

# Bristol Myers Squibb navigating our new funding process

## User Training



## Background

Effective March 2, 2020, Bristol Myers Squibb will begin using one new consolidated Letter of Request application form

This consolidated format will allow you to change to a specific language to view application questions

# Agenda

The purpose of this training is to familiarize requestors with the process of submitting applications through the “Letter of Request”

## Topics covered are:

Process Overview

Navigating the BMS Grants and Giving website

The Application Portal

The Letter of Request (LOR)

Application Support



# Process overview

## Funding Process

All funding requests are to be submitted through a “Letter of Request” (LOR) application

- Incomplete LORs will be rejected without review
- After review by BMS, if additional information is needed to make a decision, we will notify you via email

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Multiple funding requests can be submitted

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Funding requests can be submitted throughout the year

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Requests submitted as a response to a “Request for Proposal (RFP)” or “Request for Education (RFE)” must be submitted by the deadline included in the RFP or RFE specifications



# Process overview

## Types of funding process

The system is used to request funding for:

- Corporate Sponsorship support
- Charitable Donations
- Independent Medical Education
- Continuing Medical Education
- Patient Education Support
- Support of Patient Advocacy organizations
- Scholarships
- Fellowships
- Corporate Memberships

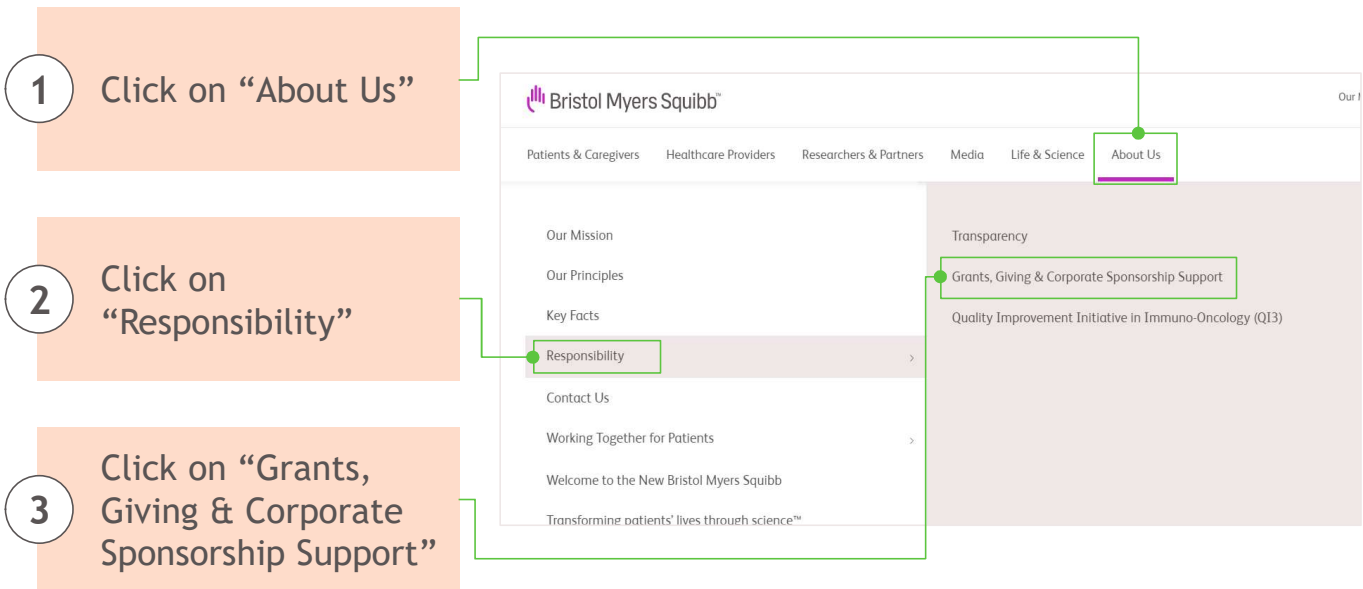
**The consolidated LOR is used for all funding requests**



