

abbvie



FREQUENTLY ASKED QUESTIONS (FAQ)
ABBVIE GRANT MANAGEMENT SYSTEM
INFORMATION FOR GLOBAL AND US GRANTS



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TECHNICAL

What Internet Browsers can I use to access the AbbVie Grant Management System?

The recommended browser is Google Chrome v10 and up. Other supported browsers include Microsoft Edge/Internet Explorer v7- v10, Mozilla Firefox v8 and up. The AbbVie Grant Management System can be accessed through Safari on Apple Desktop and Chromebook.

Please note: a PDF viewer will need to be installed on your computer in order to view or download PDF documents.

Please Keep in the mind the following:

- When accessing the grant system, please clear all cache' and remove all auto populate features for passwords.
- To enhance your viewing of the grant management system, please maximize your screen by clicking the Double window Icon at the top of the Window Tab.

Why did I not receive an email notification from the AbbVie Grant Management System?

AbbVie Grant Management System generated emails may be viewed as spam or blocked by your organizations spam filter. Check spam and junk folder filters, as correspondence will primarily be sent via e-mail, and if the spam filter is set at "Enabled", you may not receive any communications and alerts from AbbVie concerning your Grant or Charitable Donation request. Any correspondence that is sent out is directed to the e-mail address of the contact person provided in the Grant or Charitable Donation request. If you were not listed as the contact person, you will not receive correspondences. There can only be one contact name on the request and this name will be used on all legal documents.

How do I register on the AbbVie Grant Management System?

1. Go to the portal website <https://grants.abbvie.com/> and click 'Register'. (See Requester Training Guide for step-by-step Instructions with screenshots)
2. Using the Requester training guide, search to verify if your Organization is already registered. If already registered, select the appropriate Tax ID number with the Organization name, address/location from the search list. If your address is not listed, select the appropriate Tax ID number with the Organization name and you will have the ability to update the address and pre-populated information and documents during the registration process.



3. If your Organization does not show in the search according to the Tax ID Number and Name of the Organization. You can create a new Organization Account by clicking the 'Add a New Organization' button.

The following information is required to register: (Please Note: Fields marked with an asterisk are required.)

- Organization Name
- Federal Tax ID Number (EIN)
- W9/W8 Form for your organization signed and dated within 12 months of the program start date.
- IRS Determination Letter
- Organization's Mission Statement
- Organizational Information/Profile
- Accreditation Certificates (all that apply)

If you would like changes made to your profile for existing Grant or Charitable Donation requests in our system, send an e-mail with the requested changes to: abbviegrants@abbvie.com.

Fields you will not be able to change in your profile include:

- Organization Name
- Tax ID
- Organization Status
- E-Mail Address

If you would like changes made to these fields, send an e-mail with the requested change to: abbviegrants@abbvie.com.

IMPORTANT: the e-mail address and phone number you provide in your profile for any communications regarding your request will be used to communicate to you about your request. Make sure the e-mail address is current and spelled correctly and the telephone number is accurate.

Why was I prevented from Registering?

Common reasons Include:

- Some information entered as part of registration is not valid. Look for red error messages at the top of the page. Or re-enter the information to rectify the issue.
- The email address listed, or password has been used or does not meet requirements. Look for red error messages at the top of the page for information on the issue. If your email address is already being used. You will have to enter a new one to complete the registration.
- Your username is your email address. This is the email address that will receive email notifications. Please make sure you can access this email account.

Still experiencing issues, contact AbbVie Independent Education at (877)-228-7177 or via e-mail at abbviegrants@abbvie.com.

What if I cannot remember my username/email address or password?



You can click the “Forgot Password” on the homepage of the grants portal or Contact AbbVie Independent Education at (877)-228-7177 or via e-mail at abbviegrants@abbvie.com to request a password reset.

Please Note: Your username is your e-mail address you registered with the system.

What do I do if I entered my password too many times and I’m locked out of the Grant Management System?

If you attempt to login incorrectly more than 3 times, you will be locked out of the system. If you set up Security Question and Answer. Answer the question correctly and you will be able to reset your password. To have your password reset contact AbbVie Independent Education at (877) 228-7177 or via email at abbviegrants@abbvie.com.

