

# SAKURA Independent Medical Education (IME) & Fellowships

Grant Applicant User Guide



# Using This Guide

## NAVIGATION

Quickly navigate through the guide using the icons in the top-right corner of each page



Guide Main Menu

## SUPPORT RESOURCES



To access the Sakura Grants Portal, click this link:

[https://otsuka.envisionpharma.com/ienv\\_otsuka/visiontracker/portal/login.xhtml?pgm=GRANTS](https://otsuka.envisionpharma.com/ienv_otsuka/visiontracker/portal/login.xhtml?pgm=GRANTS)



For Sakura process related questions, please contact:

[grants@otsuka-us.com](mailto:grants@otsuka-us.com)



For technical support, and system access support, contact the Envision Pharma Helpdesk at:

[helpdesk@envisionpharmasupport.com](mailto:helpdesk@envisionpharmasupport.com)



# Guide Contents

## 01 | REGISTRATION AND ACCESS

- [Access the Sakura Grants Portal](#)
- [New Sakura Grants Account Registration](#)
- [Log Into the Sakura Grants Portal](#)

## 02 | NAVIGATING THE SYSTEM

- [System Icons](#)
- [Navigation Overview](#)
- [Global Tools](#)
- [Profile](#)
- [Context Bar and Menu](#)
- [Customize Your View](#)
- [Dashboard](#)
- [Workbench](#)

## 03 | SUBMIT A NEW APPLICATION

- [Create a New Application](#)
- [Acknowledgment](#)
- [Attestation](#)
- [Program Details](#) (Education Programs only)
- [Program Details](#) (Fellowships only)
- [Personnel](#) (Fellowships only)
- [Organizations](#)
- [Fellowship](#) (Fellowships only)
- [Budget](#) (Education Programs only)
- [Activities](#) (Education Programs only)
- [Attachments](#)
- [Submission](#)

## 04 | POST SUBMISSION ACTIVITIES

- [Request for Additional Information](#)
- [Letter of Agreement \(LOA\) Process](#)
- [Request a Change of Scope](#) (Education Programs only)
- [Update Program Activities](#) (Education Programs only)
- [Program Closure](#) (Education Programs only)
  - [Budget Reconciliation](#)
  - [Program Outcomes](#)
  - [Transfer of Value](#)
- [Program Reconciliation](#) (Fellowships only)
  - [Closure](#)
  - [Transfer of Value](#)
- [Program Closure Notification](#)



# 01 | Registration and Access

- [Access the Sakura Grants Portal](#)
- [New Sakura Grants Account Registration](#)
- [Log into the Sakura Grants Portal](#)

# Access the Sakura Grants Portal

Navigate to the **Sakura Grants Portal** landing page: [https://otsuka.envisionpharma.com/ienv\\_otsuka/visiontracker/portal/login.xhtml?pgm=GRANTS](https://otsuka.envisionpharma.com/ienv_otsuka/visiontracker/portal/login.xhtml?pgm=GRANTS)

## ACCESS THE SYSTEM

Home | How to Apply | Our Process | FAQ

**System Login**

User Name  
Password

Register for New Account  
Forgot Password?  
Forgot Login ID?

Log In

**Contact Us**

Tech Support:  
helpdesk@envisionpharmasupport.com

Tech Support: 1 860  
266 4944

Otsuka Grants:  
grants@otsuka-us.com

Otsuka Grants: 1 800  
438 6120

Areas of Interest | Ethical, Responsible & Transparent | User Guide

From EPG site: © 2016 Envision Pharma Limited. "Envision Pharma Group", "Envision Technology Solutions", "DataVision", "Visiontracker", "Clear", "Executive Window", "MedInfo", "iEnvision", "Envision Scientific Solutions", "Evidence Scientific Solutions", "Engage Scientific Solutions", "Excel Scientific Solutions", "ProScribe", "Envision Market Access Solutions", and "iGLevate", are registered trademarks or trademarks of Envision Pharma Limited or its affiliate/group companies. All rights reserved.

### RETURNING APPLICANTS

Log into the Sakura Grants Portal by entering your credentials in the **System Login** section

### NEW APPLICANTS

Must first create an account by selecting the **Register for New Account** link

### SYSTEM SUPPORT

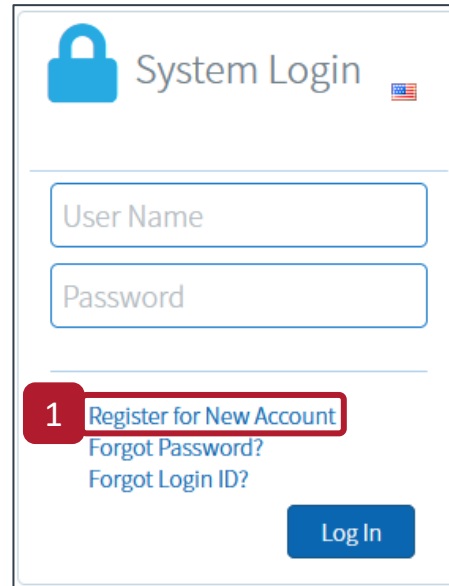
# New Sakura Grants Account Registration (1 of 2)

New Applicants must complete registration to create an account before proceeding with applications for Sakura ME grants

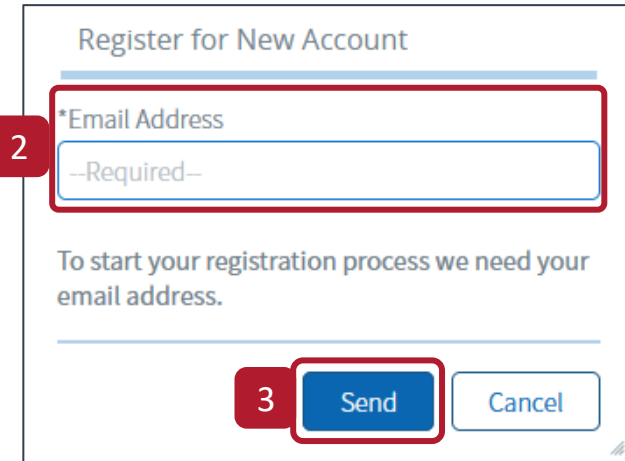
To register for a **New Sakura Grants Account**:

1. Self-register for an account by clicking the **Register for New Account** link on the right side of the Sakura ME Portal
2. Enter your **Email Address**
3. Click **Send** to open the User Registration form

**Note:** The system will only accept official organizational email addresses; please do not register using your personal email address



The image shows a 'System Login' form with a blue padlock icon and a small American flag. It contains two input fields: 'User Name' and 'Password'. Below these fields are three links: 'Register for New Account' (highlighted with a red box and a red circle containing the number 1), 'Forgot Password?', and 'Forgot Login ID?'. At the bottom right is a blue 'Log In' button.



The image shows a 'Register for New Account' form. It features a red box around an input field labeled '\*Email Address' with the placeholder text '--Required--'. A red circle with the number 2 is next to this field. Below the field is the text 'To start your registration process we need your email address.' At the bottom right, there are two buttons: a blue 'Send' button (highlighted with a red box and a red circle with the number 3) and a white 'Cancel' button.

# New Sakura Grants Account Registration (2 of 2)

Your **User Registration** form will open up

Complete the **User Registration** form as follows:

- From the **Organization** dropdown menu, click on the icon to find your organization by searching with your Tax ID

**Note:** If you cannot locate your organization, please see **Adding Organizations** on how to add your organization to the Sakura Grants Portal

- Enter the **Registration Information**, including all required fields marked with an asterisk (\*)

- ✓ **First/Last Name**
- ✓ **Confirm Email**
- ✓ Your **Password** must contain a minimum of eight characters with at least one lowercase and one uppercase letter
- ✓ Select and provide an answer to your two **Security Questions**
- ✓ Select your **preferred language**
- ✓ Read and agree to the **Terms and Conditions** by selecting the checkbox

- Click **Create Account** to submit your **User Registration** form

**Note:** You will receive an email containing an activation link; click the link to activate your account

**User Registration**
3

1
\*Organization
2
To enter your organization, click the search button to the right

**Registration Instructions**

Your organization may already have a profile with us. Please click the Search button to the right and then search for your organization using the Tax ID (e.g., 12-3456789). If not found, you will be able to add a new organization.

Name Prefix

Middle Name

Name Suffix

I agree to the Terms and Conditions

**Registration Information**

\*Email Address

\*Password

\*Security Question 1

\*Security Question 2

\*My preferred language is...

\*Confirm Email

\*Confirm Password

\*Answer

\*Answer

Time Zone

4
Create Account
Cancel

# Log into the Sakura Grants Portal

Newly registered and returning applicants log into the system from the **Sakura Grants Portal** landing page:

1. Enter your email address used in the registration process as your **User Name**
2. Enter your account **Password**
  - Your initial account password will match what you had entered on your **User Registration** form
  - If you forgot your Login ID or Password, use the **Forgot Password?** and **Forgot Login ID?** links to self troubleshoot
3. Click **Log In**

Home    How to Apply    Our Process    FAQ

**System Login**

1 User Name

2 Password

3 Log In

Register for New Account  
Forgot Password?  
Forgot Login ID?

Contact Us

Tech Support:  
helpdesk@envisionpharmasupport.com

Tech Support: 1 860  
266 4944

Otsuka Grants:  
grants@otsuka-us.com

Otsuka Grants: 1 800  
438 6120

Areas of Interest    Ethical, Responsible & Transparent    User Guide

From EPG site: © 2016 Envision Pharma Limited. "Envision Pharma Group", "Envision Technology Solutions", "Datavision", "Visiontracker", "Clear", "Executive Window", "Medinfo", "Envision", "Envision Scientific Solutions", "Evidence Scientific Solutions", "Engage Scientific Solutions", "Excel Scientific Solutions", "ProScribe", "Envision Market Access Solutions", and "MSLevate", are registered trademarks or trademarks of Envision Pharma Limited or its affiliate/group companies. All rights reserved.