# Navigating grants and giving website

## Grants, Giving & Corporate Sponsorship support website

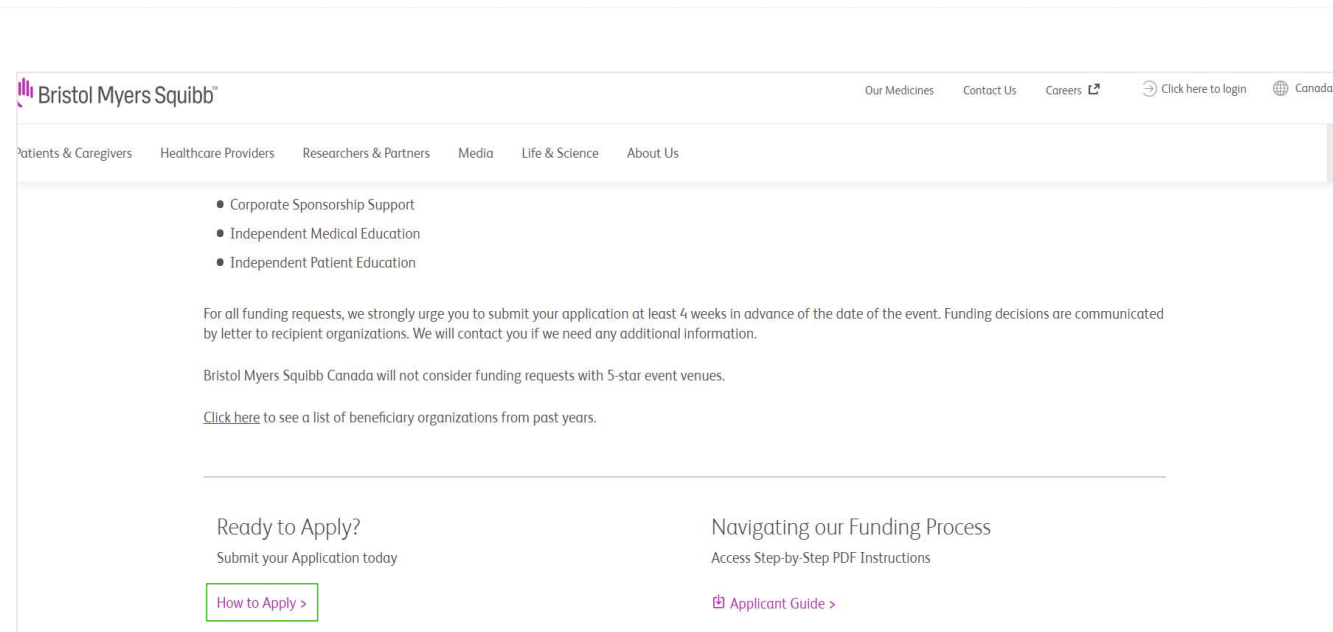
To access the Grants and Giving website from <https://www.bms.com/ca/en>



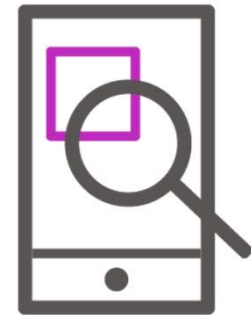
# Navigating grants and giving website

## Grants, Giving & Corporate Sponsorship support website (continued)

Please scroll down to the bottom and click “How to Apply”