I don’t have access to a scanner, and I am unable to upload the requested documents to complete my submission. What do I do?

Contact AbbVie Independent Education at (877) 228-7177 or via e-mail at abbviegrants@abbvie.com.



SUPPORTED ACTIVITIES

Who request a Grant or Charitable Donations through the AbbVie Grant Management System?

AbbVie Independent Education is dedicated to supporting appropriate third-party entities, including health care delivery organizations and professional associations, to foster increased understanding of scientific, clinical or health care issues that contribute to the enhancement of patient care. AbbVie also supports charitable donation requests from non-profit organizations, including non-profit health care providers.

What types of Grants and Charitable Donations are considered by AbbVie?

Grant Request Types

Independent Medical Education

Independent Medical Education is funding to an independent third party to support the development or implementation of clearly defined medical or education programs or activities for health care providers that foster increased understanding/knowledge of scientific, clinical or health care issues that contribute to the enhancement of patient care.

Examples may include live presentations (e.g., symposia, regional/local programs, teleconferences, live webcasts) or enduring materials (e.g., printed materials, programmed tests, podcasts, slide kits, monographs, and web-based instructional materials).

Allowed

- Expenses for executing medical education programs (e.g., disease presentations, symposia's, websites)
- Expenses for the development of medical education items (e.g., agendas, program content and development, accreditation fees)
- Equipment rental (e.g., chairs, tables, AV, etc.)
- Modest food buffet allowed

Not allowed

- Registration, travel costs, lodging or any other expenses for non-faculty attendees
- Entertainment and recreation expenses
- Parking for attendees

Independent Patient Education

Patient Education is programs designed primarily to advance disease state or treatment education to patients/consumers and/or care partners.



Examples may include:

- Patient support groups
- Live patient education
- Development, production, and distribution of an enduring patient education piece
- Disease state awareness programs

Allowed

- Expenses for executing patient programs (e.g., disease presentations, symposia, websites)
- Expenses for the development of patient education items (e.g., brochures, patient diaries)
- Written materials that inform patients about adherence to medication regimes, health lifestyle choices.
- Patient self-assessment and tracking tools
- Equipment rental (e.g., chairs, tables, AV, etc.)
- Modest food buffet allowed

Not allowed

- Entertainment and recreation expenses
- Parking for attendees
- Equipment purchases
- Salary for employees or agents of an HCP
- Travel costs, lodging or other expenses for non-faculty attendees including guests, spouses or family members of faculty

Charitable Donations

Charitable donations are funding to support 501(c)(3) or other nonprofit organizations for specific nonprofit purposes. For nonprofit providers (e.g., hospitals) of their related foundations, the nonprofit purpose must specifically relate to support for low-income persons or families, indigent/homeless persons or families or underserved or uninsured persons or families.

Examples include:

- General administrative expenses
- Donations that support the 501(c)(3) mission

Allowed

- General mission support

Not Allowed

- Funds cannot be used to support educational efforts
- Funds cannot be used to support capital projects
- Funds cannot be used for lobbying purposes
- Funds cannot be used for food



Fellowships

Fellowships are financial assistance provided to a university, medical school or nonprofit organization for fellowship programs to support educational or research activities of HCP's in training. AbbVie may not participate in the selection of the recipient.

Examples

- Funds to a university or 501(c)(3) to support the ongoing education of a fellow or resident
- May support a large fellowship program or an individual fellow

Allowed

- Support of educational or research activities
- Reasonable stipend/salary and textbooks

Not allowed

- Expenses for tools and equipment
- Funds for the purpose of purchasing educational items with an independent value (e.g., laptop, smart phone, tablet)

Other Considerations for Grant and Charitable Donations

- Most of the program time is devoted to education and not recreation or entertainment activities.
- Grant payments can only be paid to an organization, not to an individual or group practice.
- Venue must be conducive to learning.

What in-kind products may I request through an Independent Medical Education Grant?

