Merck Canada Sponsorship Portal - Submission Guide

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CA-NON-03692

November 2024

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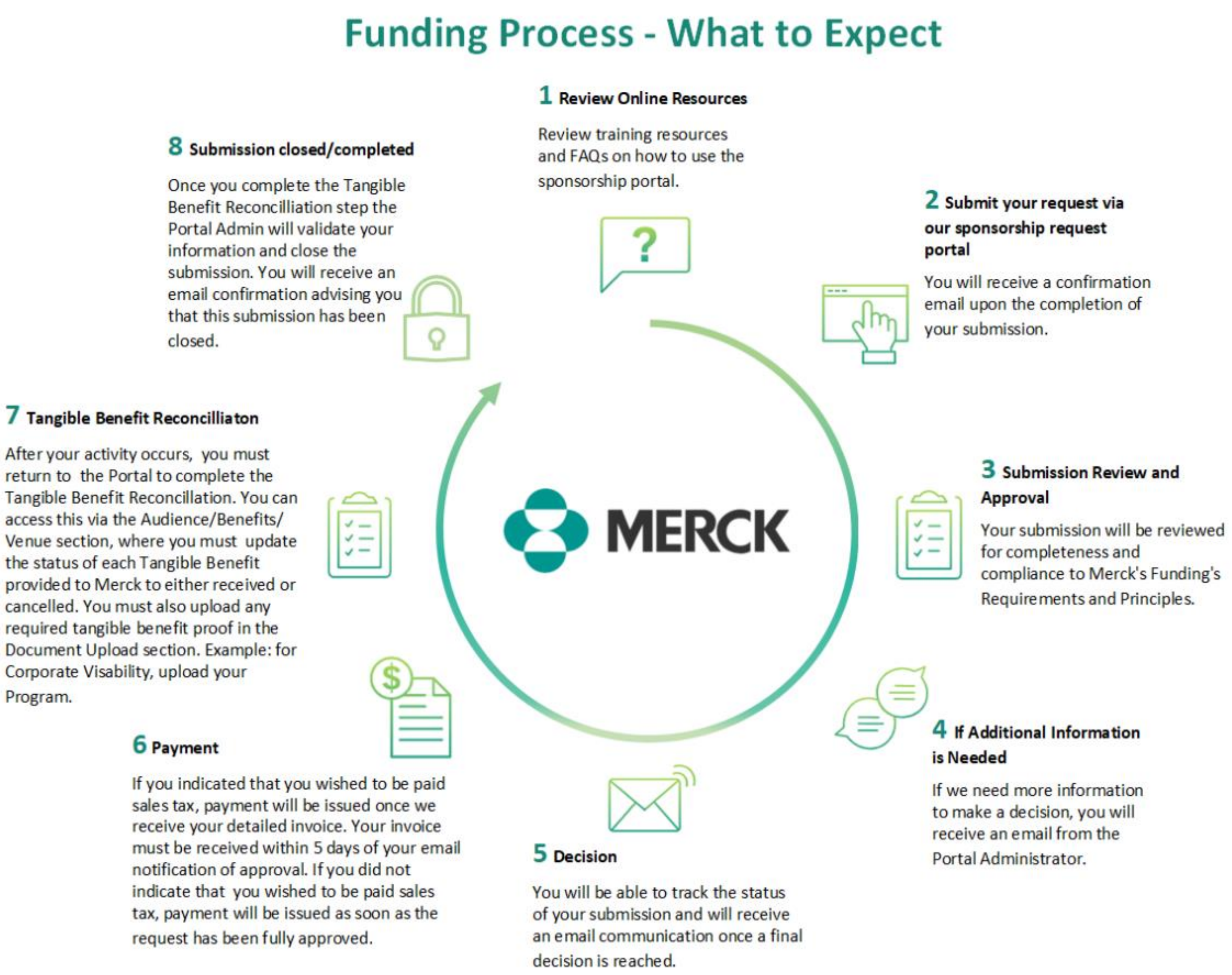
Funding Process Sections in this Job-Aid

Funding Process Flow



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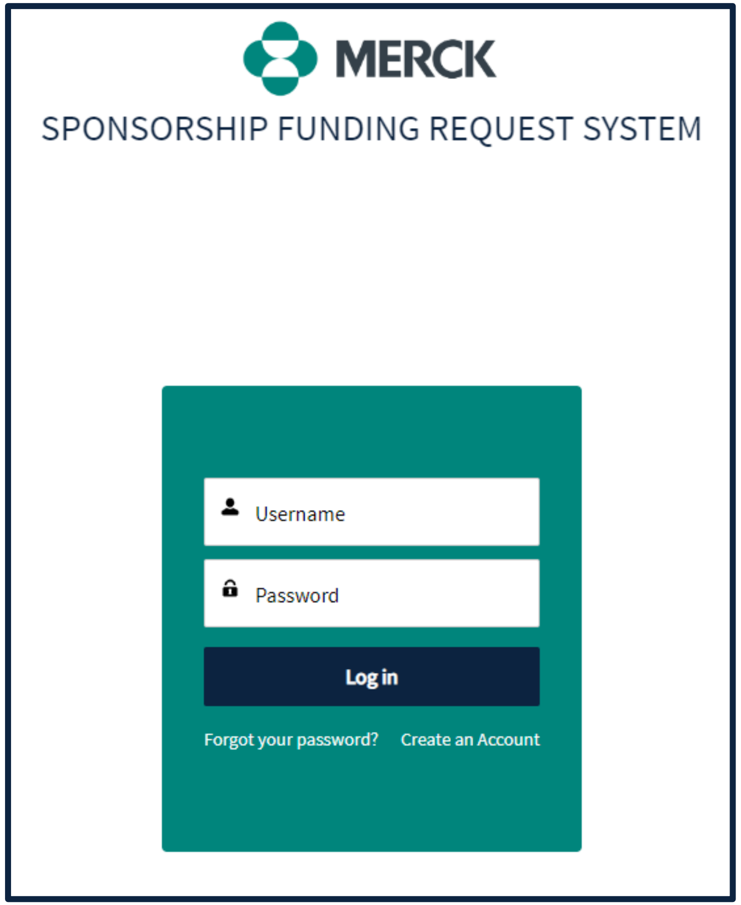
Accessing the Merck Canada Sponsorship Portal

- 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.