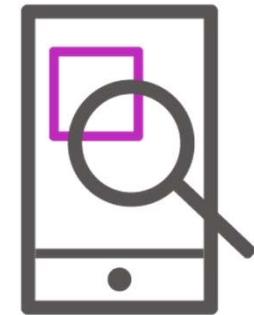
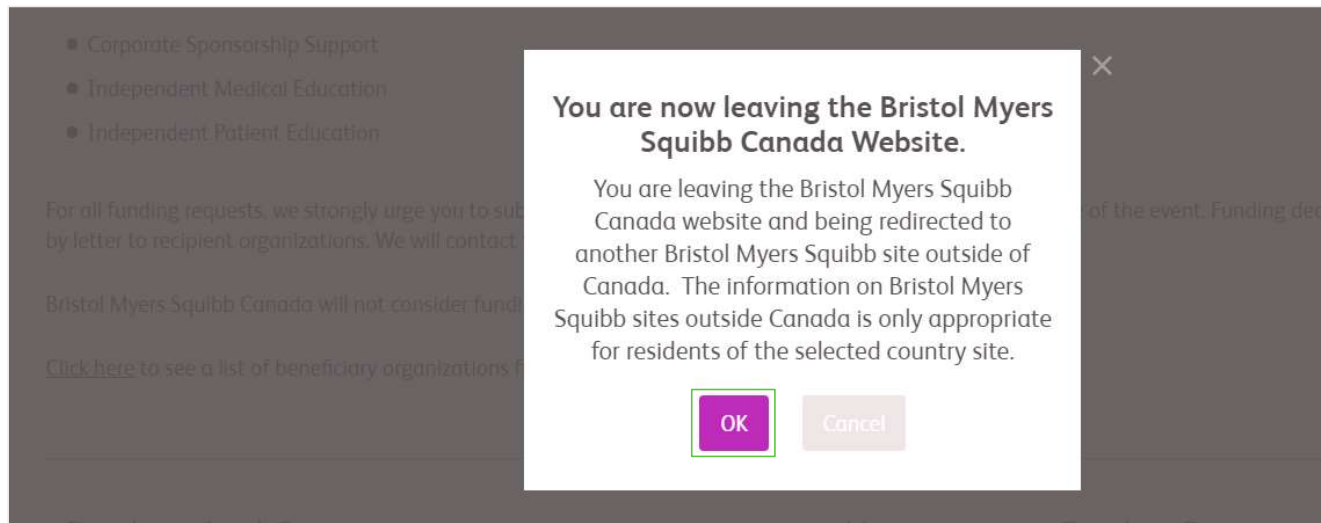
The screenshot shows the website's navigation menu with the following items: Patients & Caregivers, Healthcare Providers, Researchers & Partners, Media, Life & Science, and About Us. The main content area includes a bulleted list of support categories: Corporate Sponsorship Support, Independent Medical Education, and Independent Patient Education. Below this is a paragraph stating that funding requests should be submitted at least 4 weeks in advance and that decisions are communicated by letter. Another paragraph notes that 5-star event venues are not considered. A link is provided to view a list of beneficiary organizations from past years. At the bottom, there are two columns of text: 'Ready to Apply?' with a 'Submit your Application today' link and a highlighted 'How to Apply >' button; and 'Navigating our Funding Process' with a link to 'Access Step-by-Step PDF Instructions' and an 'Applicant Guide >' link.



# Navigating grants and giving website

## Grants, Giving & Corporate Sponsorship support website (continued)

You will receive a notification that you are leaving the Bristol Myers Squibb Canada website and redirected to the Bristol Myers Squibb site outside of Canada. Please press “OK”



# Navigating grants and giving website

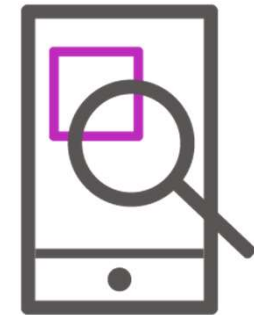
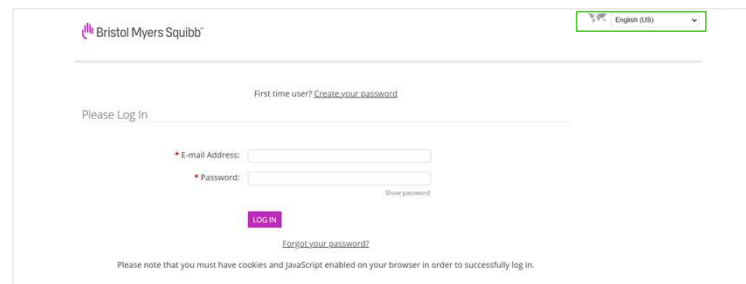
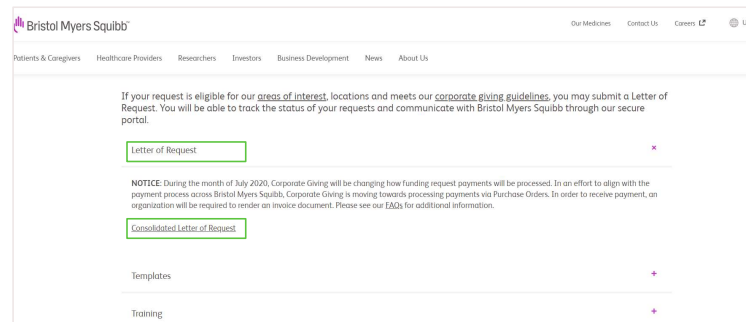
## Accessing the Letter of Request

You will be redirected to the [Bristol Myers Squibb Corporate Giving global site](#). When you are ready to submit your application click on the “Letter of Request” link under “How to Apply”. Then select “Consolidated Letter of Request”

### How To Apply

You can submit a simple Letter of Request (LOR), track the status of your request and communicate with Bristol-Myers Squibb through our secure portal.

The LOR can be viewed in 11 different languages. To view the LOR in your language please select the preferred language from the drop-down list on the top right corner of the Log In page.





