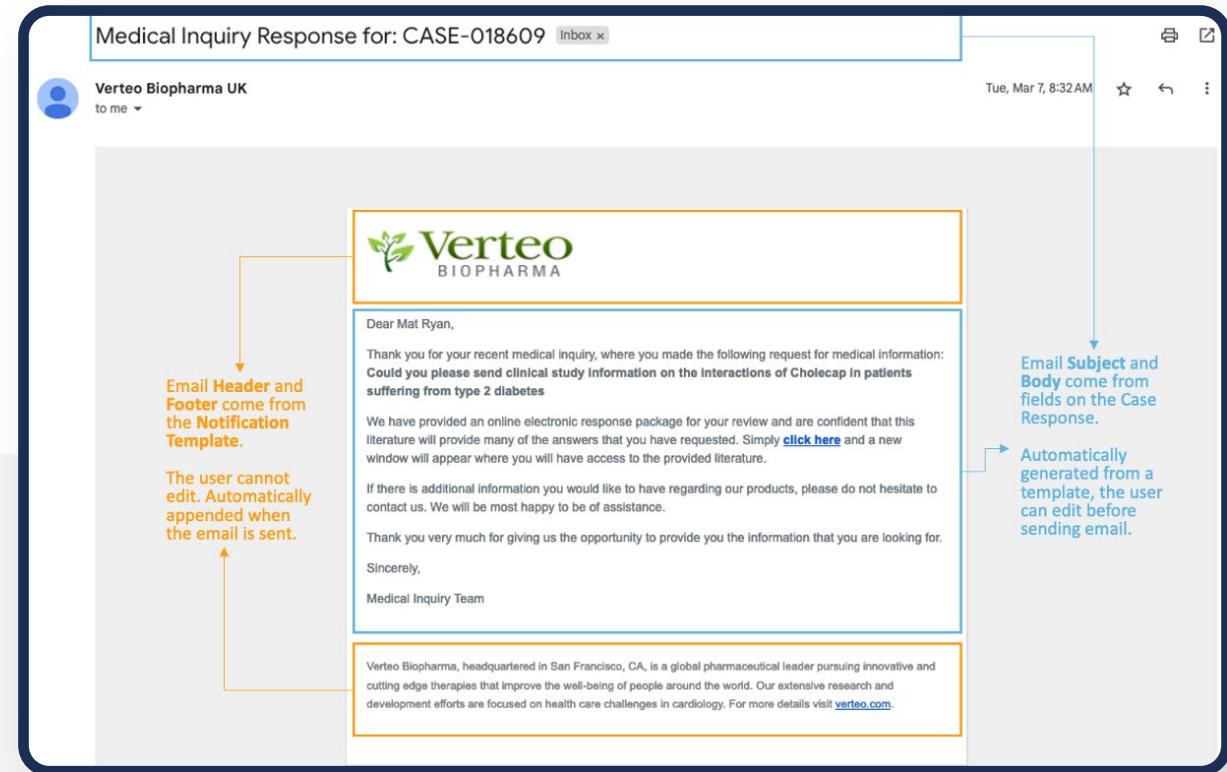
The screenshot displays the Veeva MedInquiry software interface. On the left, the 'Compose Email' screen is shown, featuring a 'Case Details' section with 'Response Details' (Draft Email, CC/BCC, Email Message, Add Fulfillment Documents, Workflow Timeline, System Information) and 'Sharing Settings'. The 'Case Details' section includes a 'Case Details' sub-section and a 'Response Details' sub-section with an 'Include Fulfillment Documents' checkbox (set to 'Yes'). Below these are sections for 'Draft Email', 'CC/BCC', 'Email Message', and 'Add Fulfillment Documents'. The 'Add Fulfillment Documents' section lists three items: 'FULFILLMENT-000180', 'FULFILLMENT-000196', and 'FULFILLMENT-000187'. On the right, a preview of the 'Cover Letter: CASE-000181 (v1.0)' is shown, with the subject line 'Cover Letter: CASE-000181 (v1.0) Approved for Use'. The letter is dated 'September 29, 2022' and addressed to 'Dear Dr. Abbott'. It contains a block of text about Natavea and a signature from 'Matt Jones'.

Cover Letters are documents that summarize the response to a request for medical information. These can be drafted automatically from pre-defined templates stored in the system.

Templates use tokens to pull in information captured about the inquiry such as the requestor's name and the question they asked. The content can be edited, if necessary, before sending the response.