## 02 | Navigate the System

- [System Icons](#)
- [Navigation Overview](#)
- [Global Tools](#)
- [Profile](#)
- [Context Bar and Menu](#)
- [Customize Your View](#)
- [Dashboard](#)
- [Workbench](#)

# System Icons

## Navigation Menu



Navigation



Dashboard



Workbench

## Functionality Tools



Back



Expand



Collapse



Save



Copy



Print



Maximize  
Widget



Gear Icon



Edit



Remove

## Global Tools



Help



Bookmarks



Notifications



Profile



iEnvision  
Logo

## Context Bar



Search



Help Text  
Available



View  
Menu



Open  
Menu



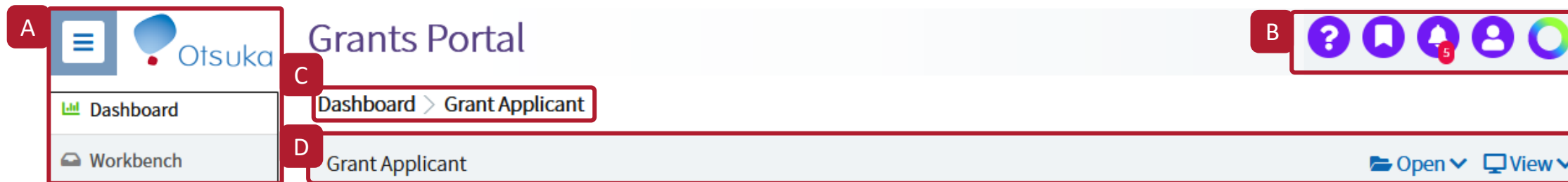
Actions  
Menu

# Navigation Overview






Once you log into the Sakura Grants Portal, you will default to your **Grant Applicant Dashboard**


To navigate the **Sakura Grants Portal**:

- A. Use the **Navigation** menu to quickly access the Platform tools:
  - **Dashboard**: View information about your task, training videos, and additional information
  - **Workbench**: Displays a high-level summary of your active studies
- B. The **Global Tools** provide access to system support, bookmarks, notifications, and your user profile
- C. The **Breadcrumbs** show your current location within iEnvision, and the path taken by which you arrived
- D. The **Context Bar** and **Context Menus** display a brief overview of your current screen location and allows you to interact with and action your tasks




# Global Tools


-  **Help** – View a list of frequently asked questions and other support documentation
-  **Bookmarks** – Access and manage any saved Dashboard, or Workbench
-  **Notifications** – View your system notifications including task requests, record updates, and updates to your subscribed lists
-  **Profile** – Manage your user information, out of office settings, skills, notification preferences, and log out
-  **iEnvision** – Open the Envision Pharma Group company website or email Envision Pharma Group technical support




ienv\_otsuka - 2.5.0.055  
 Apache MyFaces JSF-2.2 Core API - 2.2.12  
 primefaces-6.0.30 - 6.0.30





 Manage Bookmarks



 More...


---

 My Files




**Applicant**  
 Last Login - 16 Mar 2022


---


 Profile


---

 English / United States


---

 Logout



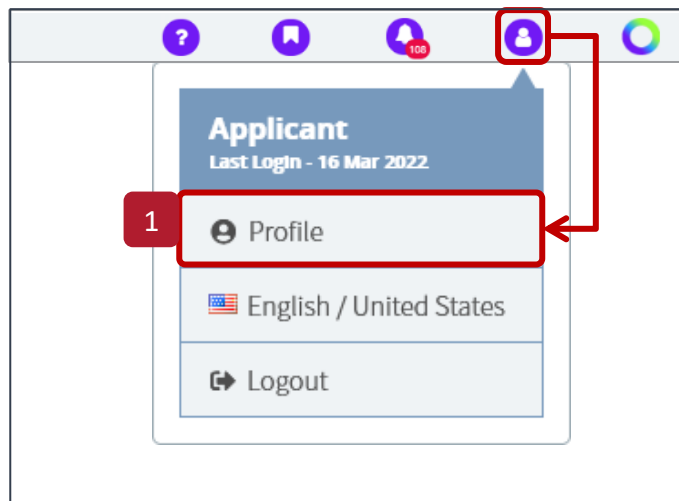
 About Envision Pharma Group

---

 Contact Envision Pharma Group

# Profile

1. To manage your User Information, navigate to the **Profile** tool
2. Verify your information on **My Profile** and update as needed, including:
  - **Contact details**, required fields are notated with an asterisk (\*)
  - **Preferred language**
  - **Country and Time Zone**



2 My Profile Actions ▾

▼ My Information

<div style="border: 1px solid red; padding: 2px;">                     *My preferred language is...                      English - United States ▾                 </div>	Name Prefix <input style="width: 100%;" type="text"/>	*Email Addresses <span style="float: right;">Verify Add Edit Delete</span> sakura@sakura.com ▾	
*First Name Applicant	Middle Name <input style="width: 100%;" type="text"/>	Addresses <span style="float: right;">Add Edit Delete</span> <input style="width: 100%;" type="text"/> ▾	
*Last Name Applicant	Name Suffix <input style="width: 100%;" type="text"/>	Phone Numbers <span style="float: right;">Add Edit Delete</span> Fax Number <input style="width: 100%;" type="text"/> ▾	
<div style="border: 1px solid red; padding: 2px;">                     Country (office, locale)                      -- Select One or More -- ▾                 </div>	<div style="border: 1px solid red; padding: 2px;">                     TimeZone                      --- Select One --- ▾                 </div>	Organization <input style="width: 100%;" type="text"/> [empty] <span style="float: right;">🔍</span>	
User Type --- Select One --- ▾	Business Role --- Select One --- ▾	Professional ID Type --- Select One --- ▾	Medical License Number <input style="width: 100%;" type="text"/>
Title <input style="width: 100%;" type="text"/>	Organization <input style="width: 100%;" type="text"/>	Degrees <input style="width: 100%;" type="text"/>	ORCID <input style="width: 100%;" type="text"/>
Skills -- Select One or More -- ▾	Specialties -- Select One or More -- ▾		
	Designation --- Select One --- ▾	Business Unit <input style="width: 100%;" type="text"/>	


# Context Bar and Menu

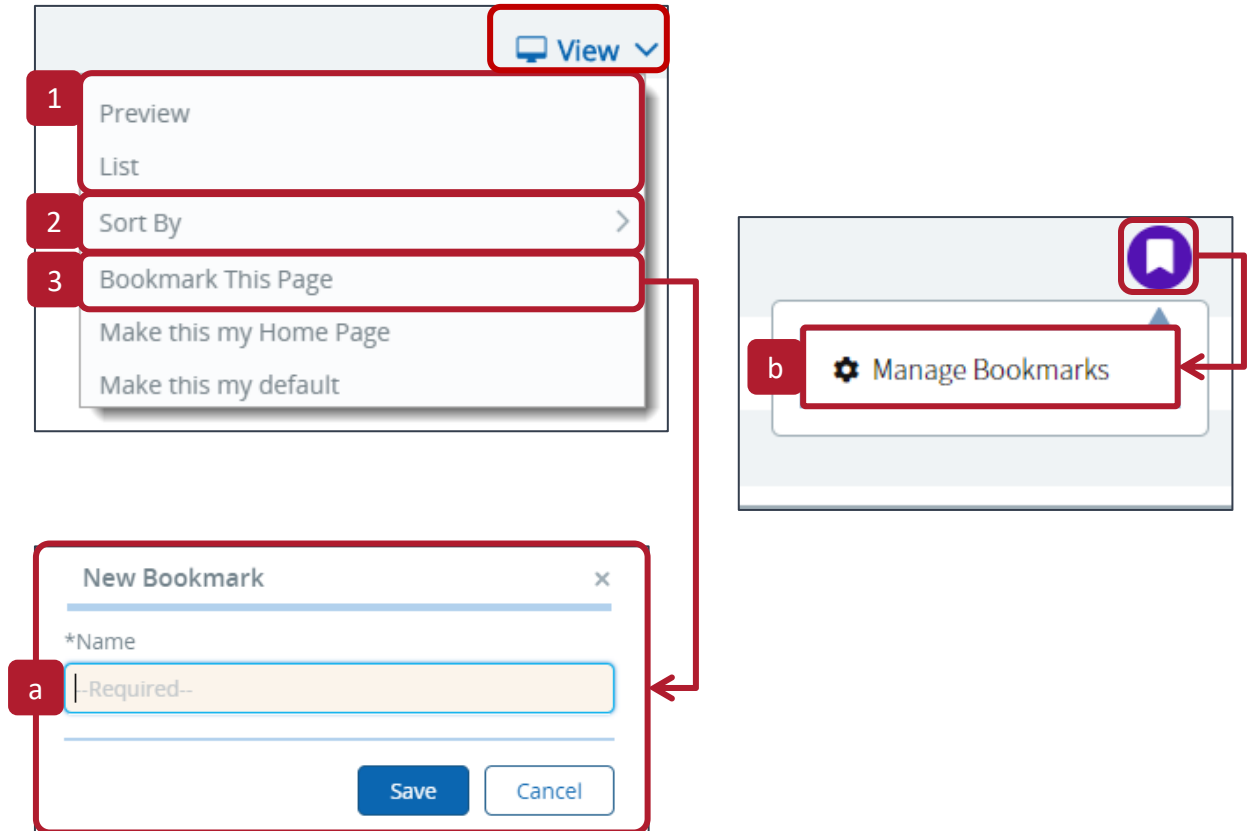
1. The **Context Bar** is located below the breadcrumb area and provides information about the record or set of records on display. The contents of the context bar will differ based on your location in the system. The example shown is the context bar for the Workbench
2. The **Context Menus**: the contents of these menus change based on where you are in the system
  - **Open**: Opens record sets and task groups
  - **View**: Toggles between different views
  - **Actions**: Lists actions available based on your current record selection

The screenshot displays the 'Workbench > Grants' interface. A red box labeled '1' highlights the breadcrumb 'Workbench > Grants'. Another red box labeled '2' highlights the context bar containing 'My Applications: 1 of 1' and a menu with 'Open', 'View', and 'Actions' options. The 'Grants' menu is expanded, showing 'My Applications [1]', 'Incomplete Applications [1]', and 'Applications [1]'. The main content area shows a record for 'TEMP003895' with details: Applicant 'Otsuka 2022', Accredited Education Program, and Incomplete status. The right sidebar contains various fields: \*Application Sub Type (Accredited Education Program), Requestor (Applicant), \*Organization / Institution Name (Required), Status Group (Incomplete), \*Program Title (Otsuka 2022), \*Requested Amount (empty), Request Date (18 Mar 2022), and \*Therapeutic Area / Disease Area (Autosomal Dominant Polycystic Kidney Disease).

