**EngageMate Fact Sheet**

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# **Part 1 October 2022**

## 

## **System Functionality**

1. Users can have dual roles (Submitter & Reviewer). Roles are chosen when logging-in using the EngageMate URL.
2. To change user role, you must log out of the current role and select the other role.
3. To view the current role’s profile (how you are logged in), click on the “hamburger” menu icon. You can also log out in this area.



1. Language can be changed on top right corner of page ( icon next to your initials)
2. To duplicate an activity, click the *Copy* button. This can save the user some time.
3. System allows users to print approved activity submissions to a PDF file. (Note: For submissions not yet approved, the “Print to PDF” is not visible). The button is found in the *Audit Trail* tab.
4. 15MB is the size limit for uploaded documents.
5. Advance to a next page on bottom right of the grid page (“Page 1 of Page 3”).
6. View current Tier, FMV Range, and the CV of Service Providers in EngageMate’s Customer Master on the left hand navigation panel.
7. Tiles on your home page filter your activity lists. To see your complete activity list, click on Activity on left hand navigation panel.

## 

## **Submission Requirements**

1. CVs of Service Providers are uploaded just once to the Service Provider’s profile. However, if a *Tier Change* is requested, an updated CV is required to be uploaded.
2. Drop down lists showing *Document Type* will change depending on the activity type selected, or the current step in the review workflow.
3. Healthcare Professionals are always nominated as an individual; they cannot be nominated using an organization name (Healthcare Organization).
4. For Hospitality forms, the estimated number of attendees includes Teva employees.
5. *Project Originator* is the owner of the activity and is responsible for all aspects of the submission and not just the data entry of the submission.
6. For example: An Administrative Assistant, creating an activity submission on behalf of a Product Manager is a *Submitter*, while the Product Manager is the *Project Originator*
7. Project Originators are required to certify the activities alignment to Teva policy and procedures before an activity can be closed out
8. FMV Modifications are requested when necessary to exceed the maximum allowable *preparation time* or *travel time*, change the HCPs current *Tier*, or request either a *one-time rate change* or a *permanent rate change*.
9. Medical is a required part of the review workflow (1) when a new Service Provider is nominated and requires a Tier, or (2) when a Tier change is requested via an FMV modification.

## 

## **System Controls**

1. Activities cannot be “back dated” in EngageMate.
2. Submitters cannot be Project Originators on the same submission. (i.e., you cannot select yourself as the Project Originator).
3. All Cross Border activities require the data entry of detailed spend data (per HCP/HCO) and supporting documentation (e.g., signed contract, invoice, proof of service, proof of payment, etc.) in the close-out section.
4. *Approved* activity(ies) move to Close-Out status, 1 day after the activity start date.
5. Users can continue to upload documents for activities in *Closed* status, if needed. However, documents cannot be deleted.
6. Advisory Board/Expert Meeting has a two-part review workflow; first is the Advisory Board/Expert Meeting’s concept and the second part is the nominees.

# **Part 2 November 2022**

## 

## **EngageMate Training Videos**

1. Several training videos were created to assist you. You can view the training videos by visiting the Teva Tube site (<https://vod.tevapharm.com/>) and search for the EngageMate channel.
2. In addition, EngageMate related training videos are tagged with #engagemate for easy searching.

## 

## **System Functionality**

1. When you **copy an activity** in EngageMate, the documents uploaded in the original submission are also copied to the new activity. You must delete the documentation if not applicable to the newly copied activity.
2. HIP activities when migrated to EngageMate will not have the associated documents uploaded. Documentation for these activities are a part of the HIP-Archived record.
3. You can upload a new CV by editing the Service Provider’s profile. You will be able to delete the existing CV.
4. **Do not** reply to automated email messages received from EngageMate. The reply mailbox is **not** monitored and you will not receive a reply.
5. When **searching for a Service Provider**, it is suggested you use the “Local Name” fields. The “English Name” fields, for most Service Providers are blank.
6. When using the “English Name” fields if you do not have an English Name you can enter the local language name but remove any special characters in the name since not all users can easily access those special characters on their keyboard.
7. **Designated Reviewer** - if you are unsure who to select as your designated reviewer reach out to your Local Compliance Officer for guidance.
8. **Review Groups** are set-up in EngageMate. For activities that require a level 2 review, the user does not need to select the reviewer(s).
9. **Dual Role Users** - Some users have multiple user roles in EngageMate. Therefore, if you use the link in the email notification when accessing the activity, remember to login using the same role listed in the body of the email. If you login using the wrong role, you will receive an error message or be unable to take action.
10. **Request for More Information** – when a Reviewer selects “Request for More Information”, the complete review cycle is re-initiated. This means all Reviewers will have to re-review and render a decision after the submitter adds the additional information requested.
11. **Reviewers Tab** – We understand this tab may be confusing because it lists all possible reviewers. If a user would like to know who is currently reviewing the activity and/or the status, please view the **Audit Trail** tab for this information.
12. **“Any” Reviewer** – some groups in the Level 2 review have the “any” reviewer feature where multiple individuals are assigned to review an activity; but only **one** individual is needed to render a decision. If you see the same **sub-role** listed in the Audit Trail tab or Reviewer tab for a reviewer, this indicates that only one individual has to render a decision. Others are skipped in the system after the first decision is rendered.
13. **Uploading documents** in EngageMate – The systems identifies if the activity includes uploaded documentation by the name of the action button. For example:

|  |  |
| --- | --- |
| cid:image001.png@01D8F9B8.210D5450 | “*View/Edit uploads*” reflect there ARE documents uploaded. Click this button to view or edit what is uploaded. |
|  | “*Start uploading*” reflects there NO documents uploaded in this section. Click this button to upload documents. |

1. **Cancelling an activity** – Submitter can **cancel** an activity while the activity is in their queue (and not with a Reviewer). To cancel an activity that is currently with a Reviewer, the Submitter must ask the Reviewer to “Request More Information”. This will return the activity to the Submitter where they can cancel the activity in the Step 1 – Activity Details tab.

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## **Submission Requirements**

1. Advisory Board concept must be approved before Service Providers are nominated.
2. When an activity has multiple Service Providers, and one Service Provider is being put through with an FMV modification, all other Service Providers must wait until the FMV modification is reviewed and a decision is rendered.
3. Reviewers can add comments when approving an activity; however, comments are not required for approval.

## **System Controls**

1. When entering amounts, users should not use numerical separators. For example:
   1. Do not enter: 100,500.99
   2. Enter: 100500.99
2. Certain countries require entry of product or location during close-out. Because this is not a global requirement and not all countries require product or location, please note these fields will not reflect as required on the excel template to upload.