RMS Request Workflow and Other Functionalities

Note: Click on titles below to advance to any section. The Home Icon will bring you back to this page at any time in this training guide.

Request Workflow

Registration

Request Submission Process

- Education and Fellowship Requests
- Education Requests with Inkind Product / Model

Additional Information Needed and Amendments

Letter of Agreement

Reconciliation

Other Functionalities

Requestor's Inbox

- View/Print Agreement
- Update User Profile
- Change Password

Throughout the application, hover over help bubble for additional information for that field.

Please access the grants portal using one of the following web browsers: Google Chrome, Microsoft Edge, Internet Explorer & Safari.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
Registration
How do I register in the system?
STEP 1. Navigate to the Grant Management System and click “Register”.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I register in the system?

STEP 2. The system will require you to first search for your Organization. Enter in the Country, Identifier Type, Identifier Value and/or Organization Legal Name and Click Search.

**Identifier Types:**

US Organizations submitting Grants and Donations should use TIN (Tax Identification Number) located on the W9 tax form.

OUS Organizations submitting Grants and Donations should use TIN (Tax Identification Number) located on the W8 BEN-E tax form or a Unique Country Identifier which would include VAT Registration, SIREN, or Foreign Tax ID Number located on your Countries Tax or Charity Documentation.

**Identifier Values:**

The number or letter number sequence provided to the Organization on your Countries Tax or Charity Documentation (ie: Tax ID Number, VAT Registration, SIREN, Foreign Tax ID Number, Unique Country Identifier, etc.)
How do I register in the system?

STEP 3. If your organization does not come up in the Results section, click “Add a New Organization”. You will be required to enter the proper information and upload documentation to register the organization. If your Organization is listed in the results section. Select them to review. After reviewing organization information answer question “Is this your Organization?” at the bottom of the page and click Proceed.

Note: If your Organization is listed under Results. But the address is not correct. You still need to select that account in order to create a new account and add new address information.

If you answer NO to the question, you will be asked to go back to the previous page to Add a New Organization to the grant system.

An Organization’s Tax ID Number can only be registered once in the grant system. But can have multiple accounts and addresses under the Tax ID Number.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I register in the system?

STEP 4. To create a new account with a different address. You will need to answer the question “Is your address correct?”. If yes, select Yes and click Proceed. If no, select No. The page will open for you to enter your new information. Once completed, then click Proceed.
How do I register in the system?
STEP 5. Enter New Organization Information and upload required documentation. Then click PROCEED.

Required Registration Documentation:
• W8/ W9 Tax form
• Tax Documentation (IRS Letter of Determination or equivalent)
• Mission Statement of the Organization
• Accreditation Certificates (If accredited and all applicable)

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I register in the system?

STEP 6. Enter an email in the User Information Tab. The system will check to make sure the email address is not already in use. *If the email address is already in use. You will need to go back to the homepage and click forgot password for the email address already in use. New registration is not needed. Or create a new account with a new email address.*
How do I register in the system?

STEP 7. If email address is available, enter User Information.

* If you do not have legal authority to sign on behalf of your organization. Answer NO, to the question “Do you have legal authority to sign on behalf of your organization?” and list the first, last name and email address of the person that is the authorized signer. They will receive an email requesting them to register and confirm they are the authorized signer for the Organization. You will also list this person in the grant request on the payee and authorized signer section.
How do I register in the system?

STEP 8. Review and Agree to the Compliance Commitment by selecting I Agree and click “Complete Registration” to submit your registration.

Note: You will receive an email confirmation from the grant portal confirming your registration was submitted successfully.
Update Profile & Password Reset

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbyiegrants@abbvie.com
How do I update my profile?

STEP 1. Within your inbox, locate “My Account” on the top header.
How do I update my profile?

STEP 2. Fields that are editable by the requestor will be open within these 3 tabs.

