

# Sponsorship Portal - User Guide

This user guide is designed to help requestors become familiar to Merck Canada's Sponsorship Process

## Validating Your Request: Is it a Sponsorship?

If you answer yes to each of the statements below, then your request is a sponsorship.

**Third-Party Institution/Organization:** Is the funding being provided to a third-party institution, association, or organization?

**Relevance to Medical Education or Scientific Information Sharing:** Is the event, meeting, program, or project directly related to medical education, scientific information sharing, or other related information sharing?

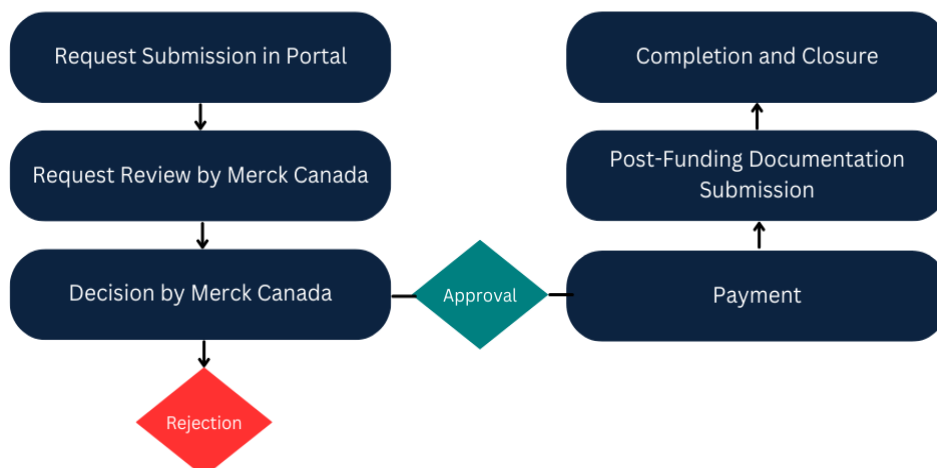
**Tangible Benefits:** Are there tangible benefits being offered to Merck Canada in exchange for the sponsorship, such as a post event report, booth, materials developed etc.? See FAQ for more details

**Compliance with Company Policies:** Does the sponsorship request align with the company's policies and guidelines for sponsorships, including adherence to legal and ethical standards?

## Sponsorship Funding Process – What to Expect

Your sponsorship request needs to be submitted no less than 45 days in advance of the event/activity.

**Any request for an event/activity taking place in less than 45 days will be rejected.**



Should you have a question regarding your submission or a general inquiry, please email : [fundingrequest@merck.com](mailto:fundingrequest@merck.com) and your Request ID (MT-2024-xxxx). Merck's Portal Administrator will respond within 24 hours.

# Sponsorship Funding Process - Details

## 1 Request Submission in Portal

You will be asked to provide the information below:

- Sponsorship Details
- Audience and Venue Details
- Tangible Benefits
- Sponsorship Documentation and Budget
- Authorized Signers and Payee Information

You will receive a confirmation email once your request is submitted.

## 2 Request Review by Merck Canada

Your submission will be reviewed for completeness and compliance to Merck Canada's Funding Requirements and Principles. If we need more information to take a decision, you will receive an email from the Portal Administrator for "Request for Additional Information"

## 3 Decision by Merck Canada

You will be able to track the status of your submission and will receive an email once a final decision is reached.

## 4 Payment

If you indicated that sales tax need to be added, payment will be issued once we receive your detailed invoice. **Your invoice must be sent within 5 days of receiving your approval notification email.** If you did not indicate that you wished to be paid sales tax, payment will be issued as soon as the request has been fully approved.

## 5 Post-Funding Documentation Submission

After your event or activity, you will receive an email prompting you to submit post-funding materials in the portal for reconciliation. Merck Canada will review these materials to ensure the following:

- The event, project, or activity took place.
- The purpose and objectives of the sponsorship request were achieved.
- The funds were used for their intended purpose, including all deliverables and tangible benefits specified in the request.

Additionally, you will need to upload proof of the tangible benefits in the Document Upload Section of the portal. It's important to note that future funding requests from your organization could be affected if there are any concerns with the submitted materials or if there are delays in providing the required documents for your funded sponsorship.

## 6 Completion and Closure

Once you complete the Tangible Benefit Reconciliation step, the Portal Admin will validate your information and close the submission. You will get a notification stating this change.

