

## Gilead Sciences Canada Medical, Fellowship, Journal Clubs and Rounds User Guidance Document

The aim of Gilead Canada Medical, Fellowship, Journal Clubs and Rounds Grants Program is to support healthcare-focused organizations to develop innovative, high-impact projects that deliver measurable benefits to patients, healthcare providers and communities impacted by Gilead’s therapeutic areas of expertise.

Gilead supports many organizations and projects via the Medical, Fellowship, Journal Clubs and Rounds Grants Program, but we receive more grant requests than we can fund. Applying for a grant is not a guarantee of funding.

Medical, Fellowship, Journal Clubs and Rounds grants are separate from the company’s commercial activities; sales and marketing personnel are not involved in grant decisions. Grants are not connected to, or conditioned upon, purchasing, prescribing, recommending or otherwise supporting Gilead products.

This document is intended to provide guidance on how to submit an application to the Gilead Canada Medical, Fellowship, Journal Clubs and Rounds Grants Program. If you have questions regarding the application process or the program more generally, please email our support team at:

[Canada.Grants@gilead.com](mailto:Canada.Grants@gilead.com)

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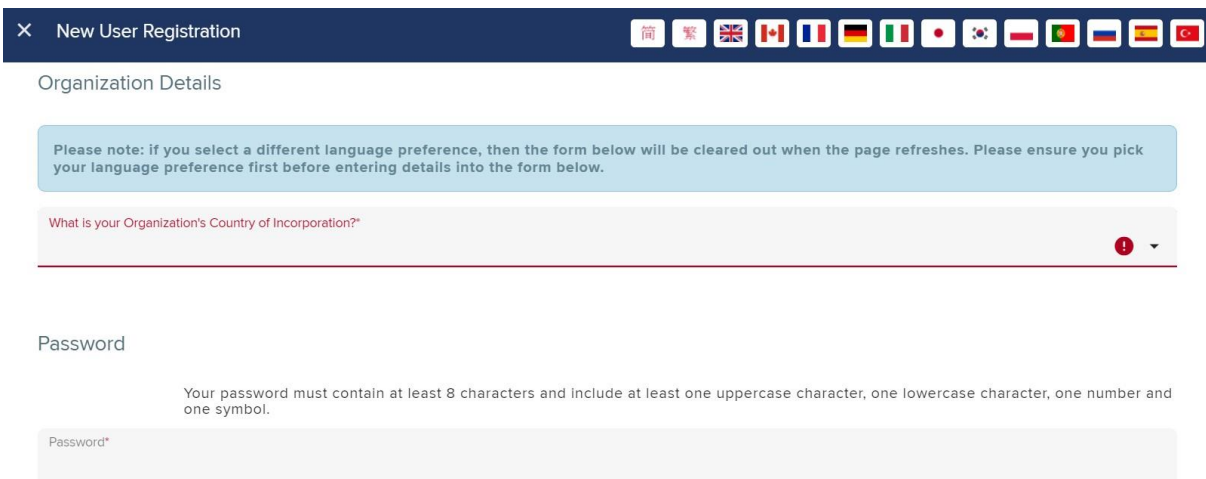
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## How to Create an Account

Please visit the Gilead Canada website page [here](#) and click “Create Account” to register for access to the application portal.

- You will be directed to the New User Registration page, shown below.
- There are four sections to complete to register: Organization Details, Applicant Details, Password and Privacy Consent.
- Upon entry of all required fields, select the SAVE button on the bottom right of the page to complete the registration process.
- Upon selecting SAVE, you will receive a pop-up message indicating that your New User Registration has been sent.
- Finally, you will receive a separate email message regarding your request, including your login details to access the portal.



The screenshot shows the 'New User Registration' page. At the top, there is a dark blue header with the title 'New User Registration' and a row of language selection icons (Chinese, Japanese, UK, Canada, France, Germany, Italy, Japan, Korea, Mexico, Russia, Spain, Turkey). Below the header, the 'Organization Details' section is visible. It contains a light blue informational box: 'Please note: if you select a different language preference, then the form below will be cleared out when the page refreshes. Please ensure you pick your language preference first before entering details into the form below.' Below this is a dropdown menu labeled 'What is your Organization's Country of Incorporation?' with a red exclamation mark icon. The 'Password' section follows, with a note: 'Your password must contain at least 8 characters and include at least one uppercase character, one lowercase character, one number and one symbol.' Below the note is a text input field labeled 'Password\*'. The bottom of the page shows a row of social media icons.