# Customize Your View

The **View** menu allows you to:

1. Change the way records are displayed by selecting **Preview** or **List**
2. Use **Sort By** to customize the order in which your records appear
3. Select **Bookmark This Page** to save your preferred view
  - a. Give your **New Bookmark** a descriptive name for future reference and click **Save**
  - b. Access or edit your bookmarks from anywhere in the system by selecting **Manage Bookmarks** from the  icon in the [Global Tools](#) menu (found at the top right corner of every screen)



# Dashboard

After logging in, the Coordinator Dashboard is your default landing page and contains menus and a set of widgets showing information about your tasks and projects, including:

- A. The **Welcome** widget contains any current grants grouped by task type
- B. The **Announcements** widget displays details of important news from the Otsuka Grants team to applicants. This is updated periodically as new details are shared
- C. Your **Resources** widget provides users with documentation around various aspects of the application for and processing of Grant requests
- D. The **Recent** widget displays a list of the last 15 projects you accessed in the system

The screenshot shows the Otsuka Grants Portal dashboard. At the top, there is a navigation bar with the Otsuka logo, the text 'Grants Portal', and several utility icons (help, notifications, user profile). Below the navigation bar, the breadcrumb 'Dashboard > Grant Applicant' is visible. The main content area is divided into four widgets:



- Widget A: Welcome** - Shows the current date (Monday, 14 MAR) and the user's role (ME Applicant). A 'Start New' button is located at the bottom right.
- Widget B: Announcements (4)** - Contains a message about the new Otsuka Charitable Donations and Sponsorships web site, including a note about completing an eligibility quiz and logging in.
- Widget C: Resources (2)** - Lists two documents: 'Otsuka Sunshine Act Food & Beverage Policy' and 'US.CORP.X.21.00057 MDD Summary'.
- Widget D: Recent** - Displays a table of recent projects accessed.

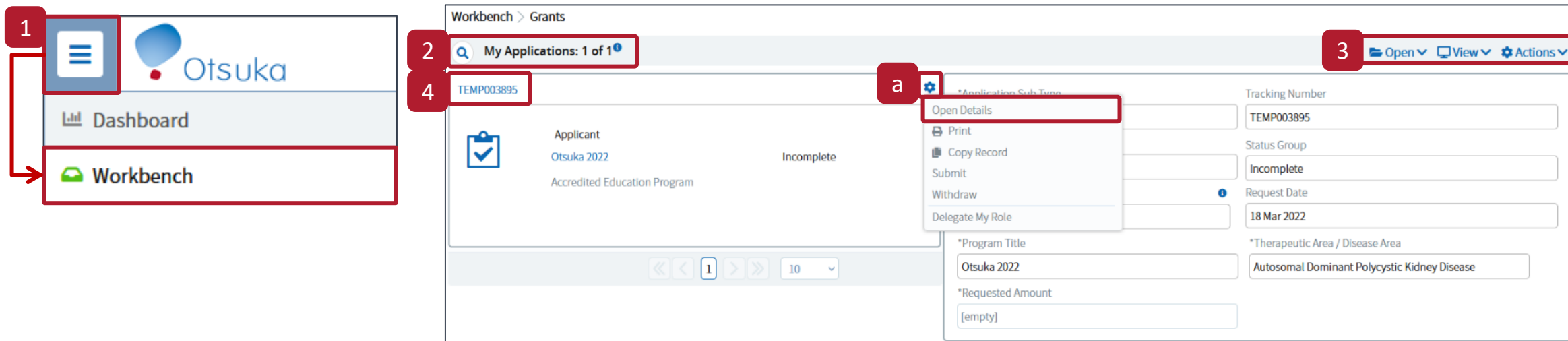
Tracking Number	Program Title	Request Date	Status Group
GRT-ME-001586	Differentiating Among the New Treatments for Autosomal Domina...	09 Mar 2022	Program Active
GRT-ME-001593	Differentiating Among the New Treatments for Autosomal Domina...	14 Mar 2022	Under Review
TEMP003871	Differentiating Among the New Treatments for Autosomal Domina...	09 Mar 2022	Incomplete



# Workbench

Your **Workbench** displays records of open applications that have tasks pending your action and a high-level summary of your active applications

1. Access your **Workbench** from the **Navigation** menu
2. The active task group and total number of documents are shown on the context bar
  - Click the  icon to search within the active task group; for example, search by application type or title
3. Use **Context menus** to open task groups, change your **Workbench** view, or start a new application from the **Actions** menu
4. Applications in the active task group will be listed below the Context Bar
  - a. To view details or continue an in-progress application, click the  icon and select **Open Details**



The screenshot illustrates the Otsuka Workbench interface. On the left, a navigation menu (1) shows 'Dashboard' and 'Workbench' (highlighted). The main area displays 'Workbench > Grants' with a search bar (2) showing 'My Applications: 1 of 1' and a list of applications (4) including 'TEMP003895'. A context bar (3) at the top right contains 'Open', 'View', and 'Actions' menus. A details view for application 'TEMP003895' is shown, with a gear icon (a) opening a menu with options like 'Open Details', 'Print', 'Copy Record', 'Submit', 'Withdraw', and 'Delegate My Role'. The details view includes fields for 'Applicant' (Otsuka 2022), 'Status Group' (Incomplete), 'Request Date' (18 Mar 2022), '\*Program Title' (Otsuka 2022), and '\*Therapeutic Area / Disease Area' (Autosomal Dominant Polycystic Kidney Disease).

## 03 | Submit a New Application

- [Create a New Application](#)
- [Acknowledgment](#)
- [Attestation](#)
- [Program Details](#) (Education Programs only)
- [Program Details](#) (Fellowships only)
- [Personnel](#) (Fellowships only)
- [Organizations](#)
- [Fellowship](#) (Fellowships only)
- [Budget](#) (Education Programs only)
- [Activities](#) (Education Programs only)
- [Attachments](#)
- [Submission](#)

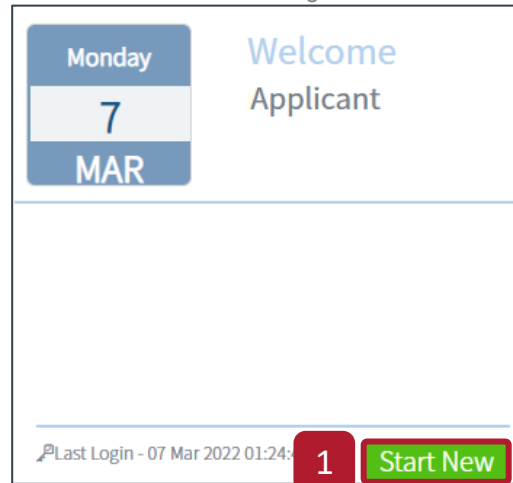
# Creating a New Application

1. To start a new application, click **Start New**
2. Next, select the type of application that you will be submitting
3. Click **Continue** at the bottom right of your screen

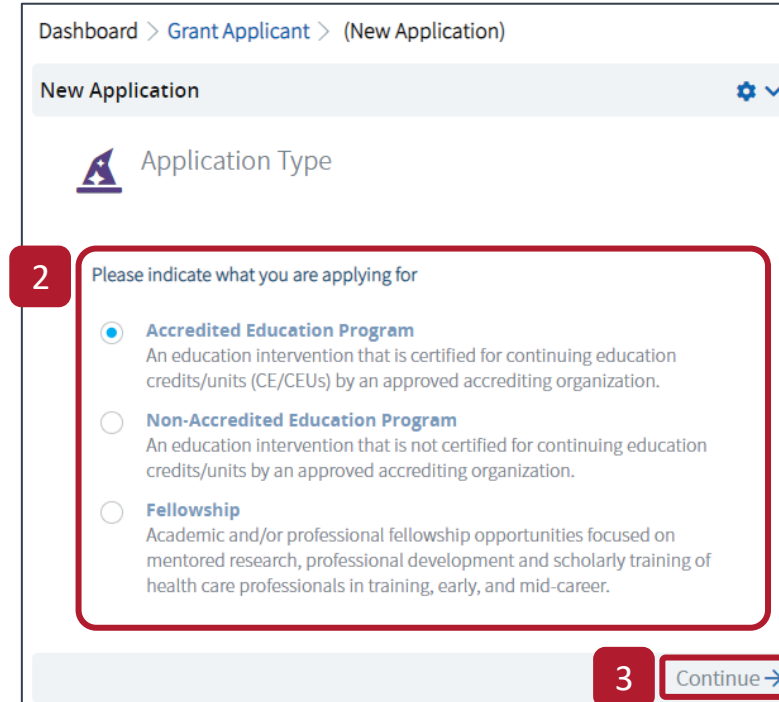
Please note that while this guide will primarily show details on how to complete an **Accredited Education Program** application; this guide can also be used to assist completion of any of the three application types, including **Non-Accredited Education Program** and **Fellowship**

When creating a new application, a temporary request ID is assigned until the application is successfully submitted. The Status of the application will also read “Incomplete” until submitted

Dashboard – Welcome Widget



New Application Wizard





# Acknowledgment

You are required to read, understand, and agree to the Terms and Conditions on the Acknowledgment node

1. Check the **Acknowledged** box at the bottom of the acknowledgment section after reading the Acknowledgment
2. Once you have clicked the **Acknowledged** box, **Attestation** appears on the bottom right of your screen, click it to continue

Dashboard > Grant Applicant > Acknowledgement (New Application)

Accredited Education Program TEMP003863 1 of 1 Requestor: ME Applicant Status: Incomplete Request Date: 07 Mar 2022 Actions

- Application
  - Acknowledgement
  - Attestation
  - Program Details
- Organizations
  - Applicant
  - Payee
  - Accrediting Provider
  - Budget
  - Activities
  - Attachments
  - Summary

**1**

## Acknowledgement

Please read these terms and conditions carefully. You must agree to all the following terms and conditions before you proceed.

