

# R&D STUDY PROCESS

By partner type



Powered by a web-based application, our study process is streamlined and cost effective.

	REFERRAL		OUTSOURCE			SOFTWARE	
Setup	Clarus R+D	Client	Partner	Clarus R+D	Client	Partner	Client
Kickoff call	●	●	●	●	○	●	●
Study organization and approach	●	●	●	●	○	●	●
Login credentials   System access	●			●		●	
<b>Qualification (credit year + base years, if needed)</b>							
Business component definition	○	●	○	○	●	○	●
Project qualification	○	●	○	○	●	○	●
Expense qualification	○	●	○	○	●	○	●
Submissions review and quality control	●			●		●	
<b>Calculation (per credit year)</b>							
Federal calculation	●			●		●	
State calculation	●			●		●	
<b>Wrap Up</b>							
Preparation of forms, reports for CPA and client	●			●		●	
Confirmation of filing with CPA	●			●		●	
Information rollover to next tax year	●			●		●	
<b>Credit Tracking (payroll offset only)</b>							
Credit documentation to payroll company	●			●		●	
Quarterly credit review with payroll company	●			●		●	

● Directly involved

○ Optionally involved as determined by partner