# Application portal



Applicant Log-in



New User Registration



Add a New Organization



Account Portal - Welcome Page



Edit Profile



# Applicant log-in

## On this page you can:

- 1 Register and create a password - First time users only
- 2 Log in using your email address and password
- 3 Reset your password

This application is hosted by CyberGrants on behalf of Bristol-Myers Squibb. CyberGrants has recently updated our Privacy Policy. [Learn More](#)

**Bristol Myers Squibb**

First time user? [Create your password](#)

Please Log In

Please log in again.

\* E-mail Address:

\* Password:  [Show password](#)

**LOG IN**

[Forgot your password?](#)

Please note that you must have cookies and JavaScript enabled on your browser in order to successfully log in.

[Need Support?](#)

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1

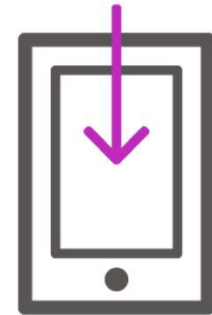
**FOR FIRST TIME USERS:** If you do not have a login account, **CLICK HERE**

2

**HAVE AN ACCOUNT:** Login using your credentials **HERE**

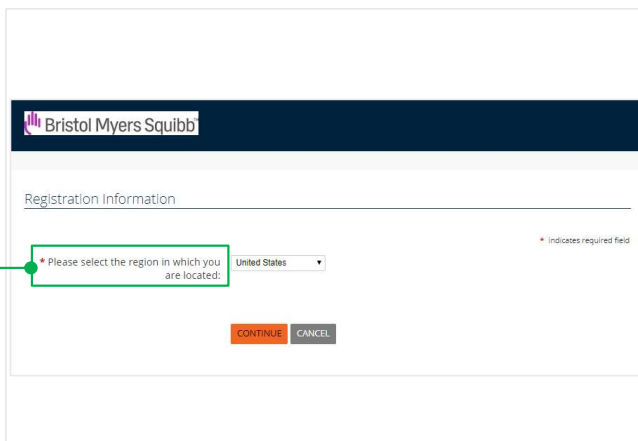
3

**FORGOT PASSWORD:** **CLICK HERE**



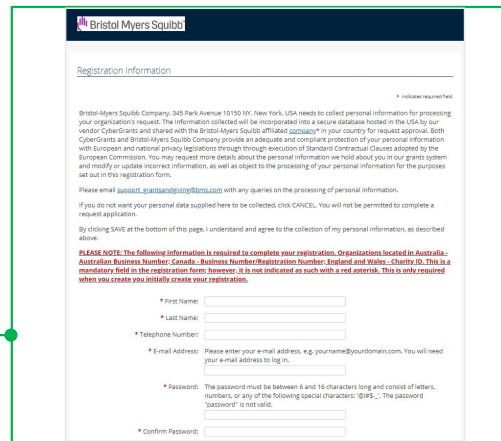
# New user registration

**Please note:** If this is your first time using our system, please check to see if your organization is in our database, before creating a new organization. You can search your organization by tax ID or organization name in the system



The screenshot shows the 'Registration Information' form with the 'United States' selected in a dropdown menu. A green box highlights the dropdown and a text prompt: '\* Please select the region in which you are located:'. Below the dropdown are 'CONTINUE' and 'CANCEL' buttons. A red asterisk indicates a required field.

1 Select the region in which you are located



The screenshot shows the 'Registration Information' form with fields for First Name, Last Name, Telephone Number, Email Address, Password, and Confirm Password. A green box highlights these fields. A red asterisk indicates a required field. A 'PLEASE NOTE' section is visible at the top of the form, detailing privacy policies and required information for registration.

2 Complete the Registration fields



*User Accounts in CyberGrants are individual based and not organization based. A single user can be associated with multiple organizations*

## New user registration (cont'd)

On the “*New Registration*” page, we ask you to please read the listed Privacy laws. By proceeding to register, you agree to the collection of your personal information. If you do not wish your personal data to be collected, click CANCEL. You will not be permitted to complete a request

Bristol-Myers Squibb Company, 345 Park Avenue 10150 NY, New York, USA needs to collect personal information for processing your organization's request. The Information collected will be incorporated into a secure database hosted in the USA by our vendor CyberGrants and shared with the Bristol-Myers Squibb affiliated [company](#)\* in your country for request approval. Both CyberGrants and Bristol-Myers Squibb Company provide an adequate and compliant protection of your personal information with European and national privacy legislations through through execution of Standard Contractual Clauses adopted by the European Commission. You may request more details about the personal information we hold about you in our grants system and modify or update incorrect information, as well as object to the processing of your personal information for the purposes set out in this registration form.