# Before Submitting a Sponsorship Request

a) Important information to consider prior to the submission of your request

## When can I submit my sponsorship request?

Your sponsorship request needs to be submitted no less than 45 days in advance of the event/activity. **Any request for an event/activity taking place in less than 45 days will be rejected.**

## What types of requests does Merck Canada NOT support?

### Individual and Organization Restrictions:

- A sole individual (e.g. HCP)
- An organization owned by a single HCP or individual (Solely Owned Organizations/Entities)

### Restrictions on Specific Organizational Types:

- Political organizations, campaigns, and activities
- Fraternal/labor/veteran organizations and activities
- Religious organizations or groups whose activities are primarily sectarian in purpose (programs open to the community or providing a community benefit may qualify for support)
- Organizations that discriminate on the basis of race, gender, sexual orientation, marital status, religion, age, national origin, veteran's status or disability or any other grounds of illicit discrimination

### Venue and Event Restrictions:

- Meetings or events held at 5-star venues or venues that might give the impression that professional education or exchange is secondary or incidental to other activities associated with the location

### Sponsorship Request Restrictions:

- Requests that are not scientific, medical and/or educational in nature
- Requests that could be seen as a support to prescription, recommendation, supply, administration or consumption of Merck Canada's products
- Requests for services already covered/reimbursed by provincial/federal health care systems or private insurers
- Requests to cover capital expenses such as new constructions or the renovation of existing facilities
- Requests that don't have tangible benefits

## What to do when submitting my first sponsorship request to Merck Canada?

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 (view next page for detailed instructions).

## I have questions about my request, who do I contact for support?

Should you have a question regarding your submission or a general inquiry, please email [fundingrequest@merck.com](mailto:fundingrequest@merck.com) and reference your Request ID (MT-2022-xxxx), if applicable. Merck's Portal Administrator will respond within 24 hours.

# Before Submitting a Sponsorship Request (cont'd)

b) To complete the One Time Organization/Profile Set-up:

## 1 Click on My Required Tasks to provide user and organization information:

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

## 2 Search your organization

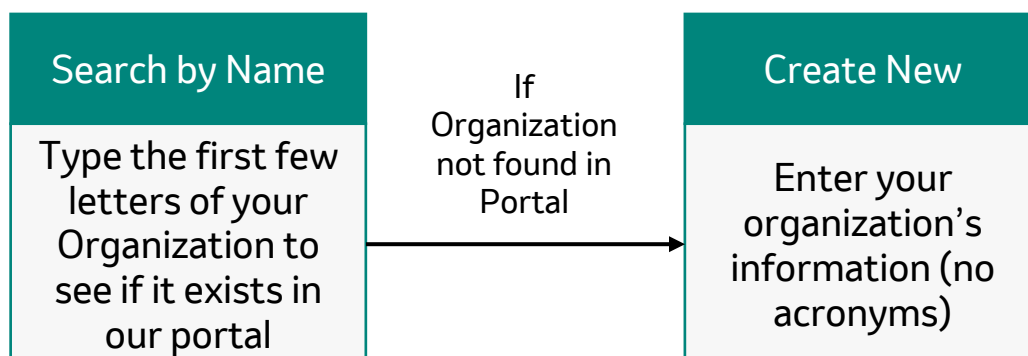
Select the Organization Information Tab

User Information | Organization Information

Salutation		First Name	XXXX
Middle Name		Last Name	XXXX
Suffix		Professional Title	
Email	xxxxxx@xxxx.com	Mobile	XXXXX
Phone		Fax	

When you click on the New button you will be given 2 options.

- a) Search by Name
- b) Create New



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

## Before Submitting a Sponsorship Request (cont'd)

### c) Required information and Mandatory Documents to Prepare

<b>For Conference/Congress/Symposia</b>	A request letter on official letterhead and copy of your Agenda
<b>For Package/Tier Requests</b>	Meeting Prospectus, Program/Brochure
<b>For Patient Support Initiatives with Multiple Activities</b>	Detailed breakdown of all the objectives related to each activity
<b>Tangible Benefit (s)</b>	Merck Canada's funding decision is not based on the number of tangible benefits you list in your application. However, you will be responsible for delivering all the tangible benefits you promise as part of your post-funding obligations.
<b>Budget Information</b>	Must be provided by pdf form if not itemized in the Budget Section

## Email Notifications

Once you have submitted your request, you will receive email notifications to keep track of these statuses:



Confirmation of receipt of your submission



Request for Additional Information,  
only if more information about your submission is required.



Confirmation that your request was either  
Approved or Rejected.



Notification for “Event Reconciliation” advising you  
to Confirm the Tangible Benefits, you entered. You will receive this notification 5 days after  
your event /activity due date. Note: you will receive daily email reminders until you have  
completed this task.



