



Merck Canada Sponsorship Portal - Submission Guide

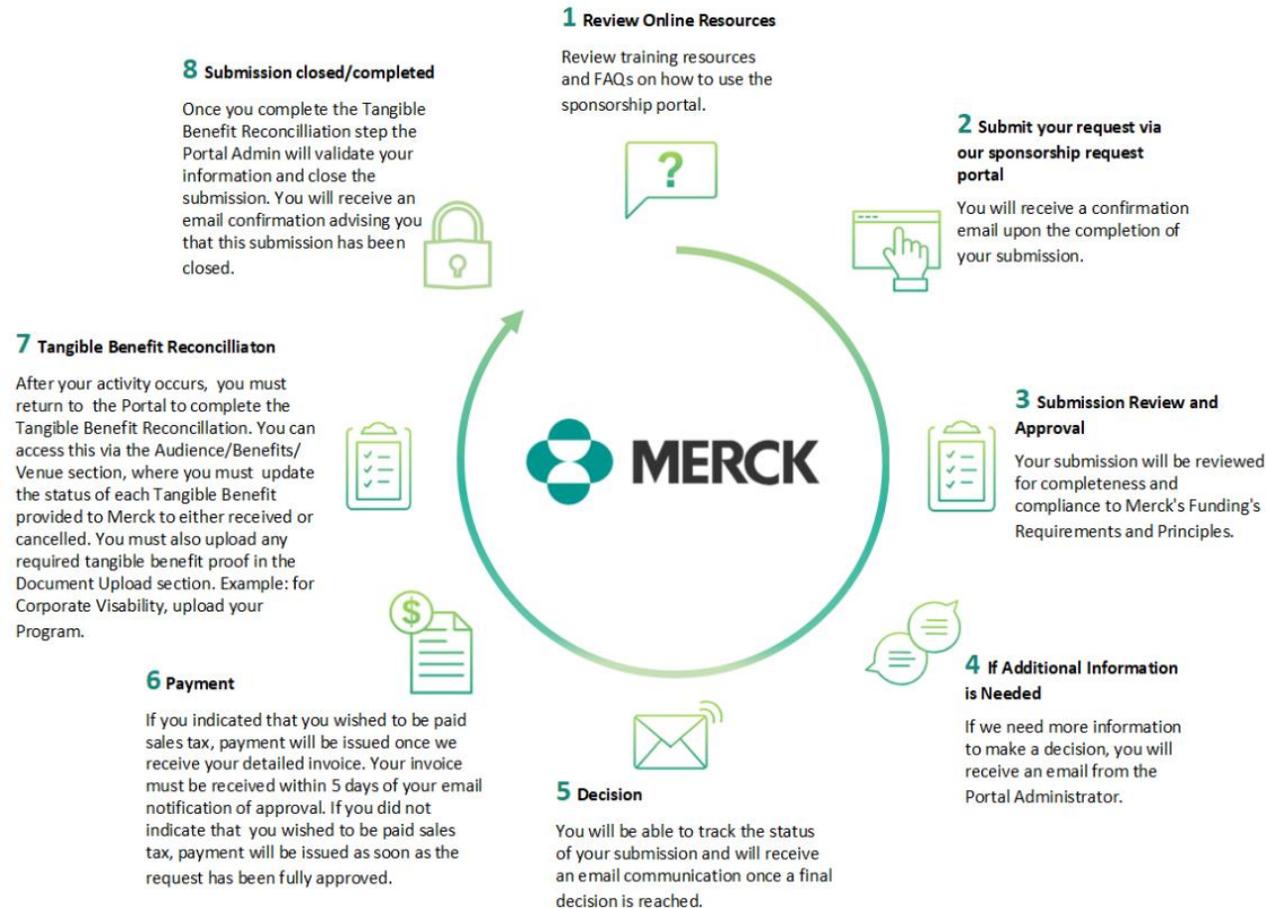
Table of Contents

Funding Process Sections in this Job-Aid

1	<u>Sponsorship Portal Home Page</u>	p. 5
2	<u>One-Time Organization Setup</u>	p. 6
3	<u>Initiating Your Request</u>	p. 8
4	<u>Specific Details on Your Request</u>	p. 9
5	<u>Audience / Benefits / Venue</u>	p. 10
6	<u>Budget</u>	p. 13
7	<u>Document Uploads</u>	p. 16
8	<u>Authorized Signer</u>	p. 17
9	<u>Payee Information</u>	p. 18
10	<u>Reviewing Your Request</u>	p. 19
11	<u>Tangible Benefits Reconciliation</u>	p. 22