AbbVie may only provide in-kind products in connection with an educational grant, if the activity is conducted by an ACCME-accredited provider and/or if it is an independent medical education activity conducted for the education of residents, fellows, or other physicians in training. The following products may be requested:

- BOTOX® Cosmetic vials
- BOTOX® Therapeutic vials
- JUVÉDERM® Ultra XC and JUVÉDERM® Ultra Plus XC syringes
- JUVÉDERM®VOLUMA® XC syringes
- JUVÉDERM®TSK Cannula & Needle Kit (only can be ordered when requesting JUVÉDERM®VOLUMA® XC syringes)
- JUVÉDERM®VOLBELLA® XC syringes
- JUVÉDERM®VOLLURE® XC syringes
- JUVÉDERM®VOLUX® XC syringes
- Kybella® vials
- Skin Marking Grid (only can be ordered when requesting Kybella® vials)
- EMG Needles (for Neurosciences only)
- Anatomical models (for Neurosciences and Headache)



What are the Grants and Charitable Donations Not Considered by AbbVie?

- Grants or Charitable Donations to individuals or group practices
- Payee is a physician group or its affiliate
- Payee is an individual
- Retroactive support (program already occurred)
- Advertising Space (Contact your local AbbVie Sales Representative)
- Staff/Professional Development Grants or Charitable Donations to individuals or group practices
- Retroactive support (program already occurred)
- Staff/Professional Development Travel, lodging or registration expenses for non-faculty healthcare professionals or spouses to attend an educational program [there are exceptions for healthcare professionals in training (i.e., medical students, fellows, etc.) to attend major medical society meetings]
- Registration or parking for conference attendees (there are exceptions for healthcare professionals in training for registration fees)
- Promotional exhibit or display space (Contact your local AbbVie Sales Representative)
- Entertainment or social events

Any questions regarding items not listed here. Contact AbbVie Independent Education at (877) 228-7177 or via e-mail at abbviegrants@abbvie.com.

Who is eligible to receive Grants and Charitable Donations from AbbVie?

- Medical and Other Health Care Professional Associations
- Patient Organizations
- Academic Institutions
- Hospitals and Other Medical Centers
- Medical Education Companies
- Other Scientific Associations

Can I request funding for a program that has already taken place?

No, AbbVie Independent Education does not fund programs that have already occurred. Requests for support must be submitted to AbbVie 60 days prior to the decision needed by date. If the event is less than 60 days out, the system will not allow your request to be submitted.

Any questions contact AbbVie Independent Education at (877) 228-7177 or via e-mail at abbviegrants@abbvie.com.

Can I submit more than one request at a time? Is there a submission cut off?

Yes, multiple Grant or Charitable Donation requests may be submitted simultaneously as individual requests. Each request will be evaluated based on its individual merits. The AbbVie Grant Management System is an open system that accepts grant submissions throughout the year/365 days. All submissions should be submitted at least 60 days prior to the start date of the program.



Can AbbVie provide speaker suggestions for my Medical Education Activity?

No, AbbVie complies with the Accreditation Council for Continuing Medical Education (ACCME) guidelines which state in part, “A provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.”

Does previous support from AbbVie Independent Education guarantee future support?

No, Each Grant or Charitable Donation submitted to AbbVie Independent Education will be evaluated on its individual merit. Please do not consider any Grant or Charitable Donation request approved until you receive written confirmation from AbbVie and a Contractual Agreement has signed by all parties prior to the start of the event.

REQUEST PROCESS

What is the process for submitting a Grant or Charitable Donation request? (See Requester Training Guide for step-by-step instructions with screenshots of Grant Management System)

Medical Education Requests:

1. Create an account on the grant’s portal <https://grants.abbvie.com/>
2. Once you have registered, the system will take to your inbox. Click ‘Submit New Request’.
3. Review the Grant Types and Definitions and select the correct Grant Type for your program.
4. Complete the online Grant Request Application and upload any required and supporting documents.
5. All correspondence relating to your Grant or Charitable Donation request will be conducted through the e-mail address identified in your profile. You will be notified via e-mail if additional information is required and when a decision has been made on your Grant request.
6. If approved, the authorized signer will be sent an e-mail to login, review and accept the terms of the Contractual Agreement. The Agreement must be reviewed and electronically accepted. All accepted requests require all parties to agree to the terms of AbbVie's Contractual Agreement prior to awarding the Grant or Donation. Should an organization choose not to accept the terms of AbbVie's Contractual Agreement prior to the start of the event, AbbVie Independent Education reserves the right to withdraw approval of the proposal.
7. Upon receipt of the accepted Contractual Agreement from all parties, a check per the terms of the Contractual Agreement will be mailed to the payee at the address identified in the request or an electronic transfer of funds (ACH) will be deposited in the account of the organization.
8. Independent Medical Education, Patient Education, and Fellowship Grants must reconcile within 90 days following the grant end date. Reconciliation includes attesting that the funds were used in accordance with how they were lined out in the budget. Failure to reconcile within 90 days of the