Confirmation of closure

# FAQ – Sponsorship Process at Merck Canada

## What is the difference between a sponsorship, a grant, a charitable contribution/donations, and a collaboration?

**Sponsorships:** defined as funding to a third-party institution, association or organization in support of an event, meeting, program or other type of project that is related to medical education, scientific information sharing, or other related information sharing where Merck Canada receives tangible benefits. To apply, follow this link: ([Merck Canada Sponsorship Portal](#))

**Charitable Contributions/Donations:** activities of organizations designed to benefit and improve individuals mentally, morally and physically, such as, poverty relief, humanitarian aid, access to education, community wellbeing and health, etc. Merck Canada provides funding to support philanthropic or community-related initiatives. Only requests from Registered Charities having a registration number issued by the Canada Revenue Agency can be considered for this type of support. To apply, follow this link: ([Merck Canada Charitable Contributions/Donations/Grants Portal](#))

**Grants:** provision of value/funding to support independent medical care or educational activities, where Merck Canada has no involvement or participation in the activity where Merck Canada receives nothing in return. Merck Canada provides financial assistance to legally registered not-for-profit Canadian organizations, for programs that are aligned with our three priority areas: health care, science education and related community-based charitable initiatives. To apply, follow this link: ([Merck Canada Charitable Contributions/Donations/Grants Portal](#))

**Collaboration:** A collaboration is an arrangement where Merck, along with other companies and organizations, jointly pool skills, resources, and expertise for patient-centered projects. All parties make significant contributions, and the outcomes must be measured. Collaborations must be of mutual benefit, with the patient being the principal beneficiary. Review and approval follow a separate process and should not be submitted in the sponsorship portal. [Contact your Merck point of contact for further discussions on potential collaborations.](#)

## Why does Merck Canada require a 45-day advance notice prior to the event/activity?

To ensure thorough review and assessment of sponsorship proposals, a minimum of 45 days is required due to the substantial volume of sponsorship requests received annually. Merck Canada is committed to execute and review your sponsorship request in a timely matter. It's important to emphasize that requests for events/activities taking place in less than 45 days will not be accepted and attempts to bypass this requirement will result in rejection of the request.

# FAQ – Sponsorship Process at Merck Canada (cont'd)

## How does Merck Canada evaluate a sponsorship request?

Merck Canada evaluates sponsorship requests based on various factors, including but not limited to:

- **Scientific quality of the program:** The program should be based on sound scientific principles and contribute to the advancement of healthcare knowledge.
- **Educational need:** The request should address an identified educational need within the healthcare community.
- **Impact on patient care:** Merck Canada considers how the sponsorship will contribute to improved patient care and health outcomes.
- **Budget:** The proposed budget should be reasonable and aligned with the objectives of the program.
- **Audience reach:** The sponsorship request should demonstrate a clear plan to reach and engage the intended audience effectively.

## What is a tangible benefit?

The term "**Tangible Benefits**" refers to various elements that can be offered as part of a sponsorship, such as entry tickets, booth or floor space, prominent print or online corporate logo placement, and the opportunity to enhance corporate reputation and recognition for Merck Canada. It is important to note that Merck Canada's funding decisions are not influenced by the number of tangible benefits identified in the application. **Additionally, selecting tangible benefits requires careful consideration, as fulfilling these obligations post-funding is the responsibility of the applicant.** It is crucial to understand that any concerns with the uploaded materials or delays in providing the required documents for the funded sponsorship could impact future funding requests from your organization.

## Why do I need to provide post-event documentation?

Following your event/activity, you will receive an email notification requesting the upload of post-funding materials (tangible benefits) in the portal for reconciliation. Merck will review these materials to ensure they demonstrate the following:

- Confirmation of the occurrence of the event/project/activity
- Evidence that the purpose and objectives of the sponsorship request were successfully met
- Verification that the funds were utilized for their intended purposes, including all specified deliverables and tangible benefits

## What are examples of tangible benefits?

- **Corporate visibility:** Copy or photo of your program showing Merck's logo as a sponsor.
- **Post-Event Report:** Copy of the report (report can include usage statistics, pictures of the platform or initiative, screenshots of questionnaires, quizzes, or program insights.).
- **Symposium:** Copy of the Agenda showing Merck's time slot.
- **Materials Developed:** Copies of the material developed such as PowerPoint presentation, webinar links etc.).
- **Attendance:** Confirmation that Merck received X # of tickets/registrations.
- **Booth:** Photo confirmation that Merck had booth spot/location X.