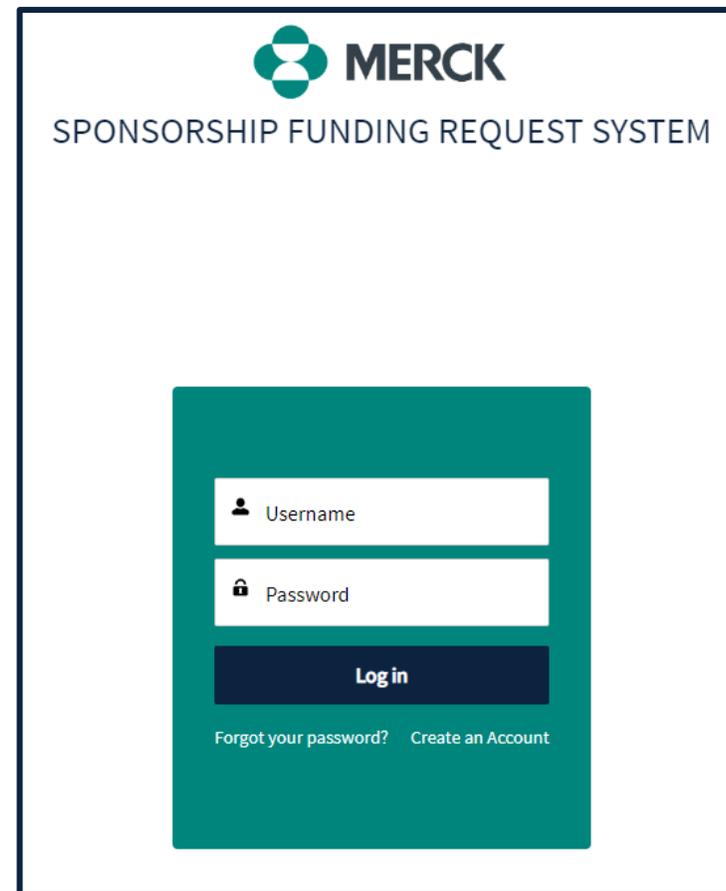
Funding Process Flow

Funding Process - What to Expect



Accessing the Merck Canada Sponsorship Portal

- Open a web browser and navigate towards the Merck Canada website - [Link](#).
- Scroll down the web page until you reach the **Provision of Funding by Merck Canada** Section.
- Click on "**Apply Online**" under the Sponsorship section. *(Please ensure you click on the Sponsorship and NOT the Grant section when applying)* - [Login](#)
- Click on "**Proceed**" to leave the Merck.ca site.
- Once the application page opens, you need to "**Create an Account**". *(Only if you do not have an account yet setup)*
- Retain your **username and password**, as you will need these credentials for future access to the Portal.
- If you ever **forget your password**, there is an option to retrieve it.



The screenshot displays the Merck Sponsorship Funding Request System login interface. At the top, the Merck logo and the text "SPONSORSHIP FUNDING REQUEST SYSTEM" are visible. Below this, there is a teal-colored login box containing a "Username" input field with a person icon, a "Password" input field with a lock icon, and a dark teal "Log in" button. At the bottom of the login box, there are two links: "Forgot your password?" and "Create an Account".

Sponsorship Portal Home Page

- Once you **LOG IN** successfully, you will land on this Home Page.
- On the right-hand side of this page, you can see the different functionalities available to you.

Resources + Guides to help you with your submission

Language Settings

Account Settings

MERCK Home Sponsorship Definition Process Overview FAQ

Welcome to the Merck Canada Inc. Sponsorship Funding Request Homepage

Submitting a Request:
You will be provided with instructions to help guide you through the submission process. The fields designated by an asterisk (*) are mandatory and you will not be able to submit your request if these fields are not completed. Additional fields are available to allow you to provide supplemental information, that you feel is relevant to help support your submission. For additional help, hover over the information icons.

Please note that the submission of your request does not indicate that Merck has agreed to provide support. Support decisions will be made after reviewing your request. As a member of Innovative Medicines Canada (IMC), Merck must ensure that all requests meet the requirements as set forth in both the Code of Ethical Practices as well as Merck's Global Policies and local procedures. Should we require additional information as it relates to your submission, we will contact you via the email address you provided upon registration.

Request Status:
Upon submitting your Request, you will receive an email confirmation with your Sponsorship Request #. You can use this # to track the status of your submission in the **My Requests** section of the page below. You will also receive an email confirmation advising if your request has been approved or not.

Approval Time:
Please note that Merck requires adequate time for the review process; as such, requests must be submitted at least **45 days** prior to the program/activity start date. Requests submitted outside these requirements **will not be** considered.

Sponsorship Process Overview:
The Sponsorship Process Overview outlines the stages that a submission goes through from time of receipt to closure. We suggest you take a moment to review this information to help you understand the overarching process.

Updating your Account or Organization Information

Submitting Requests
Please click the "submit a request" button, to begin the submission process. Please read carefully the information you will need to have on hand to complete your submission

Submit a Request

To **START** your submission process (only once the Org Setup is completed)

One-Time Organization Setup (for first time users)

Request Status

My Required Tasks

COMPLETE THE 'MY ACCOUNT' SECTION...

Action Required
Complete User Information

Go

COMPLETE THE 'MY ACCOUNT' SECTION O...

Action Required
Complete Organization Information

Go

History of Requests (18)

Showing records 1-10 of 18

Title ↑	Created Date	Subtype	Request ID	Requested Amount	Request Status	Request Receive...	Decision Provide...	Approved Amount
Case #17	2022-8-24, 07:53 p.m.	Edited script	MT-2022-559000	CAD 500.00	New			
Case 16 ENG Heidi - Stephanie	2022-8-24, 04:31 p.m.	Select a value other than -- None --	MT-2022-149940	CAD 25,000.00	New			
Case 20 - Sean F for Kelly	2022-8-28, 05:09 p.m.	Educational material for Patients	MT-2022-522381	CAD 25,000.00	Closed	2022-8-28	2022-8-28	CAD 25,000.00
Congress at Disney	2022-8-16, 05:54 p.m.	Congress	MT-2022-762660	CAD 10,000.00	Additional Information Requested	2022-8-16		
RI - Disney Conference # 4	2022-8-17, 06:58 p.m.	Conference	MT-2022-679545	CAD 75,000.00	Reconciliation In Review	2022-8-17	2022-8-23	CAD 50,000.00
RI - Disney Conference # 5	2022-8-17, 07:21 p.m.	Conference	MT-2022-567258	CAD 5,000.00	Approved	2022-8-17	2022-8-24	CAD 5,000.00
RI - Disney Conference #7	2022-8-17, 07:45 p.m.	Conference	MT-2023-267921	CAD 10,000.00	Submitted for Review	2022-8-18	2022-8-23	