## Using the Application Portal

### Browser Settings

- Please note, Internet Explorer 10+, Chrome or Firefox are the preferred browsers.
- Pop-up windows must be allowed for certain features on the site to work. Please see the instructions below on how to allow pop-up windows.

Internet Explorer	Firefox
<ul style="list-style-type: none"> <li>• Select the 'Tools' tab</li> <li>• Scroll down to 'Pop-up Blocker'</li> <li>• Select 'Pop-up Blocker settings'</li> <li>• Type '*.steeprokin.com' into the 'Address of website to allow' field</li> <li>• Select 'Add' and 'Close'</li> </ul>	<ul style="list-style-type: none"> <li>• Select the 'Tools' tab</li> <li>• Select the 'Content' tab</li> <li>• Select 'Pop-ups' 'Exceptions' button across from the 'Block pop-ups windows' check box</li> <li>• Type '*.steeprokin.com' into 'Address of website' field</li> <li>• 'Save Changes'</li> </ul>

### Chrome

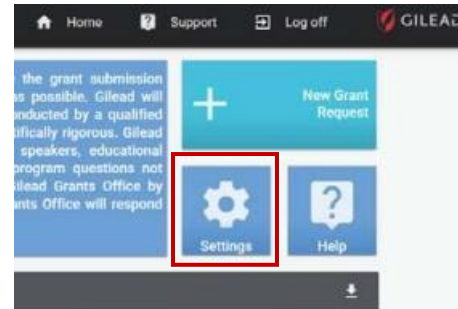
- Select the Chrome menu button on the top right-hand side
- 'Settings.'
- 'Show Advanced Settings'
- Under 'Privacy' select 'Content Settings'
- Under 'Pop-ups' select 'Manage Exceptions'
- Type '\*steeprokcinc.com' into the 'Hostname pattern' field and select 'Done'

### Safari

- Select the 'Safari' tab
- Select 'Preferences'
- Select 'Websites' and then 'Pop-up windows' on the left
- Select 'Allow' on the dropdown next to Steeprokcinc from the list of websites (you will need to be on the portal for it to appear)

### Profile and Username/Password

- You can update your Profile details via the settings button on the homepage of the portal.
- If you do not remember your username and password, you can click on the blue Forgot Username and password? link located under the green login button [here](#). Your information will be sent to you within 5 minutes.

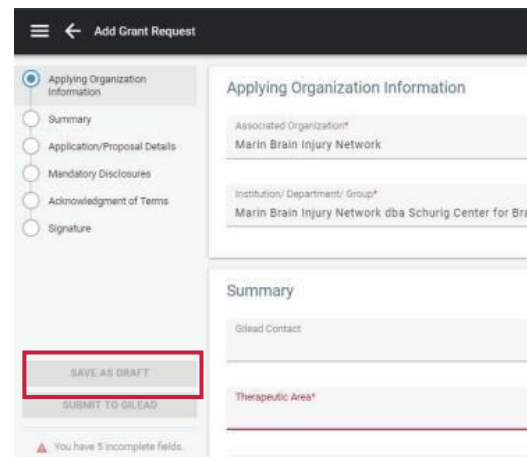


### Required Fields

- All fields marked with red outlines/ asterisks/ exclamation marks indicate required fields. You will not be able to save the record if one of the required fields is not completed.

### Saving an Application and Viewing Drafts

- Once you have started a new grant request and entered a title for your project, you can save a draft by clicking the red SAVE AS DRAFT button on the left side panel.
- It is recommended to regularly click on this button to avoid losing work if the system times out.
- You can view saved drafts via the Homepage of the application portal under My Grant Requests.