I understand that when Otsuka evaluates my request, no preferences will be given based on prescribing or purchasing Otsuka products or to influence the prescription or purchase of Otsuka products. I understand that if my request is approved that I am not expected or obliged to prescribe, purchase or recommend any Otsuka products

I certify that no one at Otsuka has made any promises or representation to me about whether or not my request will be approved. I understand that my request will be reviewed and evaluated by the Otsuka Grants Office and that my request may not be approved.

If my request is approved, I agree to abide by all applicable laws, rules and regulations as well as applicable guidelines, standards and codes of practice

I certify that neither I or my organization is on the United States Department of the Treasury Office of Foreign Assets Control (OFAC) List, the United States Department of Health and Human Services Office of Inspector General (OIG), Food and Drug Administration (FDA), or Accreditation Council of Continuing Medical Education (ACCME) probation, debarment, or exclusion lists or any other exclusion lists that would prohibit me or my organization from receiving funding from Otsuka.

With respect to requests for support for specific programs and activities, I affirm that this application is for a program or activity that will take place in the future and not for a program or activity that has already taken place.

I acknowledge that Otsuka will process applications in the order in which completed applications are received, and I understand that Otsuka cannot and will not commit to process any request within a specific period of time.

I acknowledge that the submission of my application does not mean that the request will be funded by Otsuka and that the Otsuka Grant Review Committee can approve or deny funding for any grant request.

I understand that in certain instances where Otsuka, in its sole discretion, decides to approve an application, it may choose to award grant funds for a lesser amount than the original request.

If my application is for an educational grant, I acknowledge that prior to Otsuka disbursing any funds I must sign and return the Letter of Agreement (LOA). I acknowledge that within the Letter of Agreement I will agree to the following:

- Use the grant funds for actual and reasonable expenses of the program;
- Use the grant funds only for the purpose set out by the grant application and the Letter of Agreement;
- Furnish Otsuka with a financial reconciliation detailing expenditure of all grant funds, supported by appropriate substantiation and including any information required under either the Patient Protection and Affordable Care (PPACA) or any applicable State Regulations;
- Promptly refund any unused grant funds to Otsuka within 30 days of the refund request.
- Furnish Otsuka with education outcomes data as specified in the original grant request.

I acknowledge that the failure to comply with these terms may adversely impact my ability to apply for and/or receive funding in the future.

If my application is for an educational grant or sponsorship, I acknowledge that if I fail to provide a timely reconciliation and/or return any unused funds, Otsuka will not process any new grant requests or render a decision on any pending requests for funding or in-kind support for me or my organization until such reconciliation and return of funds occurs.

I acknowledge that Otsuka reserves the right to correct any administrative or technology-based errors which may occur during the application submission or review process.

I agree that Otsuka may contact me in the future by phone, fax, mail or email, for the limited purpose of evaluating my experience and satisfaction with the SAKURA IME & CC platform and process.

I certify that the statements made in this request are true, complete and accurate to the best of my knowledge.

\*Acknowledged

**2** Attestation →

# Attestation

The next node of the application is the **Attestation**

1. Per the guidance on this page, please read and answer each question to attest to your understanding of and willingness to comply with policy statements regarding the support and administration of the program you are applying for financial support
2. Once you have answered the questions, scroll to the very bottom of the section and click **Program Details** to progress your application

Dashboard > Grant Applicant > Attestation (New Application)

Accredited Education Program TEMP003863 1 of 1 Requestor: ME Applicant Status: Incomplete Request Date: 07 Mar 2022 Actions

Application

Acknowledgement

**Attestation**

Program Details

Organizations

Applicant

Payee

Accrediting Provider

Budget

Activities

Attachments

Summary

## Attestation

\*My organization has not received an educational grant from Otsuka in the past 12 months.

1 -- Select One --

\*My organization has not provided any promotional services to Otsuka in the past 12 months.

-- Select One --

\*The education provided by this organization meets the following criteria:

a. Non-promotional, truthful and not misleading

b. Scientifically and/or clinically relevant

c. Fair and balanced (e.g. presentation of product benefits and risks and a range of available treatments options when applicable)

-- Select One --

\*My organization has not interacted with any Otsuka employee with respect to the design, content or faculty selection for any aspect of this program.

-- Select One --

← Acknowledgement

2 Program Details →

# Program Details (Education Programs only) (1 of 2)

On the **Program Details** node, you are required to fill out details of the program for which you are seeking funding

Click [here](#) to skip to the Program Details page for Fellowships

Required fields for this section include:

- **Program Title**
- **Therapeutic Area / Disease Area**
- **Start Date** and **End Date** of the Program
- **Anticipated Outcome Level**
- **Accrediting Bodies**
- **Geographic Reach**
- **Associated Congress** (if applicable)

1. To add an **Associated Congress**, click the magnifying glass next to the field
2. To search for a congress, enter a keyword into the search bar, enter the dates of the event, and click **Search**. A list of congresses matching the criteria will appear at the bottom of the screen

Once you have selected a congress click **Add**

- Should you be unable to find the congress you are looking for, click the word **here** at the bottom of the window to add the congress manually

Dashboard > Grant Applicant > Program Details (New Application)

Accredited Ed... TEMP003863 1 of 1 ME Applicant Incomplete 07 Mar 2022 Actions

Application
 

- Acknowledgement
- Attestation
- Program Details

Organizations
 

- Applicant
- Payee
- Accrediting Provider
- Budget
- Activities
- Attachments
- Summary

Program Details

\*Program Title  
--Required--

Short Title  
[Text Field]

\*Therapeutic Area / Disease Area  
-- Select One --

\*Program Start Date  
--Required-- [Calendar Icon]

\*Program End Date  
--Required-- [Calendar Icon]

\*Anticipated Outcomes Level  
-- Select One --

\*Accrediting Bodies  
-- Select One or More --

\*Geographic Reach  
-- Select One --

Associated Congress  
Click here to initiate a search [Magnifying Glass Icon]

Search Target Name

Select the type of target  
 Congress

Renal

From: 07 Mar 2022 [Calendar Icon]

To: [Calendar Icon]

[Search] [Clear] [Cancel]

The following targets are recommended.

<input checked="" type="radio"/>	ERA	European Renal Asso...	19 May 2022 - 22 May ...	Paris	[Add]
<input type="radio"/>	JSRC	Japanese Society of R...	09 Jul 2022 - 09 Jul 20...	Fukuoka	[Add]

If you did not find your target, please click [here](#) to add it manually.

[Add]

# Program Details (Education Programs only) (2 of 2)

Scrolling down on the **Program Details** page, find sections where you can detail:

- **Program Description**
- **Learning Objectives**
- **Needs Assessment Summary**
- **Recruitment Plan**
- **Prior Experience**

1. For each of the text boxes, you are able to either format text you entered, or insert a Word document
  - a. **Request on Letterhead**
  - b. **Needs Assessment with References**
  - c. **Program Agenda/Overview**
2. You are required to upload documents for:
  - a. **Request on Letterhead**
  - b. **Needs Assessment with References**
  - c. **Program Agenda/Overview**
3. Once all of the fields for **Program Details** have been filled, and all required attachments uploaded to the request application, click **Organizations** at the bottom right of the screen to progress the application

The screenshot shows the 'Program Details' application form with several sections and annotations:

- 1**: A red box highlights the formatting toolbar at the top of the first text box.
- \*Program Description**: A text box containing placeholder text.
- \*Learning Objectives**: A text box containing placeholder text.
- \*Needs Assessment Summary**: A text box containing placeholder text.
- \*Recruitment Plan**: A text box containing placeholder text.
- \*Needs Assessment Summary**: A text box containing placeholder text.
- Please limit all file sizes to 3MB**: A section containing three file upload boxes:
  - 2.a**: A red box highlights the 'Request on Letterhead.docx' file upload box.
  - 2.b**: A red box highlights the 'Needs Assessment with References' file upload box.
  - 2.c**: A red box highlights the 'Program Agenda / Overview' file upload box.
- 3**: A red box highlights the 'Organizations' button at the bottom right of the form.

# Program Details (Fellowships only) (1 of 2)

**Note:** This page is specific to the details found within **Fellowship Applications**

Required fields for this section include:

- **Fellowship Type** and **Sub-Type**
- **Accreditation Status**
- **Program Title**
- **Therapeutic Area / Disease Area**
- **Start Date** and **End Date** of the Fellowship
- **Total Budget**
- **Requested Amount** and **Currency**
- **Description of How the Funding Will Be Used**
- **Budget file** (must use Otsuka template)

1. To download the Budget template, click **Download Template**

2. Read the **Instructions** before moving to the **Fellowship Budget** Excel sheet

3. Complete all the Anticipated Expenses in the **Blue** Section

**Note:** You will only need to complete the **Red** section (not shown in the screenshot) when the Application is in Reconciliation

Expenditure Type	Category	Quantity	Unit Price	Line Item Cost (auto-calculated)	Amount Requested from Otsuka	Description (Please provide a description for each line item.)
Housing Stipends, Travel Meal Expenses, Subsistence, Other Expenses						Required when "other" is chosen in column B
Fellowship Program Management Expenses						
Supplies/Materials						

4. Upload the completed Otsuka Excel **Budget** file



# Program Details (Fellowships only) (2 of 2)

**Note:** This page is specific to the details found within **Fellowship Applications**

Scrolling down on the **Program Details** node, find sections where you can detail:

- **Fellowship Description**
- **Fellowship Goals and Objectives**
- **Needs Assessment Summary**
- **Recruitment Plan**
- **Prior Experience**
- **Fellowship Program Deliverables**
- **Educational Plan**
- **Describe Plan to Publish Original Research**
- **Describe Methods Used to Create Awareness of Fellowship Opportunities**

1. For each of the text boxes, you are able to either format text you entered, or insert a Word document
2. Once all of the fields for **Program Details** have been filled, click **Personnel** (Fellowship Only) at the bottom right of the screen to progress the application

The screenshot displays a form titled "Program Details" with several sections, each containing a text input field with a rich text editor toolbar. The sections are:

- \*Fellowship Description** (highlighted with a red box and a red circle with '1')
- \*Fellowship Goals and Objectives**
- \*Needs Assessment Summary**
- \*Recruitment Plan**
- \*Prior Experience**
- \*Fellowship Program Deliverables**
- \*Educational Plan**
- \*Describe Plan to Publish Original Research**
- \*Describe Methods Used to Create Awareness of Fellowship Opportunities**

At the bottom of the form, there is a navigation bar with a left arrow and the text "Attestation", a red circle with the number "2", and a button labeled "Personnel" with a right arrow.

