

# ***Grants, Giving and Corporate Sponsorship Support: Request Close Out process***

***June 2016***

## Objective

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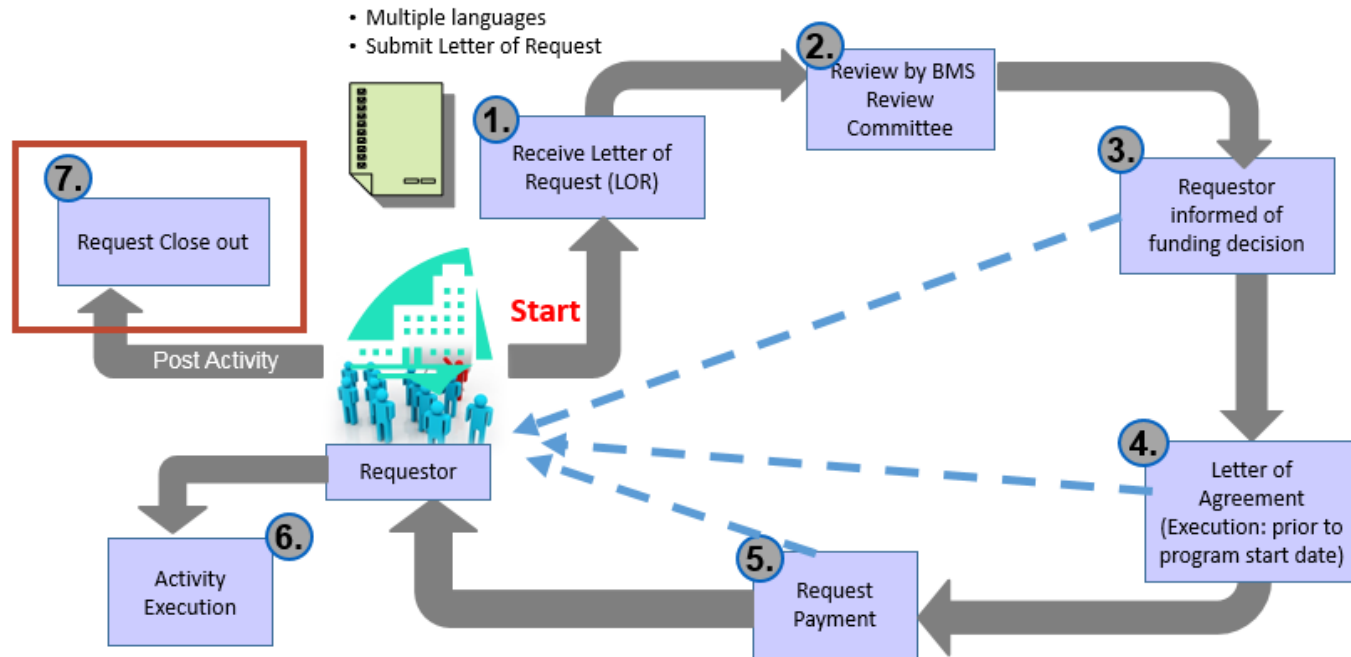
**The purpose of this training is to -**

- Provide an overview of the **close out process** for a request funded by Bristol-Myers Squibb (BMS).
- Familiarize the requestors receiving BMS funding with the process and information that is required to complete the close out process

*Effective 23<sup>rd</sup> June 2016, BMS will begin use of a new close out process to reconcile budget and execution of the program.*

# Close Out Process

Organizations receiving support from Bristol-Myers Squibb are required to close out the activity/program after its completion in the Request Management System (CyberGrants)



## *Types of support requiring close out*

Corporate Sponsorship Support	Independent Medical Education Support
Fellowship Support	Patient Education Support
Umbrella Research Grant	Scholarship Support

Close out is not needed for charitable donation, co-pay donation or a corporate membership support.

# Close Out Report

Questions in request close out form are conditional and will display/hide based on your responses.

Welcome Page	Request Information	
<h2>BMS Close out Report</h2>		
<p><b>* Did the activity(ies) occur as detailed in the original funding request?</b></p>	<p>Yes <input type="button" value="v"/></p>	
<p><b>Please upload the program brochure/additional information for activity.</b></p>	<p><input type="button" value="Upload File"/></p>	
<p><b>Was the funding received for this request used as stated in the original funding request and as per the Letter of Agreement?</b></p>	<p>Yes <input type="button" value="v"/></p>	
<p><b>Total Amount of BMS funding used</b></p>	<p><input type="text"/></p>	
<p><input type="button" value="Save and Proceed"/></p>		

## Close Out Report (cont'd)

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- Close out report collects information regarding –
  - Activity Execution
  - Actual Budget for the program (Total Amount)
- Close out for a request needs to be completed within **90 days** from the program completion date
- Email notifications will be sent to the organization on a periodic basis to complete the request close out
- Once the close out report is received, BMS will analyze the information to determine if there is a refund due based on the actual expenses and proposed expenses at the time of request submission.

## Refund Process

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- If it is determined that a refund is due, a Grant Analyst reaches out to the organization with a refund notification
- Refund is due within **30 days** of notification
- Refunds can be mailed to

Bristol-Myers Squibb  
Attn: Lauren Graham  
777 Scudders Mill Road  
Plainsboro, NJ 08536

- For any questions, please contact the Grant Analyst who sent out the notification through email

# Support

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For general support questions regarding request close out process, please contact –

Email: [support\\_grantsandgiving@bms.com](mailto:support_grantsandgiving@bms.com)

Phone: 1-800-831-9008 (Mon – Fri, 8:30 am to 4:30 pm EST)