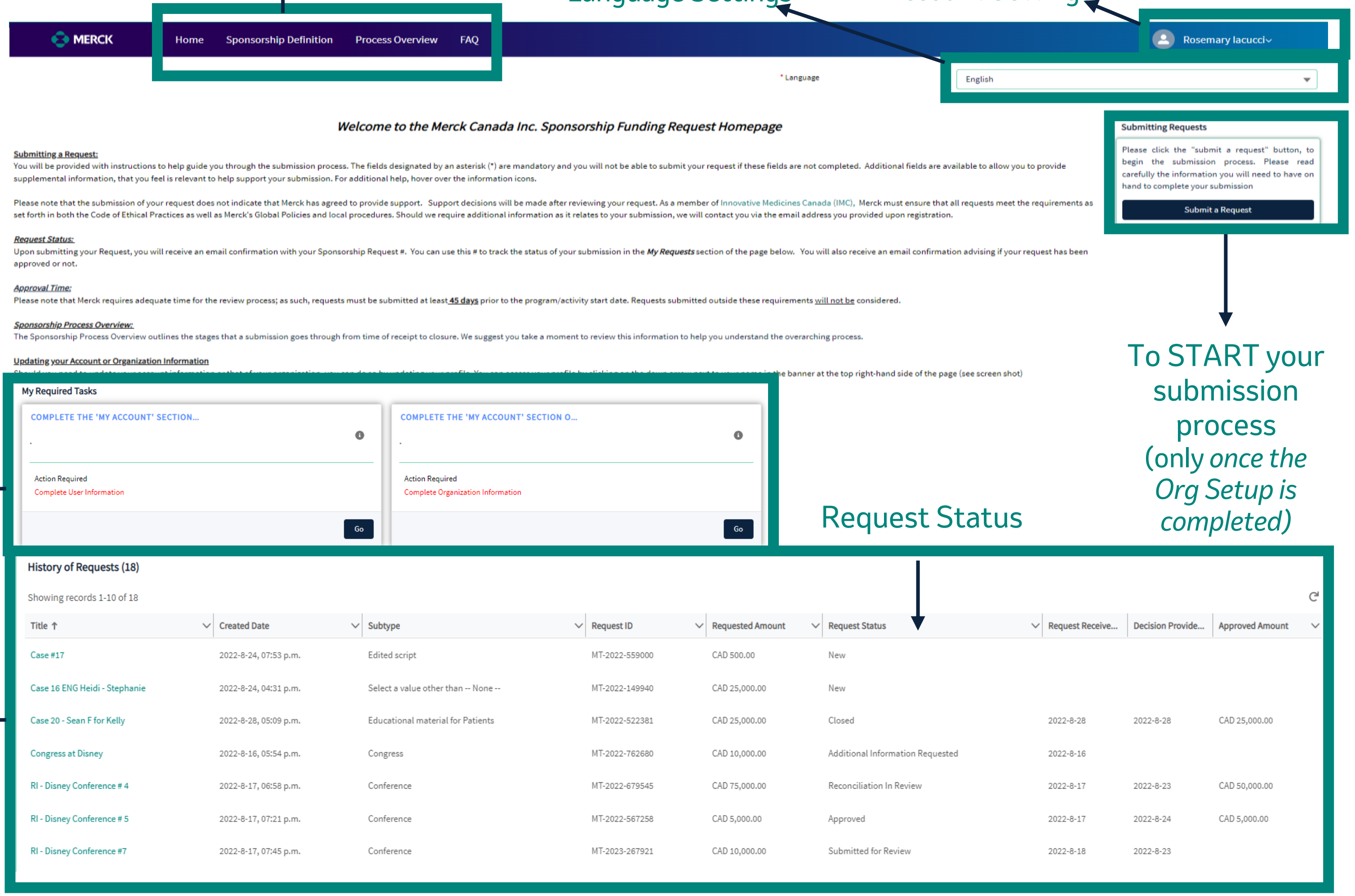
Sponsorship Portal Home Page

- 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



One-Time Organization Setup (for first time users)

Request Status

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

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:

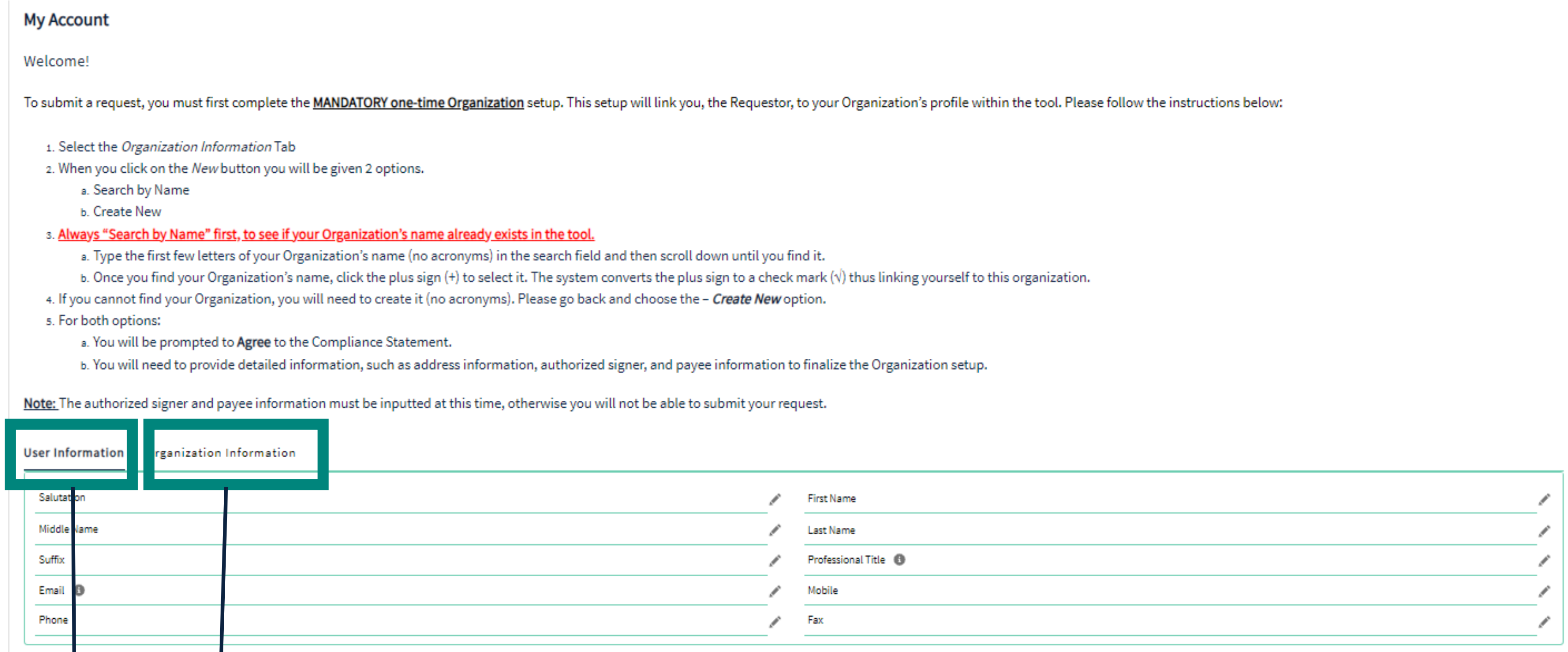
- Complete your **User Information (A).**
- Complete your **Organization Information (B)**.

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.

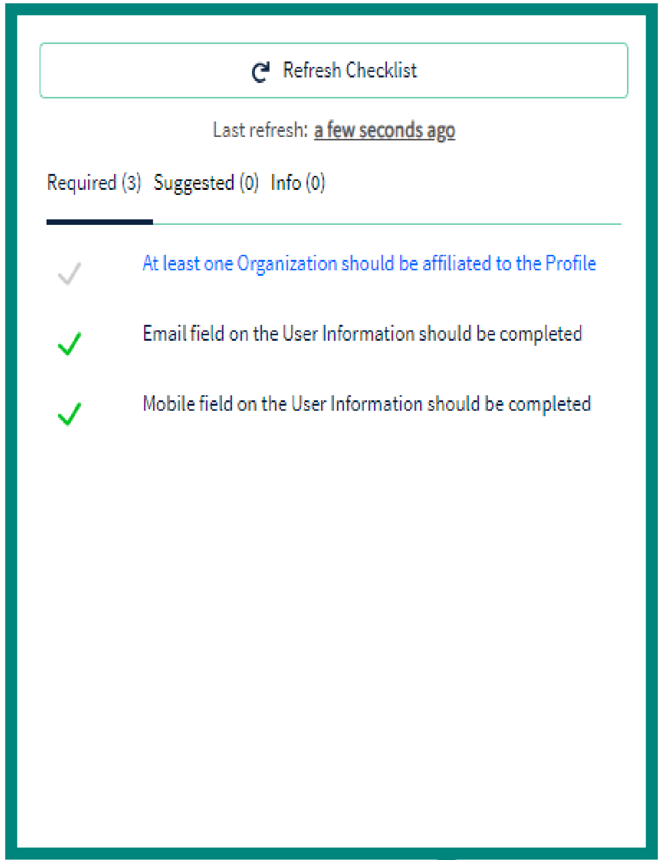
Note: The authorized signer and payee information must be inputted at this time, otherwise you will not be able to submit your request.

