



Global R&D Employees:

Global R&D / Global Medical Affairs / HEOR

Refer to the “*Global R&D EngageMate Document Upload Requirements*” document (effective March 2024) for specific document guidance on your R&D activity.

Europe Region Employees:

Commercial / Local Medical / TPE Medical / TPE Commercial

Refer to the “*EU EngageMate Document Upload Requirements*” document (effective March 2024) for specific document guidance on the following activities occurring in Europe

- Educational Grants/Scholarships
- Educational Sponsorships
- Sponsorship of Third Party Activity

Both of the above-mentioned documents can be found on the EngageMate Resource Center. Alternatively, you may contact your Local Compliance Officer for additional questions.

Request Preparation: Documentation Guidelines

Activity Type	Documentation Examples
Advisory Board / Expert Meeting	• CV • Draft Agenda • List of specific questions to be asked of the Advisors • Draft Contract • Draft presentation materials • Advisory Board Planning Form • Invitation • Excel spreadsheet listing estimated hospitality expenses
Teva Sponsored Research Activity	• Draft agreement • Research proposal and detailed protocol • Detailed study budget • Proof of FMV evaluation For Medical Affairs collaborative research • Documentation of MARC approval • CV
Community Donations	• Request letter or email from Organization describing purpose of the organization and the request for the donation • Draft Letter of Agreement • Tax exempt status documentation and/or where the organization is domiciled
Corporate Membership	• Request letter or email from Organization describing purpose of the organization and the request for membership detailing the benefits provided to Teva as a result of the membership • Draft agreement • Tax exempt status documentation and/or where the organization is domiciled
Educational Grant / Scholarship	• Request letter or email from Organization describing purpose of the organization and the request for the grant/scholarship • Draft Letter of Agreement • Tax exempt status documentation and/or where the organization is domiciled
Educational Sponsorship	• Request letter or email from Organization describing purpose of the event and request for sponsorship • Draft Letter of Agreement • Tax exempt status documentation and/or where the organization is domiciled • Request letters from HCP's • Letter of Agreement

Equipment / Product Donation	• Request letter or email from Organization describing purpose of the organization and the request for the donation • Details of the equipment and product and associated costs, including a rationale for where the equipment/product will be purchased from or distributed from • Draft Letter of Agreement • Tax exempt status documentation and/or where the organization is domiciled
Fee for Service	• CV • Draft Contract • Invitation • Draft Agenda
Hospitality	• Excel spreadsheet listing estimated hospitality expenses
Items / Gifts	• Excel spreadsheet listing estimated items/gifts expenses • Photograph or detailed description of item/gift
Market Research	• Protocol • List of participants
Patient Support	• Request letter or email from Organization describing purpose of the organization and request for support • Tax exempt status documentation and/or where the organization is domiciled
Research Grant	• Unsolicited grant request or application from recipient organization • Draft agreement • Tax exempt status documentation
Scientific / Investigator Meeting	• Investigator meeting proposal request form/documentation of approval from Head of GCO or Medical Affairs Review Committee • Draft agenda • Example Invitation • Excel spreadsheet listing estimated hospitality expenses
Site Visit	• Draft agenda • List of attendees • Draft presentation materials • Event synopsis or memo describing need/purpose • Copy of the slide deck to be presented • Invitation
Speaker Program	• Event synopsis or memo describing need/purpose

Sponsorship of 3rd Party Event	• Request letter or email from Organization describing purpose of the event and request for sponsorship • Draft Contract/Letter of Agreement • Draft Agenda/Event Synopsis • Draft presentation materials, if applicable • Tax exempt status documentation and/or where the organization is domiciled • Anti-Corruption Compliance Form
Third Party Representative Service Retention	• Riskmate recommendations

Activity Close-Out: Documentation Guidelines

Activity Type	Documentation Examples
Advisory Board / Expert Meeting	• Sign In Sheet • Meeting minutes • Summary of recommendations received from Advisors • Final report of expenses per person • Final slides, agenda, questions, etc. (if changes made from those previously approved) • Final executed contracts • Final work plans • Other proof of service documents, as applicable
Teva Sponsored Research Activity	• Evidence of research data conducted/collected, including how the research results were used within Teva • Final executed agreement • Other proof of service documents, as applicable, including a link to or location of the final study report and/or publication
Community Donations	• Final executed agreement Letter of acknowledgment from the organization • Other proof of service documents, as applicable
Corporate Membership	• Final executed agreement • Membership acknowledgment • Copy of event materials if Teva is mentioned as Corporate Member • Other proof of service documents, as applicable
Educational Grant / Scholarship	• Final executed agreement • List of recipient(s) • Grant/Scholarship acknowledgment • Other proof of service documents, as applicable

Educational Sponsorship	• Final executed agreement • Sign-in sheet • Other proof of service documents, as applicable
Equipment / Product Donation	• Final executed agreement • Letter of acknowledgment from the organization • Invoice for purchased equipment/product • Other proof of service documents, as applicable

Fee for Service	• Summary of advice/outcomes received from consultant • Final executed contract • Final work plan • Other proof of service documents as applicable
Hospitality	• Final report of expenses per person • Other proof of service documents, as applicable
Items / Gifts	• Final report of expenses per person • Other proof of service documents, as applicable
Market Research	• Other proof of service documents, as applicable
Patient Support	• Final executed agreement • Letter of acknowledgment from the organization • Other proof of service documents, as applicable
Research Grant	• Evidence of research data conducted/collected (e.g., progress reports, final reports, presentations, etc.) • Final executed agreement • Other proof of service documents, as applicable
Scientific / Investigator Meeting	• Final report of expenses per person • Final list of attendees if not previously provided • Final agenda, etc. (if changes made from those previously approved) • Other proof of service documents, as applicable
Site Visit	• Final agenda • Final presentation materials (if changes made from those previously approved) • Final list of attendees • Other proof of service documents, as applicable
Speaker Program	• Sign-In Sheet
Sponsorship of 3rd Party Event	• Final executed agreement • Copy of event materials if Teva mentioned as a sponsor of the event • Final presentation materials, agenda, etc. (if changes made from those previously approved) • Sign-In Sheet • Other proof of service documents, as applicable
Third Party Representative Service Retention	• Final executed agreement • Any documentation referring to conditions required in Riskmate • Other proof of service documents, as applicable