# Personnel (Fellowships only)

**Note:** This page is specific to the details found within **Fellowship Applications**

On the Personnel node, you need to enter details for the **Program Director** and any other personnel that are applicable to the Fellowship

Mandatory information includes field entries indicated with an asterisk (\*)

1. If you are the personnel member you can copy information over from your Sakura user profile
2. Upload the person's CV, if applicable
3. Add any additional Personnel
4. Once all information for the Personnel have been entered, scroll down and click Organizations on the lower right of your screen to progress the application

Dashboard > Grant Applicant > Personnel (Fellowship for Autosomal Dominant Polycystic Ki...)

Fellowship TEMP003965 1 of 1 ME Applicant Incomplete 07 Mar 2022 Actions

Personnel

Expand rows (D) to see detailed information.

Personnel Type	Name	Email	Institution Name	Country
> Fellowship Program Director	Program Director, Fellowship	Fellowship@ProgramDirector.com	Hope Hospital	United States
▼ Chairman/Director of Department	Chairman, Department	Department@Chairman.com	Hope Hospital	United States

1 Copy My Profile

Type any part of name or email - 3 characters min - or click the search icon.

\*Personnel Type: Chairman/Director of Department Please Specify Other Personnel Type

\*Institution Type: Hospital / Health System Please Specify Other Institution Type

Prefix: Department \*First Name: Department

Middle Name: \*Last Name: Chairman

Suffix: \*Email: Department@Chairman.com

\*Primary Phone Number: 01234 567 890 Fax Number:

Department:

\*Institution Name: Hope Hospital

\*Address Line 1 (No PO box): Hospital St

Address Line 2:

\*Country: United States \*City: San Diego

\*State/Province: California \*Postal Code: 59382

2 CV Remove Replace CV.docx

3 Add Personnel

4 Organizations

<Program Details

# Organizations

On the Organizations node, you need to enter details for the **Applicant**, **Payee**, and **Accrediting Provider** (if an Accredited application)

Mandatory information includes field entries indicated with an asterisk (\*)

You are also be required to upload files such as a payee **W8/W9**, and the provider's **Certificate of Accreditation**

1. Search for an organization by clicking the icon
2. Enter the Organization's **Tax ID**, if not found add the Organization to the system by clicking **+ Add New Organization**
3. Copy information over from either your Applicant, Payee, or Accrediting Provider sections using the **Copy contact from** function next to the Organization search bar
4. Once all information for the Organisations have been entered, scroll down and click **Budget** on the lower right of your screen to progress the application

**Note:** For Fellowship Applications the option will be instead be **Fellowship**

The screenshot shows the 'Organizations' management page for an applicant. The interface includes a sidebar with navigation options, a main table of organizations, and a detailed form for adding a new organization. Red callouts and boxes highlight the following steps:

- 1:** The search bar in the 'Organization / Institution' field.
- 2:** The '+ Add New Organization' button in the search results.
- 3:** The 'Copy contact from' dropdown menu, which includes options for Applicant, Payee, and Accrediting Provider.
- 4:** The 'Budget' button at the bottom right of the page.

The 'New Organization' form contains the following fields:

- Organization Information: Short Name, Website URL, IRS Determination Letter (Attach file).
- Legal Name: \*Legal Name (Required).
- Tax ID: \*Tax ID (Required), \*Tax Status (Select One), Institution Type (Select One), Please Specify Other.
- Parent Organization: Searchable field.
- Address: Postal Address Type (Select One), Country (Select One), Address Line.

At the bottom of the form, there are 'Add' and 'Cancel' buttons.

# Fellowship (Fellowships only)

**Note:** This page is specific to the details found within **Fellowship Applications**

Scrolling down on the **Fellowship** node, complete all the Mandatory field indicated with an asterisk (\*)

1. For each of the text boxes, you are able to either format text you entered, or insert a Word document
2. Once all of the fields for **Fellowship** have been entered, click **Attachments** at the bottom right of the screen to progress the application

Dashboard > Grant Applicant > Fellowship (Fellowship for Autosomal Dominant Polycystic Ki...)

Fellowship TEMP003965 1 of 1 Requestor: ME Applicant Status: Incomplete Request Date: 12 Apr 2022 Actions

**Fellowship**

\*Describe Mentor/Program Director Responsibilities, Requirements and Qualifications

Sans Serif Normal B I U G A x<sup>2</sup> x<sub>2</sub> H. -Required-

\*Describe Mentee/Fellowship Candidate Responsibilities and Requirements

Sans Serif Normal B I U G A x<sup>2</sup> x<sub>2</sub> H. -Required-

\*Describe How the Fellowship Will Be Evaluated

Sans Serif Normal B I U G A x<sup>2</sup> x<sub>2</sub> H. -Required-

\*Describe the Application/Award Criteria and Selection Process

Sans Serif Normal B I U G A x<sup>2</sup> x<sub>2</sub> H. -Required-

\*Department with Which the Fellow Will Be Affiliated -Required-

\*How many Faculty Members are currently in the Department? -Required-

\*How many Fellows are currently in the Department? -Required-

\*How many Fellows are currently receiving Otsuka support in this calendar year? -Required-

<Organizations

Attachments

# Budget (Education Programs only)

On the Budget node, the financial details on the right will update automatically as line items are added to the table on the left

**Note:** If you are submitting a Fellowship application, you will not have this node and will instead need to enter the **Budget** information on the **Program Details** node by using the Otsuka Template form

1. To fill the table with line items, click **+ Add Line**, and add each item that falls within the budget of your program
2. Alternatively, you can upload a budget template to populate the table. Click **Download Budget Template** at the top left of the screen. You will then be prompted to save an Excel budget template. Once the template has been completed, click **Upload and Extract**. All values entered will be extracted from the template, and moved to the table
3. Once all budget line items have been added, ensure that the USD amount requested for each line item has been added. Click **Save** once completed
4. Click **Activities** to progress the application to the next step

Dashboard > Grant Applicant > Budget (Differentiating Among the New Treatments for Au...)

Accredited Educati... TEMP003863 1 of 1 Applicant Incomplete 07 Mar 2022

**1** Save

**2** Download Budget Template Upload and Extract

**3** + Add Line

**4** Activities

**Budget**

**Budget Template Instructions**

Please click on the link below to download the budget template, and open the workbook in Microsoft Excel. All program costs must be entered into the template and have one of the appropriate expense types and categories selected.

When complete, upload the template using the Upload and Extract link. All values will be extracted from the template and imported into the table below.

If you need to change any values after the initial budget upload, please download the budget template again and input any new values or change existing ones. Then, use the Upload and Extract link to import the budget template again.

Expand rows [D] to see detailed information.

Type	Category	Quantity	Unit Price (U...	Line Item Co...
> Honoraria Fees	Chair	1	4,000.00	4,000.00
> Honoraria Fees	Faculty	2	2,000.00	4,000.00
> Management Fees	Program Management	1	12,000.00	12,000.00
> Travel Fees	Faculty Airfare	3	900.00	2,700.00
> Travel Fees	Faculty Hotel / Lodging	3	750.00	2,250.00
▼ Venue Facility Fees	Meeting Room Rental	1	11,000.00	11,000.00

\*Type: Venue Facility Fees \*Category: Meeting Room R... \*Quantity: 1 \*Unit Price: 11,000.00

Line Item Cost: 11,000.00 \*Amount Requeste...: 11,000.00 Description:

\*Type of Support: Multisupport Request Other Funding Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus pharetra purus in sapien aliquam, vitae tristique metus tristique. Mauris non ullamcorper arcu. Vivamus lobortis pulvinar mattis. In pellentesque ligula posuere

\*Total Number of Additional Suppor...: 1

Please use the budget template on the left to complete and import all budget line items. Alternatively, enter the line items directly into the budget table.

Currency: United States Dollar

Expense Totals: 35,950.00 (USD)

- Honoraria Fees: 8,000.00
- Management Fees: 12,000.00
- Travel Fees: 4,950.00
- Venue Facility Fees: 11,000.00

Total Program Revenue: 0.00 (USD)

- Total Registration Fees: 0.00
- Other Non-Grant Support: 0.00
- Total Program Revenue: 0.00

Total Program Bud...: 35,950.00 (USD)

- Total Costs: 35,950.00
- Less Program Revenue: -0.00
- Total Program Budget: 35,950.00

Requested Amount: 33,950.00 (USD)

- \*Requested Amount: 33,950.00
- Percent Total Requested: 95%

← Organizations

# Activities (Education Programs only) (1 of 2)

**Note:** If you are submitting a Fellowship application, you will **not** have an **Activities** node

1. Click **+ Add Activity** to select the type of activity you want to add
  - Complete the Mandatory fields indicated with an asterisk (\*)
  - You can add multiple activities, and within each activity you can have multiple occurrences; make sure that the dates fall in between the Program Start and End dates
2. On the right, the system will automatically update the **Activity Summary** as fields are completed

Dashboard > Grant Applicant > Activities (Differentiating Among the New Treatments for Au...)