User Information | rganization Information

Salutation	First Name
Middle Name	Last Name
Suffix	Professional Title
Email	Mobile
Phone	Fax

STEP 1 STEP 2

D



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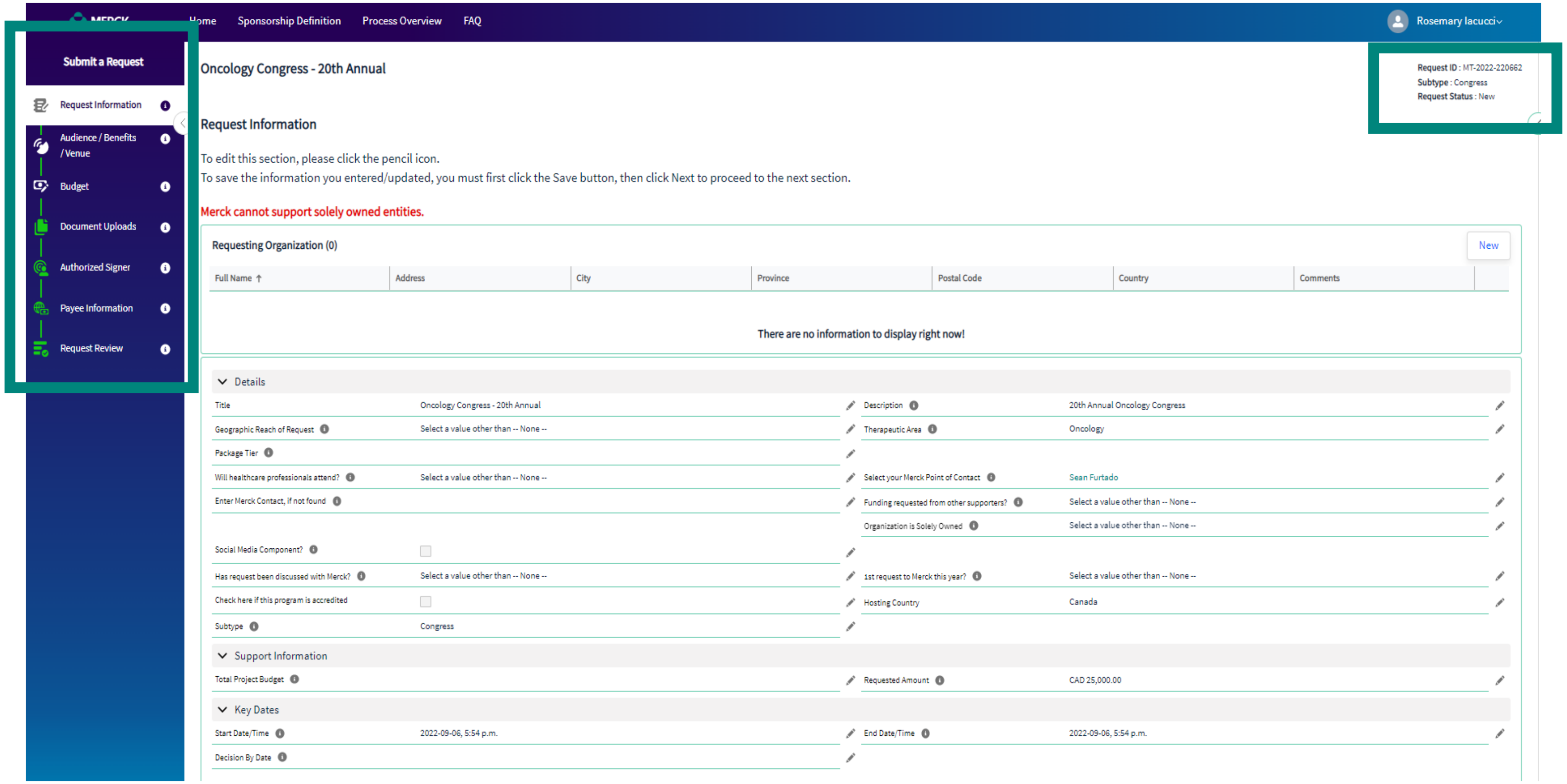
MERCK

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



Request ID

Specific Details on Your Request

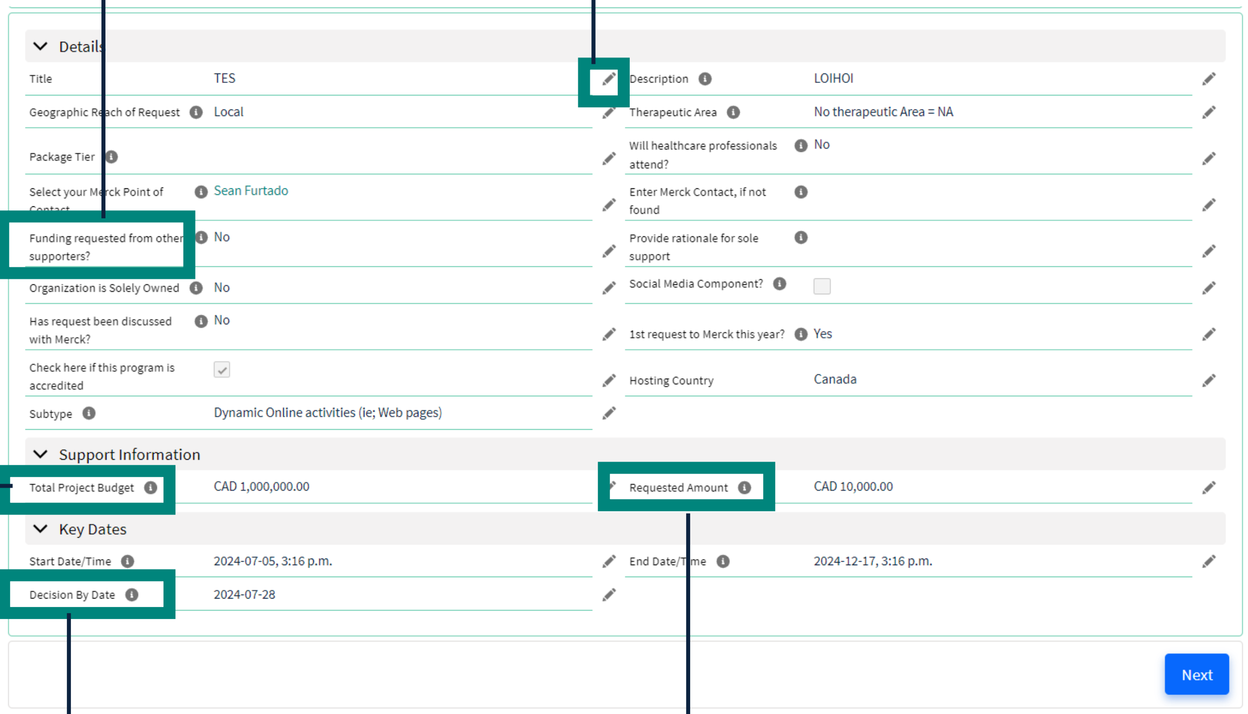
To enter the information for your request, follow the following steps:

- 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)



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?