Your History of current and past requests

One-Time Organization Setup

If this is your first Sponsorship submission, please fill out the One-Time Organization Setup

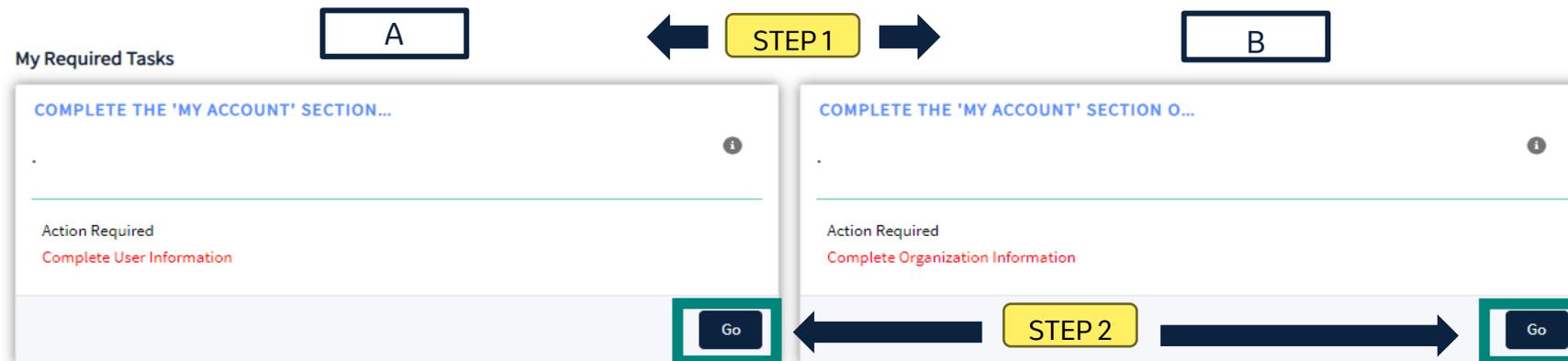


If this step was already completed, go to slide 8.

STEP 1 - Upon Logging IN - 2 tasks require your action:

- Complete your **User Information (A)**.
- Complete your **Organization Information (B)**.

STEP 2 - Click on either of the "Go" buttons to launch the "My Account" profile page



One-Time Organization Setup (cont'd)

STEP 3 - Follow the instructions on the My Account Page (C) and review the **checklist (D)** to ensure adequate completion of this section.

C

My Account

Welcome!

To submit a request, you must first complete the **MANDATORY one-time Organization** setup. This setup will link you, the Requestor, to your Organization's profile within the tool. Please follow the instructions below:

1. Select the *Organization Information* Tab
2. When you click on the *New* button you will be given 2 options.
 - a. Search by Name
 - b. Create New
3. **Always "Search by Name" first, to see if your Organization's name already exists in the tool.**
 - a. Type the first few letters of your Organization's name (no acronyms) in the search field and then scroll down until you find it.
 - b. Once you find your Organization's name, click the plus sign (+) to select it. The system converts the plus sign to a check mark (✓) thus linking yourself to this organization.
4. If you cannot find your Organization, you will need to create it (no acronyms). Please go back and choose the - *Create New* option.
5. For both options:
 - a. You will be prompted to **Agree** to the Compliance Statement.
 - b. You will need to provide detailed information, such as address information, authorized signer, and payee information to finalize the Organization setup.

Note: The authorized signer and payee information must be inputted at this time, otherwise you will not be able to submit your request.

User Information	Organization Information
Salutation	First Name
Middle Name	Last Name
Suffix	Professional Title ⓘ
Email ⓘ	Mobile
Phone	Fax

STEP 1

STEP 2

D

Refresh Checklist

Last refresh: **a few seconds ago**

Required (3) Suggested (0) Info (0)

- ✓ At least one Organization should be affiliated to the Profile
- ✓ Email field on the User Information should be completed
- ✓ Mobile field on the User Information should be completed

Initiating Your Request

A skeleton of your Request has been created. View the below functionalities to help you with your submission.

Note: Some sections will appear as completed (Green) if the One-Time Organization Setup was already done.