Accredited Educati... TEMP003863 1 of 1 Applicant Incomplete 07 Mar 2022

**Activities**  
Using the 'Add Activity' button to the right, please add a unique entry to the table for each activity type that will be part of the program.

\*Program Start Date: 24 Jun 2022 \*Program End Date: 24 Jun 2022

**Activity Summary**

Activity Type	0
Avg. Participant Cost	USD 0.00
Num. of Participants	0
Avg. Participant Cost	USD 0.00
Participants	0

**+ Add Activity**

- Live Event
- Web/Digital Event
- Print/Material

**Activities**  
Using the 'Add Activity' button to the right, please add a unique entry to the table for each activity type that will be part of the program.

\*Program Start Date: 24 Jun 2022 \*Program End Date: 24 Jun 2022

**Activities**

Activity Title	Activity Type	Category
Differentiating Among the New Treatments for Autosomal Dominant Polycystic Kidney Disease	Live Event	Stand-alone Symposium

\*Activity Type: Live Event \*Category: Stand-alone Symposium

\*Activity Title: Differentiating Among the New Treatments for Autosomal Dominant Polycystic Kidney Disease

\*Activity Start Date: 24 Jun 2022 \*Activity End Date: 24 Jun 2022

\*Number Of Estimated Attendees: 150 \*Number Of Credit Hours: 1.00

\*Activity Audiences: Physician (MD/DO) Activity Audience Specialties: Nephrology

\*Activity Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus pharetra purus in sapien aliquam, vitae tristique metus tristique. Mauris non ullamcorper arcu. Vivamus lobortis pulvinar mattis. In pellentesque ligula posuere massa dictum, sed tincidunt turpis malesuada. Sed nisi velit, blandit vitae nisi sed, mollis finibus turpis. Vestibulum elementum tellus nunc, eget rutrum

**Stand-alone Symposium Occurrences (1)** + Add Occurrence

**Activity Summary**

Activity Type	1
Live Event	1
Avg. Participant Cost	USD 239.67
Num. of Participants	150
Avg. Participant Cost	USD 239.67
Participants	150
Live Event	150

# Activities (Education Programs only) (2 of 2)

Information that you can add to the Activities node include:

1. **+Add Venue** to enter information about the activity's venue. Search using the search bar at the top of the window or enter the venue's information manually
2. **+Add Occurrence** to duplicate the activity already entered should another occurrence of the activity take place at a later date
3. **+Add Activity** to add another activity
4. Once you have enter all of the activities associated with your program, scroll down to the bottom of the page and click **Attachments** to progress the application

Activities node

Stand-alone Symposium Occurrences (1)

Stand-alone Symposium 1

\*Occurrence Start Date: 24 Jun 2022

\*Occurrence End Date: 24 Jun 2022

Program Venue: **1** + Add Venue

Venue Name	Venue Address	Del
No records found.		

**2** + Add Occurrence

**3** + Add Activity

**4** Attachments →

← Budget

Add Venue

Enter the information below or search for a venue by typing in the search field.  
Edit the venue information below.

Type the name of the venue - 3 chars min

\*Name: Moscone West

\*Address Line (No PO Box): 747 Howard St

\*Country: United States

\*City: San Francisco

\*State/Province: California

\*Postal Code: 94103

Save Cancel

# Attachments

On the Attachments node, you can review or download any of attachments that have been uploaded within your application

1. Click the icon to make changes to a specific material
2. You can upload new supporting material to the application via the **Actions** menu
3. After reviewing your attachments, click **Summary** at the bottom right of your screen to review a consolidated view of your application

**Note:** For Fellowship Applications this is the final node, however, the information on the next slide will accurately describe how to submit your application

Dashboard > Grant Applicant > Attachments (Differentiating Among the New Treatments for Au...)

Accredited Educa...TEMP003863 1 of 1 Applicant Incomplete 07 Mar 2022

Attachments

- Application
  - Acknowledgement
  - Attestation
  - Program Details
- Organizations
  - ME Applicant
  - ME Applicant
  - ME Applicant
- Budget
- Activities
- Attachments**
- Summary

Attachments (5)	Posted By	Posted Date	
Program Agenda / Overview	ME Applicant	07 Mar 2022 02:57:33	
Request on Letter Head	ME Applicant	07 Mar 2022 02:57:33	
Needs Assessment with References	ME Applicant	07 Mar 2022 02:57:33	
Organizations			
ME Applicant			
W8/W9	ME Applicant	08 Mar 2022 12:13:36	
ME Applicant			
Certificate(s) of Accreditation	ME Applicant	08 Mar 2022 12:14:29	
Supporting Materials			

← Activities 3 Summary →





# Submission

Once you have reviewed your application to your satisfaction:

1. Click the **Actions** menu at the top right and select **Submit**
2. Confirm that you would like to submit your application and your application will then be forwarded for internal Otsuka review

Now that the application has been submitted, a permanent Grant ID will be assigned to your application

You can check the status of your application by referring to your **Workbench** or **Dashboard**

From any node

Dashboard > Grant Applicant > Summary (Differentiating Among the New Treatments for Au...)

Accredited Ed... TEMP003863 1 of 1 Applicant Incomplete 07 Mar 2022 Actions

- Application
  - Acknowledgement
  - Attestation
  - Program Details
- Organizations
  - ME Applicant
  - ME Applicant
  - ME Applicant
- Budget
- Activities
- Attachments
- Attachments
- Summary

Summary

- Program Details
- Organizations
- Budget
- Activities
- Attachments
- Attachments

Save  
Copy Record  
Print  
Submit  
Withdraw

1

Confirmation

Are you sure you want to Submit this Request?

2 Yes No

Info

Thank you for submitting this application. Your request tracking number is : GRT-ME-001586

OK

## 04 | Post Submission Activities

- [Request for Additional Information](#)
- [Letter of Agreement \(LOA\) Process](#)
- [Request a Change of Scope](#) (Education Programs Only)
- [Update Program Activities](#) (Education Programs Only)
- [Program Closure](#) (Education Programs Only)
  - [Budget Reconciliation](#)
  - [Program Outcomes](#)
  - [Transfer of Value](#)
- [Program Reconciliation](#) (Fellowships Only)
  - [Closure](#)
  - [Transfer of Value](#)
- [Program Closure Notification](#)

# Request for Additional Information

If additional information is deemed necessary to complete the review of your grant request, you will receive an email detailing the incomplete or missing information; click the embedded link within the email to access your application

**Note:** A window containing the information will also be available after logging back into the system

1. Update the application content and/or attachments with the information requested
2. Click the **Actions** menu and select **Submit Additional Info**

From any node

Dashboard > Grant Applicant > Program Details (Differentiating Among the New Treatments for Au...)

Accredited ... GRT-ME-001586 2 of 2 Applicant Information Requested 09 Mar 2022 2 Actions

Application

- Application
- Acknowledgement
- Attestation
- Program Details
- Organizations
  - ME Applicant
  - ME Applicant
  - ME Applicant
- Budget
- Activities
- Attachments
- Summary

Program Details

\*Program Title  
Differentiating Among the New Treatments for Autosomal Dominant Polycystic Kidney Disease

\*Anticipated Out  
Level 5 - Behav

\*Geographic Rea  
Local

Additional Information Questions  
Please provide additional information about endgoals

Save  
Addtl. Info Requested  
Copy Record  
Print  
Submit Additional Info  
Withdraw  
Delegate My Role




# Letter of Agreement (LOA)

Once your application has been reviewed and an approval decision has been reached, the LOA process will be initiated. In addition to your approval email, you will receive an email directly from DocuSign with a link to electronically sign the LOA

Please note that the LOA will be routed to the primary contact of the Payee Organization, as well as the contacts for any joint sponsors listed for the program

Once the LOA Process is completed, your application will enter the **Program Active** state



**LETTER OF AGREEMENT  
INDEPENDENT CONTINUING HEALTHCARE EDUCATION  
REQUEST FOR SUPPORT**

*Terms, Conditions and Purpose of Continuing Healthcare Education Requests*

This agreement is between ME Applicant , ME Applicant , ME Applicant "Sponsor(s), and "Otsuka".

Otsuka agrees to provide support for the activity: Differentiating Among the New Treatments for Autosomal Dominant Polycystic Kidney Disease

Tracking Number: GRT-ME-001586  
 Program Start Date: 24 Jun 2022  
 Program End Date: 24 Jun 2022  
 Amount Awarded: \$33,950.00

---

Applicant Name: Applicant  
 Payee TIN: 12-3456789  
 Payee Mailing Address:  
 123 Address Street  
 San Diego CA 00284 United States  
 Payee Email Address: sakuraapplicant@email.com

Accrediting Provider Name: ME Applicant  
 Accrediting Provider Email Address: sakuraapplicant@email.com

---

**CONDITIONS**

Otsuka and Sponsor agree that the funding is expressly conditioned upon the following:

1. Statement of Purpose: Otsuka wants to serve the healthcare community through support of independent continuing education of healthcare professionals. The activity described above is for independent continuing education of healthcare professionals only and will not promote Otsuka's products, directly or indirectly. Further, Otsuka does not expect and will not receive anything of tangible benefit in exchange for Otsuka's support of the activity.

Otsuka America Pharmaceutical, Inc.  
 Otsuka Grants | 2440 Research Boulevard | Rockville, MD 20850 | P: 1 (800) 438-6120 | F: 1 (301) 721-7532 | [OtsukaGrants.com](http://OtsukaGrants.com)

# Request a Change of Scope (Education Programs only)

**Note:** If you are submitting a Fellowship application, were the program has been approved, you will **not** have the option to **change the scope** as they are only available for Accredited and Non-Accredited Education Programs

1. After your grant has been approved, if you have a change of scope that would affect the LOA, click the **Actions** menu and select **Request Change of Scope**  
This will open up your application again, and make all items editable
2. Once you have updated your application content with information that required a scope change, click the **Actions** menu and select **Submit Change of Scope**, and make all items read-only again

Please note that your application will now undergo the review process again and may be subject to denial or approval at a lesser amount. A new LOA may also require a new signature

From any node

Dashboard > Grant Applicant > Program Details (Differentiating Among the New Treatments for Au...)