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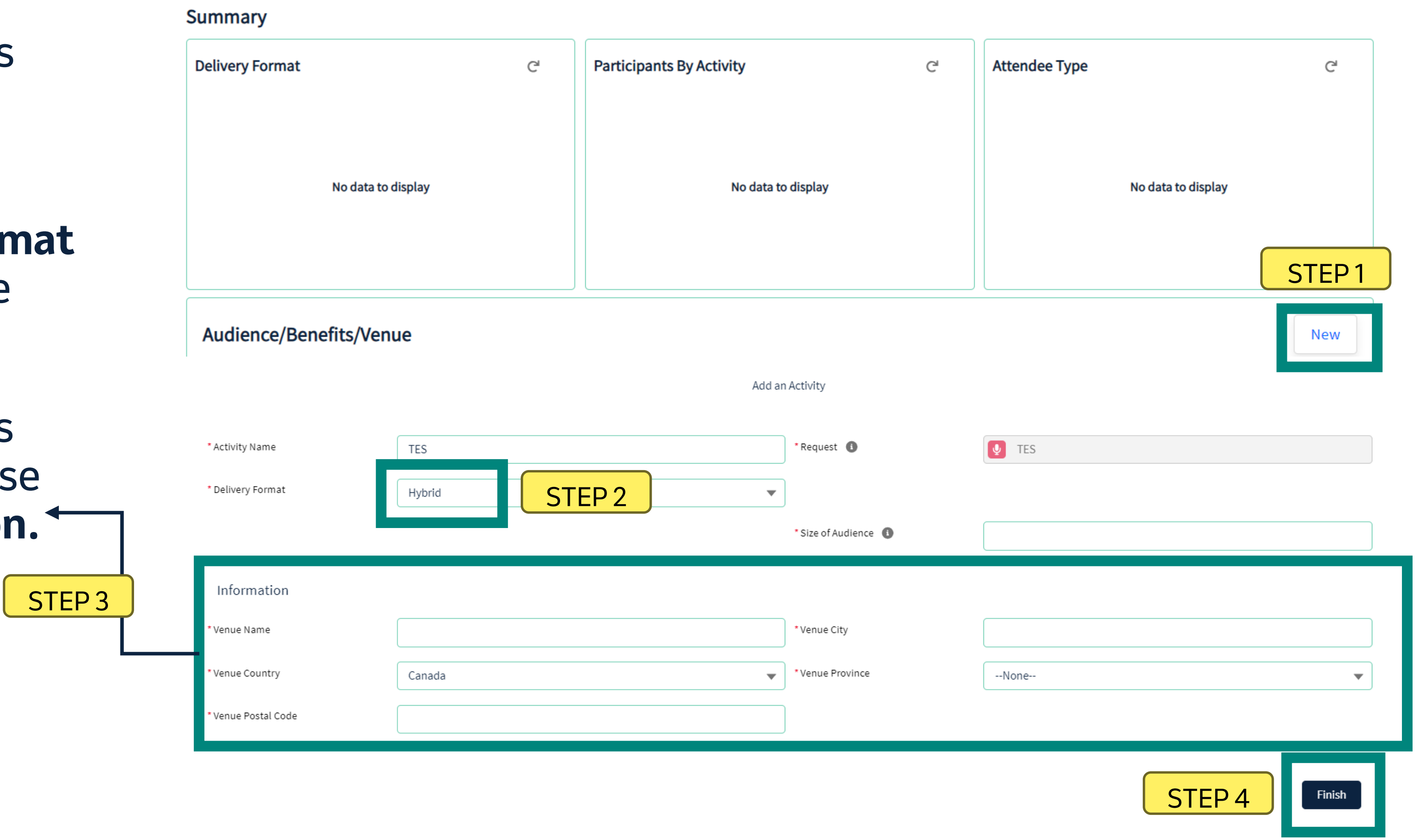
MERCK

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".**



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".**

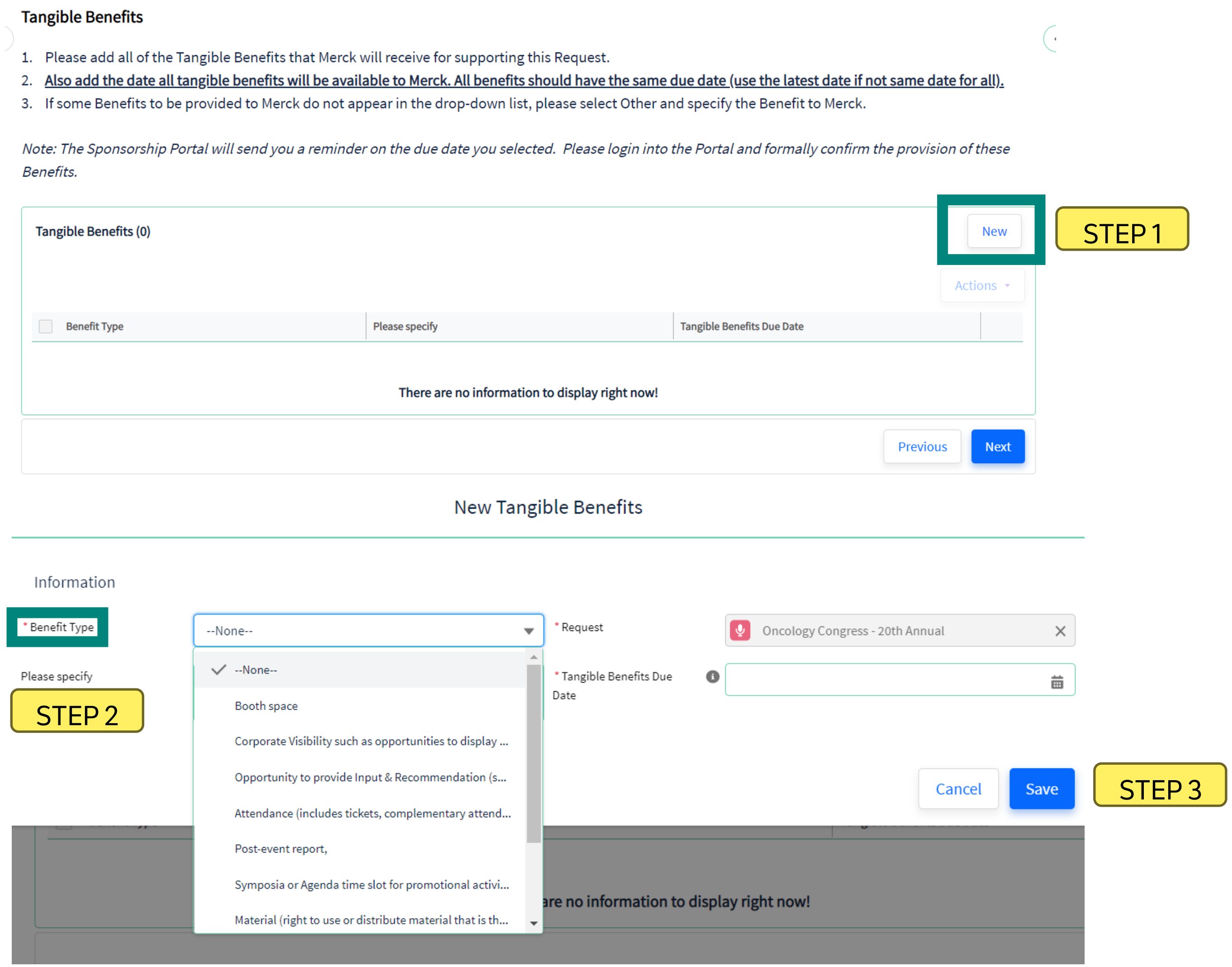
Step 2 - New Tangible Benefit

- 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.



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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:

