

R&D Required Documentation for Activities in EngageMate (1/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Fee for Service	CV or other Qualification of the Service Providers that is used to determine FMV	✗				
	Draft Contract	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully Executed Contract			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Proof of Service (e.g., key deliverables, reports, presentations, meeting minutes or attendance records)			✗		
	Proof of Payment and Supporting Documentation (e.g., invoices, receipts, electronic invoices report with approved hours and rates, travel, accommodation and other expense evidence)			✗		

R&D Required Documentation for Activities in EngageMate (2/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Advisory Board / Expert Meetings	Advisory Board Form	✗				Required for Advisory boards only (not Expert meetings)
	CV or other Qualification of the Service Providers that is used to determine FMV	✗				
	Meeting Materials: Draft meeting Agenda, Example Advisor Meeting Invitation, Final Version of All Presentations	✗				Note: Presentations can be sent by email
	Final approval of Meeting materials from Legal, Compliance, IP			✗		Upload a PDF of email approvals from Legal, Compliance and IP (IP not required for GMA)
	Draft Contract	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully Executed Contract			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Attendance records with specific times that each advisor was present			✗		
	Final Meeting Agenda			✗		
	Executive Report: Written evidence of the advice and/or feedback received and documentation of how the advice is used by Teva			✗		
	Proof of Payment and Supporting Documentation (e.g., invoices, receipts, electronic invoices report with approved hours and rates, travel, accommodation and other expense evidence)			✗		

R&D Required Documentation for Activities in EngageMate (3/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Scientific Meetings	Meeting Materials: Draft meeting Agenda	✗				
	Final presentation materials		✗			Can be sent by email, file transfer, etc.
	Sign-in sheet / proof of attendance			✗		
	Final Meeting Agenda			✗		
	Final Version of All Presentations and proof of Legal, Compliance and/or IP approval			✗		Required for Scientific Meetings only
	Proof of Payment and Supporting Documentation (e.g., receipts for travel, accommodation and other expense evidence)			✗		

R&D Required Documentation for Activities in EngageMate (4/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Investigator Meetings	Documentation of the legitimate business need which must include which countries are participating	✗				
	If using an external vendor/contractor, make sure to obtain Due Diligence approval	✗				
	Investigator Meeting proposal request form and/or documentation of approval from Head of GCO	✗				
	Meeting Materials: Draft meeting Agenda - If a speaker is hired to attend EM activity approval # is required	✗				
	Excel spreadsheet listing estimated hospitality expenses (detailed budget) and hotel proposal	✗				
	Example Meeting Invitation	✗				
	Final presentation materials		✗			Can be sent by email, file transfer, etc.
	Approval of Hospitality of LCOs (participating countries)	✗				Can be uploaded by R&D Compliance upon approval
	Final Meeting Agenda			✗		
	Proof of Payment and Supporting Documentation (e.g., receipts for travel, accommodation and other expense evidence)			✗		
	If a speaker is hired to attend, submit all documents required by Fee for Service section			✗		

R&D Required Documentation for Activities in EngageMate (5/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Post Marketing Study / Collaborative Research	Copy of research proposal and documentation of approval by the relevant R&D governance committee (e.g., MARC), or for preclinical studies, the appropriate scientific senior management	x				
	CV or other Qualification of the researchers that is used to determine FMV	x				
	Detailed study budget with supporting evidence of clinical FMV assessment	x				
	Clear description of responsibilities between Teva and research collaborator	x				
	Draft Contract	x				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully Executed Contract			x		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Proof that the research has taken place (e.g., records from the recipient verifying receipt and expenditure of funds), and documents, as applicable, including a link to or location of the final study report and/or publication			x		
	Financial Supporting Documentation (e.g., invoices from Academic Institutions, Universities and print screen from SAP showing proof of payment)			x		
Investigator Sponsored Studies	See GMA POL 23 "Investigator Sponsored Studies" for guidance, as well as related SOPs and Work Instructions					

R&D Required Documentation for Activities in EngageMate (6/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Educational Grants and Scholarships	Copy of educational grant or scholarship request	✗				
	Proof of tax status for non profit organizations, if applicable	✗				
	Proof of Local or Global Grant Committee review (Refer to Global Donations Policy for guidance)	✗				
	Draft grant/scholarship agreement	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully Executed Contract			✗		
	Documentation that the activity has taken place			✗		
	Final Educational Agenda and Program			✗		
	Financial Supporting Documentation (e.g., proof of payment) and grant reconciliation to document that the funding was used as described			✗		

