

Gilead UK & Ireland Fellowship & Medical Grants Programme: User Guidance Document

The aim of Gilead UK & Ireland Fellowship & Medical Grants Programme is to support not-for-profit healthcare focused organisations to develop innovative, high-impact projects that deliver measurable benefits to patients, healthcare providers and communities impacted by Gilead's therapeutic areas of expertise.

Gilead supports many organisations and projects via the UK & Ireland Fellowship & Medical Grants Programme, but we receive more grant requests than we can fund. Applying for a grant is not a guarantee of funding.

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

This document is intended to provide guidance on how to submit an application to the Fellowship & Medical Grants Programme. If you have questions regarding the application process or the Programme more generally, please email our support team at gileadfellowship@axon-com.com.


Contents

1. [How to create an account](#)
2. [Using the application portal](#)
 - a. Browser settings
 - b. Profile and username/ password
 - c. Required fields
 - d. Saving an application and viewing drafts
 - e. Support
3. [How to apply for a grant](#)
 - a. Getting started
 - b. Applying organisation information
 - c. Summary
 - d. Application/proposal details
 - e. Supporting documents
 - f. Line item budget
 - g. Mandatory disclosures
 - h. Finalising your application
 - i. Additional materials required
4. [What happens next?](#)
 - a. Requests for clarification and notifications
 - b. Fellowship grant approval or denial notifications
 - c. Agreements
 - d. Change in scope
 - e. Payment information
 - f. Reports and reconciliations

How to create an account


Please visit the Gilead UK & Ireland website page [here](#) and click “Create an account” to register for access to the application portal.

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

× New User Registration 

Organization Details

Please note: if you select a different language preference, then the form below will be cleared out when the page refreshes. Please ensure you pick your language preference first before entering details into the form below.

What is your Organization's Country of Incorporation? 

Password

Your password must contain at least 8 characters and include at least one uppercase character, one lowercase character, one number and one symbol.

Password*

Using the application portal

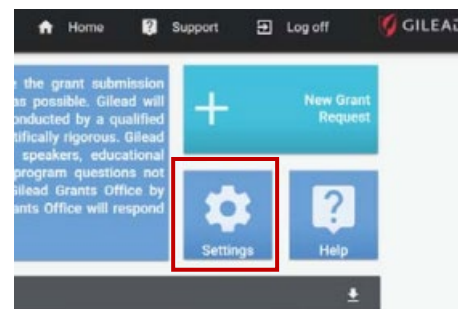
Browser settings

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

<p>Internet Explorer</p> <ul style="list-style-type: none"> • Select the 'Tools' tab • Scroll down to 'Pop-up Blocker' • Select 'Pop-up Blocker settings' • Type '*.steeprokin.com' into the 'Address of website to allow' field • Select 'Add' and 'Close' 	<p>Firefox</p> <ul style="list-style-type: none"> • Select the 'Tools' tab • Select the 'Content' tab • Select 'Pop-ups' 'Exceptions' button across from the 'Block pop-ups windows' check box • Type '*.steeprokin.com' into 'Address of website' field • 'Save Changes'
<p>Chrome</p> <ul style="list-style-type: none"> • Select the Chrome menu button on the top right-hand side • 'Settings.' • 'Show Advanced Settings' • Under 'Privacy' select 'Content Settings' • Under 'Pop-ups' select 'Manage Exceptions' • Type '*.steeprokin.com' into the 'Hostname pattern' field and select 'Done' 	<p>Safari</p> <ul style="list-style-type: none"> • Select the 'Safari' tab • Select 'Preferences' • Select 'Websites' and then 'Pop-up windows' on the left • Select 'Allow' on the dropdown next to Steeprokin from the list of websites (you will need to be on the portal for it to appear)