Please email [support\\_grantsandgiving@bms.com](mailto:support_grantsandgiving@bms.com) with any queries on the processing of personal information.

If you do not want your personal data supplied here to be collected, click CANCEL. You will not be permitted to complete a request application.

By clicking SAVE at the bottom of this page, I understand and agree to the collection of my personal information, as described above.



**Please Note:** These privacy laws apply to ex-US applicants

# Add a new organization

If you want to add a new organization to your account, click on “click here to add a new organization to your account” link

Organization information

Organization Name:  \* required field

Zip/Postal Code:

Organization Country:

IRS AND/OR NCES information

Tax ID/Charity ID (if applicable):  Enter the nine digit U.S. Tax ID of the 501(c)(3) non-profit organization for which you are applying. If you do not know the organization's Tax ID, please contact the business office of the organization or call the IRS toll-free at 1-877-839-5500. If your organization is not located in the United States or otherwise does not have a U.S. Tax ID number then leave this field empty.

School District ID (U.S. Pre-K-12 public schools and public school districts only):  For U.S. public schools, the District ID should be the first 7 digits of a 12 digit National Center for Education Statistics (NCEES) School ID. If you do not know the school's NCEES information, please visit the NCEES website.

School ID (U.S. Pre-K-12 public and private schools only):  For U.S. public schools, the School ID should be the last 5 digits of a 12 digit National Center for Education Statistics (NCEES) School ID. For private schools, the School ID should be the 8 digit NCEES School ID. If you do not know the school's NCEES information, please visit the NCEES website.

My Organizations

If you would like to change the organization that you are currently logged in to, please select the appropriate organization from the list below.

You are currently logged in as:

The New Test Organization  
Trenton NJ 08620  
United States

test organization  
Fort Dix United States

SWITCH ORGANIZATION

Once you have multiple organizations associated with your account, you will always be taken to the organization selection page after login, to select the organization that you want to work with

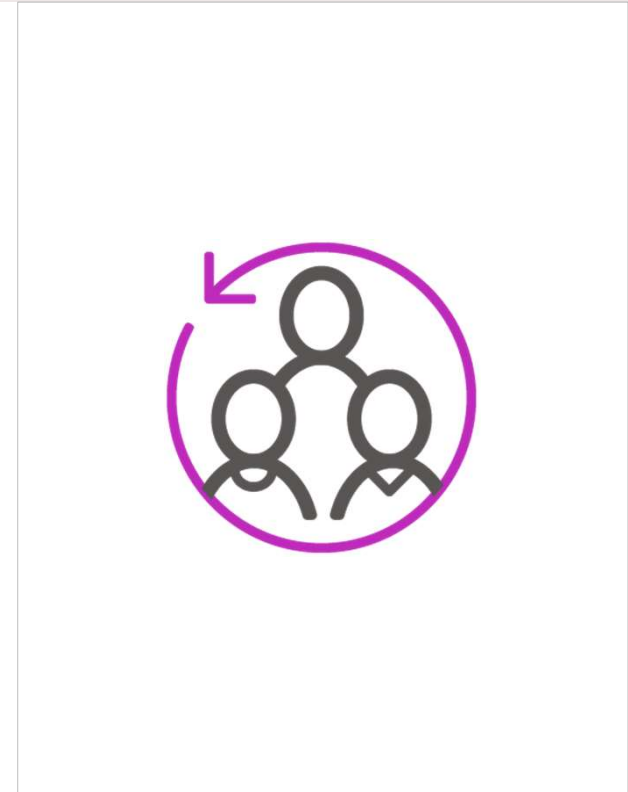
# Add a new organization (cont'd)

Once you successfully login, this is your “Welcome Page”

On this page you can

- 1 Identify the name of your organization
- 2 Add a new organization to your account
- 3 Edit your profile

The screenshot shows the 'Welcome Page' for a user logged into the Bristol Myers Squibb system. The page header includes the BMS logo and the text 'Bristol Myers Squibb'. In the top right corner, there are two links: 'EDIT PROFILE' and 'LOGOUT'. The main content area starts with a 'Welcome,' message. Below this, a green box highlights the text: 'The organization you are currently associated with is test organization.' Another green box highlights a link: 'click here to add a new organization to your account.' The page also contains several paragraphs of text, including a notice about Celgene being part of BMS and a list of sections for the Online Letter of Request: 1. Contact information, 2. Organization Information, 3. Letter of Request, 4. Attachments, 5. Certification. At the bottom, there is a note: 'We reserve the right to reject application if the information provided is not complete.'



