

# ✓ Donation Checklist for EngageMate

## Overall Procedural Guidance

- All donations must be submitted, reviewed, approved and closed out in EngageMate
- If the donation recipients include Members of the Health Care Community/Healthcare Organizations (HCO) or Government Organizations (GO), the approval must include legal and compliance. Please use the EngageMate form titled [Donations \(HCO/GO\)](#)
  - If the donation recipient is not a HCO/GO, use the EngageMate form titled [Donations \(Non-HCO or Non-GO\)](#)
- Submitters (or Project Originators, if applicable) are required to ensure/certify the donation aligns to the Teva Donations Policy and Procedures
- All donations require appropriate documentation for approval and closeout. A Documentation Checklist is provided below:

## Documentation Checklist by Donation Type

| Activity type               | Documents required for approval                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Close out documents                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><i>All Donations</i></b> | <ul style="list-style-type: none"><li><input type="checkbox"/> Request letter or email from organization describing purpose of the organization and how the donation will be used</li><li><input type="checkbox"/> Description of how the funding will be used with supporting evidence of Fair Market Value (FMV)</li><li><input type="checkbox"/> Details of recipient organization sufficient to evaluate its credentials and any relevant accreditation</li><li><input type="checkbox"/> Draft Letter of Agreement</li><li><input type="checkbox"/> Tax exempt status documentation (if applicable) and/or where the organization is domiciled</li><li><input type="checkbox"/> Due Diligence Committee approval (if applicable for recipients based on Global TPDDP)</li><li><input type="checkbox"/> Donations Committee approval (if applicable by local SOP)</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Final executed Letter of Agreement from the organization</li><li><input type="checkbox"/> Invoice, if applicable</li><li><input type="checkbox"/> Proof of payment</li><li><input type="checkbox"/> Global Donations Committee (GDC) approval for donations over 100,000 USD</li></ul> |

In addition to the requirements for ***All Donations***, the following types of donation require supplementary documentation for approval as indicated below:

| Activity type                                    | Documents required for approval                                                                                                                                                                           |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><i>Donations to Patient Organizations</i></b> | <ul style="list-style-type: none"><li><input type="checkbox"/> List of participants (if applicable)</li><li><input type="checkbox"/> Note: Teva must not be the sole funder of the organization</li></ul> |
| <b><i>Product Donations</i></b>                  | <ul style="list-style-type: none"><li><input type="checkbox"/> Description of the initiative based on Teva Access Play Book and SOP</li></ul>                                                             |
| <b><i>Equipment/Infrastructure Donations</i></b> | <ul style="list-style-type: none"><li><input type="checkbox"/> Approval based on Research Grants process or the Global Investigator-Sponsored Studies process if applicable.</li></ul>                    |

Contact the Compliance Operations Team, [ComplianceOperations@tevapharm.com](mailto:ComplianceOperations@tevapharm.com), for any operational questions related to Engagement submissions and your Local Compliance Officer for any further questions.

Please refer to the links below to read more about the Donation policy:

- [Global Teva Donations SOP Manual - myteva intranet](#)
- [Global Teva Donations Policy and Procedures 2022 - myteva intranet](#)