*Changes to the Name of the Organization or Tax ID Number require a request submitted via email to AbbVie Independent Education with documentation.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I change my password?

STEP 1. Within your inbox, locate “Change Password” on the top header.

STEP 2. Reset your password by providing your current and new passwords, click “Change Password”.

* If you are unable to change your password. Please contact AbbVie Independent Education for assistance.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
Request Submission Process
How do I submit an Education or Fellowship request?

STEP 1. Select “Submit New Request” to start the submission process.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit an Education or Fellowship request?

STEP 2. Select the Education Requests or Fellowships button to start the process. Read the descriptions for each request type to the right-hand side. Then choose what best fits your program.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit an Education or Fellowship request?

STEP 3. Read the Request Completion Instructions for the request type selected and click “Proceed” to enter the request.
How do I submit an Education or Fellowship request?

STEP 4. Enter Request Information on the General Information Tab. (This includes requests with Inkind Product/Model)

Tips:
- Any text in BLUE is instructional and will not prevent you from moving to the next step. All Red Asterisk areas are required as part of the grant submission.
- Your 60-day submission time STARTS on the day you start the submission. The dates available are based on what Month is showing in the calendar at the time you START the submission. If your program dates are no longer available, you are not within the 60-day submission window. Please STOP and call the AbbVie Independent Education Team.
- The decision needed by date should be at least 2 weeks up to 3 months prior to start date. Not the same as start date.
- The Start and End date listed on this page will need to be entered again on the Delivery Format Tab.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit an Education request with Inkind Product /Model?

STEP 4-A: Select Activity Sub-Type from the drop down.  Note: Product / Models can only be requested thru the Independent Medical Education Activity Sub-Type.

The following Therapeutic areas can request In-Kind Product/Models:

- Aesthetics - Non-Surgical Facial
- EyeCare
- Neuroscience - Spasticity / Movement Disorders
- Neuroscience - Chronic Migraine

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit an Education with Inkind Product /Model?

STEP 4-B: For Monetary and/or Product select the Monetary and/or Product radio button.

Note: For Product only select Monetary and/or Product and enter in $0.00 in Requested Amount. (No Budget is required)

Enter $0 in the requested amount if only product is requested.
How do I submit an Education with Inkind Product /Model?

STEP 4-C: Select products in the Product Requested Drop down and enter the amount requested for each product. (Products will only be present for certain Therapeutic areas, see Slide 18)

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit an Education with Inkind Product /Model?

**STEP 4-D : Enter information for each product requested.**

- Product Requested (drop down)
- Units Per Pkg & Patient Limit (read only)
- Definition of Unit (read only)

**Input fields: (Use Scroll Bar to access)**
- Units Requested
- Physician Name
- Physician License State (drop down)
- Physician License #
- Ship to Address
- Ship to City
- Ship to State
- Ship to Zip
- Expected Delivery Date

**Duplicate Products**
The same product can be requested on more than one row to accommodate for different ship locations and dates.

**Scrolling Bar**
Use this to see the other fields that need to be filled out.

**Add Another Row**
Click here to add another product to request

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbreviegrants@abbvie.com
How do I submit an Education or Fellowship request?

STEP 5. Enter the Needs Assessment and Learning Objectives on the Request Information Tab.

Note: Click on the BLUE circle with checkmark under “Action” icon to save each learning objective.
How do I submit an Education or Fellowship request?

STEP 6. Enter Request Information on the Delivery Format Tab. Select Delivery Format Type from the drop down and fill out the information. Note: Click Save Activity to add Multiple Activities. Otherwise, you can Click Save and Proceed to Next Step after adding 1 Delivery Format. *If the program has multiple dates and locations. You will need to add 1 delivery format for each location.
How do I submit an Education or Fellowship request?

STEP 7. Enter Request Information on the Planned Outcomes Tab.

Note: Accreditation Details Tab will not appear for Fellowship request.
How do I submit an Education or Fellowship request?