# Account portal - Welcome page

The “Welcome Page” will be your home page each time you login

Please check the accuracy of your name and the organization you are associated with before you start a new application

On this page you can find

- 1 “Start a New Letter of Request” link
- 2 Impact Reports\* requiring action
- 3 All your application(s) requiring action
- 4 Submitted Applications
- 5 “My Organizations” showing all the organizations you are associated with

The screenshot shows the account portal interface with the following sections and callouts:

- Navigation Bar:** Welcome Page, Contact Information, Organization Information, Letter of Request, Attachments, Certification.
- Start a New Letter of Request:** A red box highlights the link, with a red arrow pointing to item 1 in the list.
- Impact Reports Requiring Action:** A green box highlights the section header, with a green arrow pointing to item 2. Below it is a table:

Action	Project Title	Report Type	Report Due Date
Due	Education Awareness	CG - BMS Contract	06/21/2014
Due	Test Proj Budget	DME - BMS Contract	11/14/2014
- Applications Requiring Action:** A green box highlights the section header, with a green arrow pointing to item 3. Below it is a table:

Action	Project Title	Application Date	Proposal Type
View	Charitable Donation	03/21/2014	
View	Charitable Donation	03/21/2014	
- Submitted Applications:** A green box highlights the section header, with a green arrow pointing to item 4. Below it is a table:

Action	Project Title	Application Date	Proposal Type
View	test	06/04/2015	
- My Organizations:** A green box highlights the section header, with a green arrow pointing to item 5. Below it is a list of organizations with radio buttons for selection.



\*Impact Reports are follow up reports that will be sent to you via the system to gather additional information about the request. These can be pre or post-approval of a request

# Edit profile

Welcome,

The organization you are currently associated with is test organization.

If you work with multiple organizations, [click here to add a new organization to your account.](#)

Celgene is now part of Bristol-Myers Squibb creating a leading biopharma company positioned to help address the needs of patients with serious diseases. Funding requests may continue to be submitted via the current BMS processes until further notice.

During this transition period, we will jointly review all requests as a team to avoid duplication of funding.

In addition, we are currently updating our FAQs, which will be updated on or about December 15, 2019. Any questions can be submitted to [grantsandgiving@bms.com](mailto:grantsandgiving@bms.com).

The Online Letter of Request consists of the following sections, each of which must be completed for your proposal to be considered:

1. Contact information
2. Organization information
3. Letter of Request
4. Attachments
5. Certification

Once completed, all Letters of Request created are immediately submitted to Bristol-Myers Squibb.

**Your Profile**

\* indicates required field

\* First Name:

\* Last Name:

\* Telephone Number:

\* E-mail Address:

Change E-mail

Change Password

Password:

**SAVE** **CANCEL**

[Need Support?](#)

1

To make changes to your profile, click on “edit profile”

2

Here, you can make all the appropriate edits you need

3

Once you are finished, click “save” located at the bottom of the screen

4

Click, “return to the home page” to proceed with your application





# Letter of request



Welcome Page



Contact Information



Organization Information



Letter of Request



Attachments



Certification



Reviewing and Submitting Application



# Welcome page

When beginning a *New Request* click the “**Start a New Letter of Request**” link on the Welcome Page



All Corporate Giving and IME Requests can be requested throughout the year except for the Letter of Requests that are made in response to a specific **Request for Proposal or Request for Education** with a submission deadline



# Contact information

This section allows you to select all the individuals you would like to receive correspondence for this request

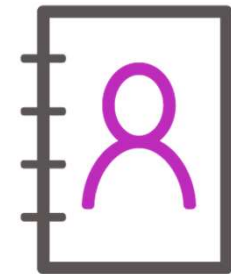
The screenshot shows a web interface with a navigation bar containing 'Welcome Page', 'Contact Information', 'Organization Information', 'Letter of Request', 'Attachments', and 'Certification'. A 'LOGOUT' link is in the top right. The 'Contact Information' section is active. It features a 'Match' checkbox with the instruction 'Match: Check the box to associate this individual with this application.' Below this are input fields for 'Name: (Unknown)', 'Telephone Number:', and 'E-mail Address:'. A red asterisk indicates a required field. At the bottom of the form are 'SAVE AND PROCEED' and 'CREATE NEW' buttons. A 'Need Support?' link is located below the buttons. Three green callout lines with numbered circles (1, 2, 3) point to the 'Match' checkbox, the 'CREATE NEW' button, and the 'Need Support?' link respectively.

