EMD Serono's Request Management System

How to Use EMD Serono's Online System to Respond to the RFP for 2025 I'M IN Oncodisparity Fellowship

September 2024

EMD Serono

Overview

- This Presentation is for organizations who want to submit a Proposal in response to EMD Serono's two *Request for Proposals* for the **2025 EMD Serono I'M IN Oncodisparity Fellowship**
  - One RFP has been issued focusing on **Advanced Urothelial Carcinoma**.
  - Another RFP has been issued focusing on **NSCLC**

- **How to Submit:** Proposals must be submitted through EMD Serono's Request Management System at www.grants.emdserono.com. This Presentation walks you through how to use our system to submit your Proposal. We do not accept Proposals sent via email.

- **Deadline:** Proposals must be submitted by **Tuesday, October 15, 2024**, midnight (EST)

High-Level Overview of the Process

Request Submitted

- Request is submitted online through **Request Management System** at https://grants.emdserono.com

Review by Review Committee

Decisions will be made by Tuesday, October 22, 2024

Notification of Decision

- A **Fellowship Agreement** will be sent to winners on October 22, 2024. The Agreement **must** be signed by November 1, 2024, or funding will be jeopardized.

Reconciliation of Request

- **Funding Reconciliation** is required at the end of the fellowship

Already a Registered User?

If you submitted a Proposal for a Fellowship before, then you are already a "registered user".

Jump forward to slide 16 for your next step.

New users go the next slide.

New Users

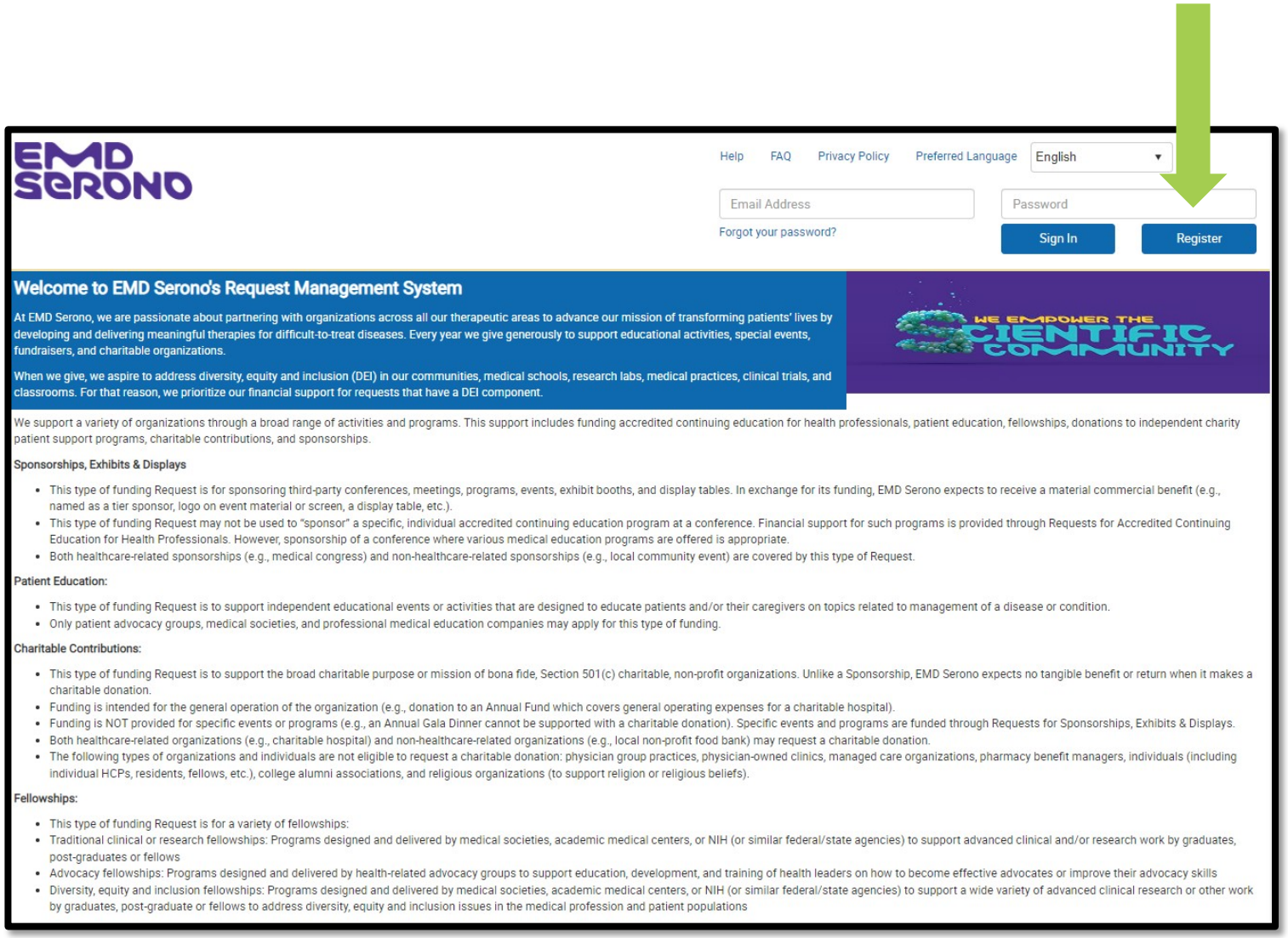
To register as a new user:

Step 1 – go to our website at www.grants.emdserono.com and **click** the ***second*** "Click Here" button on the left-hand side of the screen.

This brings you to the part of the system where you can register as a new user of the system.

New Users

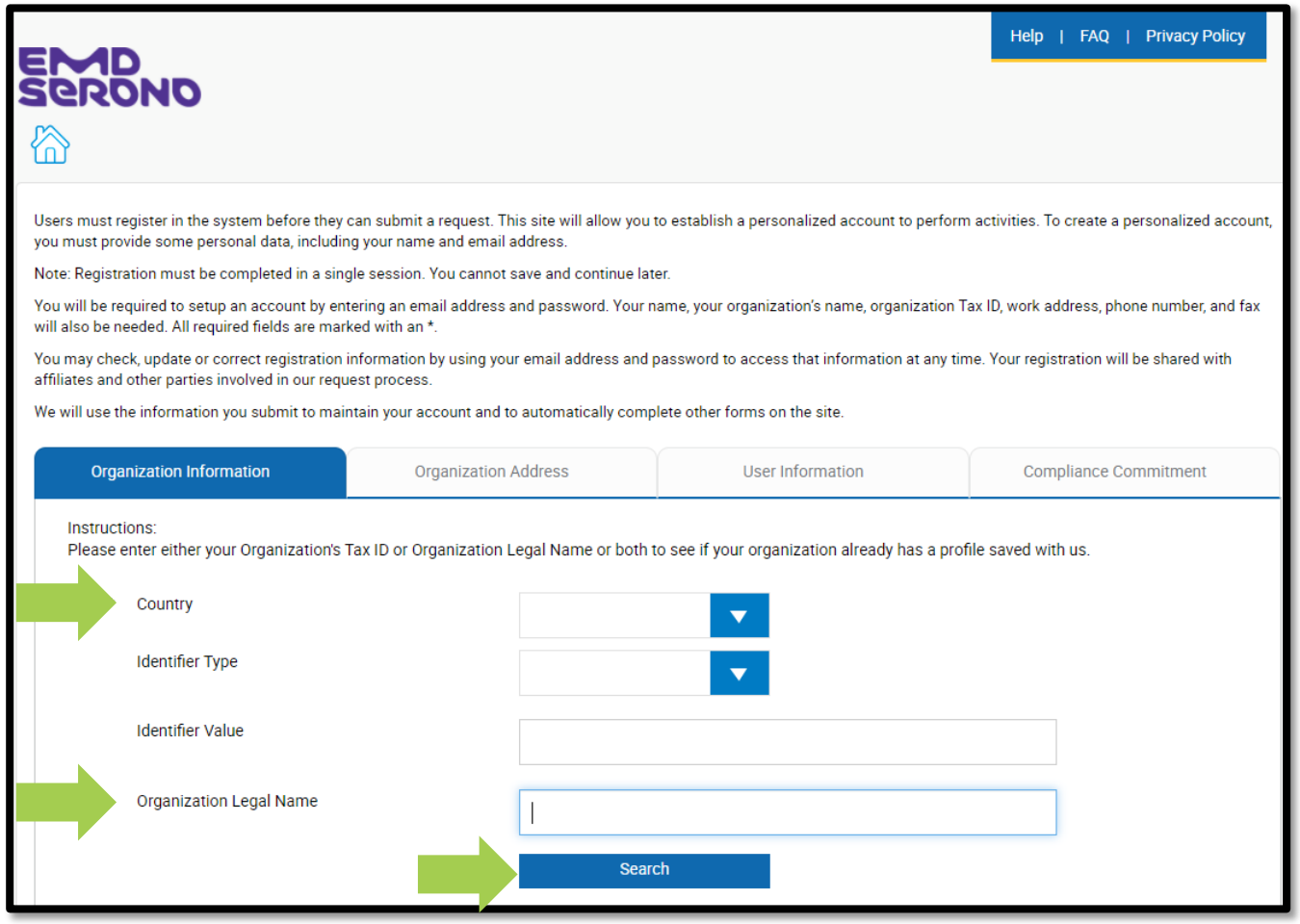
Step 2 – **Click** the "Register" button on the top right-hand corner of the screen