educational program completion date will prevent you and anyone in your organization from entering into a Contractual Agreement with AbbVie.

Please note: For honorarium, AbbVie Independent Education will require refund for any honoraria payment that exceeded the honoraria amount originally requested from AbbVie Independent Education.

Charitable Donation Grants Requests:

1. Create an account on the grant's portal <https://grants.abbvie.com/>
2. Once you have registered, the system will take to your inbox. Click 'Submit New Request'.
3. Review the Grant Types and Definitions and select the correct Grant Type for your program.
4. Complete the online Grant Request Application and upload any required and supporting documents.
5. All correspondence relating to your Grant or Charitable Donation request will be conducted through the e-mail address identified in your profile. You will be notified via e-mail if additional information is required and when a decision has been made on your Grant or Charitable Donation request.
6. If approved, you will be sent an e-mail to login, review and accept the terms of the Contractual Agreement. The Agreement must be reviewed and electronically accepted. All accepted requests require all parties to agree to the terms of AbbVie's Contractual Agreement prior to awarding the Grant Donation. Should an organization choose not to accept the terms of AbbVie's Contractual Agreement prior to start of the event, AbbVie Independent Education Department reserves the right to withdraw approval of the proposal.
7. Upon receipt of the accepted Contractual Agreement from all parties, a check per the terms of the Contractual Agreement will be mailed to the payee at the address identified in the request or an electronic transfer of funds (ACH) will be deposited in the account of the organization.
8. *Charitable Donations must be reconciled within 30 days of the funding year. A Letter of Acknowledgment for the funds received is required to be uploaded within 30 days of receiving funds.* Reconciliation includes attesting that the funds were used in accordance with how they were lined out in the budget. Failure to reconcile will prevent you and anyone in your organization from entering a Contractual Agreement with AbbVie.

Please note: For honorarium, AbbVie Independent Education will require refund for any honoraria payment that exceeded the honoraria amount originally requested from AbbVie Independent Education.

What information do I need in order to submit a Grant or Charitable Donation request?

You may need to include the following information as it applies to your Grant or Charitable Donation request:

- Federal Tax ID W9/W8 Form for your organization signed and dated within 12 months of the program start date
- IRS Determination Letter
- Organizational Information/Profile
- Organization's Mission Statement



- Accreditation Information for accredited medical education programs only
- The name of your accrediting body (your organization or a third-party accreditor) for accredited medical education programs only. Note: It is very important to submit accurate and up-to-date information as many times the Grant Management Department is required to follow up with the accreditor.
- A copy of your accrediting organization's Letter of Accreditation to upload for accredited medical education programs only
- E-mail address and phone number for continuous communications
- Full Program Description
- Number of Faculty/Speakers
- Number of participants and audience type
- Detailed Agenda with topic titles and time allocation (for Live program)
- Location and date of event (for all programs if a series is requested)
- Letter of Request for funding on company letterhead. The dollar amount in the Letter of Request must match the amount in the submission and the Letter of Request must be signed.
- Needs Assessment describing the need for the program
- Copy of Detailed Program Budget (Annual Operating Budget for Charitable Donation requests)
- Outcomes: Description of how and when they will be measured (not required for Charitable Donation requests).
- Plan to Evaluate if program was successful
- Learning Objectives for program
- Payment address and Bank Information (if receiving ACH Wire Transfer)
- Decision Needed by Date: The date a decision on the Grant or Charitable Donation is needed by in order to plan, confirm or proceed with the program. This must be at least 60 days from the submission date.