### Support

If you have questions about the application portal that have not been answered in this document, you can find the User Support Assistance contact details via the **Support** button on the upper right corner of the portal:

**Phone number: +1-718-576-1406**

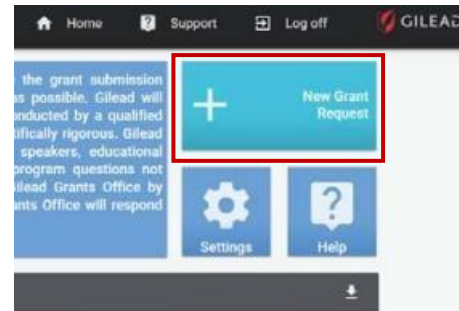
**Email: [gilead@steeprokcinc.com](mailto:gilead@steeprokcinc.com)**

For general inquiries regarding the Gilead Canada Medical, Fellowship, Journal Clubs and Rounds Grants Program please contact: [Canada.Grants@gilead.com](mailto:Canada.Grants@gilead.com).

## How to Apply for a Medical, Fellowship, Journal Clubs and Rounds Grant

### Getting Started

- Once you are registered on the application portal and you have logged in you can begin the application process.
- To begin, click on the New Grant Request tile on the homepage of the portal.



### Applying Organization Information

Each grant request will require the designation of the requesting organization. Your Applying Organization Information section is pre-populated with the details you entered during your New User Registration.

The organization associated with the application must be the same organization that will receive the grant funds in the event of a successful application.

Please Note: If you have multiple organizations which you will be submitting Grant Requests with, each organization will require a separate account creation.

### Summary

Please complete all the required fields in the Summary section:

FIELD	GUIDANCE
<b>Therapeutic Area</b>	Select the relevant option.
<b>Primary Sub-Therapeutic Area</b>	Select the relevant option.
<b>Grant Type</b>	Select <i>Medical/Scientific</i> .
<b>Program Type</b>	Select the relevant option.
<b>Grant Program Tags</b>	CA – Medical, Fellowship, Journal Club and Rounds Grant Program
<b>Digital Health Program</b>	Yes/No
<b>Event/ Project/ Program Title</b>	Enter a name for your grant request.
<b>Grant Currency</b>	This will be pre-populated based on your organization's country address. All subsequent currency-related fields will be pre-populated with this currency.
<b>Amount Requested from Gilead</b>	Please enter numbers only.
<b>Total Event/ Project/ Program Budget</b>	Please enter numbers only here.  A full breakdown of how the budget will be spent must also be submitted in the line-item budget section of the application portal and can be uploaded as an attachment under 'Supporting document(s)'.

<p><b>If Gilead partially or fully approves this application, will the cumulative funding provided by Gilead within this calendar year exceed 33% of your organization's revenue?</b></p>	<p>Select <i>Yes</i> or <i>No</i>.</p> <p>Please note that Gilead is unable to provide funding for projects where the cumulative funding within the calendar year exceeds 33% of your organization's revenue. Should this value be less than but close to 33%, the annual income of recent preceding years will also be assessed, and appropriate files should be provided as supporting documents attached to the application.</p>
<p><b>Will there be other supports of this Event/ Project/ Program?</b></p>	<p>Select <i>Yes</i> or <i>No</i>.</p> <p>If you select <i>Yes</i>, a new free-text field will appear for you to list the details of other expected sources of funding.</p>
<p><b>Is this an existing Event/Project/Program</b></p>	<p>Select <i>Yes</i> or <i>No</i>.</p>
<p><b>Expected Number of Attendees/ Participants</b></p>	<p>Please enter a projected number.</p>
<p><b>Primary Audience/ Participants</b></p>	<p>Please select one option.</p> <p>You also have the option to select a Secondary and Tertiary Audience/ Participants in the following fields if relevant.</p>
<p><b>Primary Target Population</b></p>	<p>Please select one option.</p> <p>There are additional non-required fields available to provide more detail on your target population, as desired.</p>
<p><b>Is this application for a specific event(s)</b></p>	<p>Select <i>yes</i> or <i>no</i>.</p> <p>If you select <i>yes</i> additional fields will appear for you to provide the start and end dates as well as a free-text field to include the event details. You can use the + button to include details if you have more than one event.</p>
<p><b>Program/Project Start Date + End Date</b></p>	
<p><b>Geographical Area Served by this Event/ Project /Program(s)</b></p>	<p>Please note the Gilead Canada Medical, Fellowship, Journal Clubs and Rounds Grants Program can only fund projects based in Canada.</p>