New Users

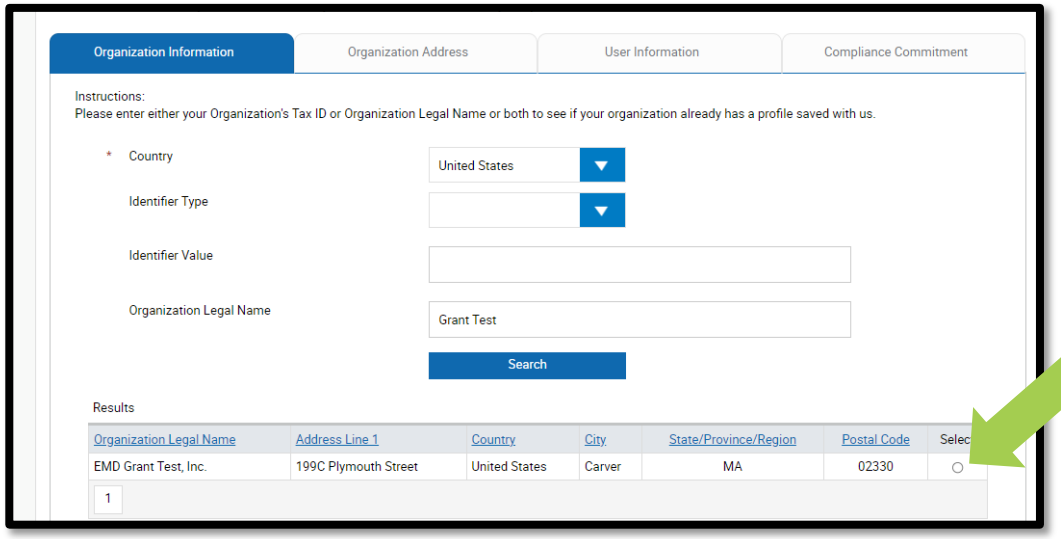
Step 3 – Search for your organization to make sure you don't already have a user account. To do this:

- **Enter** the country (United States) and your organization's legal name (no need to fill out the other fields) and then **click** the "search" button

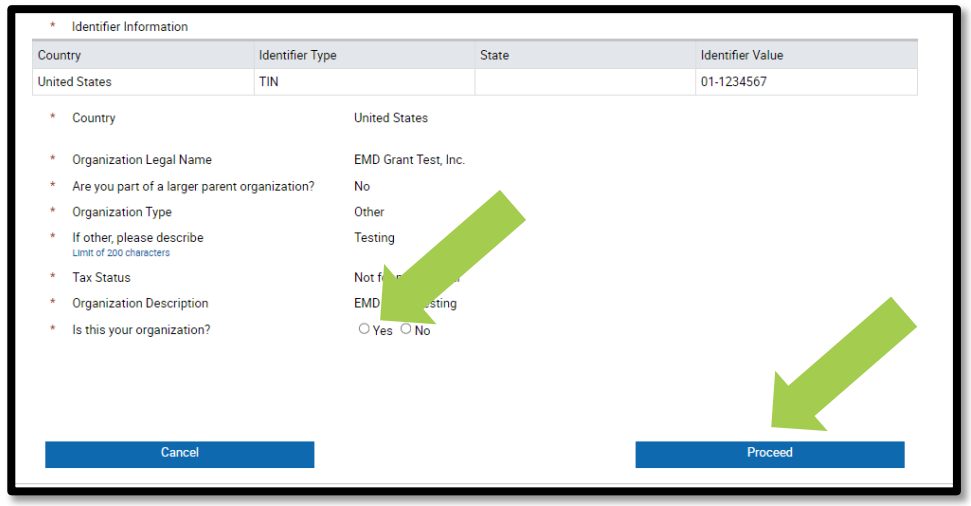


New Users

Step 4 – If your organization does appear in the search results, there is no need to create a new user or a new organization in the Request Management System.



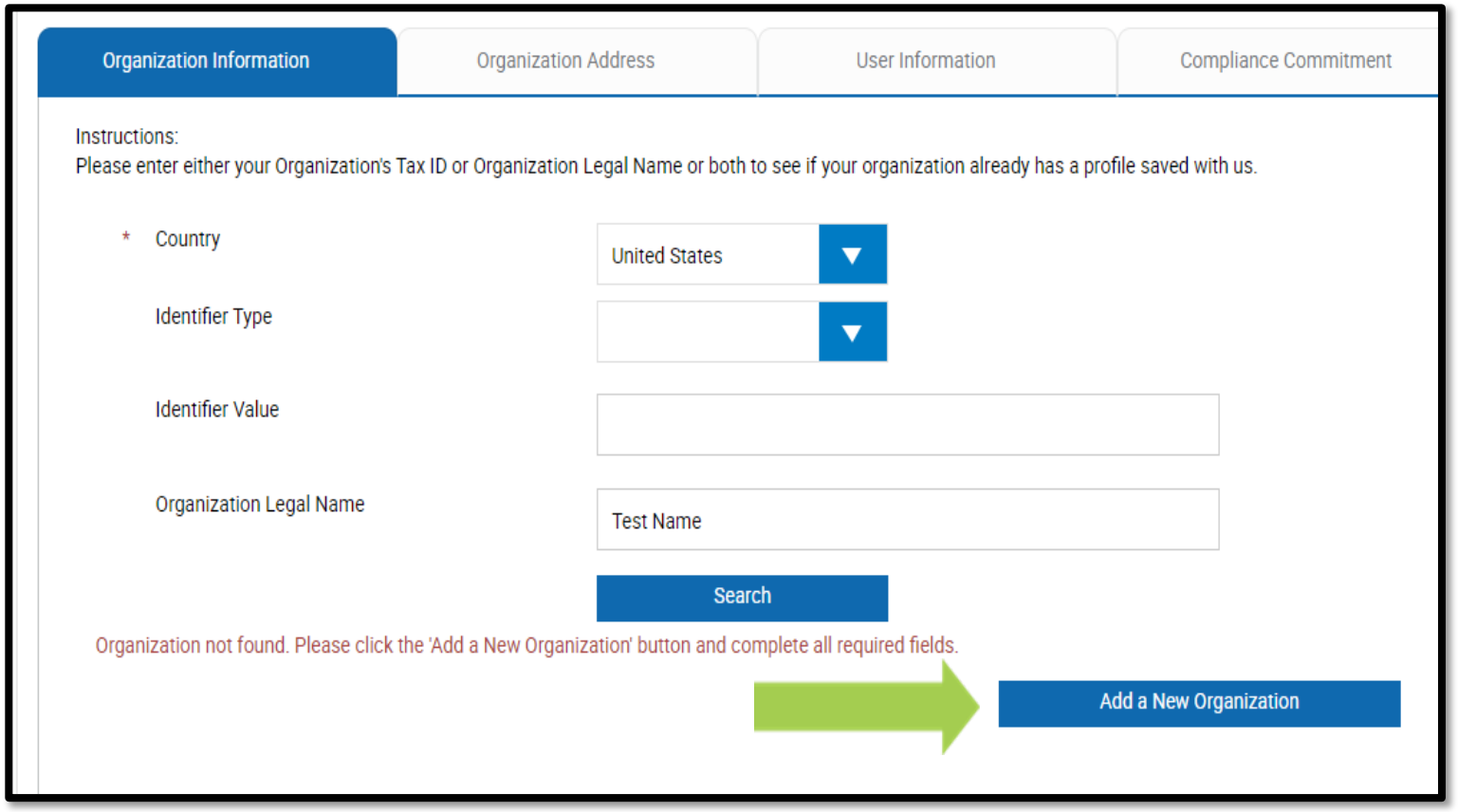
- **Click** the radio button under the "Select" column and your organization's information will automatically pop up on the screen.



- Then **click** the "Yes" radio button next to "Is this your organization?"
- Then **click** the "Proceed" button.
- Jump forward to slide 16 for your next steps.

New Users

Step 5 – If your organization is not found, then **click** "Add a New Organization"

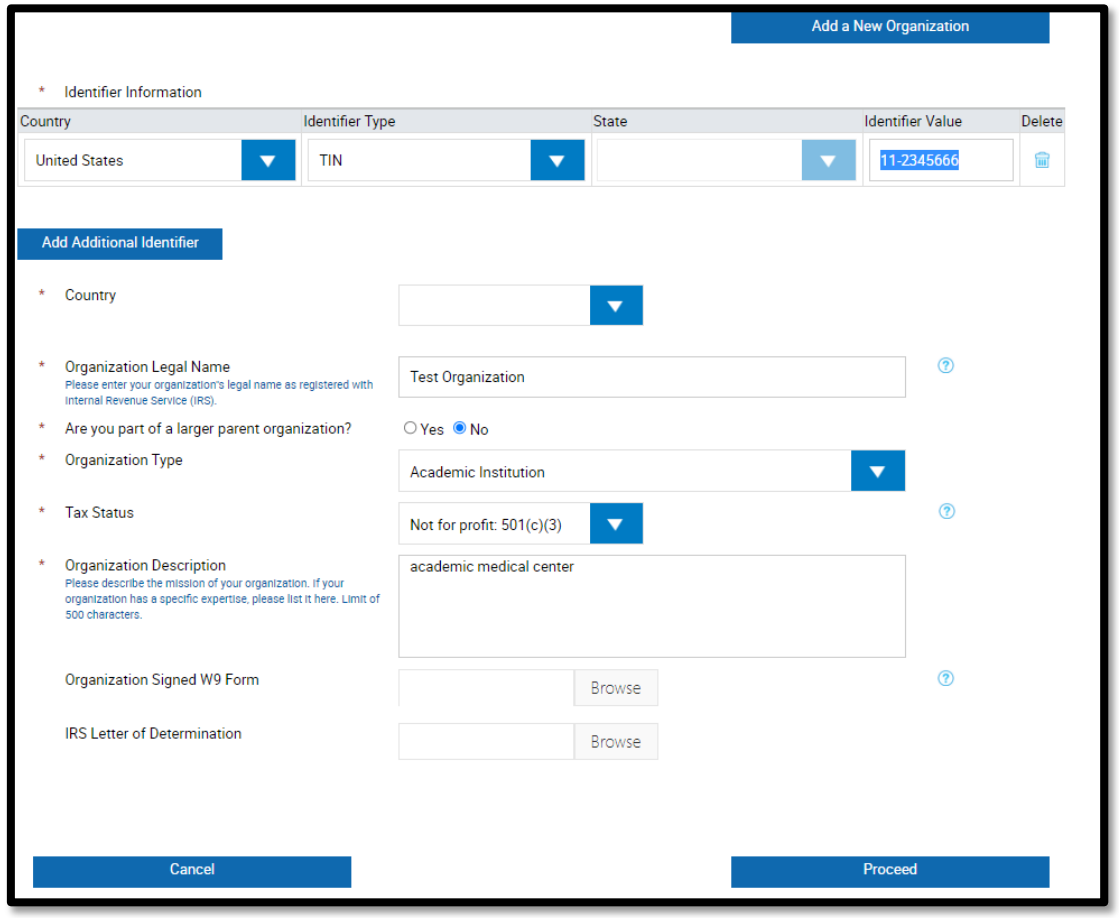


New Users

Step 6 – Fill out the "**Identifier Information**" in the top row:

