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

June 2016
Objective

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 23rd June 2016, BMS will begin use of a new close out process to reconcile budget and execution of the program.
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

<table>
<thead>
<tr>
<th>Corporate Sponsorship Support</th>
<th>Independent Medical Education Support</th>
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<tbody>
<tr>
<td>Fellowship Support</td>
<td>Patient Education Support</td>
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<tr>
<td>Umbrella Research Grant</td>
<td>Scholarship Support</td>
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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.

- Did the activity(ies) occur as detailed in the original funding request?
- Please upload the program brochure/additional information for activity.
- Was the funding received for this request used as stated in the original funding request and as per the Letter of Agreement?
- Total Amount of BMS funding used

Save and Proceed
Close Out Report (cont’d)

• Close out report collects information regarding –
  • Activity Execution
  • Actual Budget for the program (Total Amount)

• Close out for a request needs to 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

• 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

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

Email: support_grantsandgiving@bms.com

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