Global Grants and Charitable Donations

Requestor Training Guide

Effective August 5, 2019
Requestor – Request Workflow and Other Functionalities

Request Workflow
- Registration
- Request Submission
  - Education and Fellowships & Scholarships
  - Charitable Donations
- Additional Information Needed and Amendments
- Letter of Agreement
- Reconciliation

Other Functionalities
- Requestor’s Inbox
  - View/Print Agreement
  - Update User Profile
  - Change Password

Note: Click on titles above to advance to any section.

Throughout the application, hover over help bubble for additional information for that field.
How do I register in the system?

STEP 1. Navigate to the Request Management System and click “Register”.

All new users must register to create an account in the system. Please go to www.abbvie.com/qgrants for step by step instructions to register. If you are a returning system user, please log on using the credentials you registered with. If you forgot your password, please click on “Forgot Password?” and follow the instructions to reset your password.
How do I register in the system?

STEP 2. The system will require you to search for your organization first. Enter in the Country, Tax ID and/or Organization Legal Name to search the system.
How do I register in the system?

STEP 3. If your organization is not within the system, click “Add a New Organization”. You will be required to enter the proper information and documentation to register the organization.

Required Documents:

- W-9/W-8 BEN-E form, (current version)
- Accreditation Certificates (all that apply)
- Mission Statement
How do I register in the system?

STEP 4. Enter Organization Information.
How do I register in the system?

STEP 5. Enter Organization Address.
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 is not already in use.
How do I register in the system?

STEP 7. If email address is unique, enter User Information.
How do I register in the system?

STEP 8. Agree to the Compliance Commitment and click “Complete Registration” to submit your registration.
**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.
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”.

Welcome, Ana Moore

Welcome to the AbbVie Grant Management System!

Submitting a Request

When submitting a request, you will be guided through the electronic submission. Please make sure that you have all the necessary information before submitting the request.

AbbVie will review all requests. Please note that submission of a request does not indicate that AbbVie has received or reviewed it.

Reviewing Request Status

In your inbox below, you can view the status of all requests submitted to date. The status of each application column indicates you need to take action on that request.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 1. Select “Submit New Request” to start the submission process.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 2. Select the Education Requests or Fellowships and Scholarships button to start the process.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 3. Read the Request Submission Instructions and click “Proceed” to enter the request form.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 4. Enter Request Information on the General Information Tab.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 5. Enter Request Information on the Request Information Tab. Note: Click on “Action” icon to save learning objectives.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 6. Enter Request Information on the Delivery Format Tab.

Note: Click on pencil icon to save each delivery format.
How do I submit an Education request or Fellowships & Scholarships request?

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

Note: Accreditation Details Tab will not appear for Fellowships and Scholarships request.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 8. Enter Request Information on the Budget Tab.

Note: Individual budget items must equal the Total Program Amount.
How do I submit an Education request or Fellowships & Scholarships request?

How do I submit an Education request or Fellowships & Scholarships request?

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

Note: Accreditation Details Tab will not appear for Fellowships and Scholarships request.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 11. Enter Request Information on the Authorized Signer/Payee Tab. (If applicable)
How do I submit an Education request or Fellowships & Scholarships 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.
How do I submit an Education request or Fellowships & Scholarships request?

STEP 14. Confirmation of submission page will display. Select Proceed to move to your inbox.
How do I submit a Charitable Donations request?

STEP 1. Select “Submit New Request” to start the submission process.
How do I submit a Charitable Donations request?

STEP 2. Select Charitable Donations button to start the process.
How do I submit a Charitable Donations request?

STEP 3. Read the Request Submission Instructions and click “Proceed” to enter the request form.
How do I submit a Charitable Donations request?

STEP 4. Enter Request Information on the Overview Tab.
How do I submit a Charitable Donations request?

STEP 5. Enter Request Information on the Delivery Format Tab.
How do I submit a Charitable Donations request?

STEP 6. Enter Request Information on the Authorized Signer/Payee Tab.
How do I submit a Charitable Donations request?

STEP 7. Review Request before submitting. Use the Pencil Icon to go back and make edits to specific tabs, if needed.
How do I submit a Charitable Donations request?

STEP 8. Check the checkbox within the agreement section to continue to submission. Click “Proceed” to submit the request.
How do I submit a Charitable Donations request?