**Note: please ensure that you complete the Grant Type, Program Type and Grant Program Tags fields accurately as indicated in the table above. If incorrect information is entered here, your application may not be received by the Medical, Fellowship, Journal Clubs and Rounds Grants Program.**

### **Application/Proposal Details**

The Application/Proposal Details section is made of the following required free-text fields:

- Executive Summary (This field is limited to 800 characters)
- Program Purpose
- Objectives

- Activities
- Expected Outcome

There is also an Additional Information free-text field within which we would ask that you include information on the following points and questions – and further information that you feel is relevant but not covered in the above fields. Should you encounter a word limit please upload this as a separate document upon submission:

- Overview of the organization
- Information on the project sustainability
- During the project implementation and after, how will you communicate publicly about this program/event/project?
- Please describe what platforms your organization will use to share the learnings or success of your program

### Supporting Documents

- Please use the + icon to attach all required supporting documents in the Supporting Document(s) field.
- This should include a **new supplier creation form, your organization’s most recent annual report** and a **Letter of Support** (see the [Additional Materials Required](#) section of this guide for further details).
- You will need to enter a document name in order to save each uploaded document.

### Line-item Budget

- To ensure consistency and clarity, please ensure the ‘Line-item budget’ is the same as the ‘Total project budget’ in the Summary section of the application.
- There is a link to an example on the portal to see the level of detail required for your itemized budget breakdown.
- Once you have entered all of the required information for each line item and clicked UPDATE, the system will calculate the **Sub-Totals, Total Budget** and **Total Requested from Gilead** fields at the bottom of the section.
- There is a non-required free-text field for you to add further **Budget Justification Details**.

**Please be aware when completing the ‘Line-item budget’, Gilead cannot support funding of the following:**

- Medication or purchasing of medication
- Existing financial deficits within an organization
- Clinical research or clinical trials
- Projects that could directly influence or advance Gilead’s business, including purchase, utilization, prescribing, formulary position, pricing, reimbursement, referral, recommendation or payment for products
- Salaries/wages for healthcare professionals who have prescribing authority
- Paying grants to individuals, individual healthcare providers or physician group practices
- Events or programs which have already occurred
- Government lobbying activities
- Organizations that discriminate based on race, colour, gender, religion, disability, sexual orientation, or gender identity or expression
- Any equipment that could be kept beyond the project timelines and which could be of further benefit to the organization, e.g. mobile phones, laptops/computers, vehicles, etc.
- To compensate individuals who provide services to Gilead Canada, such as speaking or advising directly for Gilead Canada
- In lieu of a discount or price concession or a part of a contract negotiation

- To fund Gilead-sponsored clinical research or investigator-sponsored research
- To pay for the compensation of HCPs with prescribing authority who are employed by the requesting organization
- To defray the operating expenses of the recipient (e.g., office equipment, salary, etc.) unless the grant request specifies the expenses to be covered, and such expenses are not for routine patient care or overhead that typically is reimbursed or paid for by other sources
- Does not fund Journal Clubs and Rounds in restaurant settings

Finally, please respond *yes* to the question **Will individuals/entities receive transfers of value for this event/program/project that are reportable under regulatory requirements?**

- If your application for a grant is successful, the payment of a grant would result in the applicant individuals/entities receiving a transfer of value. We require the applicant to respond *yes* in order for Gilead to record that the recipient of the grant has received a transfer of value so that the same can be processed and disclosed by Gilead.

### Mandatory Disclosures

Please select *yes* or *no* to all eight questions in this section. Depending on your answer to these questions, an additional free-text field may appear.

### Finalizing your Application

Before submitting an application, you must read and review the final sections and select a consent statement from the respective dropdown menus:

- Privacy Consent
- Anti-Corruption Policy
- Acknowledgment of Terms

### Additional Materials Required

As well as completing all fields within the application portal, you will need to attach three additional supporting documents for your application to be considered:

1. A “Letter of Support” on letterheaded paper from the applying organizations
2. Annual report or Tax Document, as applicable
3. Gilead new supplier creation form
  - This form must be completed and submitted even if you have applied for a grant previously
  - To download the template form, click on the link in the Application/Proposal Details section indicated below



Once all required fields are completed and you have uploaded the supporting documents, you are ready to submit.