STEP 8. Enter Request Information on the Budget Tab. * Every individual budget line-item entry must equal Total Program Amount in order to proceed to the next step.
How do I submit an Education or Fellowship request?

How do I submit an Education or Fellowship request?

STEP 10. Enter Request Information on the Accreditation Details Tab.

Note: Accreditation Details Tab will not appear for Fellowship request.
How do I submit an Education or Fellowship request?

STEP 11. Enter Request Information on the Authorized Signer/Payee Tab. (If applicable).

Note: If Payment address is different from what is listed. Select Other and enter new address for Requesting Organization.
How do I submit an Education or Fellowship request?

STEP 12. Review Request before submitting. Use the Pencil Icon to go back and make edits to specific tabs, if needed.

STEP 13. Check the checkbox within the Agreement section to continue to submission. Click “Proceed” to submit the request.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit an Education or Fellowship request?

STEP 14. Confirmation of submission page will display. Select Proceed to move to your inbox.

Note: You will receive an email confirmation from the grant's portal confirming your grant application was submitted successfully. AbbVie Independent Education will contact you if there are questions once the review process starts.
Additional Information Needed & Amendments
How do I provide additional information when AbbVie requests it?

STEP 1. Locate the request in your inbox that has an Action Required of “Please Submit Additional Information”. Click the link.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I provide additional information when AbbVie requests it?

STEP 2. The system will navigate you back through the request form from the beginning. Only the fields that AbbVie has requested additional information will be available for the user to edit (will be in blue). The rest of the fields will be in a read-only format. Click Save and Proceed to Next Step through the submission form until the end where you will re-submit.
How do I submit an amendment request?

STEP 1. An Amendment can be submitted after approval of the original request. In order to do this, please send an email to AbbVie Independent Education at abbviegrants@abbvie.com to request the scope change request form. Fill out the scope change request form and submit to AbbVie Independent Education for review.
Letter of Agreement
How do I view and sign the Letter of Agreement?

STEP 1. Navigate to your inbox and locate the request waiting for your approval. Click “Please Submit Letter of Agreement”.

*Please note: Only authorized signers will have access to the letter of agreement in their inbox.
How do I view and sign the Letter of Agreement?

STEP 2. Read the Letter of Agreement. Click on:

- "Approve" to accept the Letter of Agreement.
- Selecting "Decline" will prompt you to provide a reason for your denial which will be sent to AbbVie for review.

Note: During review, if there are questions regarding the letter of agreement, please stop and call the AbbVie Independent Education Department.
Reconciliation
How do I submit reconciliation for an Education or Fellowship request?

STEP 1. Click the “Please Reconcile Budget and Attendance” action link in your inbox.

Note: The reconciliation portion of the portal has been enhanced to allow the requester to enter and save the reconciliation information in the grant, after the start date of every delivery format/activity within the grant. You do not have to reconcile once you receive notification. You can wait until after the end date of the program to enter the information. You cannot submit the reconciliation until 1 day after the end date of the program.

You will continue to receive email notifications regarding the reconciliation until it has been submitted.

The required information for reconciliations is as follows:

- Audience Outcomes
- Indirect Spend Information (if applicable)
- Program Outcome documentation
How do I submit reconciliation for an Education or Fellowship request?

STEP 2. Locate your delivery format and select the pencil icon to update the attendee information.

<table>
<thead>
<tr>
<th>Total # Of Activities</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enduring Activities</td>
<td>0</td>
</tr>
<tr>
<td>Live Activities</td>
<td>1</td>
</tr>
<tr>
<td>Web Activities</td>
<td>1</td>
</tr>
<tr>
<td>Total # of Learners</td>
<td>24</td>
</tr>
<tr>
<td>Enduring Learners</td>
<td>0</td>
</tr>
<tr>
<td>Live Learners</td>
<td>12</td>
</tr>
<tr>
<td>Web Learners</td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Format</th>
<th>Live</th>
<th># of Speakers/Faculty Members</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venue Country</td>
<td>United States</td>
<td>State</td>
<td>MA</td>
</tr>
<tr>
<td>Venue Name</td>
<td>Demo</td>
<td>Criteria for Faculty Selection</td>
<td>12</td>
</tr>
<tr>
<td>Activity Start Date</td>
<td>29 May 2019</td>
<td>Activity End Date</td>
<td>29 May 2019</td>
</tr>
</tbody>
</table>
How do I submit reconciliation for an Education or Fellowship request?