Required Information separated by sections for Submission

The screenshot displays the Merck Request Management System interface. The top navigation bar includes 'Home', 'Sponsorship Definition', 'Process Overview', and 'FAQ'. The user profile 'Rosemary Iacucci' is visible in the top right. The main content area is titled 'Oncology Congress - 20th Annual' and shows the 'Request Information' section. A sidebar on the left lists various sections: 'Submit a Request', 'Request Information', 'Audience / Benefits / Venue', 'Budget', 'Document Uploads', 'Authorized Signer', 'Payee Information', and 'Request Review'. A green box highlights the 'Request Information' section in the sidebar and the corresponding form area. A callout box in the top right corner displays the 'Request ID : MT-2022-220662', 'Subtype : Congress', and 'Request Status : New'. A table below the form shows the 'Requesting Organization (0)' with columns for 'Full Name', 'Address', 'City', 'Province', 'Postal Code', 'Country', and 'Comments'. The 'Details' section contains various fields for request information, such as 'Title', 'Description', 'Geographic Reach of Request', 'Therapeutic Area', 'Package Tier', 'Will healthcare professionals attend?', 'Enter Merck Contact, if not found', 'Select your Merck Point of Contact', 'Funding requested from other supporters?', 'Organization is Solely Owned', 'Social Media Component?', 'Has request been discussed with Merck?', 'Check here if this program is accredited', 'Subtype', 'Total Project Budget', 'Requested Amount', 'Key Dates', 'Start Date/Time', 'End Date/Time', and 'Decision By Date'. A green box highlights the 'Request ID' field in the top right corner, with an arrow pointing to it from the text 'Request ID' on the right. Another arrow points from the text 'Required Information separated by sections for Submission' on the left to the sidebar.

Specific Details on Your Request

To enter the information for your request, follow the following steps:

- Click on the **pencil icon**.
- Fill in the mandatory questions (*marked with an asterisk '*'*).
- Once you have entered all the required information, click on **"Save"**.
- Click on **"Next"** to proceed.



Reminder: We will **NOT accept** requests for events/activities that are taking place in less than **45 days**. If the wrong activity/event date is entered to bypass this requirement, your request will be rejected.

Will Merck be the only company supporting this sponsorship?

To Edit Field (Pencil Icon)

Details	
Title	TES
Geographic Reach of Request	Local
Package Tier	
Select your Merck Point of Contact	Sean Furtado
Funding requested from other supporters?	No
Organization is Solely Owned	No
Has request been discussed with Merck?	No
Check here if this program is accredited	<input checked="" type="checkbox"/>
Subtype	Dynamic Online activities (ie; Web pages)
Description	
Description	LOIHOI
Therapeutic Area	No therapeutic Area = NA
Will healthcare professionals attend?	No
Enter Merck Contact, if not found	
Provide rationale for sole support	
Social Media Component?	<input type="checkbox"/>
1st request to Merck this year?	Yes
Hosting Country	Canada

Support Information	
Total Project Budget	CAD 1,000,000.00
Requested Amount	CAD 10,000.00

Key Dates	
Start Date/Time	2024-07-05, 3:16 p.m.
End Date/Time	2024-12-17, 3:16 p.m.
Decision By Date	2024-07-28

What is the total budget of your event?

What date are you expecting a confirmation as for the status of your request?

What is the specific amount requested?

Audience / Benefits / Venue Section

- **Step 1** - Click on "New" to access the Audience/Benefits /Venue Section.
- **Step 2** - Select the **Delivery Format** for your Activity/Event from the drop-down menu.
- **Step 3** - If the Delivery Format is either **In Person or Hybrid**, please complete the **Venue Information**.
- **Step 4** - Once completed, click "Finish".

Summary

Delivery Format No data to display	Participants By Activity No data to display	Attendee Type No data to display
---------------------------------------	--	-------------------------------------

Audience/Benefits/Venue

Add an Activity

* Activity Name: TES

* Delivery Format: Hybrid

* Request: TES

* Size of Audience

Information

* Venue Name		* Venue City	
* Venue Country	Canada	* Venue Province	--None--
* Venue Postal Code			

STEP 1

New

STEP 2

STEP 3

STEP 4

Finish

Audience / Benefits / Venue Section (cont'd)

Tangible Benefits

Add all the Tangible Benefits Merck will receive for supporting this request.



All Tangible Benefits must have the same due date - use the latest due date for all.

Step 1 - To add a tangible benefit, click on "New".

Step 2 - New Tangible Benefit

- Select the Appropriate **Benefit Type**.
- If you select "**Other**" in Benefit Type, please specify in the field below it.

Step 3 - Click "Save"

Note: Repeat the same 3 steps for each one of your tangible benefits.



Please note that Merck Canada **does not support** meetings or events held at 5-star venues or venues that might give the impression that the professional education or exchange is secondary or incidental to the other activities associated with the location.

Tangible Benefits

1. Please add all of the Tangible Benefits that Merck will receive for supporting this Request.
2. Also add the date all tangible benefits will be available to Merck. All benefits should have the same due date (use the latest date if not same date for all).
3. If some Benefits to be provided to Merck do not appear in the drop-down list, please select Other and specify the Benefit to Merck.

Note: The Sponsorship Portal will send you a reminder on the due date you selected. Please login into the Portal and formally confirm the provision of these Benefits.

New Tangible Benefits

Information

Audience / Benefits / Venue Section (cont'd)

Tangible Benefits

Please upload all documentation demonstrating that Merck has received all the Tangible Benefits listed below.

Below is the list of Documentation/Proof required for the **Tangible Benefits** listed below.



Important Reminders for Your Merck Canada Funding Application:

- **Funding Decision:** The decision to fund your application is not based on the number of tangible benefits you list.
- **Tangible Benefits Selection:** Choose your tangible benefits carefully, as you will be responsible for fulfilling and documenting all of them as part of your post-funding obligations.
- **Future Funding Impact:** Delays in submitting required documents or concerns with the materials provided may affect your organization's eligibility for future funding requests.