How do I upload documents to the AbbVie Grant Management System?

Click on the "Browse" button to bring up the file selector and choose the file you wish to upload. After doing this, the file path name will be in the Browse Box. You may or may not have to press the upload button to attach the listed file to the request. Please Note: you can upload only one document at a time. Additionally, the upload is successful once the red "X" has been displayed to the right of the filename. Make sure you name the document before moving on to upload the next document or proceeding to the next step.

Can I complete part of the online Grant or Charitable Donation request and come back to it later?

Yes, if you are unable to complete your Grant or Charitable Donation request in one sitting, you may save the request and come back to it later by clicking "Save & Continue Later" at the bottom of the page. At any time before the submission of a Grant or Charitable Donation request, you will have the opportunity to come back and make changes. NOTE: The request is not officially submitted until you click the "Submit" button and generate a grant number. Once completed, you will receive a confirmation e-mail of your submission with the grant number.



What is a “Request for Additional Information”?

A "Request for Additional Information" is made when more information is needed to process your Grant or Charitable Donation request. The request for additional information will be sent via e-mail. Please Note: AbbVie Independent Education will not continue to review your request until the additional information requested is received. If the requested information is not received *within 7 days* of the request, the Grant or Charitable Donation may be rejected.

What if I want to fax documents regarding my Grant or Charitable Donation to AbbVie?

Online submission of documents is the required method of receiving Grant or Charitable Donation related documents. Please contact the AbbVie Independent Education Department at (877) 228-7177 or via e-mail at abbviegrants@abbvie.com.

What if I want to mail a copy of my Grant or Charitable Donation request for review, or mail documents relating to my request?

AbbVie does not accept Grant or Charitable Donation requests sent via mail or express carrier. Please do not mail any Grant or Charitable Donation requests or documents relating to requests, as we will not be able to accept them. *Only online requests submitted via the AbbVie Grant Management System will be considered.*

What criteria does AbbVie use when reviewing Grant or Charitable Donation requests?

AbbVie carefully considers every Grant or Charitable Donation request. Requests are reviewed and a decision is reached by a group of individuals within AbbVie Independent Education, Office of Ethics & Compliance, Financial Compliance, and Legal at AbbVie. Criteria for awarding a Grant or Charitable Donation includes, but is not limited to:

- Educational strategy
- Scientific and educational merit
- Target audience
- Geographic equity
- Availability of funds
- Adequate review time
- Organization’s Mission

How long does approval typically take?



Every attempt is made to make a determination on the Grant or Charitable Donation request by the “Decision Needed by Date.”

How will I be notified of the decision on my Grant or Charitable Donation request?

All correspondence related to your Grant or Charitable Donation request will be sent to the e-mail identified in your profile. You may check your grant status anytime by logging into the AbbVie Grant Management System.

How do I track the status of my Grant or Charitable Donation request?

Login to the AbbVie Grant Management System website and refer to the "My Requests" inbox section. The "Status" column will identify the status of the request and the top right header of the grant will identify any actions that are needed for the request. Below is a list of the status keys:

- *Coordinator Review* – The first stage of the review process
- *Under Consideration* - The second stage of the review process
- *Cancelled* - The request has been cancelled due to provider request for cancellation
- *Closed* - The request has been closed out. All actions of the request are complete
- *Rejected* - The request has been rejected and a notification has been sent out. The request is closed.
- *Not Submitted* - The Requestor needs to complete the request.
- *Pending Grant Closeout* - The request is in the close-out stage and AbbVie is reviewing the submitted reconciliation
- *Pending Reconciliation* - The Requestor needs to reconcile
- *Refund Due* - The requestor needs to return unused funds

I received an e-mail notification stating that AbbVie can support our Grant or Charitable Donation request. Can we consider this as a commitment and move forward with the program?

While AbbVie Independent Education has communicated that your request will be supported, it is conditional until Contractual Agreement has been electronically signed by all parties (AbbVie, Requestor, and Third-Party Accreditor [for medical education, if applicable]). AbbVie Independent Education reserves the right to withdraw funding if Contractual Agreements are not signed *prior* to the program/event date.