1 You may select multiple individuals to receive correspondence for this grant

2 Click "Create New" to add additional contacts

- Once an individual(s) information is added, this contact information will remain under this section

3 To delete a "contact," click on the name of the individual THEN, when prompted, click on "delete contact"



# Organization information

This section asks a series of questions about your organization

WELCOME PAGE CONTACT INFORMATION ORGANIZATION INFORMATION LETTER OF REQUEST ATTACHMENTS CERTIFICATION

Organization Information

\* Indicates required field

\* Legal Name Please provide the Legal Name of the Organization.

\* Country

\* Address

\* City

State

Zip

\* List of Board Members, Principals and/or Key Executives Please provide the first and last names of your organization's current board members, principals and key executives. With each individual's name, please include the company they work for, if applicable.

ADD TO LIST

REMOVE FROM LIST

\* Website Address

This section displays/ captures information regarding your organization. Please complete the information as per directed in the application



**NOTE: The Requesting organization MUST be the Payee organization**

# Letter of request

## This section captures the details of the Funding Request

LOGOUT

Welcome Page   Contact Information   Organization Information   **Letter of Request**   Attachments   Certification

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Letter of Request \* Indicates required field

**We reserve the right to reject application if the information provided is not complete.**

\* Request Title

\* Request Start Date Anticipated meeting start date or launch date for enduring/online/recurring programs.

\* Request End Date

\* Currency type for funds being requested:

\* Total Amount of funding being requested from BMS: Amount being sought from BMS for this request

\* Charitable? Can any portion of the funds being requested be considered a charitable donation?

\* Total budget amount: The total budget for this request including funds being sought from BMS

\* Where is the proposed request being implemented? *Include Country/Geographic region. For Live programs, please include venue site(s), if applicable.*  
  
(2000 character maximum)

\* Therapeutic Area of Request (?) Please select all applicable Therapeutic area of Request.  

- Cardiovascular - General Education - Anticoagulation
- Cardiovascular - Stroke Prevention/Atrial Fibrillation
- Cardiovascular - VTE Treatment and Prevention
- Immunoscience - Arthritis - Rheumatoid (RA)
- Immunoscience - Psoriasis

Complete the fields in the Letter of Request as per instructions. Incomplete Letter of Requests will be rejected without review



# Attachments

All documents **MUST** be uploaded in **PDF** format

LOGOUT

Welcome Page    Contact Information    Organization Information    Letter of Request    **Attachments**    Certification

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## Attachments

\* Indicates required field

Attachments support your application and provide BMS with the information to make a speedy decision on your funding request. Also, please note that the BMS logo should not be used in Brochures or any other communication until funding request is approved and a Letter of Agreement is signed.

Budget Form (if providing budget)	Provide Budget details to help BMS understand how the request funds will be utilized. <a href="#">Click here</a> to access the BMS Budget template. If you need assistance in completing the budget template, <a href="#">click here</a> for a step by step instruction guide. Please note that a Budget Form is mandatory for Independent Medical Education requests. <i>Must be in PDF format.</i>
	<input type="button" value="UPLOAD FILE"/>
Agenda/Curriculum	For a live (physical or online) program, please provide an agenda with detailed timelines. <i>Must be in PDF format.</i>
	<input type="button" value="UPLOAD FILE"/>
Sponsorship Packet	If applicable, please provide a sponsorship prospectus for your request. <i>Must be in PDF format.</i>
	<input type="button" value="UPLOAD FILE"/>
Full Proposal	If applicable, provide a detailed proposal for your funding request. <i>Must be in PDF format.</i>
	<input type="button" value="UPLOAD FILE"/>
Other Attachments	Any other supporting documents you think may help in reviewing your funding request. <i>Must be in PDF format.</i>
	<input type="button" value="UPLOAD FILE"/>

[Need Support?](#)



# Certification

In this section, you are requested to read the certification statement and certify your agreement with it

LOGOUT

Welcome Page   Contact Information   Organization Information   Letter of Request   Attachments   **Certification**

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Certification \* indicates required field

I am fully authorized to submit this request on behalf of the requesting organization and any partner organization, and I affirm that all responses and information provided in response to this application are truthful, accurate and complete.

I acknowledge that grants made by BMS must not in any way be connected to, or conditioned upon, any prescribing, purchasing, or recommending any product manufactured or marketed by BMS.