- Country - "United States"
- Identifier type - "TIN"
- State – **LEAVE BLANK**
- Identifier Value – type in your organization's Federal Tax Identification #

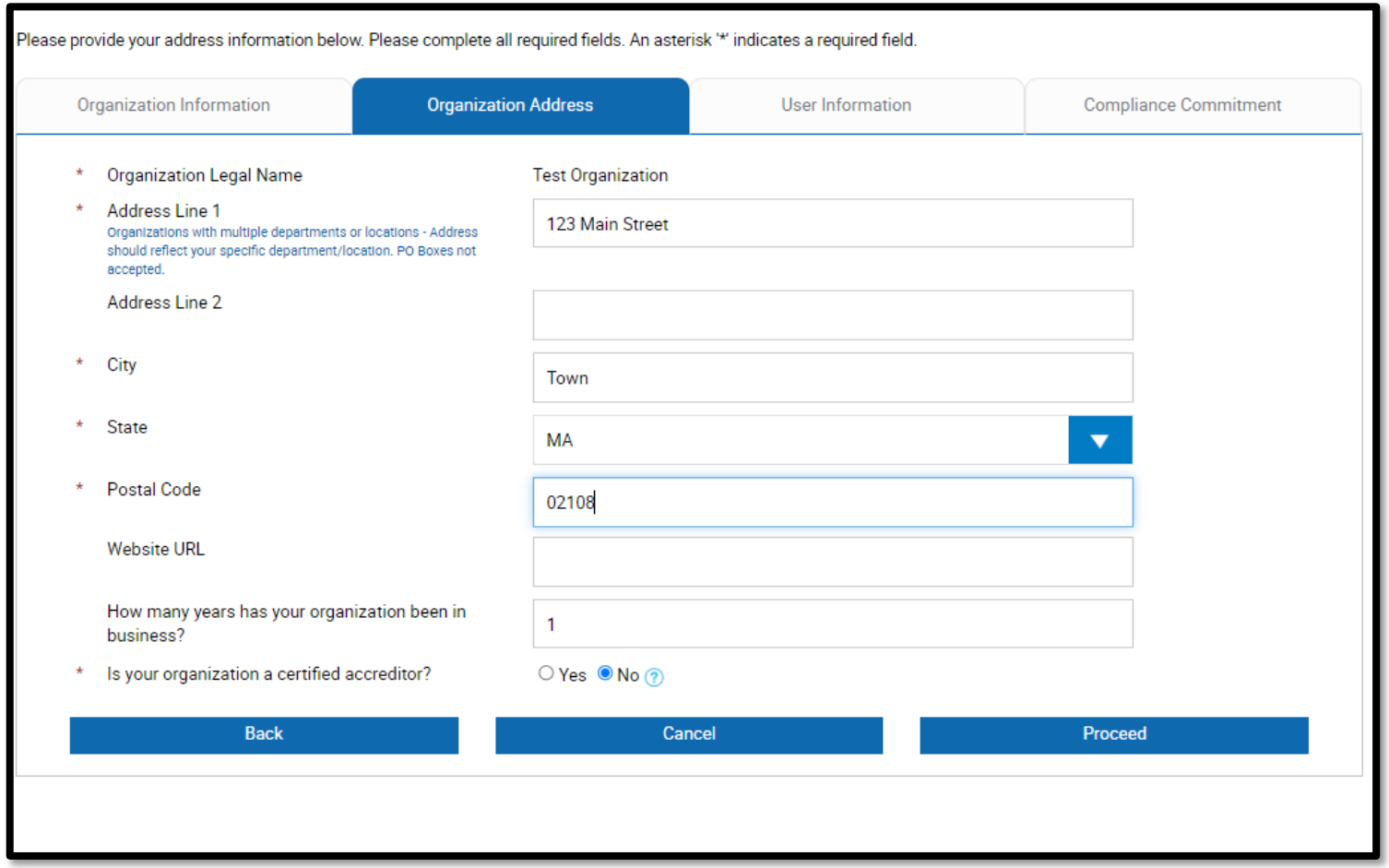
- Then fill out the "**Add Additional Identifier**" section (blue box on left side of the screen)
- Then upload a **signed W9 Form** (blank W9 form available at www.irs.gov/FormW9)
- Then **ONLY IF** you're a non-profit organization, upload your IRS Letter of Determination (i.e., non-profit status) (copy available at https://apps.irs.gov/app/eos/)
- **Click** "Proceed" when you're done



New Users

Step 7 – Fill out the "Organization Address" tab

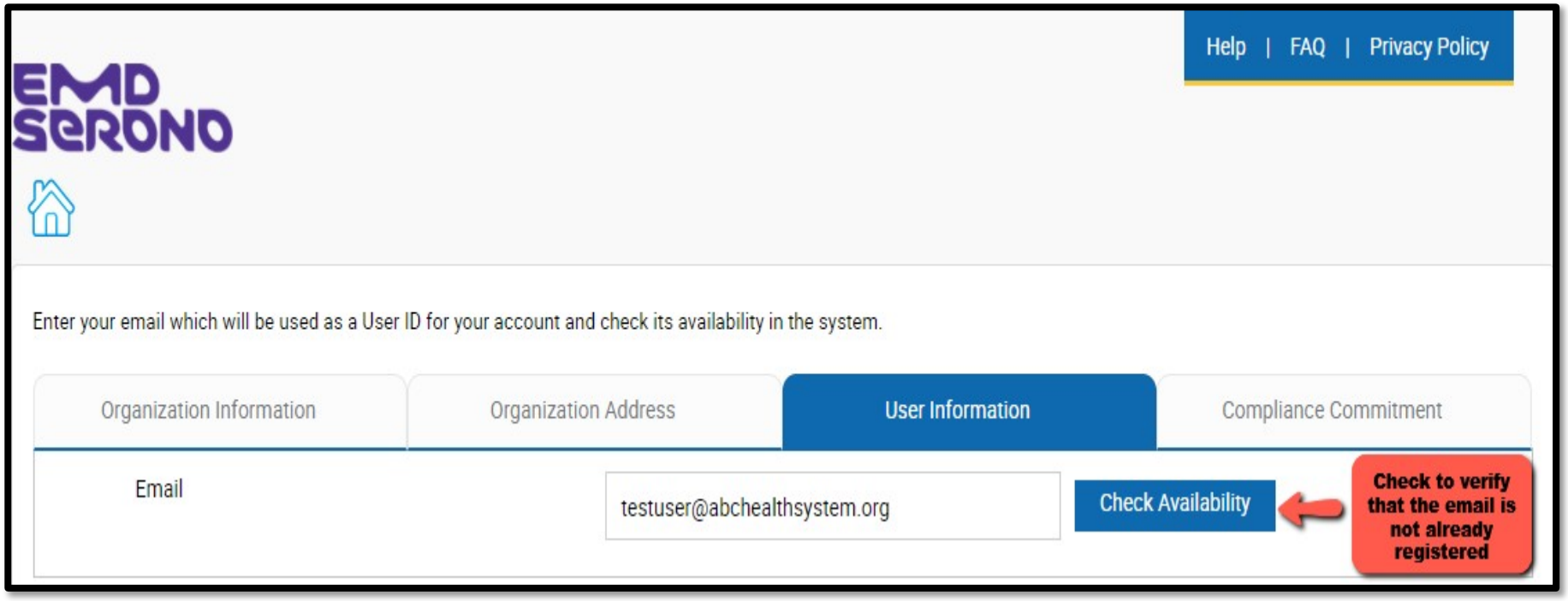
- If you do not have a website, leave this field blank (do not type in "none" or "N/A")
- The last question about being a "certified accreditor" does not apply to fellowships, so **click** the "no" radio button
- Then **click** "Proceed"



New Users

Step 8 – On the "User Information" tab, type in your email address

- **Click** "Check Availability" to make sure the email isn't already registered



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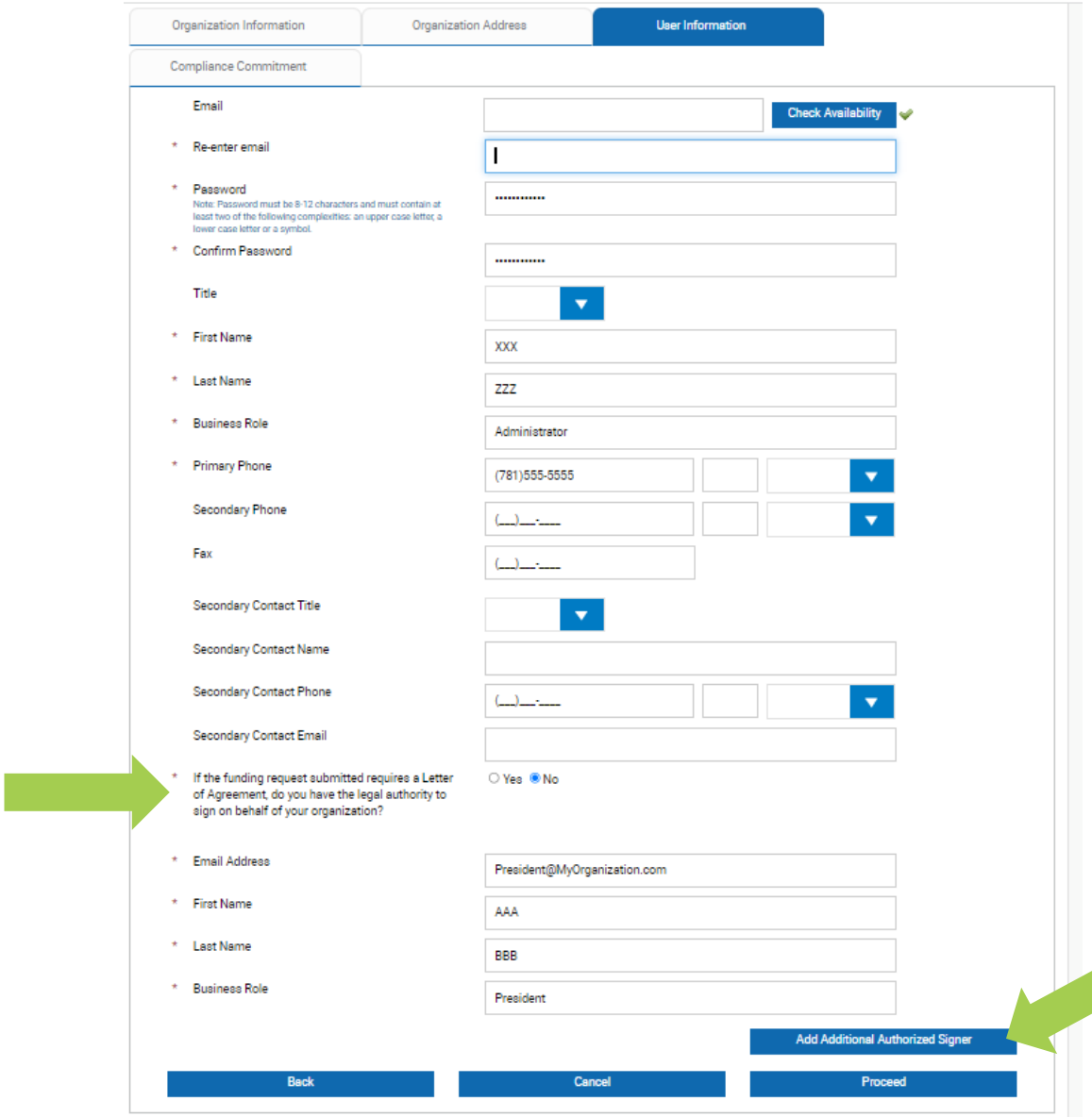
New Users