Accre... GRT-ME-001586 2 of 3 Program Active **Actions** ▾

Application

- Acknowledgement
- Attestation
- Program Details**

Organizations

- ME Applicant
- ME Applicant

Program Details

Program Title  
Differentiating Among the New Treatments for Autosos **1**

Short Title  
Differentiating New Treatments for ADPKD

- Save
- Copy Record
- Print
- Request Change of Scope**
- Submit Activity Update
- Delegate My Role

Application

- Acknowledgement
- Attestation
- Program Details**

Organizations

- ME Applicant
- ME Applicant

Program Details

Program Title  
Differentiating Among the New Treatments for Autosos **2**

Short Title

- Save
- Copy Record
- Print
- Submit Change of Scope**
- Submit Activity Update
- Delegate My Role

# Updating Program Activities (Education Programs only)

For programs consisting of multiple activities, you will be expected to provide updates as each activity has concluded on the Activities page

1. Expand each activity entry to enter the details of:
  - Actual **Activity Start and End Date**
  - **Activity Participant Reconciliation:** Audience; Therapeutic Specialty; Total Number; Total Credits (only applicable for live, accredited activities)
2. For all participant reconciliation details, please add a separate row for each unique Audience and Therapeutic Specialty combination (eg, Physician + Nephrology) by clicking **+ Add Line**
3. Once all information has been completed, select **Submit Activity Update** from the **Actions** menu

Workbench > Grants > Activities (Differentiating Among the New Treatments for Au...)

Accredited Edu... GRT-ME-001586 2 of 2 Applicant Program Active 09 Mar 2022 **Actions**

**Activities**  
Using the 'Add Activity' button to the right, please add a unique entry to the table for each activity type that will be used for this program.

Provide Reconciliation

Program Start Date: 24 Jun 2022 Program End Date: 24 Jun 2022

**Activities**

Expand rows (>) to see detailed information.

Activity Title	Activity Type	Category
Differentiating Among the New Treatments for Autosomal Dominant Polycystic Kidney Disease	Live Event	Stand-alone Symposium

Activity Start Date: 24 Jun 2022 Activity End Date: 24 Jun 2022

Activity Participant Reconciliation

Expand rows (>) to see detailed information.

Actual Audi...	Actual Therap...	Total Nu...	Total Number ...	Del
Physician (MD/DO)	Nephrology	150	1	

Actual Audience: Physician (MD/DO) Actual Therapeutic Specialty: Nephrology Total Number of Activities: 150 Total Number of Credits: 1.00

Actual Other Audience: Actual Other Therapeutic Specialty:

**+ Add Line**

Summary Panel:

- Live Event: 1 0
- Av... USD 239.67 USD 0.00
- Num. of Participants: 150 0
- Avg. Participant C... USD 2... USD 0.00
- Participants: 150 0
- Live Event: 150 0
- Participation Goal % (Actual/Estim... 0
- US vs Ex-US: 0
- Percent US: [ ]
- Percent Ex US: [ ]
- Audience Breakdown: 0

# Program Closure (Education Programs only)

One day after program's duration, the system will automatically open for reconciliation. A set of activities will have to be completed in order to successfully close out the program

**Note:** Click **Download Budget Template** to download an Excel budget template in which you can enter both direct and indirect costs

1. Three new **Closure** sub-nodes of the application will open that once complete can be submitted via the **Actions** menu:

- **Budget** (90 days from Program End)
- **Activities** (120 days from Program End)
- **Transfer of Value** (if applicable) (90 days from Program End)

**IMPORTANT:** Please note that each closure activity will have its own **Due Date** (listed above)

2. They can be submitted independently via the associated actions in the **Actions** menu

Dashboard > Grant Applicant > Budget (Differentiating Among the New Treatments for Au...)

Accredited Educ... GRT-ME-001586 2 of 4 Applicant Program Closure Activities 09 Mar 2022 Actions

**1** Application Closure Budget Activities Transfer of Value Attachments Summary

**Budget**

**Budget Template Instructions**

Please click on the link below to download the budget template, and open the workbook in Microsoft Excel. All program costs must be entered into the template and have one of the appropriate expense types and categories selected.

When complete, upload the template using the Upload and Extract link. All values will be extracted from the template and imported into the table below.

If you need to change any values after the initial budget upload, please download the budget template again and input any new values or change existing ones. Then, use the Upload and Extract link to import the budget template again.

Download Budget Template Upload and Extract

Expand rows [D] to see detailed information.

Type	Category	Quantity	Unit Price (USD)	Line Item Cos...
> Honoraria Fees	Chair	1	4,000.00	4,000.00
> Honoraria Fees	Faculty	2	2,000.00	4,000.00
> Management Fees	Program Management	1	12,000.00	12,000.00
> Travel Fees	Faculty Airfare	3	900.00	2,700.00
> Travel Fees	Faculty Hotel / Lodging	3	750.00	2,250.00
> Venue Facility Fees	Meeting Room Rental	1	11,000.00	11,000.00

+ Add Line

Type of Support: Multisupport Request

Total Number of Additional Supporters: 1

Other Funding Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus pharetra purus in sapien aliquam, vitae tristique metus tristique. Mauris non ullamcorper arcu. Vivamus lobortis pulvinar mattis. In pellentesque ligula posuere massa dictum, sed tincidunt turpis malesuada. Sed nisl velit, blandit vitae nisl sed, mollis finibus turpis. Vestibulum

**2** Save Copy Record Print Submit Transfer of Value Submit Activity Reconciliation/Outcomes Submit Budget Reconciliation Delegate My Role

Venue Facility Fees 11,000.00 0.00

Total Program R... 0.00 (USD) (USD)

	Estimated	Actual
Total Registrati...	0.00	--Requi
Other Non-Gran...	0.00	--Requi
Total Program R...	0.00	[empty]

Total P... 35,950.00 (USD) 0.00 (USD)

	Estimated	Actual
Total Costs	35,950.00	
Total Program R...	0.00	
Total Program B...	35,950.00	0.00

R... 33,950.00 (USD) 33,950.00 (USD)

Requested Amount: 33,950.00

Percent Total Requested: 95%

Actual Funds Used

← Organizations Activities →



# Budget Reconciliation (Education Programs only) (1 of 3)

In the **Closure Budget** node, start by expanding each row of the existing budget

1. Previously entered information is displayed for quick reference
2. Enter the **Actual Cost** and **Actual Funds Used** totals for each line
3. Add additional lines to the budget table, if needed
4. Each update will be reflected in the summary section to the right of the main table

Closure node – Budget section

Dashboard > Grant Applicant > Budget (Differentiating Among the New Treatments for Au...)

Accredited Educ... GRT-ME-001586 < 2 of 4 > Applicant Program Closure Activities Request Date: 09 Mar 2022 Actions

Currency: United States Dollar

Application

Closure

**Budget**

Activities

Transfer of Value

Attachments

Summary

Expand rows [D] to see detailed information.

Type	Category	Quantity	Unit Price (USD)	Line Item Cos...
Honoraria Fees	Chair	1	4,000.00	4,000.00
<div style="display: flex; justify-content: space-between;"> <div style="width: 20%;"> <p>*Type</p> <p>Honoraria Fees</p> </div> <div style="width: 20%;"> <p>*Category</p> <p>Chair</p> </div> <div style="width: 20%;"> <p>*Quantity</p> <p>1</p> </div> <div style="width: 20%;"> <p>*Unit Price</p> <p>4,000.00</p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 20%;"> <p>Line Item Cost</p> <p>4,000.00</p> </div> <div style="width: 20%;"> <p>Amount Requested ...</p> <p>4,000.00</p> </div> <div style="width: 40%;"> <p>Description</p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 20%;"> <p>*Actual Cost</p> <p>4,000.00</p> </div> <div style="width: 20%;"> <p>*Actual Funds Used</p> <p>4,000.00</p> </div> </div>				
> Honoraria Fees	Faculty	2	2,000.00	4,000.00
> Management Fees	Program Management	1	12,000.00	12,000.00
> Travel Fees	Faculty Airfare	3	900.00	2,700.00
> Travel Fees	Faculty Hotel / Lodging	3	750.00	2,250.00
> Venue Facility Fees	Meeting Room Rental	1	11,000.00	11,000.00

+ Add Line

Expense Totals		35,950.00 (USD)	35,950.00 (USD)
	Estimated	Actual	
Honoraria Fees	8,000.00	8,000.00	
Management Fees	12,000.00	12,000.00	
Travel Fees	4,950.00	4,950.00	
Venue Facility Fees	11,000.00	11,000.00	
Total Program Revenue		0.00 (USD)	(USD)
	Estimated	Actual	
Total Registration Fees	0.00	0.00	
Other Non-Grant Support	0.00	0.00	
Total Program Revenue	0.00	[empty]	
Total Program Budget		35,950.00 (USD)	35,950.00 (USD)
	Estimated	Actual	
Total Costs	35,950.00	35,950.00	
Total Program Revenue	0.00		
Total Program Budget	35,950.00	35,950.00	
Requested Amount		33,950.00 (USD)	33,950.00 (USD)
Requested Amount		33,950.00	
Percent Total Requested		95%	
Actual Funds Used		35,950.00	



# Budget Reconciliation – Summary (Education Programs only) (2 of 3)

## Expense Totals

Sums each Expense Type within the table

*Closure node – Budget section*

▼ Expense Totals			35,950.00 (USD)	35,950.00 (USD)
	Estimated	Actual		
Honoraria Fees	8,000.00	8,000.00		
Management Fees	12,000.00	12,000.00		
Travel Fees	4,950.00	4,950.00		
Venue Facility Fees	11,000.00	11,000.00		

## Total Program Budget

The Actual Program Revenue will automatically be subtracted from the Actual Program Cost to equal the Actual Program Budget