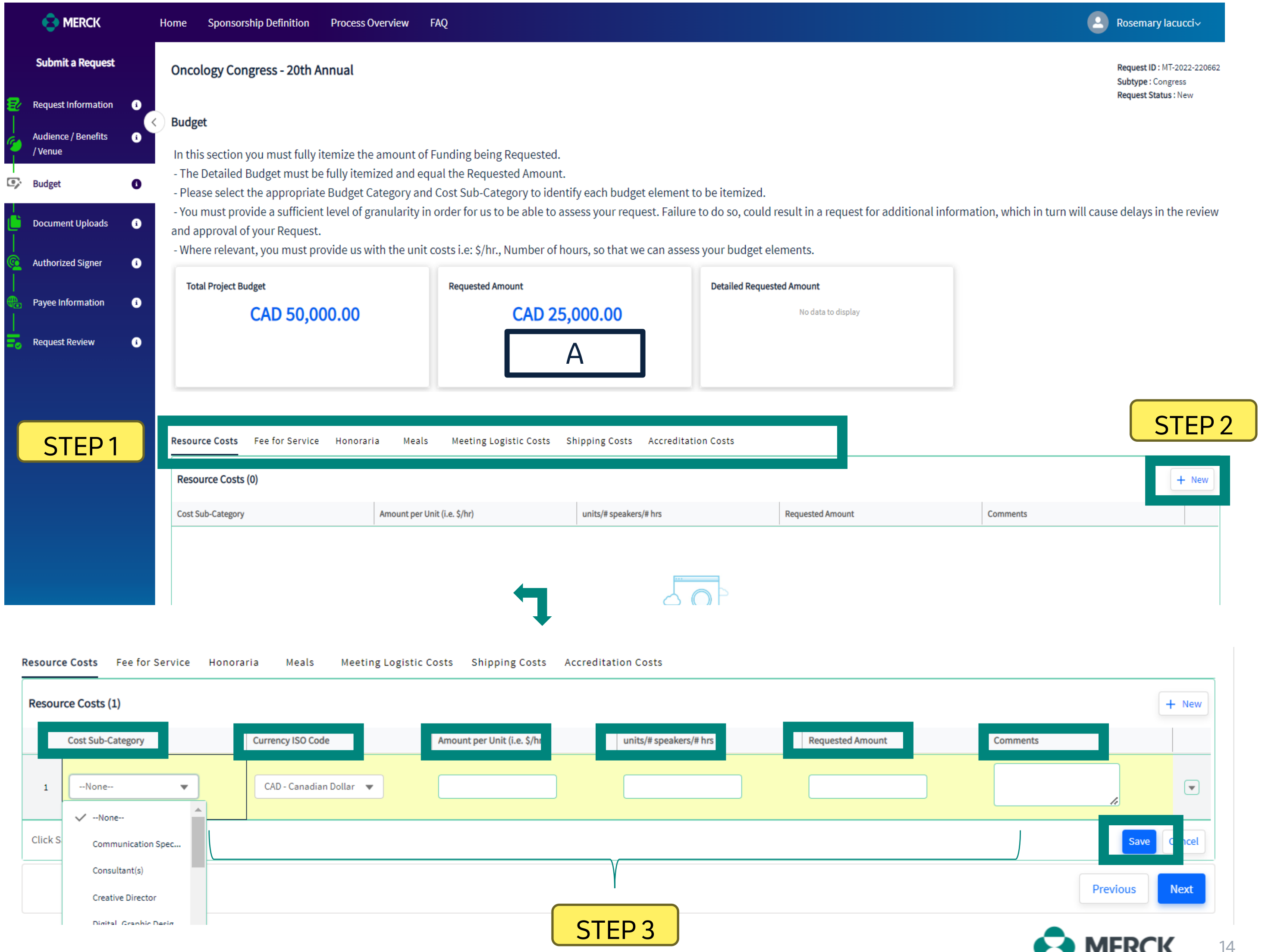
Fully itemize the Detailed Budget & ensure the total equals the Requested Amount (A).

- **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 results 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.

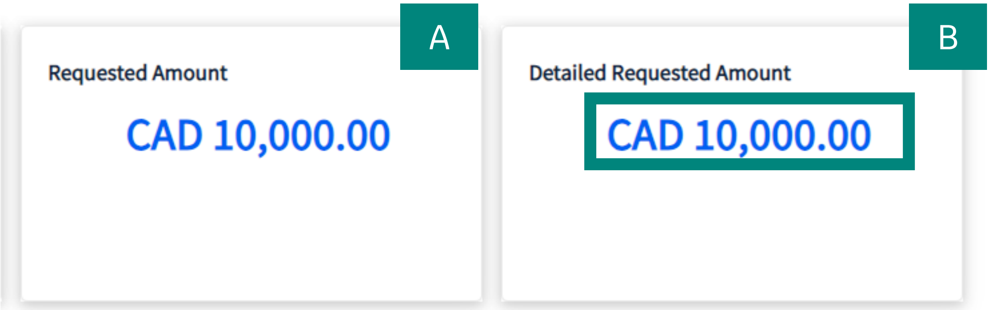


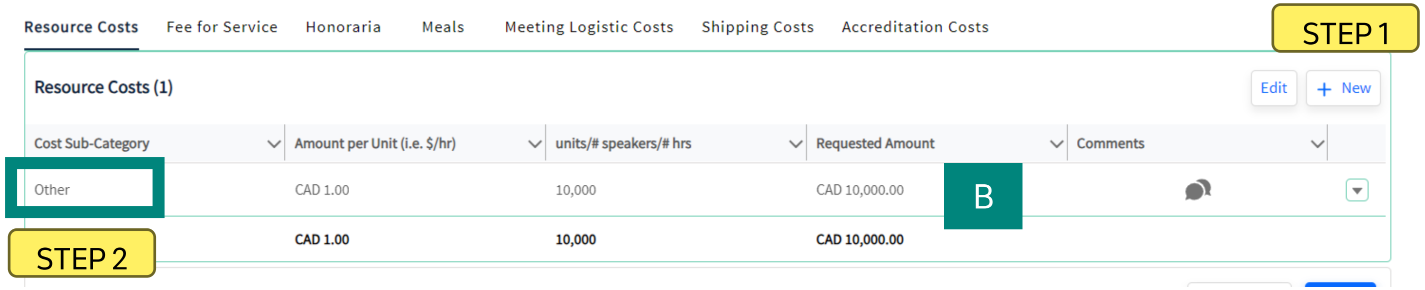
Budget Section (cont'd)

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**".





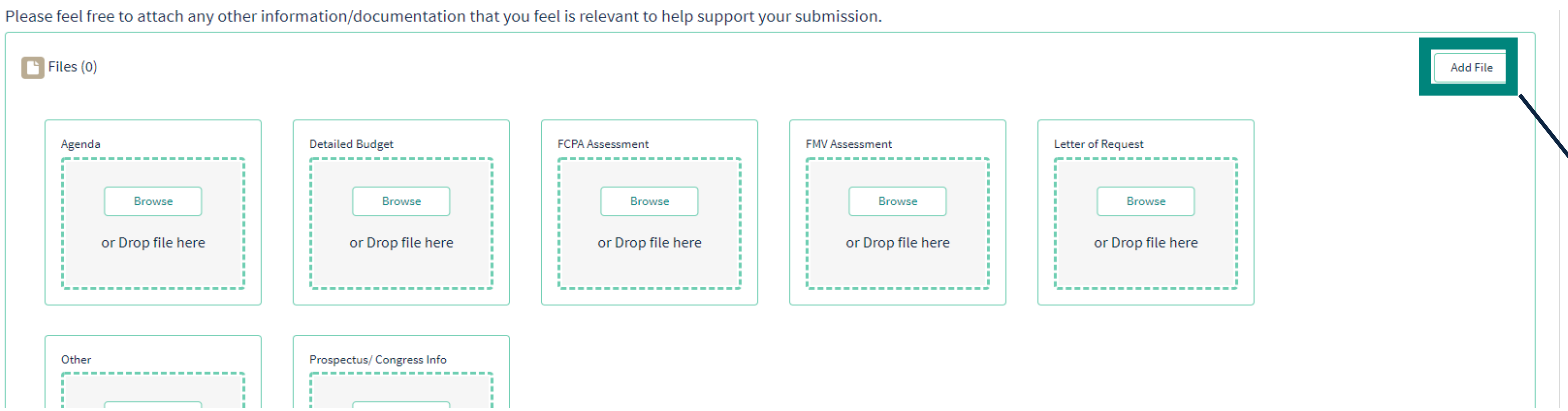
Follow detailed instructions on **page 13** to upload a pdf of your Budget.