Step 9 – Enter your email, a password, and the other information requested.

- The question *"If the funding request submitted requires a Letter of Agreement, do you have the legal authority to sign on behalf of your organization?"* is asking about who will sign the Fellowship Agreement.
  - If someone besides you needs to sign the Fellowship Agreement, then enter their contact information here.

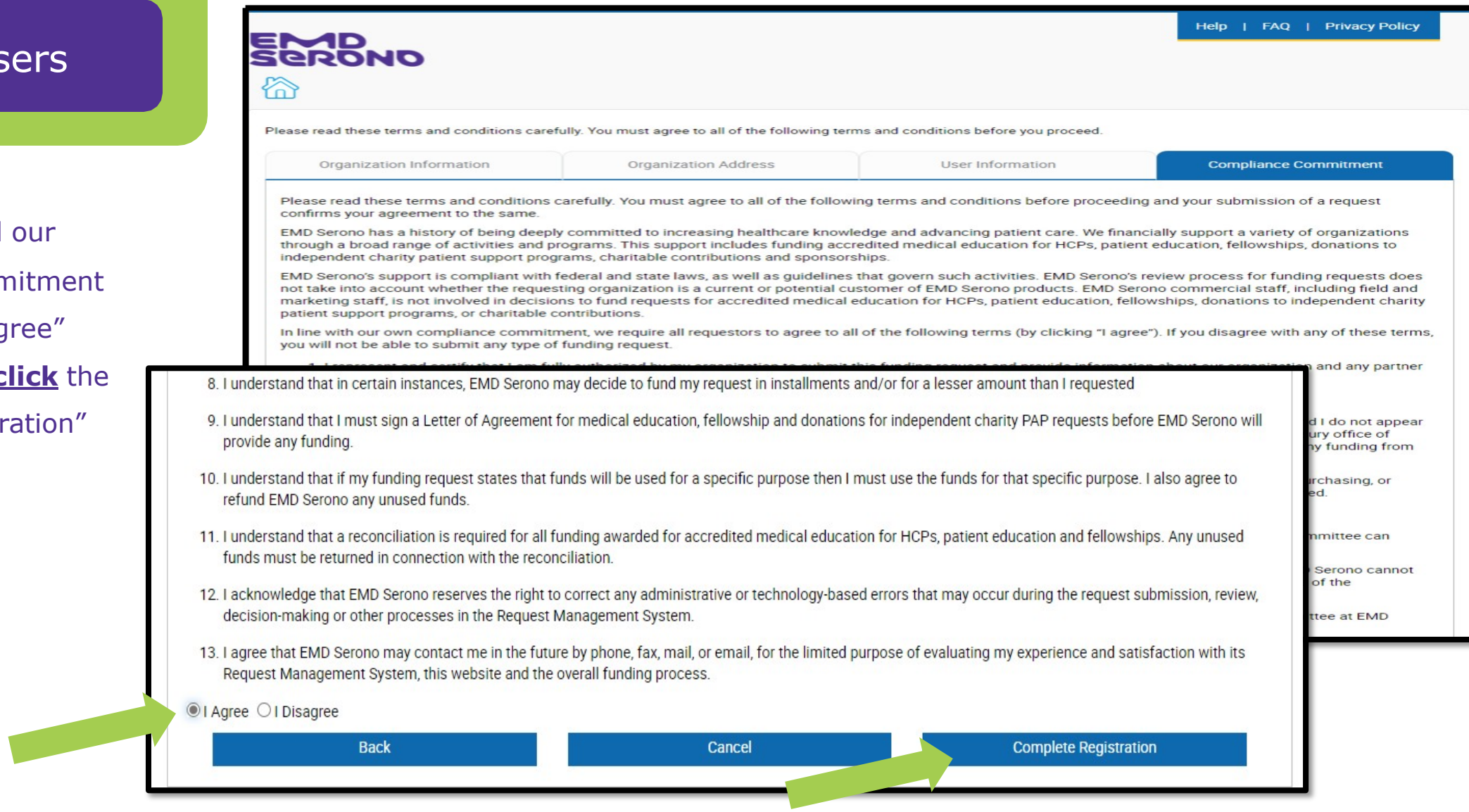


If someone besides you needs to sign the Fellowship Agreement at your institution, click this button and add their contact information

New Users

Step 10 – Read our Compliance Commitment

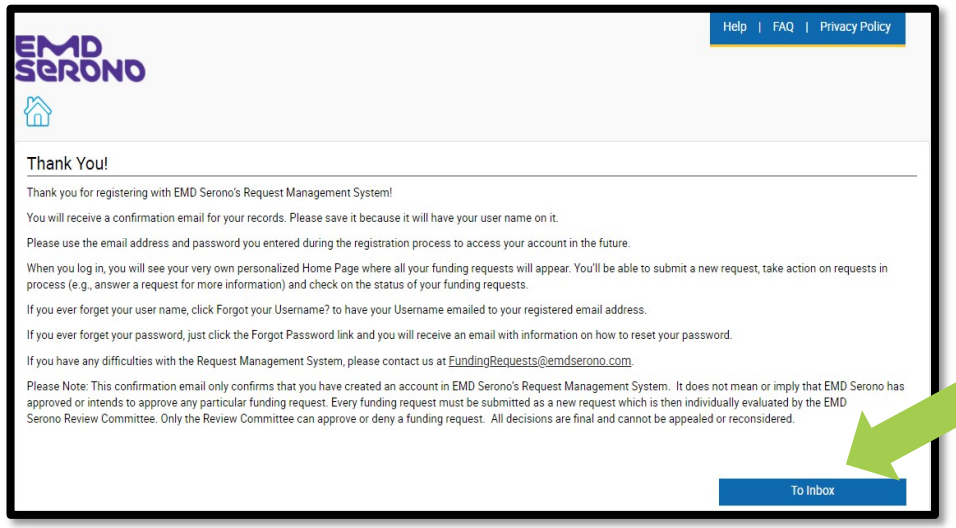
- **Click** the "I Agree" button and then **click** the "Complete Registration" button

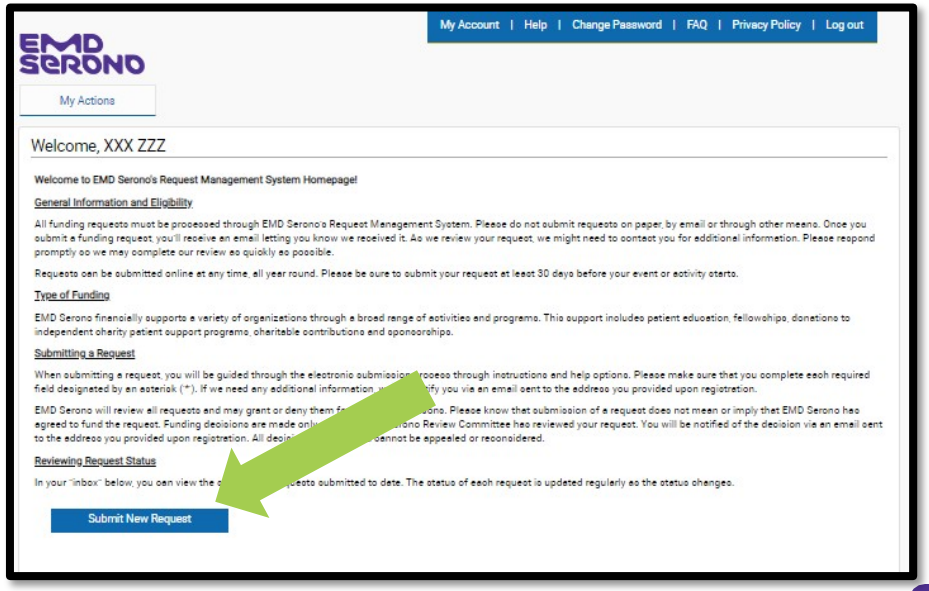


New Users

You are now registered. You will receive an email confirming your registration.