Benefit Type	Needed Documentation
Corporate Visibility	Copy or photo of your program showing Merck's logo as a sponsor
Post-Event Report	Copy of the Report
Symposium	Copy of the Agenda showing Merck's time slot
Materials Developed	Copies of the material developed
Attendance	Confirmation that Merck received X number of tickets/registrations
Booth	Confirmation that Merck had booth spot/location X

Budget Section

To complete the **Budget Details section**, select one of two options:

Option 1:

Fully itemize the budget using our drop-down options
(Refer to [page 11](#) for detailed instructions)

Option 2:

Upload a pdf document of your budget

(Refer to [page 12-13](#) for detailed instructions)



Important: If you choose NOT to itemize the budget, attach a detailed budget document in the "Document Uploads Section".

Cost Categories	Sub-Categories
Resource Costs	Communication Specialist Consultant(s) Creative Director Digital Graphic Designer Editor Facilitator Graphic Artist Medical Writer Project Manager Social Media/Media Relations Virtual Meeting Management
Fees For Service	Advertising-Digital Advertising-Print Content Creation (Patient Material, Resource Guide) Creative/Graphic Data Collection Needs Assessment Newsletter/Publication Participant Engagement Survey Design Creation/Editing Translation Services Video Creation Website Podcast Report Generation/Data Analysis Social Media Campaign
Honoraria	Faculty, Moderator, Scientific Committee Member, Speaker, Speaker Travel and Accommodation
Meals	Breakfast, Breaks/Snacks, Dinner, Lunch
Meeting Logistics Costs	Audio Visual Equipment Rental, Audio Visual Labor Costs, Onsite Meeting Support, Venue / Meeting Room Rental, Virtual Booth Costs, Virtual Platform Costs, Webcast License Costs
Shipping Costs	Postage , Printing Costs, Shipping Costs
Accreditation Costs	Accreditation, File Review and Submission

Budget Section (cont'd)

Option 1:

Fully itemize the Detailed Budget & ensure the total equals the Requested Amount (A).

- **Step 1** - Click on the appropriate Budget Category.
- **Step 2** - Select "New" to add a new budget item.
- **Step 3** - Enter the details for each budget element, including the Cost Sub-Category and the amount requested for each item.

Click "Save" & Repeat steps 1 to 3 to add more items.



Note: You must provide a sufficient level of granularity for us to be able to assess your request. Failure to do so may result in delays in the review and approval of your request.

Where relevant, you must provide us with the unit costs i.e.: \$/hr., number of hours, so that we can assess your budget elements.

STEP 1

STEP 2

STEP 3

Resource Costs (0)

Cost Sub-Category	Amount per Unit (I.e. \$/hr)	units/# speakers/# hrs	Requested Amount	Comments
1				

Resource Costs (1)

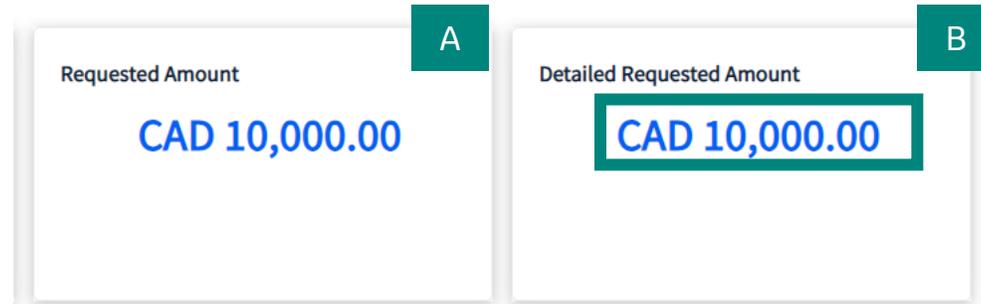
Cost Sub-Category	Currency ISO Code	Amount per Unit (I.e. \$/hr)	units/# speakers/# hrs	Requested Amount	Comments
--None--	CAD - Canadian Dollar				

Budget Section (cont'd)

Option 2:

To upload a Budget.

- ❖ Click on the appropriate Budget Category.
- ❖ Select "**New**" to add a new budget item.
- ❖ Select "**Other**" Sub-Category.
- ❖ Validate the totals (also showed in the "Detailed Requested Amount" in B equals to the "Requested Amount in A".)
- ❖ Click "**Next**".



Resource Costs Fee for Service Honoraria Meals Meeting Logistic Costs Shipping Costs Accreditation Costs STEP 1

Resource Costs (1) Edit + New

Cost Sub-Category	Amount per Unit (i.e. \$/hr)	units/# speakers/# hrs	Requested Amount	Comments
Other	CAD 1.00	10,000	CAD 10,000.00	
	CAD 1.00	10,000	CAD 10,000.00	

STEP 2

Follow detailed instructions on **page 13** to upload a pdf of your Budget.