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



Click here to upload the files

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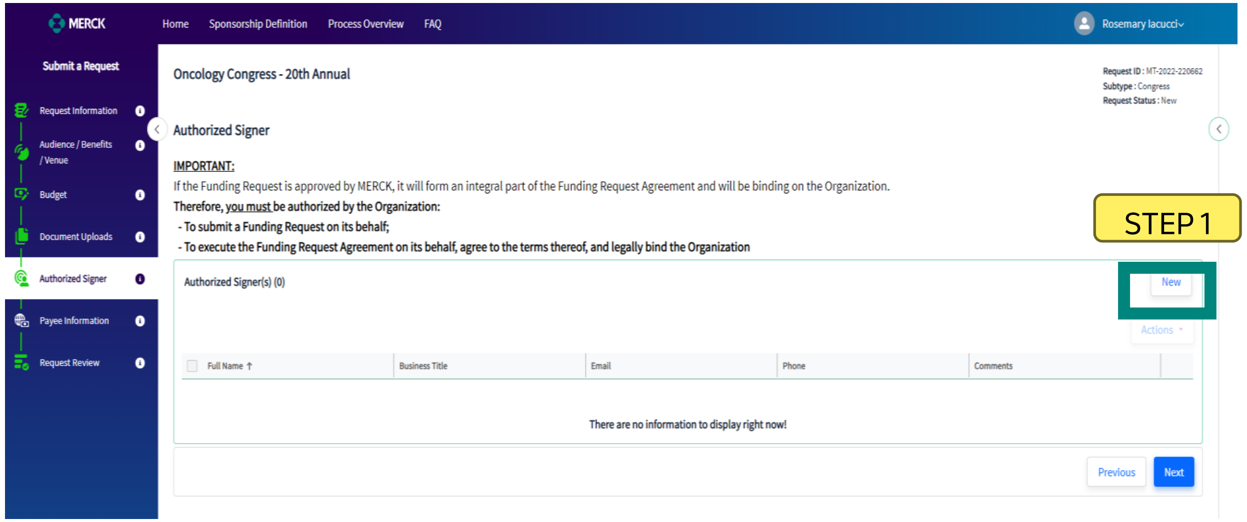
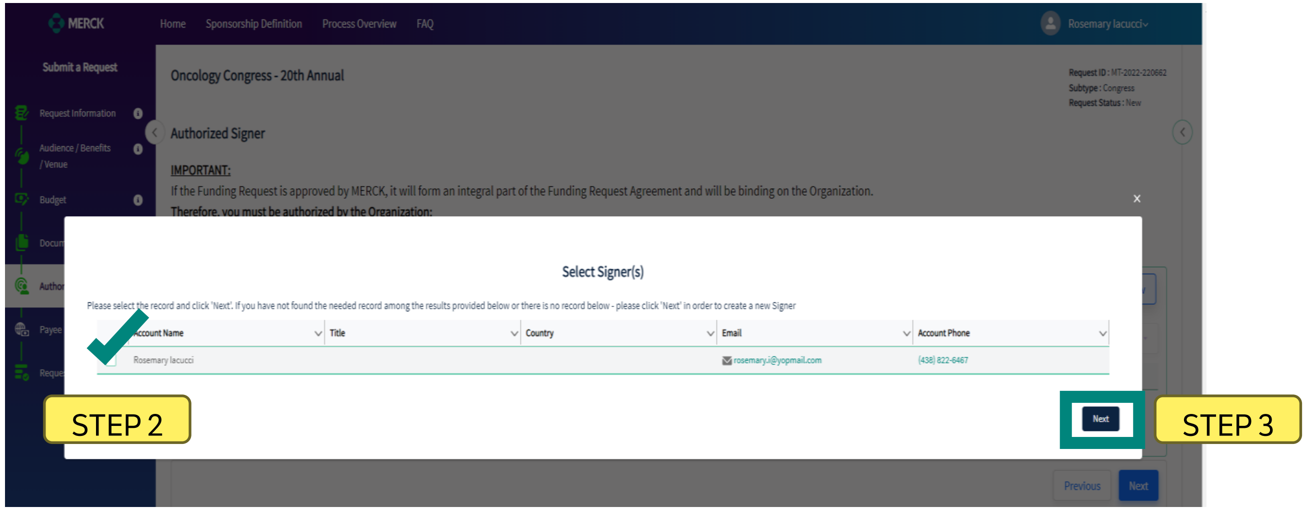
Authorized Signer Section

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.



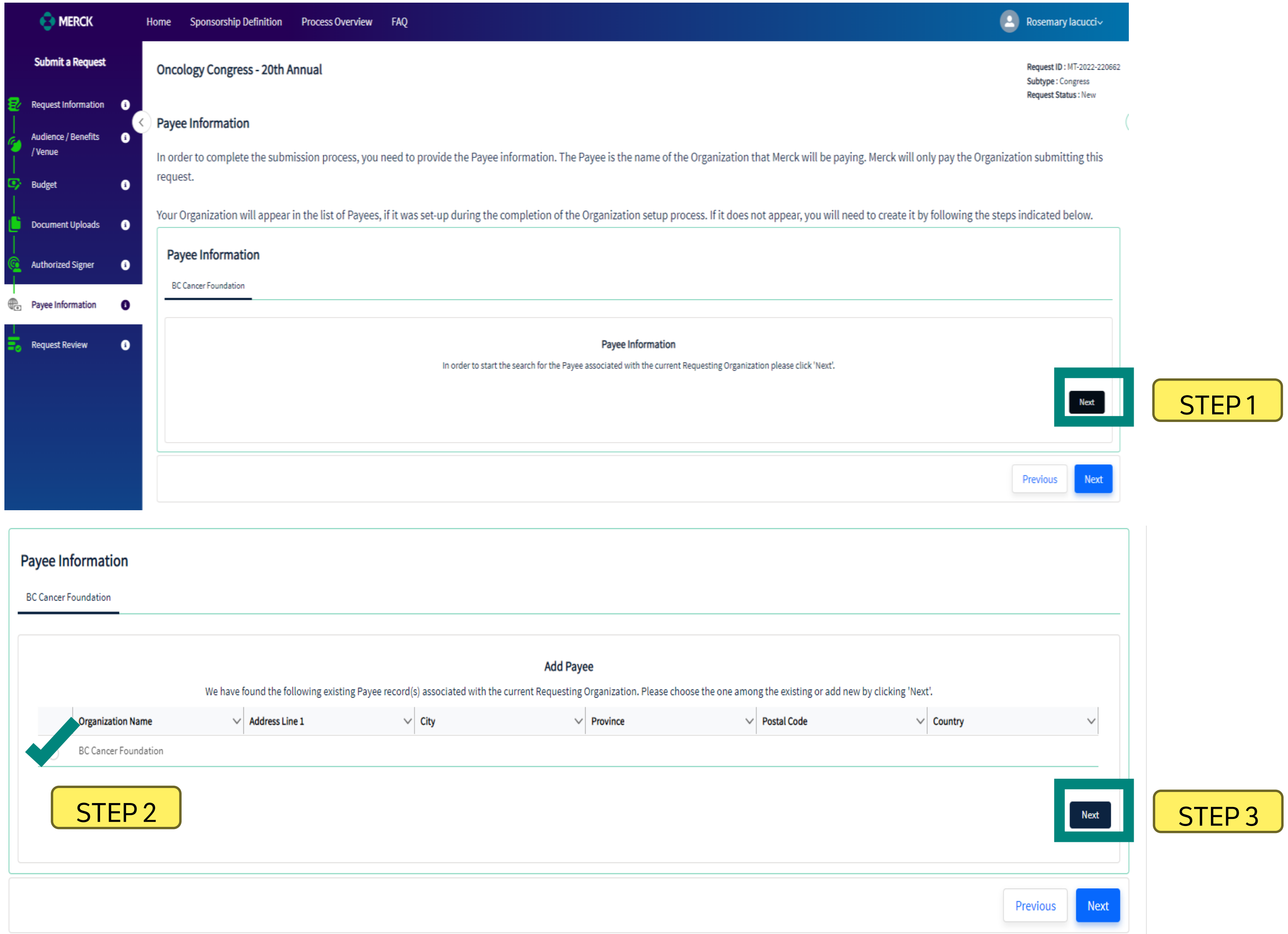


The **designated** and **authorized** signer must agree with the **Terms and Conditions** of the Funding Request Agreement on behalf of the organization