# FAQ – Sponsorship Process at Merck Canada (cont'd)

## What is a "Request for Additional Information"?

A "Request for Additional Information" is initiated when Merck Canada requires further details for the assessment or approval of a sponsorship request. Prompt and thorough provision of the requested information is crucial to prevent any delays in the review process. It is essential for applicants to respond to requests for additional information in a timely manner to facilitate an efficient review and ensure that their sponsorship requests can be thoroughly evaluated within the established timelines.

## Why can't a sales representative help with sponsorship submissions or other aspects of the sponsorship process, such as uploading tangible benefits in the portal after the event?

Sales representatives and other commercial employees, including those in sales or market access roles, are required to maintain a distance from the sponsorship process. This is to avoid the perception of promoting Merck Canada's products through sponsorships. Therefore, these employees are not involved in soliciting sponsorship requests or assisting with post-funding obligations, such as uploading tangible benefits in the portal on behalf of applicants. This policy aligns with Merck Canada's commitment to ethical and transparent sponsorship practices and underscores the independence of sponsorship evaluation and fulfillment from commercial activities.

## If I have a question or concern regarding my request, is there someone I can contact?

Yes, you can email [fundingrequest@merck.com](mailto:fundingrequest@merck.com) with your question, and the Merck Portal Administrator will respond within 24 hours.

## I need a tutorial to help me submit my sponsorship application. Where can I find this resource?

To help you with your submission, you can find a Sponsorship Submission Guide document on the Merck Canada website.

## Why is it necessary to complete the setup of the Organization before beginning the submission process?

Completing the organization information first is a critical step that ensures the organization's profile is accurately documented for all future submissions. Additionally, providing this information upfront streamlines the submission process, enabling a more efficient and expedited completion.



# FAQ – Sponsorship Submission Merck Canada (cont'd)

## How can I make changes/updates to my organization's profile/information?

Click on the down arrow next to your name in the top right-hand section of the Welcome Page. Select "Profile" from the dropdown menu to access and update the relevant account or organization information. By following these steps, you can ensure that your organization's profile is kept accurate and up to date.

## Why does Merck Canada require extensive information for my sponsorship request?

Merck Canada has a structured evaluation process for funding requests to ensure compliance with internal and external guidelines and policies, such as the Innovative Medicines Canada (IMC) code of ethical practices. The extensive information is necessary to ensure adherence to these regulations. Additionally, these requirements align with those of other IMC member companies, ensuring consistency in sponsorship evaluation processes.

## Is it possible to save my progress and return to the submission later?

Yes, you can conveniently save your progress prior to exiting the portal and return at your convenience to make further changes or complete your request.

## Certain fields are marked with an asterisk, why is that?

The asterisk (\*) indicates mandatory fields, essential for the completion of your submission. Fields without an asterisk are optional and can be filled out at your discretion, providing supplemental information that may enhance the assessment of your request.

## Why am I being asked if I have a Merck Point of Contact (POC)?

It is important to identify your Merck POC to ensure comprehensive and transparent communication throughout the sponsorship request process. By providing a designated POC, they will be copied on all email communications related to your request, thus ensuring that they are kept informed of the status and progress of the sponsorship request.

## If my meeting Agenda isn't finalized yet, what should I upload for Conferences/Congresses?

If your meeting agenda is not yet finalized, we encourage you to upload the draft agenda along with the agenda from the previous year's meeting, if applicable. This will provide a comprehensive view of the anticipated sessions as well as insights into the types of sessions that were organized in the past. This information will aid in the evaluation of the potential educational value and relevance of the meeting.

## What if I have additional information/documents to provide?

You will have the opportunity to upload supporting documentation in the "document uploads" section using the "other" dropdown. For detailed instructions on how to do so, please refer to the Submission Guide.

# FAQ – Sponsorship Submission Merck Canada (cont'd)

## Why am I being asked to provide a detailed budget?

Providing a detailed budget is essential for Merck Canada to comprehensively assess the total cost and resource allocation needed for the proposed project, initiative, or conference. It ensures that the financial support allocated is aligned with the specific needs and objectives of the request. The level of detail required in the budget will vary based on the nature and scope of the request.

## How can I view the status of my request?

You can track the status of all your submissions under the "My Requests" section of your homepage. Additionally, the system will automatically generate email updates as your submission progresses through the review and approval process.

Sponsorship Portal Status	
Action	Status
Ongoing request creation	New
The request is submitted	Submitted for Review
The request is approved	Approved
5-day post event	Pending Reconciliation
The requestor has submitted their tangible benefits	Reconciliation in Review
The reconciliation is approved	Closed