- To submit your Fellowship Proposal, **click** "To Inbox"
- On the next screen which appears, **click** "Submit New Request"





submitting your fellowship proposal

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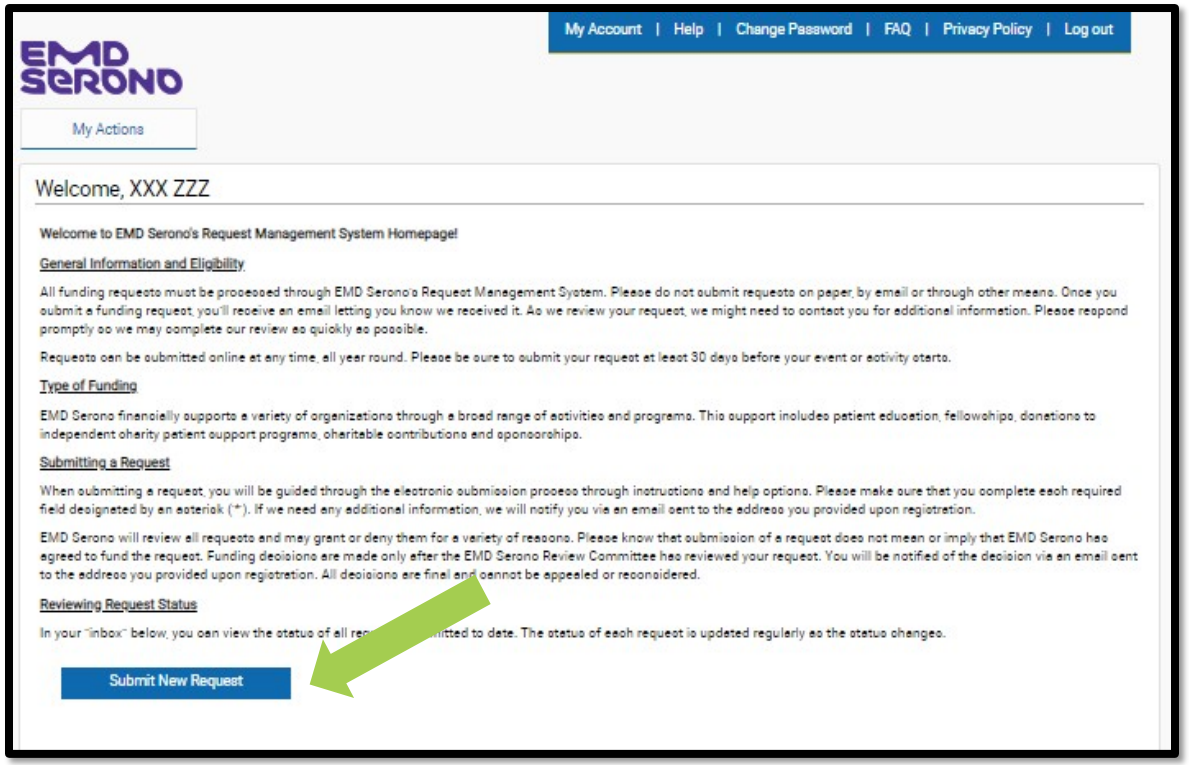
Fellowships

How to Submit a Proposal

(called a "Request" in the system)

- After logging in to the system, **Click** on "Submit New Request"

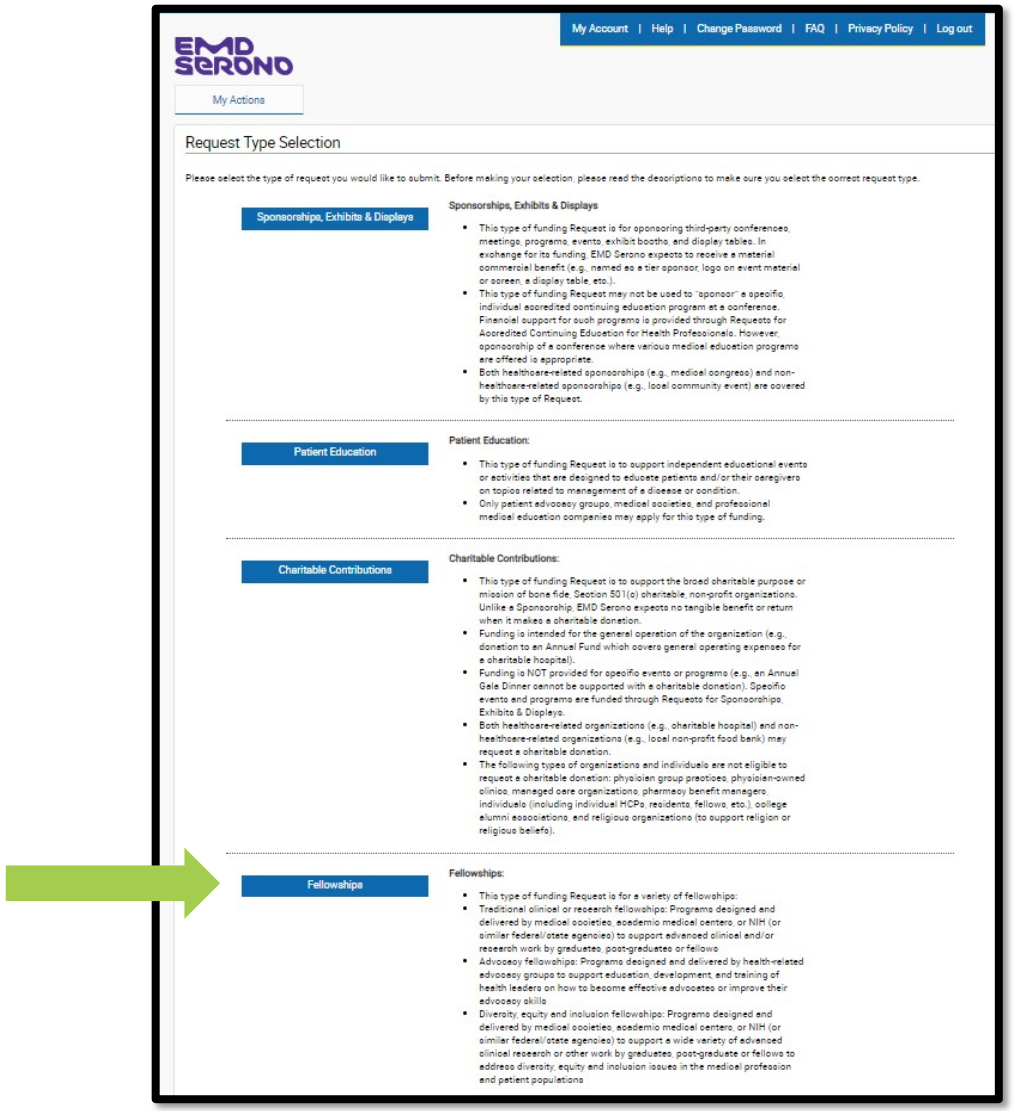


Confirmation Email

- After you submit your Request, you will receive a confirmation email.

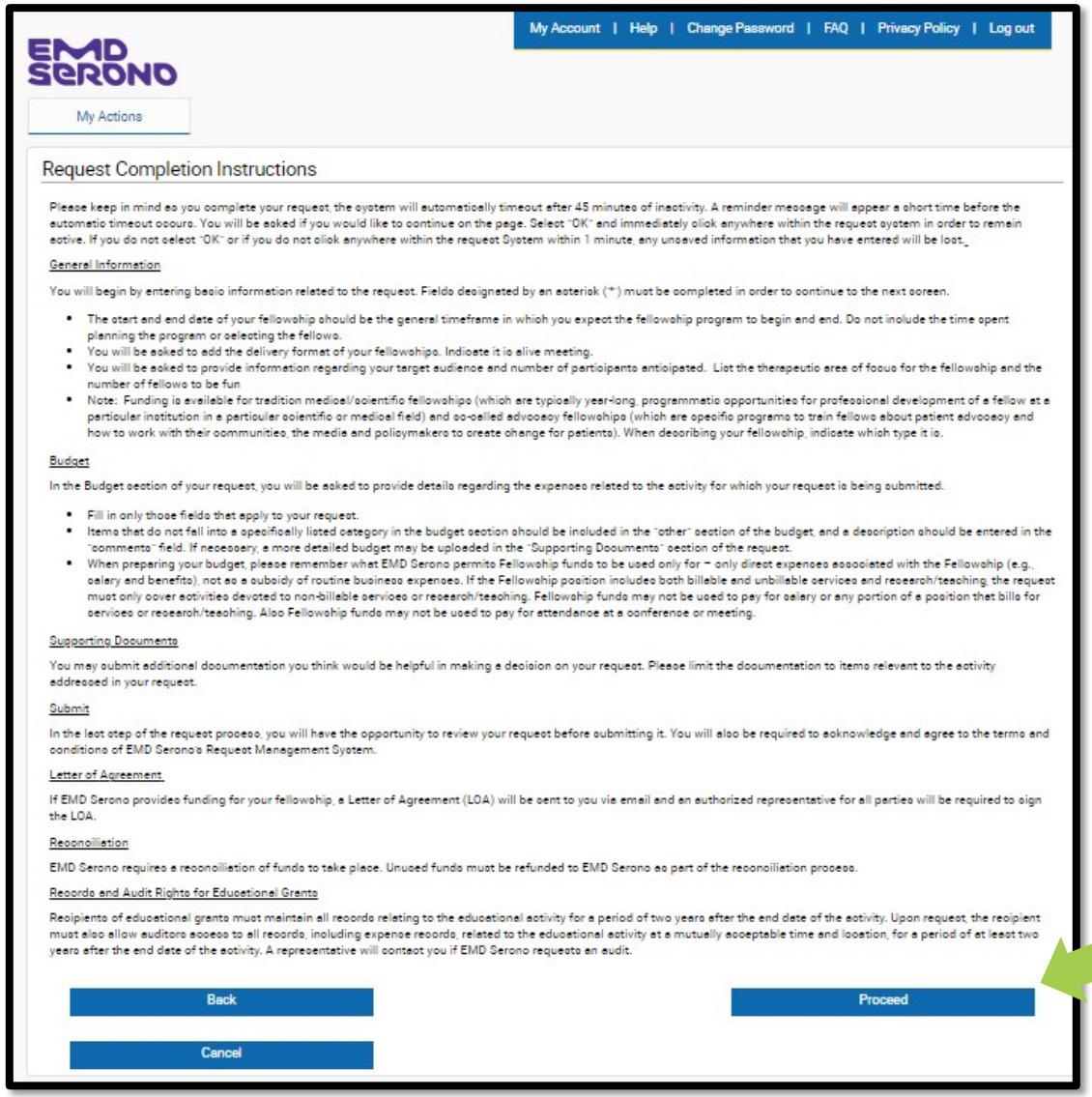
Funding Requests

- **Click** on “Fellowships”