STEP 3. Enter in all required fields for the delivery format.
How do I submit reconciliation for an Education or Fellowship request?

STEP 4. After entering the attendees, select the pencil and notepad icon to save the delivery format. This process will need to be done for each of the delivery formats that were submitted with the request. You will not be able to proceed to the next page until all mandatory fields are filled out and the pencil and notepad icon has been selected to close the opened delivery formats. The Save Activity button does not work.

<table>
<thead>
<tr>
<th>Delivery Format</th>
<th># of Speakers/Faculty Members</th>
<th># of Paid Speakers/Faculty Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Venue Country</th>
<th>State</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>MA</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Venue Name</th>
<th>Criteria for Faculty Selection</th>
<th>What percentage of expected learners are US based?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo</td>
<td></td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity Start Date</th>
<th>Activity End Date</th>
<th>Is the venue Actual or Proposed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 May 2019</td>
<td>29 May 2019</td>
<td>Actual</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Audience Group</th>
<th>Specialty</th>
<th>If this program is accredited, please choose Category of Credit</th>
<th>CE/CME Credit Hours for Category</th>
<th># of Invitations Expected to be Distributed</th>
<th># of Expected Learners</th>
<th># of Learners Expected to Receive Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dieticians</td>
<td>Pediatrics</td>
<td>AAFP</td>
<td>19</td>
<td>12</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>
**How do I submit reconciliation for an Education or Fellowship request?**

**STEP 5. Budget section of the reconciliation form will display in read only format.**

<table>
<thead>
<tr>
<th>Budget Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Program Budget: 2,000.00</td>
</tr>
<tr>
<td>Approved Amount: 2,000.00</td>
</tr>
</tbody>
</table>

**Print Materials**

<table>
<thead>
<tr>
<th>Account and Activity Management</th>
<th>Activity Marketing</th>
<th>Medical Writing and Scientific Review</th>
<th>Creative Development and Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>Costs associated with overall administrative, budget and marketing of the program.</td>
<td>Costs associated with the promotion and recruiting of the program.</td>
<td>Costs associated with the development of educational materials and audience</td>
<td>Costs associated with program design and execution other than marketing and advertising.</td>
</tr>
<tr>
<td></td>
<td>Costs associated with the promotion and recruiting of the program.</td>
<td>Costs associated with the development of educational materials and audience</td>
<td>Costs associated with program design and execution other than marketing and advertising.</td>
</tr>
<tr>
<td>Unit Cost</td>
<td>Hours/Unit</td>
<td>Estimated Program Budget</td>
<td>Comments</td>
</tr>
<tr>
<td>2000.00</td>
<td>80</td>
<td>2000.00</td>
<td>None</td>
</tr>
</tbody>
</table>

**Audience Generation**

- Costs associated with the development and implementation of marketing plans. (Note: these plans may include purchase of placement fees, advertising, social networking.

- Program Effectiveness:
  - Costs associated with measuring the effectiveness of the program (e.g., survey development, completion kits, satisfaction surveys).

- Making Lists & Labels:
  - Costs associated with developing and maintaining a list of eligible participants.

- Shipping and Postage:
  - Shipping and postage fees associated with the program.

- Accreditation Fees:
  - Accreditation provider fees for the management of the program.

- Certificate Fees:
  - Costs associated with the preparation and distribution of CME/CSE certificates.