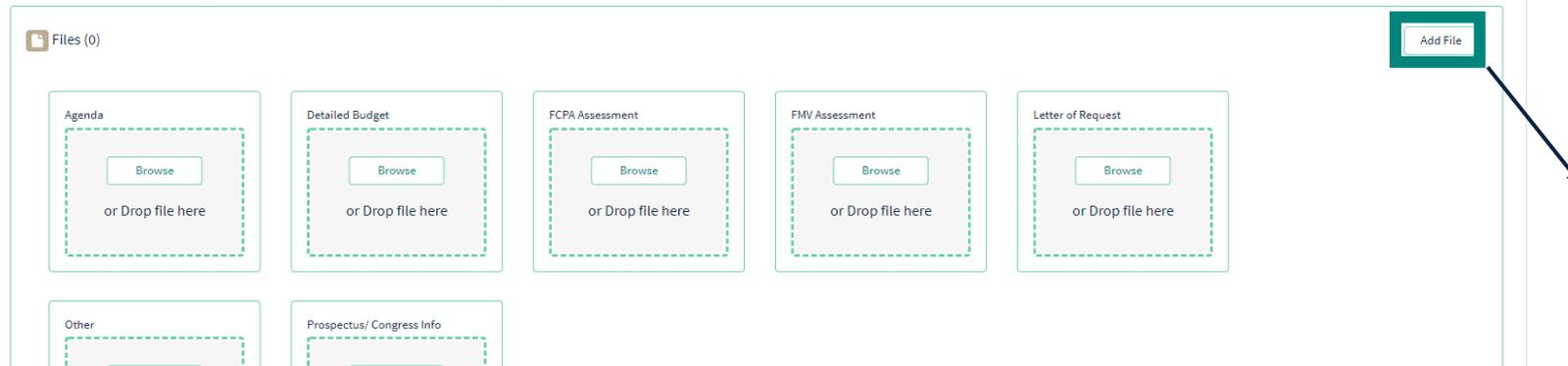
Document Uploads Section

Upload the **mandatory documents** as requested.

Conference/Congress/Symposia	A copy of your Agenda – Please upload in the “Agenda Box”. The meeting agenda is not finalized, upload the draft agenda as well as the agenda from the previous year's meeting (if applicable) to show the types of sessions organized.
For Patient Support Initiatives with Multiple Activities	Detailed breakdown of all the objectives related to each activity Please Upload in the box labeled “Other”
For Package/Tier Requests	Meeting Prospectus, Program/Brochure
Budget Information	Must upload a pdf form in the box labeled “Detailed Budget” if you don’t intend to itemize it in the Budget Section


The designated and authorized signer must agree with the Terms and Conditions of the Funding Request Agreement on behalf of the organization. Terms and conditions are considered the contract

Please feel free to attach any other information/documentation that you feel is relevant to help support your submission.



The screenshot shows a file upload interface with a header 'Files (0)'. Below it are seven upload boxes, each with a 'Browse' button and the text 'or Drop file here'. The boxes are labeled: Agenda, Detailed Budget, FCPA Assessment, FMV Assessment, Letter of Request, Other, and Prospectus/ Congress Info. To the right of these boxes is an 'Add File' button, which is highlighted with a red box. An arrow points from this button to the text 'Click here to upload the files'.

Click here to upload the files

Authorized Signer Section

During the One-Time Setup of your organization, you should have identified your authorized signer.

- Click on the "**New**" button.
- Select the authorized signer previously identified.
- Click on "**Next**" to proceed.

Request ID: MT-2022-220662
Subtype: Congress
Request Status: New

STEP 1

Full Name ↑	Business Title	Email	Phone	Comments
There are no information to display right now!				

Previous Next

Request ID: MT-2022-220662
Subtype: Congress
Request Status: New

STEP 2

STEP 3

Account Name	Title	Country	Email	Account Phone
Rosemary Iacucci			rosemary.iacucci@gmail.com	(438) 822-4467

Previous Next



The **designated** and **authorized** signer must agree with the **Terms and Conditions** of the Funding Request Agreement on behalf of the organization

Payee Information Section

Ensure that the **Payee Information** and **Requesting Organization** are the same entity.

- Select "**Next**" to proceed.
- Choose the appropriate Organization and click "**Next**".

The screenshot shows the 'Payee Information' step in a Merck web application. The breadcrumb trail is 'Home > Sponsorship Definition > Process Overview > FAQ'. The user is identified as 'Rosemary Iacucci'. The request title is 'Oncology Congress - 20th Annual'. The request ID is 'MT-2022-220662', the subtype is 'Congress', and the status is 'New'. The left sidebar shows the progress: 'Request Information' (1), 'Audience / Benefits / Venue' (2), 'Budget' (3), 'Document Uploads' (4), 'Authorized Signer' (5), 'Payee Information' (6), and 'Request Review' (7). The main content area has a title 'Payee Information' and a sub-header 'BC Cancer Foundation'. The text reads: 'In order to complete the submission process, you need to provide the Payee information. The Payee is the name of the Organization that Merck will be paying. Merck will only pay the Organization submitting this request. Your Organization will appear in the list of Payees, if it was set-up during the completion of the Organization setup process. If it does not appear, you will need to create it by following the steps indicated below.' Below this is a section titled 'Payee Information' with a sub-header 'BC Cancer Foundation'. A message says: 'In order to start the search for the Payee associated with the current Requesting Organization please click 'Next''. A 'Next' button is highlighted with a green box and labeled 'STEP 1'. There are also 'Previous' and 'Next' buttons at the bottom right.

The screenshot shows the 'Add Payee' step in a Merck web application. The breadcrumb trail is 'Home > Sponsorship Definition > Process Overview > FAQ'. The user is identified as 'Rosemary Iacucci'. The request title is 'Oncology Congress - 20th Annual'. The request ID is 'MT-2022-220662', the subtype is 'Congress', and the status is 'New'. The left sidebar shows the progress: 'Request Information' (1), 'Audience / Benefits / Venue' (2), 'Budget' (3), 'Document Uploads' (4), 'Authorized Signer' (5), 'Payee Information' (6), and 'Request Review' (7). The main content area has a title 'Payee Information' and a sub-header 'BC Cancer Foundation'. The text reads: 'Add Payee. We have found the following existing Payee record(s) associated with the current Requesting Organization. Please choose the one among the existing or add new by clicking 'Next''. Below this is a table with columns: 'Organization Name', 'Address Line 1', 'City', 'Province', 'Postal Code', and 'Country'. The first row has a green checkmark in the 'Organization Name' column and the value 'BC Cancer Foundation'. A 'Next' button is highlighted with a green box and labeled 'STEP 2'. There are also 'Previous' and 'Next' buttons at the bottom right.