▼ Total Program Revenue			0.00 (USD)	450.00 (USD)
	Estimated	Actual		
Total Registration Fees	<input type="text" value="0.00"/>	<input type="text" value="200.00"/>		
Other Non-Grant Support	<input type="text" value="0.00"/>	<input type="text" value="250.00"/>		
Total Program Revenue	<input type="text" value="0.00"/>	<input type="text" value="450.00"/>		

## Total Program Revenue

Enter Actual numbers for registration fees and other non-grant support received to help cover the cost of the program

▼ Total Program Budget			35,950.00 (USD)	35,500.00 (USD)
	Estimated	Actual		
Total Costs	35,950.00	35,950.00		
Total Program Revenue	0.00	450.00		
Total Program Budget	35,950.00	35,500.00		

# Budget Reconciliation – Summary (Education Programs only) (3 of 3)

## Actual Funds Used

- The initial **Requested Amount**, along with the official **Total Funding**, will be displayed for reference
- The **Actual Funds Used** will sum the entries within all budget line items

## Refund Owed

- If the **Actual Funds Used** are less than the total funding amount, an **Estimated Refund Owed** value will appear
- Please note that this amount is not official. Any actual refund request will be sent in a formal request after the budget reconciliation has gone through internal review

*Closure node – Budget section*

▼ Requested Amount	33,950.00 (USD)	33,950.00 (USD)
Requested Amount	<input type="text" value="33,950.00"/>	
Percent Total Requested		95%
Total Funding		33,950.00
Actual Funds Used		33,700.00
Estimated Refund Owed		250.00

Once complete, submit the budget reconciliation via the **Actions** menu

# Program Outcomes (Education Programs only)

The Activities section consists of the following components:

**Note:** Use the **Program Reconciliation** Wizard at the top to help guide you, step by step, through the Reconciliation process

- 1. Program Participant Reconciliation:** If not completed during the active program phase, this Actual Audience data is now required
- 2. Outcomes:** Corresponding questions display based on Actual Outcomes Level selected
- 3. Documentation:** Actual Outcomes Comments, etc., attachment files are required to be uploaded to accompany the outcomes submission

Closure node – Activities section

Activities
[Provide Reconciliation](#)

Program Start Date  
24 Jun 2022

Program End Date  
24 Jun 2022

[> Activities](#)

**Program Participant Reconciliation**

Expand rows [>] to see detailed information.

Audience	Therapeutic Specialty	Total Number of Attendees	Total Number of Credits A...
Physician (MD/DO)	Nephrology	150	1

Audience

Therapeutic Specialty

Total Number of Attendees

Total Number of Credits Awarded

**Outcomes**

Anticipated Outcomes Level

\*Actual Outcomes Level

**Documentation**

Actual Outcomes Comments

Remaining Practice Gaps Following Activity

Participant Feedback of Clinical Significance

Link to Activity URL

Attachments [+ Add Attachments](#)

File Name	Type	Posted Date	Posted By
No records found.			

Final Outcomes Report

Final Program Agenda

Final Program Brochure

Program Printed Materials

# Program Outcomes – Outcomes level (Education Programs only)

1. Select the actual level of outcomes reached for the program based on the Moore's Levels of Outcome

Please note, for **Level 1: Program Participation:**

The program participation is designed to aggregate the participation entries within each activity. All participant information should only be entered for each corresponding activity and not directly within the program participation table

Once complete, submit the Activity Reconciliation/Outcomes via the **Actions** menu

Closure node – Activities section

The screenshot shows a web form titled "Outcomes" under a "Closure node – Activities section". The form has two main sections: "Anticipated Outcomes Level" and "\*Actual Outcomes Level".

- Anticipated Outcomes Level:** A dropdown menu currently showing "Level 5 - Behavior". A red circle with the number "1" is positioned to the right of this field.
- \*Actual Outcomes Level:** A dropdown menu that is open, showing a list of options:
  - Select One ---
  - Select One ---
  - Level 1 - Participation
  - Level 2 - Satisfaction
  - Level 3a – Knowledge-Declarative
  - Level 3b – Knowledge-Procedural
  - Level 4 - Competence
  - Level 5 - Behavior
  - Level 6 - Patient Health
  - Level 7 - Community Health

Below these sections, there are several rows of text labels followed by empty input boxes, such as "L1. Participant Satisfaction % for Content Free...", "L1. Participant Satisfaction % for Faculty...", "L1. Participant Satisfaction % for Content...", and "L1. Participant Satisfaction % for Quality of Education".

# Transfer of Value (1 of 2)

Prior to the approval of your program, it is a requirement that an internal determination be made as to whether or not transfer of value reporting will be required at program completion

1. Answer if there was a transfer of value, and the number of reportable activities
2. Select **+Add Item**, and then select either **HCP** or **Teaching Hospital** to add an item to the table. You will then be required to populate the item's data
3. Alternatively, you can upload a template to populate the table
  - Click **Download Template** and you will then be prompted to save an Excel budget template
  - Once the template has been filled in, click **Upload and Extract**. All values entered will be extracted from the template, and moved to the table

Closure/Reconciliation node – Transfer of Value section

Dashboard > Grant Applicant > Transfer of Value (Differentiating Among the New Treatments for Au...)

Accredited Educati... GRT-ME-001586 1 of 4 Applicant Program Closure Activities 09 Mar 2022 Actions

**Transfer of Value**  
Report payments and other transfers of value

The Sunshine Act  
The Sunshine Act requires that manufacturers report payments and other transfers of value made to those parties that have been defined as Covered Recipients. This includes the cost of meals provided to physicians, as well as payments made to Covered Recipients in exchange for services provided, such as advisory boards, speaker programs, and consulting engagements. Manufacturers will also have to report other transfers of value provided to Covered Recipients, including, but not limited to, travel and provision of reprints of medical journal articles to Covered Recipients. For complete information visit: <https://www.cms.gov/OpenPayments/About/About>

\*Was there a Transfer of Value?  
Yes

\*Number of Reportable Activities  
1

Download Template Upload and Extract

Expand rows [D] to see detailed information.

Covered Item Type	Date of Payment	Third Party Payment Recipient	Nature of Payment or Transfer ...	Del
HCP				
Teaching Hospital				

+ Add Item

# Transfer of Value – Data Entry (2 of 2)

## Covered Recipient Information

1. Enter the applicable data for the covered recipient type. Note that there are slight data differences between HCP and Teaching Hospital

Ensure that all information is as complete and accurate as possible prior to submission

## Payment Information

2. Complete all relevant payment data fields

Ensure that all information is as complete and accurate as possible prior to submission

Once complete, submit the Transfer of Value data via the **Actions** menu

Closure/Reconciliation node – Transfer of Value section

# Program Reconciliation - Closure (Fellowships only)

**Note:** This page is specific to the details found within **Fellowship Applications**

One day after the program duration, the system will automatically open for reconciliation. A set of activities must be completed in order to successfully close out the program

## 1. Two new sub-nodes will open, **Closure** and **Transfer of Value**

Complete all the Mandatory fields and Attach all the files indicated with an asterisk (\*) within the **Closure** node

- Re-upload the budget template that was uploaded in the original application. Please include the actual cost expenditures

**Note:** You can re-download this Excel file from the **Attachments** node

## 2. Once complete it can be submitted via the **Actions** menu

**Note:** The **Transfer of Value** closure activity has a **Due Date** of 90 days from the Program End

Click [here](#) to move to the Transfer of Value page

The screenshot shows the 'Closure (Fellowship for Autosomal Dominant Polycystic Ki...)' page. The breadcrumb trail is 'Dashboard > Grant Applicant > Closure (Fellowship for Autosomal Dominant Polycystic Ki...)'. The page header includes 'Fellowship GRT-FE-001592', '1 of 1', 'Applicant', 'Program Closure Activities', and '07 Mar 2022'. A red box labeled '1' highlights the 'Reconciliation' section in the left sidebar, which contains 'Closure' and 'Transfer of Value' options. A red box labeled '2' highlights the 'Submit Closure' option in the 'Actions' dropdown menu. The main content area shows a 'Closure' section with a message: 'Please upload final documentation and attestations'. Below this are two dropdown menus for 'Did the Fellowship occur in alignment with the app...' and 'Were all the funds used as specified in the Letter of Agreement...'. There is also a 'Post Fellowship Executive Summary' section with an 'Attach file' button. A grey box contains instructions: 'The Otsuka Excel file is required for budget reconciliation. Please update your original Excel budget file with the program actual spend and attach the modified document below. If needed, you may navigate to the Program Details node to download your original Budget file attachment from the "Budget (must use Otsuka template)" field. Once downloaded, complete the reconciliation fields for each line, save, and upload in the provided field. Note that Excel is the only allowable file format for this attachment.' At the bottom, there is a 'Budget Reconciliation' section with another 'Attach file' button and navigation links for 'Attachments' and 'Transfer of Value'.

# Program Closure Notification

---

Once Otsuka Grants has completed a thorough review of the financial reconciliation, education outcomes data and Transfer of Value information, you will receive an email notification stating that the program has been closed

## *Email Notification*

Dear Applicant

This communication is to inform you that your grant request is now closed.

Thank you for your commitment to quality independent continuing education for healthcare professionals. Questions related to this communication may be directed to Otsuka Grants at 1 (800) 438-6120 or via email at [grants@otsuka-us.com](mailto:grants@otsuka-us.com).

Thank you,

Otsuka Grants





# SUPPORT RESOURCES



To access the Sakura Grants Portal, click the link below:

[https://otsuka.envisionpharma.com/ienv\\_otsuka/visiontracker/portal/login.xhtml?pgm=GRANTS](https://otsuka.envisionpharma.com/ienv_otsuka/visiontracker/portal/login.xhtml?pgm=GRANTS)



For Sakura process related questions, please contact:

[grants@otsuka-us.com](mailto:grants@otsuka-us.com)



For technical support, and system access support, please contact the Envision Pharma Helpdesk:

[helpdesk@envisionpharmasupport.com](mailto:helpdesk@envisionpharmasupport.com)