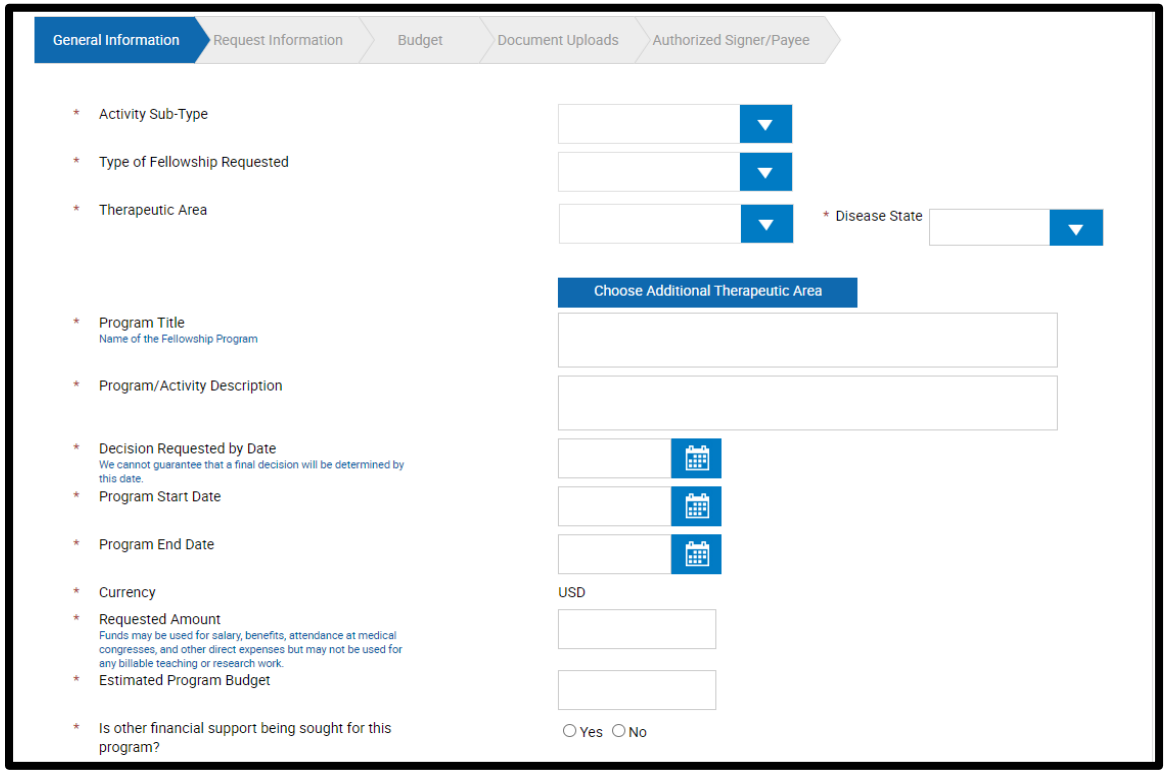
Funding Requests

- Read the “Request Completion Instructions”
- Then **click** the “Proceed” button
- You will then be brought to the “application” page for the Fellowship.



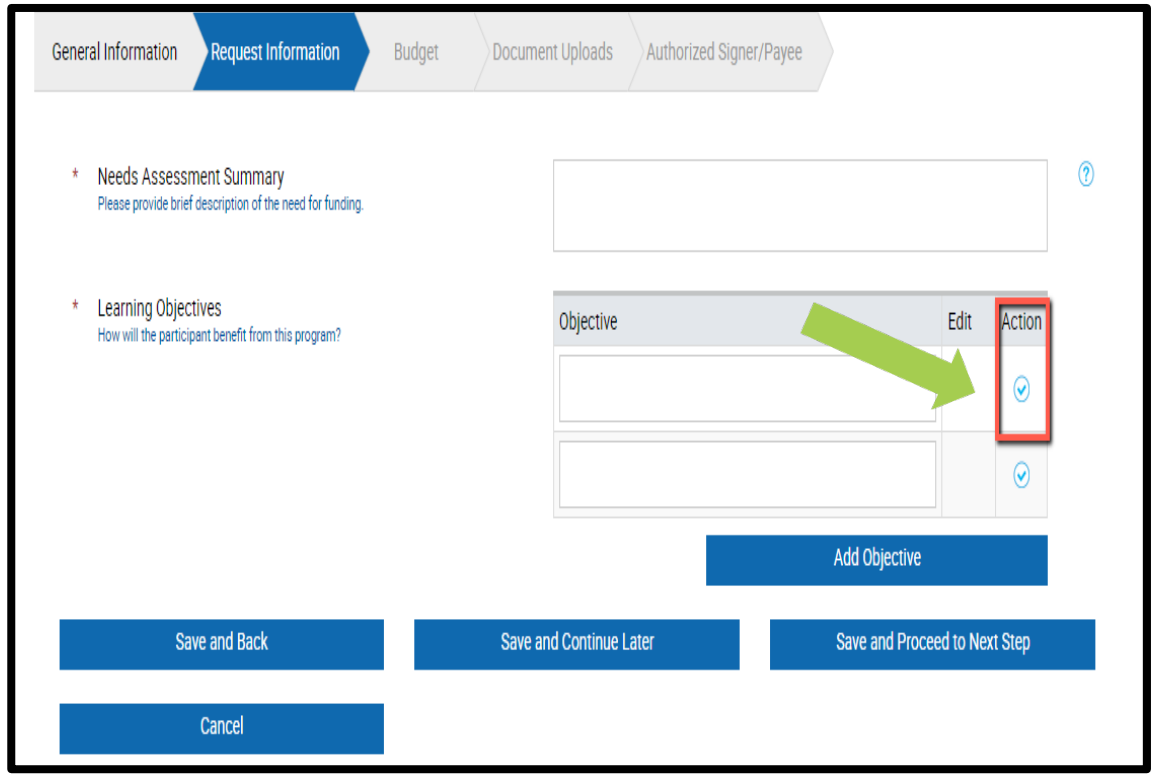
Fellowships

- Complete the “General Information” tab. Fill out the fields as shown below:
  - Activity Sub-Type: select “Fellowships"
  - Type of Fellowship Requested: “DEI Fellowship”
  - Therapeutic Area: Select Oncology
  - Disease State: Select EITHER “NSCLC” or “Bladder Cancer” (depending on which RFP you’re responding to)
  - Program Title: **IMPORTANT** - You must type in “RFP: 2025 I’M IN EMD Serono Onxodisparity Fellowship + [type in EITHER “NSCLC” or “Bladder Cancer”]
  - Program/Activity Description: **IMPORTANT** - You ***must*** type in “Oncodisparity Fellowship – see document with Detailed Information about Fellowship Program, which has been uploaded.”
    - See the “Fellowship Proposal Checklist” attached to the RFP for instructions on what to include in the “Detailed Information”
  - Program End Date: This may be any date on or before **July 1, 2026**.
  - Does Request have DEI aspect? **IMPORTANT** – select “yes” and then type “See document with Detailed Information about Fellowship Program, which has been uploaded.”
  - Fill out all other fields and **Click** “Save and Proceed to Next Step”



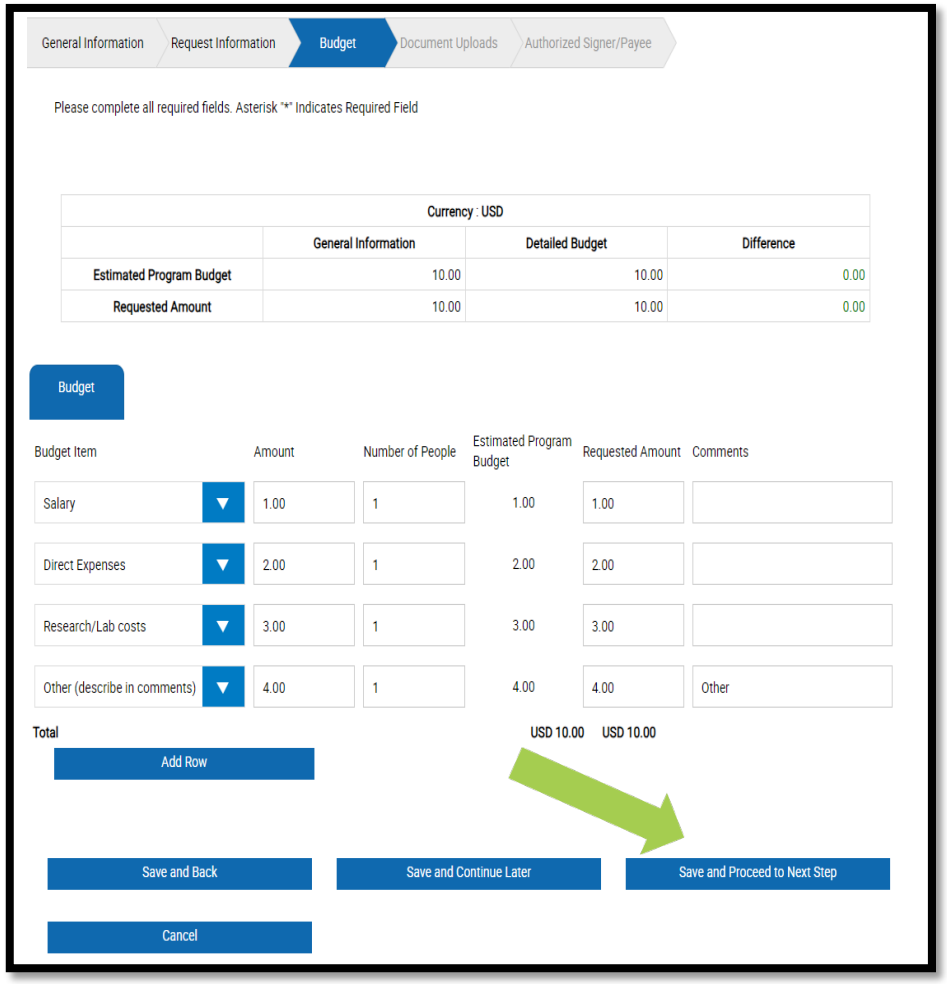
Fellowships

- Complete the “Request Information” tab. Fill out fields as indicated below:
  - Needs Assessment Summary: Tell us about the “need” your fellowship will address. If the need is fully described in the document with Detailed Information about Fellowship Program (see prior slide), then type: “See attached upload.”
  - Learning Objectives: The system requires you to enter at least one Learning Objective for your Fellowship.
  - **IMPORTANT:** You must type in an objective and then **click** the checkmark under the “Action” column on the far right. Once you do, a pencil icon will appear in the “Edit” column. If you wish, you may type in a second objective and then **click** the checkmark next to it.
- When done, **click** “Save and Proceed to Next Step”