When do I sign the Contractual Agreement?

After you receive notification that your Grant or Charitable Donation request has been approved, login to the AbbVie Grant Management System website and click on the link under the header of the grant. You (or the authorized signer if different person) will see your request listed and a link to prompting you to acknowledge the Contractual Agreement. Click this link and complete the electronic signature by reviewing the agreement and clicking on the “Accept” button. An electronic signature is required to bind all parties to the agreement.



For Medical Education: If a Third-Party is listed as the accreditor in your Grant request, please notify them that they will receive an e-mail from AbbVie Grant Management System notifying them there is a Contractual Agreement for approval. Upon receiving the notification, the accreditor needs to login to the AbbVie Grant Management System website using their unique username and password and click on the link under the “My Grants” section. They will see the Grant request listed and a link prompting them to acknowledge the terms of the Contractual Agreement. The accreditor should click this link and complete the electronic signature (IP address, time and date stamped) by reviewing the agreement and clicking on the “Accept” button.

What if I have my own Contractual Agreement?

All Grants and Charitable Donations must abide by the Contractual Agreement issued by AbbVie. If you have any questions on the agreement terms, please contact AbbVie Independent Education at (877) 228-7177 or via e-mail at abbviegrants@abbvie.com.

AFTER THE DECISION

What is a Reconciliation?

At the conclusion of the funded activity (*Charitable Donations are excluded from the financial reconciliation; however Charitable Donations require an Acknowledgment Form to be uploaded to the Donation within 30 days of the Receipt.*) A Letter of Acknowledgment for the funds received is required to be uploaded.), recipients are required to submit information detailing the audience reached, use of funds, outcomes, and other information to verify the Grant award was used as intended. You will receive an email reminding you to reconcile at the end date of your program. According to the Contractual Agreement, if you have not reconciled your Grant within 90 days after the completion of the program, all parties in your organization utilizing the same tax ID number may be prevented from entering a Contractual Agreement with AbbVie.

Why do I have to reconcile?

Reconciliation confirms proper use of the Grant funds and is a requirement as stated in the Contractual Agreement. It is not a line-by-line reconciliation; it is an attestation that the funds have been used in accordance with the budget provided.

What is AbbVie Independent Education policy regarding reconciliation?

Reconciliation must be completed within 90 days after the end date of the funded activity. If additional time is required, please contact AbbVie Independent Education at (877) 228-7177 or via e-mail abbviegrants@abbvie.com.



Note: if your organization does not complete the reconciliation within the 90 days allowed, the system will not allow a contractual agreement to be signed by anyone in your entire organization, which will prohibit your entire organization.

I have monies left over after completion of my original program. May I apply these funds to another program?

No, the funds provided are to be used for the specific program to which the applicant was awarded monies. Unexpended funds cannot be applied to another program. In pursuant to the terms of the contractual agreement, unexpended funds greater than over \$100 must be returned to AbbVie.

Checks must be made payable to:
AbbVie Inc.

Mail or Fedex check to the following address:
AbbVie Inc.
Attn: Independent Education Dept
1 North Waukegan Road
Bldg. AP34-1/ Dept ZZ02
North Chicago, IL 60064-6149

To submit refund via ACH Wire Transfer. Please e-mail abbviegrants@abbvie.com to request a copy of AbbVie W9 tax form and Bank Information.

I need help distributing invitations to my activity. Can AbbVie help?

No, AbbVie will not help with the distribution of invitations, business reply to cards, "save-the-date" cards or brochures.

MISCELLANEOUS

Will my AbbVie Sales Representative be able to assist me with the request process or keep me apprised of the status of my Grant or Charitable Donation?

No, only AbbVie Independent Education team members may assist you with your Grant or Charitable Donation request. Submission of your request by any AbbVie personnel outside of AbbVie Independent Education will lead to automatic rejection of your request.

How can I acknowledge AbbVie's support for my program?



If your grant has been approved and the Letter of Agreement has been signed by all parties. You can use one of the following statements:

- Independent Medical Education & Independent Patient Education: “Supported *by an independent educational grant from AbbVie.*”
- Charitable Donation: “Supported *through independent charitable contributions from AbbVie.*”