Profile and username/ password

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

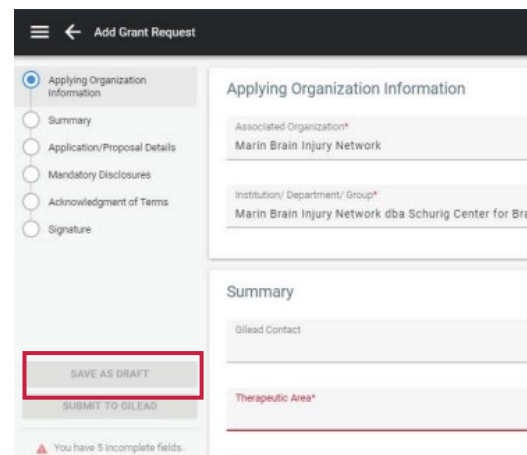


Required fields

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

Saving an application and viewing drafts

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



Support

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

Phone number: +1-718-576-1406

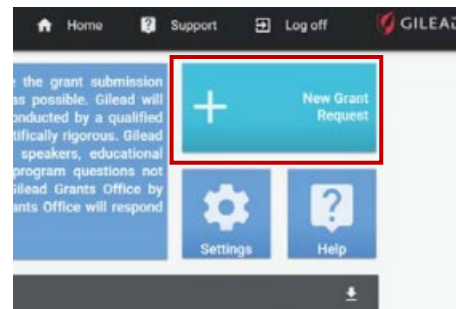
Email: gilead@steeprocks.com

For general inquiries regarding the Gilead UK & Ireland Fellowship & Medical Grants Programme, you can contact the support team at gileadfellowship@axon-com.com.

How to apply for a Fellowship & Medical Grants Programme grant

Getting started

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



Applying organisation information

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

The organisation associated with the application must be the same organisation that will receive the grant funds in the event of a successful application. Please be aware that grant funds cannot be paid to a private limited company (PLC) organisation.

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

Summary

Please complete all the required fields in the Summary section:

FIELD	GUIDANCE
Therapeutic Area	Select the relevant option.
Primary Sub-Therapeutic Area	Select the relevant option.
Grant Type	Select <i>Medical/Scientific</i> .
Program Type	Select <i>Gilead Fellowship and Medical Grants Programme</i>
Grant Program Tags	Select <i>Fellowship 2024</i>
Event/ Project/ Program Title	Enter a name for your grant request.
Grant Currency	This will be pre-populated based on your organisation's country address. All subsequent currency-related fields will be pre-populated with this currency.
Amount Requested from Gilead	Please enter numbers only.
Total Event/ Project/ Program Budget	Please enter numbers only here. A full breakdown of how the budget will be spent must also be submitted in the line item budget section of the application portal, and can be uploaded as an attachment under 'Supporting document(s)'.
If Gilead partially or fully approves this application, will the cumulative funding provided by Gilead within this calendar year exceed 33% of your organisations revenue?	Select <i>Yes</i> or <i>No</i> . If you select <i>Yes</i> , you will be prompted to contact the support team at gileadfellowship@axon-com.com to discuss your project before continuing with your application. Please note that Gilead are unable to provide funding for projects where the cumulative funding within the calendar year exceeds 33% of your

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

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

Application/proposal details

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

- Executive Summary (This field is limited to 800 characters)
- Organisation Overview
- Programs Purpose
- Objectives
- Activities
- Expected Outcome
- Sustainability

There are also two additional required fields:

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

If you have further information that you feel is relevant but not covered in the above fields, you can use the Additional Information free-text field.

Supporting documents

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

Line item budget

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

Please be aware when completing the 'Line item budget', Gilead cannot support funding of the following:

- Any retrospective activities that have already taken place
- Investment in medical equipment or medical hardware as one-off purchases
- Activities that may be linked, or may infer a link, to the purchasing, prescribing, providing of favourable recommendations for, or otherwise supporting Gilead products
- Activities relating to the direct funding of patient treatment and/or prescriptions
- Payment or defrayment of salary or fringe benefits for staff that purchase or prescribe Gilead products
- Operating expenses (e.g. fringe benefits, office equipment etc.) or purchase of standard equipment or hardware, i.e. the purchase of laptops, tablets, mobile phones, or other electronic devices that can be used beyond the scope of the project funding period
- Payment of honoraria of healthcare providers employed by or affiliated with the requesting institution
- Expenses or activities not linked to this project/event/program
- Compensation in the form of a grant, to individuals or organisations for services provided to Gilead, such as speaking or advising
- Compensation in lieu of a discount or price concession or related to a commercial contract negotiation
- Catering costs for project employees or volunteers (justified catering costs for participants/patients are permissible)
- Gestures of goodwill vouchers or similar participation rewards for participants/patients
- unspecified contingency allowances (all budget line items must be specific and relevant to the project delivery)