STEP 1

STEP 3

STEP 2

Reviewing Your Request

- Verify that all required documents have been uploaded
- Ensure the accuracy and completeness of your submission before moving forward.

Completed sections show as green on the left panel

The screenshot displays the Merck Request Review interface. On the left, a sidebar titled 'Submit a Request' contains several items, each with a green checkmark indicating completion: Request Information, Audience / Benefits / Venue, Budget, Document Uploads, Authorized Signer, Payee Information, and Request Review. The main content area is titled 'Request Information' and shows a table for 'Requesting Organization (1)' with columns for Full Name, Address, City, Province, Postal Code, Country, and Comments. Below this is a 'Details' section with various fields and their values, and a 'Support Information' section with 'Total Project Budget' and 'Requested Amount'.

Full Name	Address	City	Province	Postal Code	Country	Comments
BC Cancer Foundation	686 Broadway W	Vancouver	British Columbia	V5Z 1G1	Canada	

Details		
Title	Oncology Congress - 20th Annual	Description 20th Annual Oncology Congress
Geographic Reach of Request	Local	Therapeutic Area Oncology
Package Tier	Bronze	
Will healthcare professionals attend?	Yes	Select your Merck Point of Contact Sean Furtado
Enter Merck Contact, if not found		Funding requested from other supporters? Yes
Social Media Component?	<input type="checkbox"/>	Organization is Solely Owned No
Has request been discussed with Merck?	Yes	1st request to Merck this year? No
Check here if this program is accredited	<input type="checkbox"/>	Hosting Country Canada
Subtype	Congress	

Support Information	
Total Project Budget	CAD 50,000.00
Requested Amount	CAD 25,000.00

Key Dates	
Start Date/Time	2022-12-01, 5:54 p.m.
End Date/Time	2022-12-01, 5:54 p.m.
Decision By Date	2022-10-01

Funding Request Agreement

- Review and accept the **Terms and conditions**.
- Click on the pencil icon and tick the box **“I Accept the Terms of this Agreement”**.
- Choose the appropriate **Sales tax** option (view definition on the Request Review tab within the portal)
 - Option 1: NO SALES TAX
 - Option 2: SALES TAX
- **“Save”** and then **“Submit”**.
- If we haven't received your invoice with your sales tax number, we will default to Option 1.
- Please send your invoice to **fundrequest@merck.com** within 5 days of the approval email. If not, payment will be processed without tax.

The screenshot displays the 'Submit a Request' form in the MERCK portal. The interface includes a navigation menu on the left with options: Request Information, Audience / Benefits / Venue, Budget, Document Uploads, Authorized Signer, Payee Information, and Request Review. The main content area shows 'STEP 1' with a checkbox for 'I accept the terms of this Agreement.' Below this, 'Sales Tax Matters' are detailed, including 'Option 1: NO SALES TAX' and 'Option 2: SALES TAX'. A dropdown menu for '* Sales Tax Option' is set to 'Tax Option 2 (Tax)', labeled as 'STEP 2'. At the bottom, there are 'Cancel' and 'Save' buttons, and a 'Previous' / 'Submit' button labeled as 'STEP 3'. The user 'Rosemary Iacucci' is logged in.

Request Submission

- Submit your request and a **notification email** from Merck confirming a successful submission will be sent.

Notification

Thank you!

Your request was submitted successfully.

You can now hit the "Back to Home" button to see the status' of your pending requests or to submit a new request.

[Back to Request](#) [Back to Home](#)



See page 5 of this guide for steps on how to track the status of your request

Tangible Benefits Reconciliation

Reminder: your organization has the obligation right after the event to provide documentation to reconcile all the tangible benefits listed in the request. Please follow the steps below:

- Check your email inbox for a **notification** stating that your Sponsorship Request is Pending Reconciliation.
- On the **provided link** to access the Sponsorship portal.
- Once logged into the portal, **update the status** of all the Tangible Benefits by indicating whether they have been received or canceled.
- If you have added **new Tangible Benefits** that were not part of your original request, add them to the portal at this time (**revisit p. 9 of this document**)

Note: It is important to keep the Tangible Benefits information accurate and up to date to facilitate proper reconciliation.



Reminder: Merck Canada's funding decision is not tied to the number of tangible benefits you listed in your application. Select the tangible benefits carefully as you will be required to document each one of them as part of your funding obligations. Please take note that future funding requests from your organization could be impacted if there are any concerns with the uploaded materials or if there are delays in providing the required documents for your funded sponsorship.

Tangible Benefits Reconciliation (cont'd)

Steps to update the status of your Tangible Benefits.

Go to **Document Upload Section** and upload your Tangible Benefits in the field labelled “*Proof of Tangible Benefits*”.

Benefit Type	Required Documentation
Corporate Visibility	Copy or photo of your program showing Merck's logo as a sponsor.
Post-Event Report	Copy of the Report.
Symposium	Copy of the Agenda showing Merck's time slot.
Materials Developed	Copies of the material developed.
Attendance	Confirmation that Merck received X number of tickets/registrations.
Booth	Confirmation that Merck had booth spot/location X.