Once you have reviewed and verified the details of your application, add your name and title to the Signature field to certify that the statements made in the grant request are true and correct.

Please click on **SUBMIT TO GILEAD** to submit your grant request. Your submitted grant will now be displayed on your Homepage under My Grant Requests with the grant status listed as *submitted*.

## What Happens Next?

### Requests for Clarification and Notifications

If Gilead requires clarifications after your grant application has been submitted, you will be notified by email.

- To respond to a clarification request you will need to login to the portal and click on the relevant project under My Grant Requests on the homepage.
- The portal will only display the fields in which clarifications are requested.
- Once you are ready to send the information to Gilead, click on **RESUBMIT TO GILEAD**.

My Grant Requests					
Program/Project Start Date	Current	Grant Type	Title	Amount Requested from Gilead	Amount Approved
05-Oct-2019	Clarifications Requested	IMED	GME Today RA Program for	\$24,000.00 USD	Submit Additional Information

### Grant Approval or Denial Notifications

When a decision is made upon reviewing your Grant, you will receive an email notification informing of the decision. If your Grant is approved, your email will inform you of the funding support requests. If your Grant is denied, your email will inform you as to why it has been denied, or you may be asked to submit additional supporting information. The Grant Status will be updated on the My Grant Requests section of the portal homepage.

### Agreements

Any documents that require signature will be available to you via the portal homepage under My Grant Requests. Follow the on-screen instructions to download PDF documents to your computer for signature and reupload via the Replace button. Upon receipt of your signed documents, Gilead will review and process your grant and the Grant Status will update to *active*.

### Change in Scope

Once a Medical, Fellowship, Journal Clubs and Rounds grant is active, you will have the ability to request a change in scope via the My Grant Requests section of the portal homepage. To do this select the *Request Change in Scope* option on the relevant grant request.

You will need to complete two fields:

1. Select 'Type of Request' from the dropdown and click apply.
2. Fill in the details of your request in the free-text field - please summarize the reason for your change in scope, what the specific changes are and how they will impact Gilead.

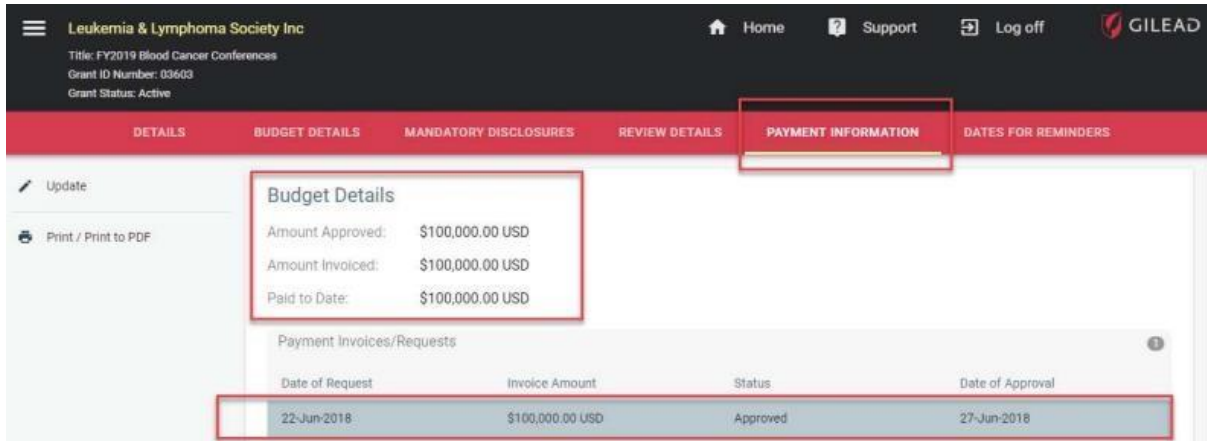
Once a request for a change in scope is submitted, it will be reviewed by the Gilead Canada Grant Review Committee (GRC). You will receive an email requesting additional information for your request and further instructions for you to update the grant information via the Changes in Scope that Require Action section of the portal.