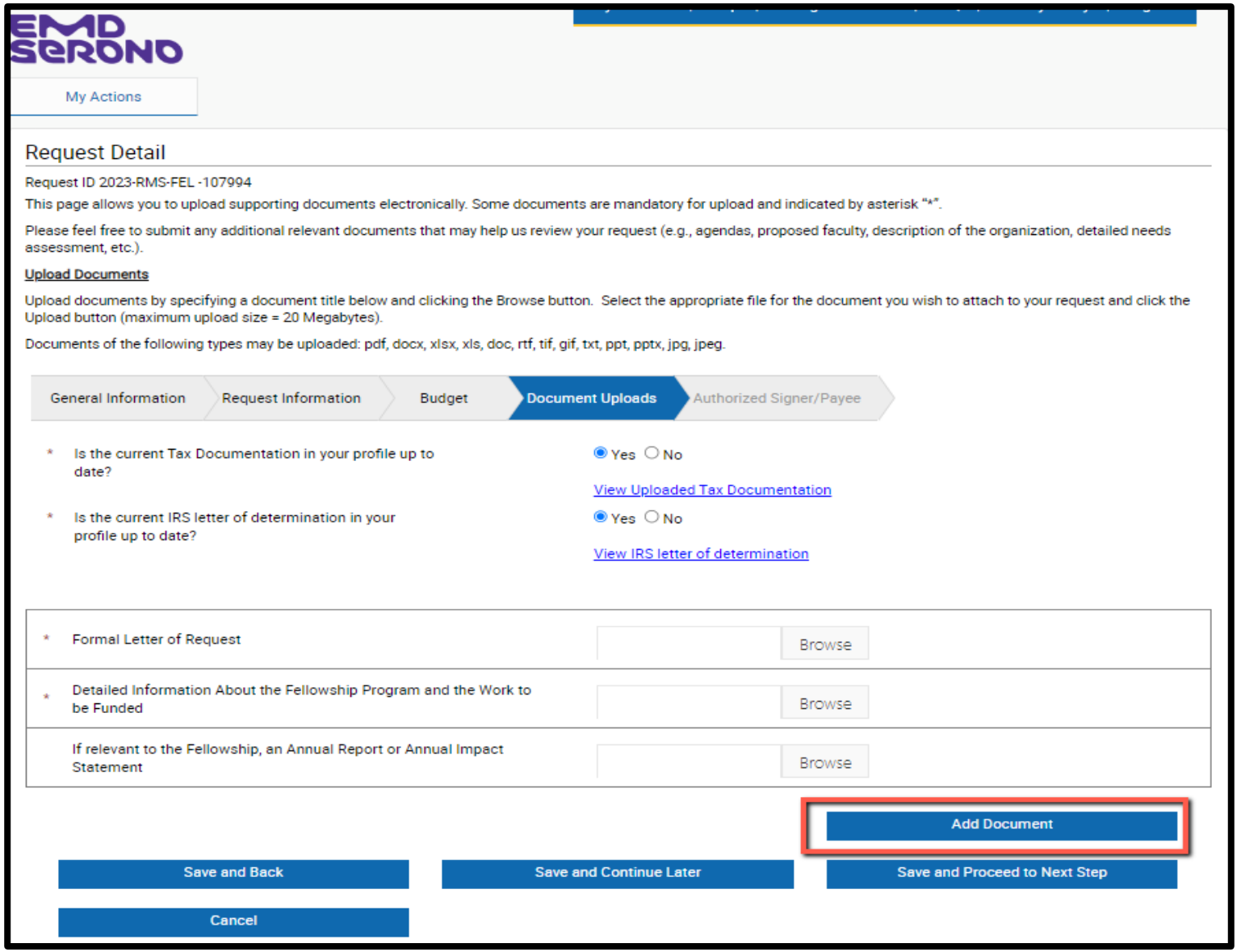
Fellowships

- Complete the “Budget” tab
- **Tips:**
  - The amount of the “Estimated Program Budget” and “Request Amount” will be pre-populated from the “Request Information” tab. The “Detailed Budget” column will show zeros and the “Difference” column will appear in red until you add your Budget Items.
  - The most common Fellowship expenses tend to be Salary, Direct Expenses (such as fringe benefits), and Other costs (such as travel to a congress, congress registration, publication expenses, etc.)
    - “Amount” – this field is asking for the TOTAL dollar amount needed for the Fellowship program (e.g., $400,000), which often is in excess of the amount provided by EMD Serono.
    - “Number of People” – the number of people supported by this amount
    - “Requested Amount” – **IMPORTANT:** this is the amount requested from EMD Serono (not to exceed a total of $75,000) and often will not be the TOTAL dollar amount needed; other funding sources may be needed.
  - When done, the “Detailed Budget” column will be filled out and the “Difference” column will show zeros.
  - **Click** “Save and Proceed to Next Step”



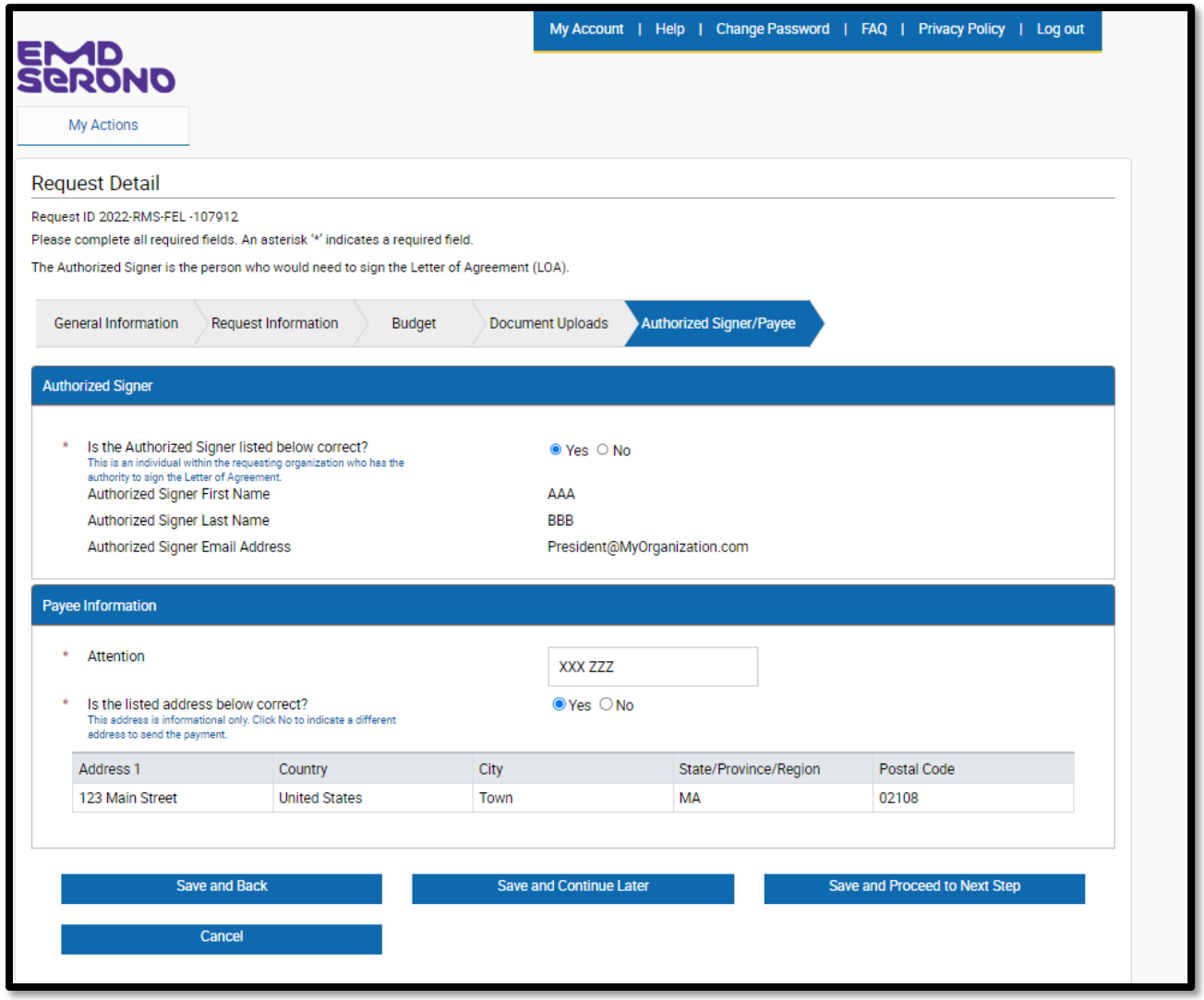
Fellowships

- Complete the “Document Uploads” tab
  - Formal Letter of Request: On institutional letterhead from the person responsible for your Fellowship Program; only needs to be 1 paragraph long
  - Detailed Info About Fellowship Program: See the “Fellowship Proposal Checklist” attached to the RFP for instructions on what to include in this document.
  - Annual Report: For purposes of this RFP, no need to upload an Annual Report or Annual Impact Statement.
  - Additional documents can be uploaded by **clicking** the “Add Document” box.
  - **Click** “Save and Proceed to Next Step”