The screenshot shows a document upload interface. At the top left, it says "Files (0)". There are two file upload boxes: "Other" and "Proof of Tangible Benefits". Each box contains a "Browse" button and the text "or Drop file here". The "Proof of Tangible Benefits" box is highlighted with a red border. To the right of the upload area, there is an "Add File" button. Below the upload area, there are "Previous" and "Next" buttons. To the right of the "Next" button, there are two yellow boxes labeled "STEP 1" and "STEP 2".

Tangible Benefits Reconciliation (cont'd)

Steps to update the status of your Tangible Benefits.

Go to the **Audience/Benefits/Venue** tab and click on **"Edit"**.

Request ID : MT-2022-634414
Subtype : Conference
Request Status : Pending Reconciliation

MERCK Home Sponsorship Definition Process Overview FAQ MaryJane Smith

Reconciliation

- Audience / Benefits / Venue **STEP 1**
- Document Uploads
- Reconciliation Review

Attendee Type: Physicians | Comments

Tangible Benefits

Which Tangible Benefits were received as a result of sponsoring this activity? Use this section to update the status of each of the Tangible Benefits and identify any new Benefits that had not been previously identified. **STEP 2**

Submitted Tangible Benefits to be Confirmed (3)

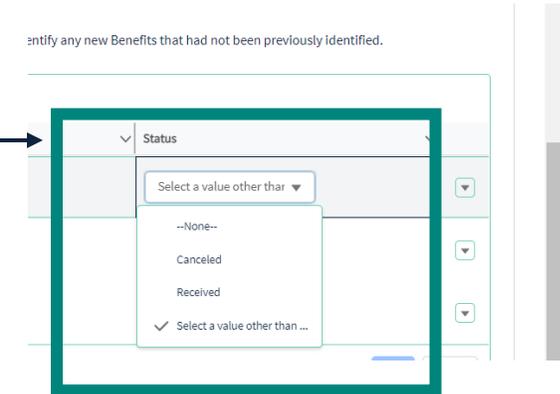
Benefit Type	Please s...	Tangible Benefits Due Date	Status
Attendance (includes tickets, complementary attendance),		2022-11-03	Select a value other than -- None --
Corporate Visibility such as opportunities to display company banner		2022-11-03	Select a value other than -- None --

Edit

Tangible Benefits Reconciliation (cont'd)

Steps to update the status of your Tangible Benefits.

- Update the status of each tangible benefit by selecting either
 - **Received:** The tangible benefits have been submitted in the Document section
 - **Cancelled:** The organization cannot provide the agreed upon tangible benefits due to unforeseen/exceptional circumstances.
- Select "**Save**".



Tangible Benefits

Which Tangible Benefits were received as a result of sponsoring this activity? Use this section to update the status of each of the Tangible Benefits and identify any new Benefits that had not been previously identified.

Submitted Tangible Benefits to be Confirmed (6)				
Benefit Type	Please specify	Tangible Benefits Due Date	Status	
1	Attendance (includes tickets, complementary attend...	2022-11-03	Received	▼
2	Corporate Visibility such as opportunities to display c...	2022-11-03	Received	▼
3	Booth space	2022-11-03	Received	▼

Click Save to save the records

Save Cancel

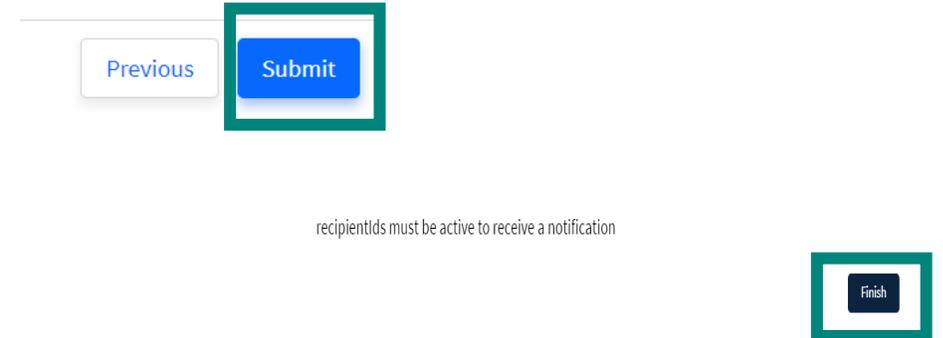
This screenshot shows a table with five columns: Benefit Type, Please specify, Tangible Benefits Due Date, Status, and an empty column. The table contains three rows of data. The first row is highlighted in yellow. The 'Status' column for all three rows is set to 'Received'. Below the table, there are 'Save' and 'Cancel' buttons. The text 'Click Save to save the records' is also present.

Tangible Benefits Reconciliation (cont'd)

Steps to update the status of your Tangible Benefits.

- Once all documentation is uploaded, click "**Submit**" & "**Finish**".
- Your Request will now have a status of "**Reconciliation in Review**".
- The Merck Portal Administrator will review the documentation/Proof of Tangible Benefits and, if satisfactory, will close your request.

Note: When your Sponsorship request has been closed, the status of your request will update to **Closed**.



Request ID : MT-2022-634414
Subtype : Conference
Request Status **Reconciliation In Review**

Request ID : MT-2022-634414
Subtype : Conference
Request Status: **Closed**

For any inquiries related to your request,
please contact
fundingrequest@merck.com