- Association Fees:
  - If the fee is charged specifically for the program, please indicate the amount.

**Total**

- Total: 2,000.00

**Buttons:**

- Save and Back
- Save and Continue Later
- Save and Proceed to Next Step
- Cancel
How do I submit reconciliation for an Education or Fellowship request?

STEP 6. If any HCO(s) and HCP(s) are associated with the program, they can be added thru Indirect Spend Module.

Note: If the program is not accredited covered recipients are reportable and must be added during reconciliation.
How do I add covered recipient in indirect spend module of reconciliation for my request?

STEP 7. Select No to “Was this program accredited?”.

STEP 8: Indicate that an indirect payment or transfer of value (TOV) was made to a covered recipient or teaching hospital.
How do I add covered recipient (physician) in indirect spend module of reconciliation for my request?

STEP 9. Select a covered recipient type “Physician”. Enter physician’s information and click on Save Covered Recipient button. **Note: Both NPI and State License will be required to move forward.**
How do I add covered recipient (physician) in indirect spend module of reconciliation for my request?

STEP 10. Once covered recipient is added, provide payment information details and click Save Payment button. STEP 11. The covered recipient must be re-entered for each payment (transfer of value).
How do I add covered recipient (teaching hospital) in indirect spend module of reconciliation for my request?

STEP 12. Select a covered recipient type “Teaching Hospital”. Search for teaching hospital by entering any search criteria in search section, click Search. Select a teaching hospital from the list, enter any missing information and then click on Save Covered Recipient button.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I add covered recipient (teaching hospital) in indirect spend module of reconciliation for my request?

STEP 13. Once covered recipient is added, provide payment information details and click Save Payment button. STEP 14. The covered recipient must be re-entered for each payment (transfer of value).
How do I submit reconciliation for an Education or Fellowship request?

STEP 15. Enter the Reconciliation Details for the request and certify that you used the funds properly. You may add supporting documents to this part of the reconciliation. Click browse to locate the document(s) on your computer and name each document uploaded. Then Click Save and Proceed to Next step to save the uploaded documents.

Note: If the program was cancelled. Add a check to the box next to the Statement: “By selecting this acknowledgment, I affirm that my program was cancelled or only a portion of the funds provided by AbbVie for this program were used for the purposes outlined in the executes Letter of Agreement, and the unused/remaining funds will be returned. A refund amount will be calculated and entered in the refund amount section. A Refund check should be mailed to GGCD with 30 days of receiving email notification or a request for AbbVie Bank information for ACH wire.
How do I submit reconciliation for an Education request with In-Kind/Model?

STEP 15-A. Enter the Reconciliation Details for the request and certify that you used the funds properly. (If request has In-Kind Product/Models there will be an additional question in this section to be completed see below) You may add supporting documents to this part of the reconciliation. Click browse to locate the document(s) on your computer and name each document uploaded. Then Click Save and Proceed to Next step to save the uploaded documents.

- If product is requested, “Any Product(s) Returned?” must be answered yes or no during reconciliation.
- If yes, a new table will appear with a new column “Units Returned”
- At least one row of product must have a positive value input and indicated as a return.

Questions? Please call AbbVie Independent Education at 877-228-7177 or send email to abbviegrants@abbvie.com
How do I submit reconciliation for an Education or Fellowship request?

STEP 16. Review the reconciliation information that was entered and make any edits that are needed. Select “Submit” when completed.
How do I view/print the Letter of Agreement?

STEP 1. After the agreement has been accepted by AbbVie, it is available within the inbox to be viewed and printed as needed. Click “View/Print Agreement” link.

Please Note: Only the Authorized signer will have access to the signed letter of agreement. If a copy needs to be requested, Contact the AbbVie Independent Education Dept and request a copy.
How do I view/print the Letter of Agreement?

STEP 2. A pop up will display with the Letter of Agreement that was signed. The print button is available in the top left corner.