Tips & Tricks



Response Emails can also be pre-defined in the system. Templates are typically associated with a particular product and country and written in the corresponding language. Business logic automatically ensures the right template is selected for the inquiry raised.

The email Vault composes can be edited further or sent as is. Emails are tracked so you can see whether your response was successfully delivered and are displayed in Vault so you can look back and see exactly what was sent.



Tips & Tricks

Lastly, depending on the nature of the inquiry, you may wish to include additional documentation in the response package. Easily search and find key medical information documents from the library of approved content stored in your Vault.

The **Response Package** is the modern equivalent of emailing documents as attachments, with some added benefits:

- The Package will always be successfully delivered, with no attachment size constraints.
- The Package will always show the latest version of the document, ensuring the reference data is completely up to date.
- Rich content such as videos or infographics can easily be included alongside text.

The screenshot shows the Vault Medical software interface. The top navigation bar includes 'Tasks', 'Library', 'Medical Library', 'Cases' (which is the active tab), 'Contacts', 'Administration', 'Medical Information', 'Field Medical', 'Publications', and a '+ Create' button. The main content area is titled 'Email: CASE-018630-RESPONSE-002 Draft'. On the left, there's a sidebar with 'Case Details' (selected), 'Response Details', 'Add Fulfillment Documents (0)', 'Workflow Timeline', 'System Details', and 'Sharing Settings'. The main pane shows 'Response Notes' with the text 'Prescribing Information for Cholecap is attached, along with the requested Clinical Study information.' Below this are sections for 'Cover Letter Response Notes' (with checkboxes for 'Allow PDF Document Download' and 'Allow Source Document Download'), 'Link Expires In (Number of Days): 30', 'Cover Letter' (with a link to 'Cover Letter: CASE-018630-RESPONSE-002 (v0.1)'), 'Email Template' (set to 'Case Response (With Response Package)'), and 'Preview Response Link'. At the bottom of the main pane are buttons for 'Add Fulfillment Documents', 'Workflow Timeline', and 'System Details'. A large blue button at the bottom right of the main pane says 'RESPONSE PACKAGE GENERATION'.



Tips & Tricks

CONNECT YOUR MEDICAL ECOSYSTEM

Having a holistic view of where your inquiries are raised, what content is available for responses, and which cross-functional teams need visibility into a given interaction can only be possible by having a connected medical ecosystem. In addition to native Veeva CRM integration, Vault's API can be used to integrate with intake mechanisms and other complementary systems your organization uses.

Veeva CRM

A native connection to Veeva CRM allows inquiries captured in the field to be automatically triaged in Veeva MedInquiry for the medical information team to respond. This connection can be data agnostic and used regardless of the source of your HCP reference data. Veeva MedInquiry will push status information back into CRM so field medical reps can see when the inquiry case is closed.

CRM INTEGRATION



Tips & Tricks

Veeva OpenData

Search for accurate, up-to-date reference data on millions of HCPs from OpenData via a dedicated connection to Veeva Network. This can be done directly from the medical inquiry user interface, so you don't need to navigate away from the case intake page to find the contact information you need.

Complementary Systems

The Vault API is versatile and can share information between Vaults or to other complementary systems your teams may use. For example, med info teams are one of the first lines of customer interaction where new potential Adverse Events (AE) and Product Quality Complaints (PQC) may arise. Both AEs and PQCs can be captured in Veeva MedInquiry and easily directed to quality and safety teams. To simplify triage, an E2B(R3) file – the global standard format supported by safety – can be generated in Veeva MedInquiry and relayed to the appropriate team's system.

TIP

Share supporting content associated with AEs by adding files to the Vault record as attachments. Vault will encode these files within the E2B(R3) .xml format when generating the report.