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

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

Mandatory disclosures

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

Finalising your application

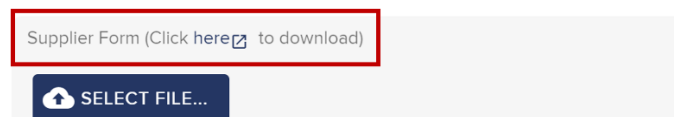
Before submitting an application, you must read and review the final sections and select a consent statement from the respective dropdown menus:

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

Additional materials required

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

1. A “Letter of Support” on letterheaded paper from one of the following organisations who can support your application:
 - Your local healthcare organisation (e.g. NHS Trust)
 - Your local Operational Delivery Network
 - Your local Primary Care Organisation (PCO)
 - Your local Clinical Commissioning Group (CCG)
 - Your local Health Board
 - Your local Health Office
2. Annual report or Tax Document, as applicable
3. Gilead new supplier creation form
 - This form must be completed and submitted even if you have applied for a grant previously
 - To download the template form, click on the link in the Application/Proposal Details section indicated below



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

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

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

What happens next?

Requests for clarification and notifications

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

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

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

Grant approval or denial notifications

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

Agreements

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

Change in scope

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

You will need to complete two fields:

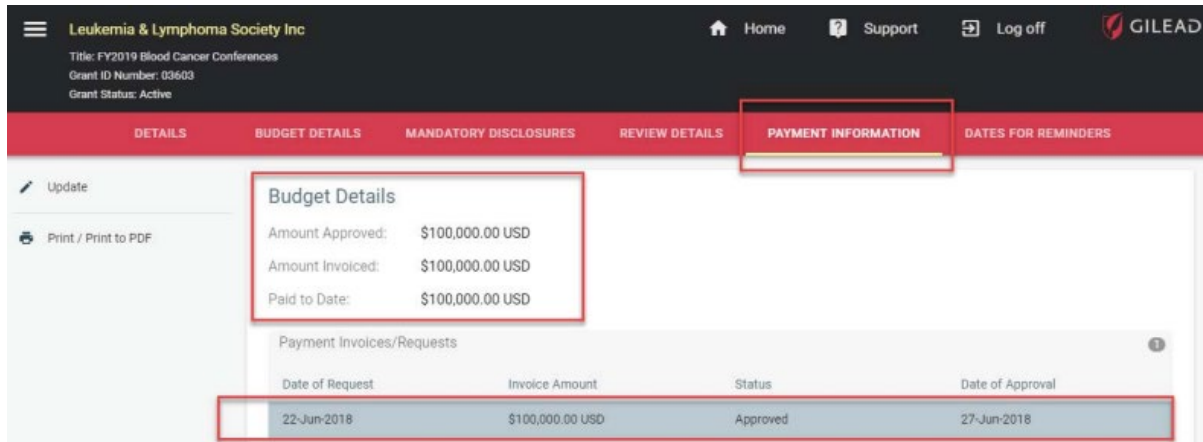
1. Select 'Type of Request' from the dropdown and click apply.
2. Fill in the details of your request in the free-text field - please summarise the reason for your change in scope, what the specific changes are and how they will impact Gilead.

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

Payment information

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

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



Reports and reconciliations

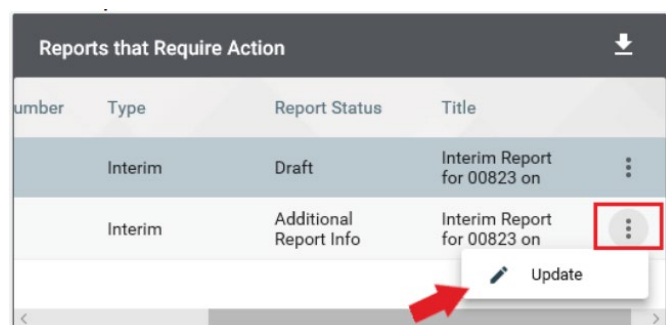
Submitting a report

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

Responding to questions on a report

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

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



Submitting a Budget Reconciliation

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

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

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

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

Phone number: +1-718-576-1406

Email: gilead@steeprocks.com