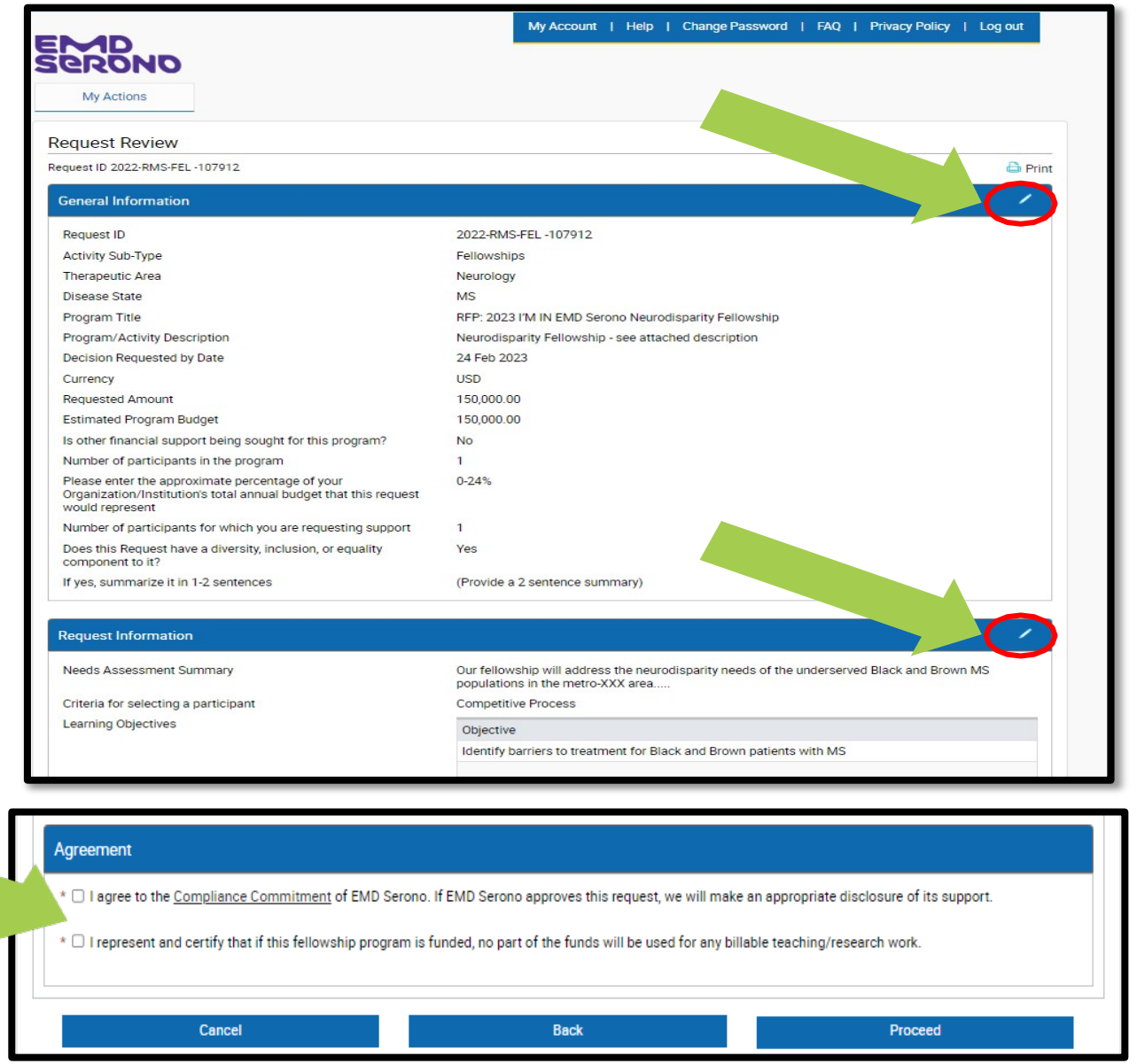
Fellowships

- Complete the “Authorized Signer/Payee” tab
    - If someone besides you must sign the Fellowship Agreement, list that person here.



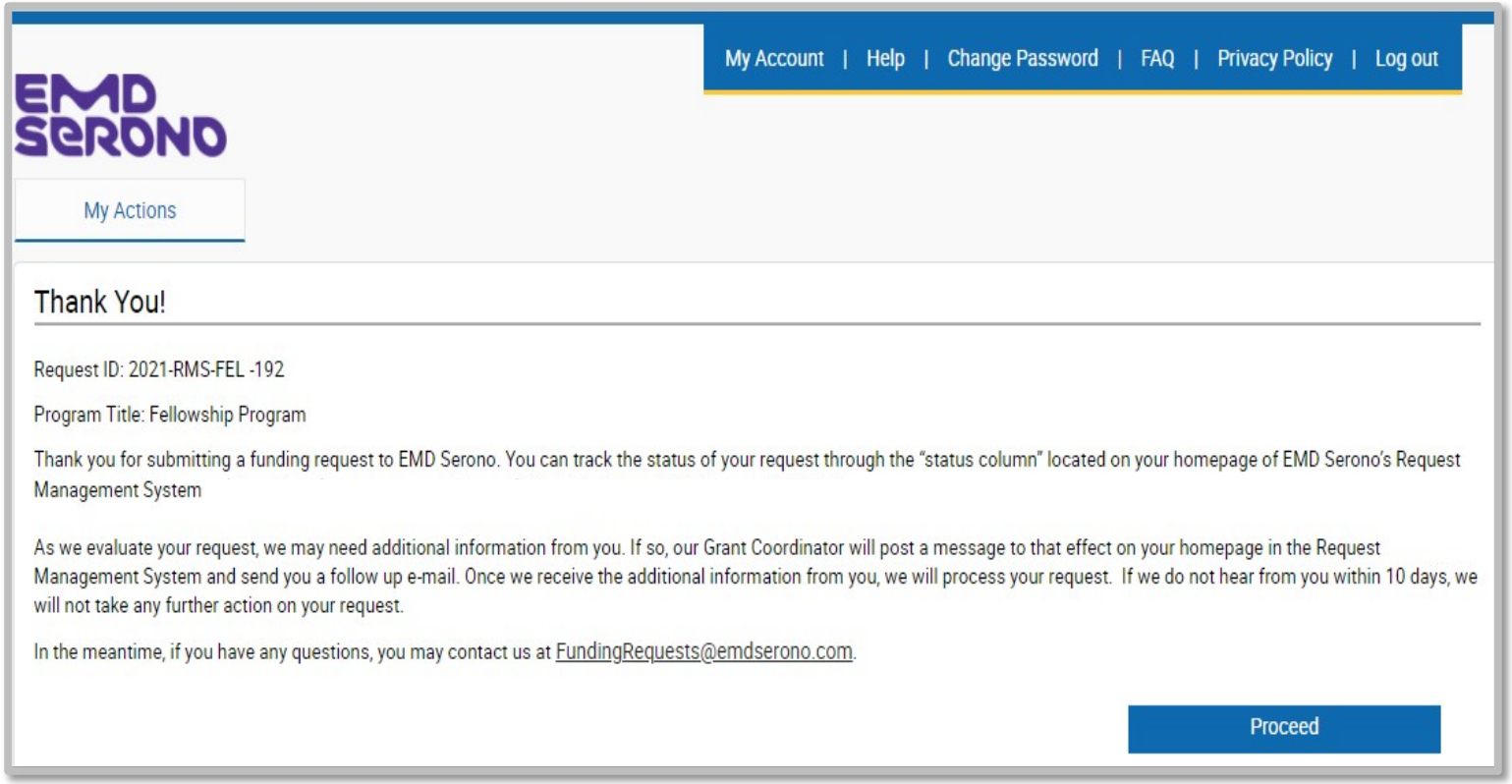
Fellowships

- On the “Review Request” page, review all the information to make sure it is correct.
- If you need to revise any information, **click** the “pencil” icon in the blue bar on the far right side (circled in red)
- At the bottom of the page, you must read and agree to our Compliance Commitment by **ticking both boxes** and then **click** “Proceed”.
- This submits your Proposal.



Fellowships

- After submitting your Request, you will see a “Thank You” screen which acknowledges your submission
- If you want to go to your inbox, **click** the “Proceed” button



Fellowships

Note about Fellowship Agreement and Method of Payment

- If your fellowship Proposal is selected for funding, a Fellowship Agreement must be entered into by November 1, 2024.
- Fellowship funding will be sent about 3 weeks later. Funding is made in one lump sum payment.
- To increase security and reliability, all payments are made via electronic ACH transfers.
  - Checks are no longer used.
- If your organization has received funding from EMD Serono before, then we already have your banking information.

First-Time Funding Recipients

- If your organization has not received funding from EMD Serono before, then we will contact you to set up an ACH transfer.

After the Fellowship: How Close Out Works

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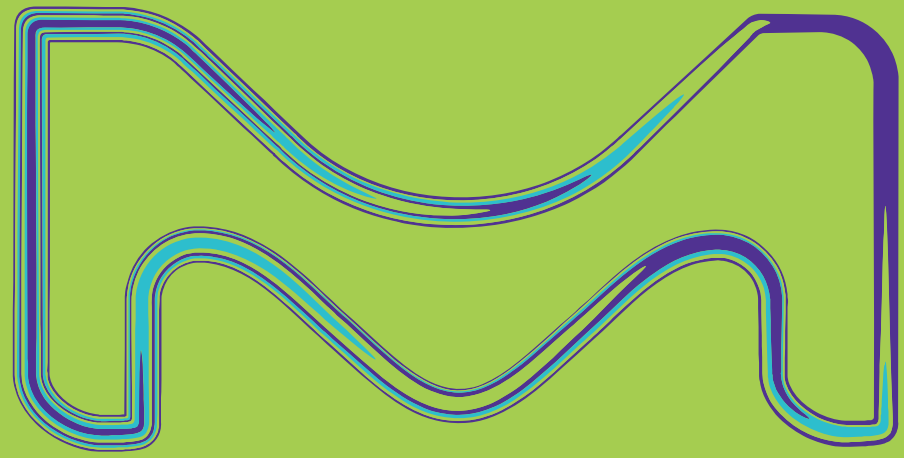
Reconciliation

- **After a Fellowship has been completed, a reconciliation via the portal will need to be done.**
  - In the reconciliation, you will need to indicate whether you have used all the Fellowship funding. If not, you will be asked to return any unused funds.
  - You will automatically receive an email when it is time to do the reconciliation.

If you have any questions about this ***Request for Proposals***, please contact Gretchen Terry-Leonard, US Medical Affairs, at gretchen.terry-leonard@emdserono.com or (949) 375-2316.

If you have any questions about the ***EMD Serono Request Management System***, please contact Claudia White, our Request Coordinator, at fundingrequests@emdserono.com or (212) 589-3507.