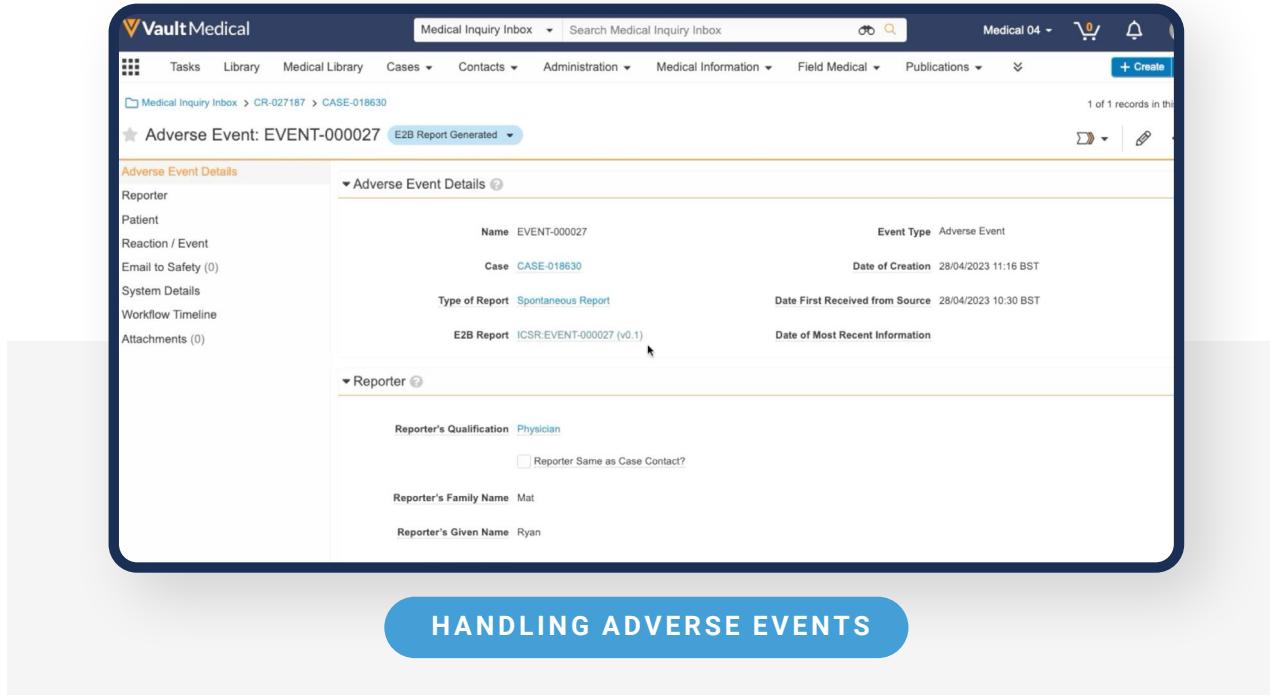
The screenshot shows the Veeva Vault Medical interface. The top navigation bar includes 'Cases', 'Search Cases', and various dropdown menus for 'Tasks', 'Medical Information', 'Field Medical', 'Publications', 'Medical Library', 'Portal', and 'Reporting'. The main content area is titled 'Adverse Event: EVENT-000004' and shows 'Adverse Event Details' such as 'Reporter', 'Patient', 'Reaction / Event', and 'System Details'. On the right, there's a 'Workflow Timeline' and an 'Attachments' section containing 'Attachment 1.pdf' and 'Attachment 2.pdf'. A context menu is open on the right side, listing options like 'Generate E2B Report', 'Edit', 'Copy Record', 'Configure Page Layout', 'Delete', and 'Audit Trail'.

Tips & Tricks



Internal Email

Veeva MedInquiry also supports communications with colleagues who aren't using the system. You can send and receive emails with questions related to a case and add that activity directly to the record within MedInquiry.



The screenshot shows the Veeva MedInquiry software interface. The top navigation bar includes 'Medical Inquiry Inbox', 'Search Medical Inquiry Inbox', and 'Medical 04'. The main content area displays an 'Adverse Event: EVENT-000027' record. The record details are as follows:

Adverse Event Details	
Reporter	Name: EVENT-000027
Patient	Event Type: Adverse Event
Reaction / Event	Case: CASE-018630
Email to Safety (0)	Date of Creation: 28/04/2023 11:16 BST
System Details	Type of Report: Spontaneous Report
Workflow Timeline	Date First Received from Source: 28/04/2023 10:30 BST
Attachments (0)	E2B Report: ICSR:EVENT-000027 (v0.1)
Reporter	
Reporter's Qualification	Physician
<input type="checkbox"/> Reporter Same as Case Contact?	
Reporter's Family Name	Mat
Reporter's Given Name	Ryan

HANDLING ADVERSE EVENTS

For more user tips and information on the latest new features, join the Veeva MedInquiry Community on Veeva Connect.

Learn more at veeva.com/eu | 925-452-6500 | veeva.com/eu/contact