Payee Information Section

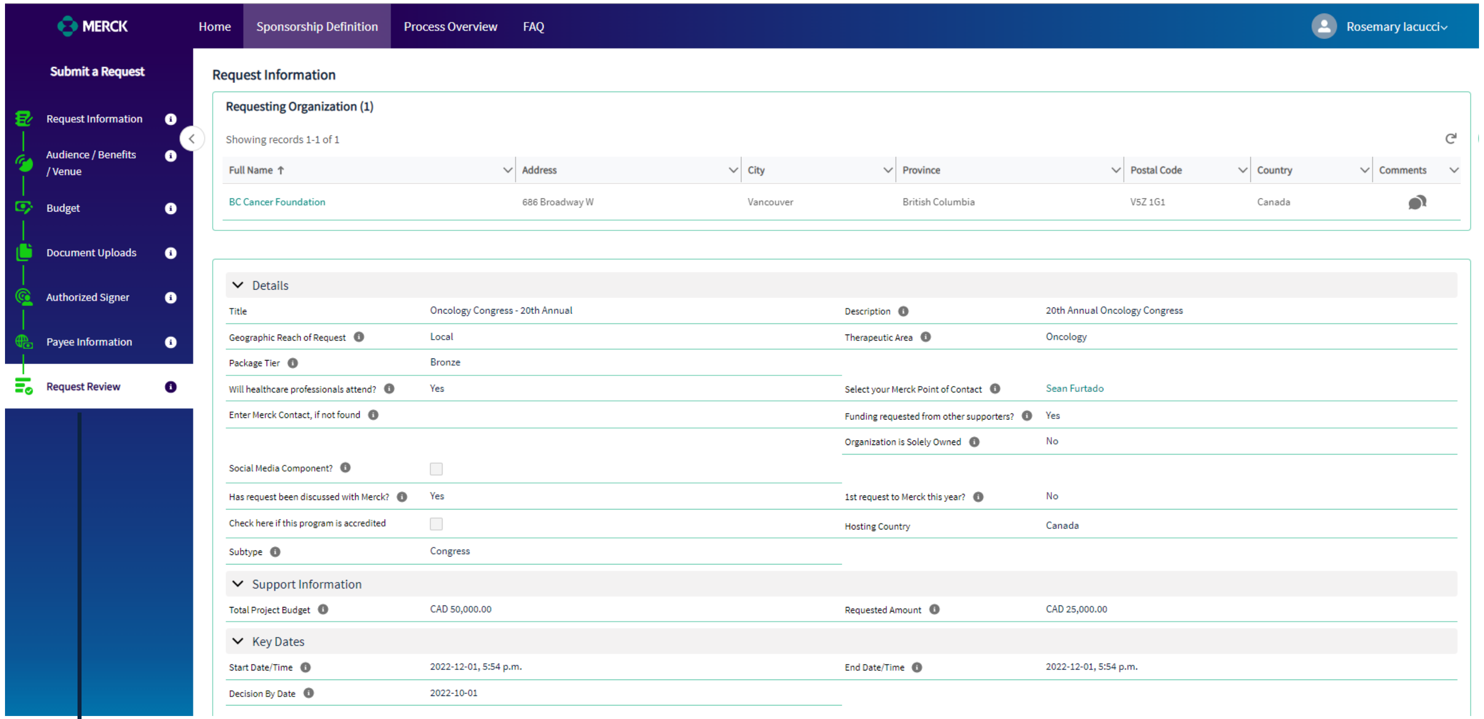
Ensure that the **Payee Information** and **Requesting Organization** are the same entity.

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



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

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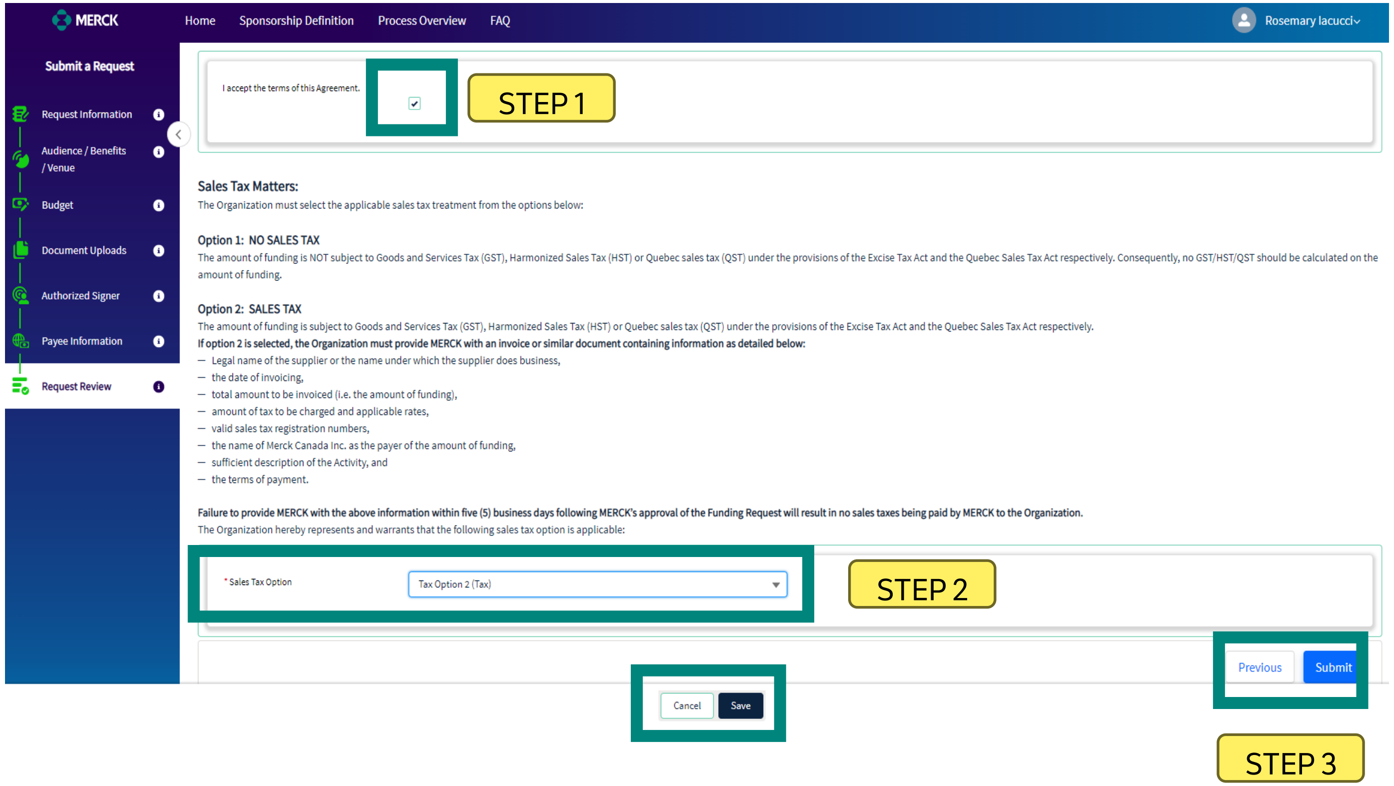
Funding Request Agreement

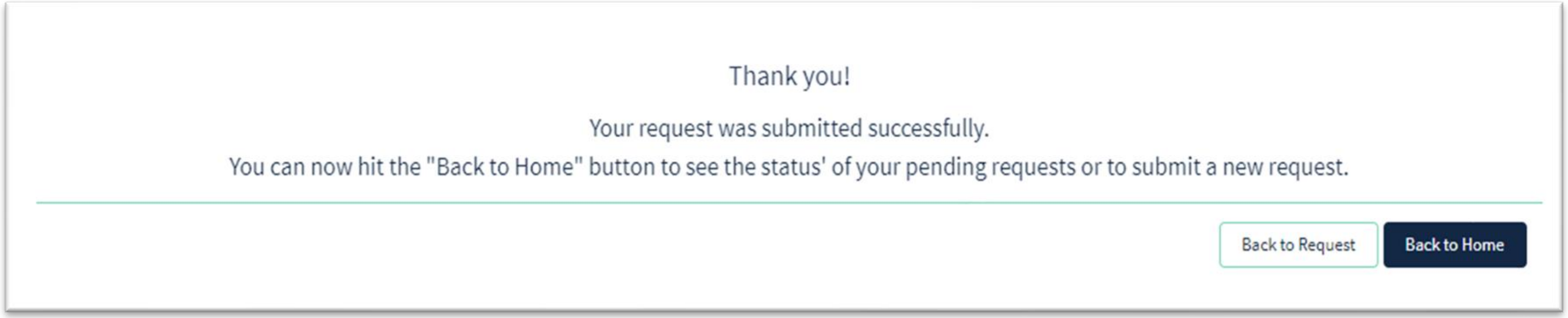
- Review and accept the **Terms and conditions.**
- Click on the pencil icon and tick the box **"I Accept the Terms of this Agreement".**
- Choose the appropriate **Sales tax** option (view definition on the Request Review tab within the portal)
  - Option 1: NO SALES TAX
  - Option 2: SALES TAX
- **"Save"** 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 **fundingrequest@merck.com** within 5 days of the approval email. If not, payment will be processed without tax.