STEP 9. Confirmation of submission page will display.
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.
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. 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 parent request. In order to do this, please click on the Request Title. Note that if there is an amendment for that request in the draft status, action link will display in Amendment column. A Requestor will be able to submit an Amendment on an approved request up until the request is in 'pending reconciliation' status. At that point, you will no longer be able to submit an Amendment.
How do I submit an amendment request?

STEP 2. On Request Review page click on Create Amendment button. Please note: This action link will only be available if the request has been approved.
How do I submit an amendment request?

STEP 3. Specify reason for requesting an amendment, check the acknowledgement checkbox and click on Continue button.
How do I submit an amendment request?

STEP 4. Update highlighted fields on the requests form. Submit the amendment.
How do I submit an amendment request?

STEP 5. Review amendment before submitting. Check the checkbox within the agreement section to continue to submission. Click “Proceed” to submit the request.
How do I submit an amendment request?

STEP 6. Confirmation of submission page will display.
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”.

Welcome, Ana Moore

Welcome to the AbbVie Grant Management System!

Submitting a Request

When submitting a request, you will be guided through the electronic submission. Please make sure that you complete each required field designated by an asterisk (*). Should AbbVie need additional information, we will notify you via an email sent to the address you provided upon registration.

AbbVie will review all requests. Please note that submission of a request does not indicate that AbbVie has agreed to provide support. You will be notified of the decision via an email sent to the address you provided upon registration.

Reviewing Request Status

In your inbox below, you can view the status of all requests submitted to date. The status of each application is updated regularly as the status changes. An item in your Action Items column indicates you need to take an action on that request.

Submit New Request

Education Inbox

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Status</th>
<th>Amendment</th>
<th>Program Title</th>
<th>Start Date</th>
<th>Action Required</th>
<th>View/Print Agreement</th>
</tr>
</thead>
</table>
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.
How do I submit reconciliation for an Education request?

STEP 1. Click the “Please Reconcile Budget and Attendance” action link in your inbox.
How do I submit reconciliation for an Education request?

STEP 2. Locate your delivery format and select the pencil icon to update the attendee information.
How do I submit reconciliation for an Education request?

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

STEP 5. Budget section of the reconciliation form will display in read only format.
How do I submit reconciliation for an Education 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 then click on Save Covered Recipient button.
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 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.

### Reconciliation Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>I certify the funds received were used only for the activity(ies) detailed in my original request or approved change of scope.</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Estimated Program Budget</td>
<td>USD 2,000.00</td>
</tr>
<tr>
<td>Approved Amount</td>
<td>USD 2,000.00</td>
</tr>
<tr>
<td>Actual Total Program Budget</td>
<td>500.00</td>
</tr>
<tr>
<td>Total amount of AbbVie funding used</td>
<td>500.00</td>
</tr>
<tr>
<td>Refund Amount</td>
<td>USD 1500.00</td>
</tr>
</tbody>
</table>

- By selecting this acknowledgement, 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 executed Letter of Agreement, and the unused/remaining funds are being returned.

**AbbVie**
How do I submit reconciliation for an Education request?

STEP 16. Review the Reconciliation Information that was entered and make any edits that are needed. Select “Submit” when completed.
**How do I submit reconciliation for a Charitable Donation request?**

STEP 1. Click the “Upload Charitable Acknowledgement Form” action link in your inbox. **NOTE:** This is due within 30 days of payment receipt.

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Status</th>
<th>Program Title</th>
<th>Start Date</th>
<th>Action Required</th>
<th>View/Print Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHR-125</td>
<td>Pending Reconciliation</td>
<td>Charitable Donations</td>
<td>19 Jun 2019</td>
<td>Upload Charitable Acknowledgement Form</td>
<td>View/Print Agreement</td>
</tr>
<tr>
<td>CHR-123</td>
<td>Pending Reconciliation</td>
<td>Charitable Reconciliation</td>
<td>18 Jun 2019</td>
<td>Upload Charitable Acknowledgement Form</td>
<td>View/Print Agreement</td>
</tr>
<tr>
<td>CHR-115</td>
<td>Pending Reconciliation</td>
<td>Charitable</td>
<td>17 Jun 2019</td>
<td>Upload Charitable Acknowledgement Form</td>
<td>View/Print Agreement</td>
</tr>
</tbody>
</table>
How do I submit reconciliation for a Charitable Donation request?

STEP 2. Download “Charitable Acknowledgement Form”, complete the form, then upload it.
How do I submit reconciliation for a Charitable Donation request?

STEP 3. Click “Submit” button to submit the reconciliation.
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.
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.