## Payment Information

Your grant payments will be generated based on grant milestones set at the time of your approval. The milestone payments are scheduled by Gilead according to the completion of specified stages and payment needs for your grant, as per the contract agreement. You can review the set payment milestones under My Grant Requests on the portal homepage and on your copy of the signed contract agreement.

Clicking on the relevant project under My Grant Requests will take you to the grant page where you can view all payment details, including amount approved, amount invoiced, paid to date and payment invoice/requests via the PAYMENT INFORMATION tab at the top of the screen.



Leukemia & Lymphoma Society Inc  
 Title: FY2019 Blood Cancer Conferences  
 Grant ID Number: 03603  
 Grant Status: Active

DETAILS BUDGET DETAILS MANDATORY DISCLOSURES REVIEW DETAILS **PAYMENT INFORMATION** DATES FOR REMINDERS

Budget Details

Amount Approved: \$100,000.00 USD  
 Amount Invoiced: \$100,000.00 USD  
 Paid to Date: \$100,000.00 USD

Payment Invoices/Requests

Date of Request	Invoice Amount	Status	Date of Approval
22-Jun-2018	\$100,000.00 USD	Approved	27-Jun-2018

## Reports and Reconciliations

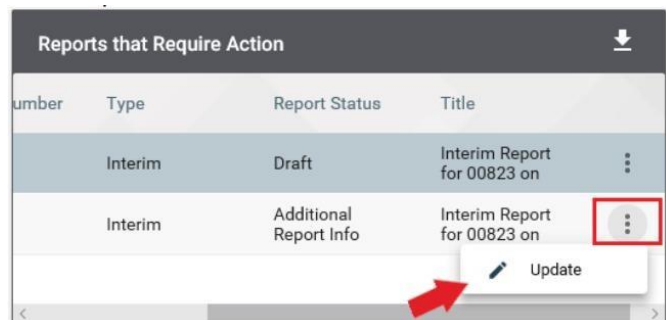
### Submitting a Report

- If you are required to submit an interim, final, or disclosure report for your project, you will receive an email notification.
- To submit a report, click on the three dots next to the relevant project under My Grant Requests on the homepage of the portal. You can then select “Submit Report” from the dropdown.
- The portal will guide you through the required fields for your report.
- At the bottom of the page, within the Supporting Documentation section, you can include any additional materials you feel are relevant to share with Gilead.
- You can save a draft report at any point – the draft report will appear in the Reports that Require Action section of the portal homepage.
- When you are finished with your report, you can click SUBMIT TO GILEAD. You will receive an email confirmation that your report has been submitted.

### Responding to Questions on a Report

You may receive a request from Gilead for additional information on a submitted report. The notification will be sent via email and will detail any questions requested.

To respond to any questions please visit the Reports that Require Action section on the portal homepage.



Reports that Require Action

Number	Type	Report Status	Title	
	Interim	Draft	Interim Report for 00823 on	⋮
	Interim	Additional Report Info	Interim Report for 00823 on	⋮

Update

### Submitting a Budget Reconciliation

If you receive a request from Gilead to reconcile your line-item budget for your project, an email will be sent to your registered email address. On the My Grant Requests section of the portal homepage, the grant status will display as Reporting Due. The system will guide you through the required fields to complete your budget reconciliation.

My Grant Requests					
Program/Project Start Date	Current	Grant Type	Title	Amount Requested from Gilead	Amount Approved
10/21/2018	Reporting Overdue	Medical/Scientific	HIV Research for Prevention HIVR4P	\$50,000.00 USD	\$50,000.00 USD
10/21/2018	Reporting Due	Sponsorship	HIV Research for Prevention HIVR4P	\$100,000.00 USD	

- + Request Change in Scope
- + **Submit Reconciliated Budget**
- + Submit Report

**If you have further questions about the application portal that have not been answered in this document, please contact User Support Assistance:**

**Phone number: +1-718-576-1406**

**Email: [gilead@steeprocks.com](mailto:gilead@steeprocks.com)**