Request Submission

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

Notification



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 Benefit**s 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.

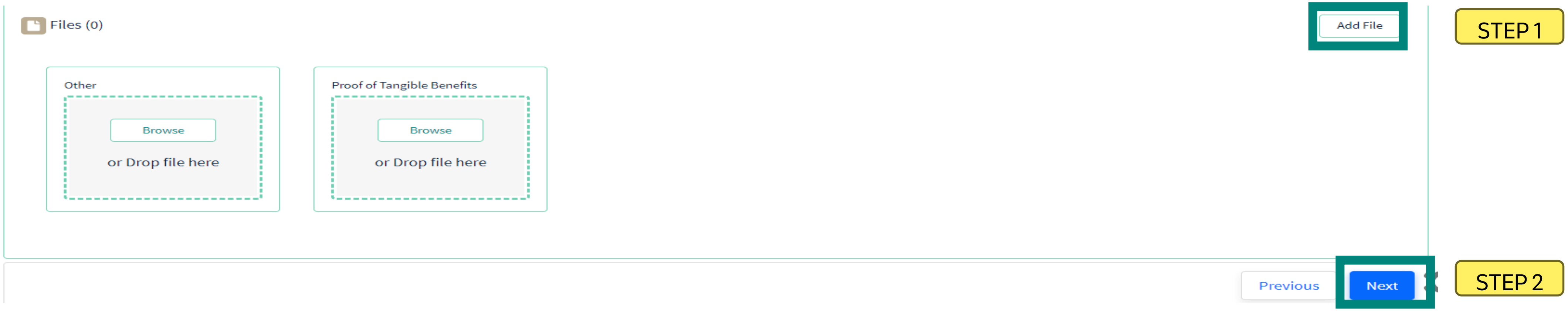
Reminder: Merck Canada's funding decision is not tied to the number of tangible benefits you listed in your application. Select the tangible benefits carefully as you will be required to document each one of them as part of your funding obligations.Please take note that future funding requests from your 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.



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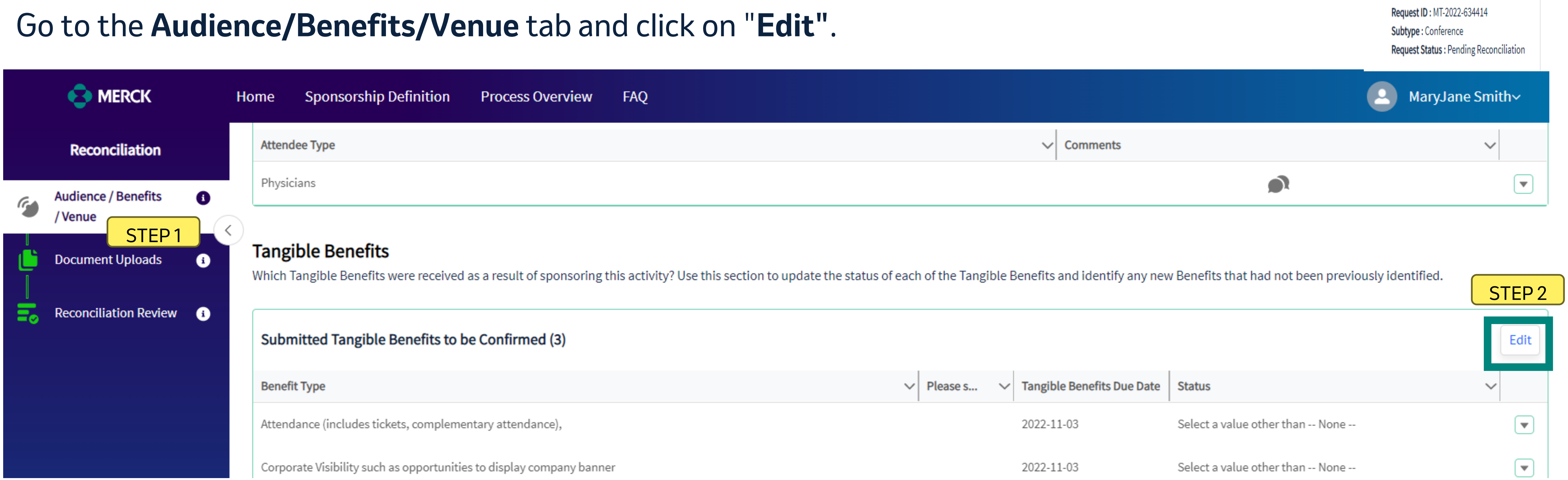
Tangible Benefits Reconciliation (cont'd)

Steps to update the status of your Tangible Benefits.

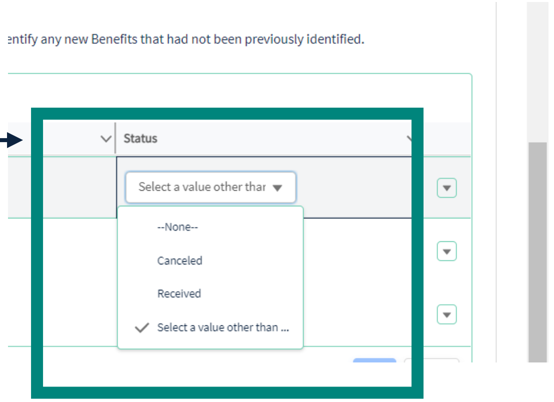
Go to the **Audience/Benefits/Venue** tab and click on "**Edit**".



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**".

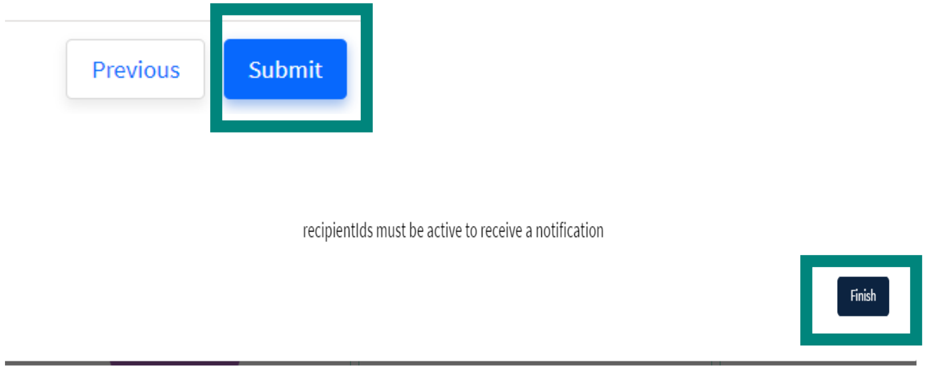


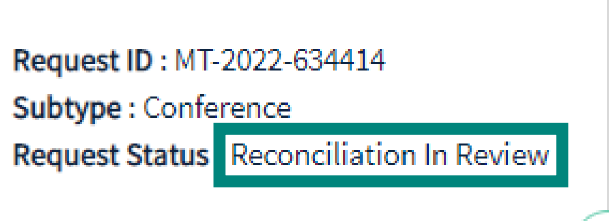
Tangible Benefits Reconciliation (cont'd)

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**.





For any inquiries related to your request, please contact

fundingrequest@merck.com

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