I acknowledge that submission of a request for a BMS Charitable Giving or an educational grant does not mean that the request will be funded by BMS, and that only a BMS grant review committee can approve funding of such requests.

I understand that BMS cannot and will not commit to process any request within a specific period of time. I understand that in certain instances where BMS decides to make a grant, the company may choose to award that grant in installments and/or for a lesser amount than the original request.

Bristol-Myers Squibb Company, 345 Park Avenue 10150 NY, New York, USA needs to collect personal information for processing your organization's request. The information collected will be incorporated into a secure database hosted in the USA by our vendor CyberGrants and shared with the Bristol-Myers Squibb affiliated [company](#)\* in your country for request approval. Both CyberGrants and Bristol-Myers Squibb Company provide an adequate and compliant protection of your personal information with European and national privacy legislations through through execution of Standard Contractual Clauses adopted by the European Commission. You may request more details about the personal information we hold about you in our grants system and modify or update incorrect information, as well as object to the processing of your personal information for the purposes set out in this registration form.

Please email [support\\_grantsandgiving@bms.com](mailto:support_grantsandgiving@bms.com) with any queries on the processing of personal information.

\* AS A CONDITION TO THE SUBMISSION OF YOUR REQUEST, PLEASE READ AND INDICATE AGREEMENT BY CERTIFYING THE ABOVE STATEMENT.    I Certify

**SAVE AND PROCEED**

**1** Once you agree to all the statements provided on this page as well as the “Terms and Conditions”, check “I Certify” to proceed further

**2** Please Note: Privacy laws apply to ex-US applicants



# Reviewing and submitting application

LOGOUT

Welcome Page   Contact Information   Organization Information   Letter of Request   Attachments   Certification

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Incomplete Application \* Indicates required field

**You have not filled in the following required fields. Click on the section name to return to that section and then provide valid responses to the following questions. These fields must be completed in order to submit your application**

[Contact Information](#)

- First Name
- Last Name
- E-mail Address

[Organization Information](#)

- Address
- List of Board Members, Principals and/or Key Executives
- Website Address
- Mission statement and purpose
- Is your organization a non-profit or non-governmental organization (NGO)?
- Is the organization Accredited?
- State

[Letter of Request](#)

- Request Title
- Request Start Date
- Request End Date

## Incomplete Application

- 1 Under each section heading, the system will identify what required field(s) were not completed
- 2 Complete the missing fields by returning to each section and adding in the missing information
- 3 Review all information you entered for accuracy
- 4 Submit the application once you are finished

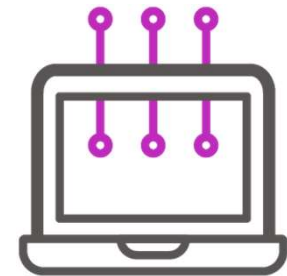
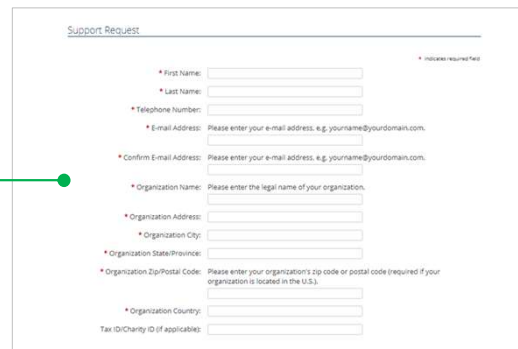
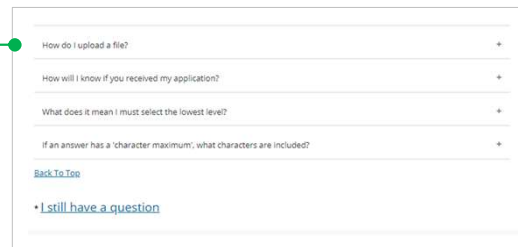




# Application support

To get application support, follow the steps below

- 1 Click the “Need Help?” link at the bottom of the application
- 2 Review listed application support questions. If you still have question(s), click on the “I still have a question” link
- 3 Fill out the form with your question(s)
- 4 Allow 24-48 business hours for the support team to respond



Check FAQs located on the BMS Grants and Giving website

- Link: <http://www.bms.com/responsibility/grantsandgiving/support/Pages/Resources.aspx>

For non-support questions: Send email to [grantsandgiving@bms.com](mailto:grantsandgiving@bms.com)

Call the Help Desk: 1-800-831-9008  
(Currently only answered in English)