R&D Required Documentation for Activities in EngageMate (7/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Educational Sponsorships	Details regarding the Educational Sponsorship Event / Activity, including dates and location	x				
	Details regarding the nominated educational sponsorship recipient, including: CV, selection criteria, and description of how the event/activity meets the recipients unmet educational need	x				
	A detailed cost estimation	x				Estimation must include registration fees, travel, accommodation, meals (in total and per sponsored HCP participant)
	Educational Sponsorship Letter of Invitation	x				
	Final Event Agenda / Program			x		
	Proof of the recipient's attendance at the event			x		
	Proof of Payment and Supporting Documentation (e.g., receipts for travel, accommodation and other expense evidence)			x		

R&D Required Documentation for Activities in EngageMate (8/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Market Research	Proof of MARC approval if required	✗				
	Confirmation of FMV for study participants obtained from Compliance.	✗				
	Draft statement of work, including methodology and detailed budget	✗				
	Final statement of work (SOW), including detailed budget with fees paid to participants by participant type			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Proof that the research has taken place (e.g., report).			✗		
	Proof of Payment and Supporting Documentation (e.g., invoice and proof of payment)			✗		
Market Research Conducted by Human Factors Team	Final statement of work (SOW), including detailed budget with fees paid to participants by participant_type			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Confirmation of FMV for study participants obtained from Compliance.	✗				
	Proof that the research has taken place (e.g., report).			✗		
	Proof of Payment and Supporting Documentation (e.g., invoice and proof of payment)			✗		

R&D Required Documentation for Activities in EngageMate (9/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Research Grants	Initial request detailing how the grant will be used	✗				
	Draft agreement	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Proof of Local or Global Grant Committee review (Refer to Global Donations Policy for guidance)	✗				
	Documentation evidencing the qualifications of the research grant recipient	✗				
	Description of expected research deliverables	✗				
	Fully Executed Contract			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Documentation that the research has taken place (e.g., recipient records verifying receipt and expenditure, final reports, presentations or publications, copies of any public disclosures of Teva donation)			✗		
	Financial supporting documentation (e.g., proof of payment)			✗		

R&D Required Documentation for Activities in EngageMate (10/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Community Donations	A copy of the initial request, proposal and/or application detailing how the donation will be used including information regarding the recipient and description of the need	✗				
	Description of how the funding will be used	✗				
	Draft agreement	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully Executed Contract			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Documentation from the recipient demonstrating that the donation has been received and appropriately utilized.			✗		
	Financial supporting documentation (e.g., proof of payment)			✗		

R&D Required Documentation for Activities in EngageMate (11/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Infrastructure / Equipment Donations and Product Donations	A copy of the draft agreement	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Copy of the donation request and information regarding the donation recipient and dscription of how and by whom the product or equipment will be used	✗				
	The approximate market value of the product or equipment (if applicable)	✗				
	Fully Executed Contract			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Documentation from the recipient demonstrating that the donation has been received and appropriately utilized.			✗		
	Financial supporting documentation (invoice and proof of payment)			✗		

R&D Required Documentation for Activities in EngageMate (12/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Site Visits	Description of purpose, draft agenda, planned hospitality and Teva attendees	x				
	Documentation of compliance approval of presentation materials and site leader approval of visit	x				
	Sign-in sheet/proof of attendance for external attendees			x		
	Final meeting agenda and description of any Hospitality provided			x		
	Final version of all presentations or other meeting materials			x		
	Documentation of expenses paid and/or reimbursement for each visitor.			x		
Hospitality	Meals: Receipt or Concur screenshot/information describing amount spent			x		Include as attachment only. Do not enter line item expense detail within EngageMate fields. This will result in double transparency reporting.
	Hotel or Travel Expenses: Receipt for all expenses incurred			x		Enter line item expense detail within EngageMate fields.

R&D Required Documentation for Activities in EngageMate (13/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Items/Gifts	Details and Market Value of the Item/Gift	✗				
	Documentation of each Item/Gift recipient	✗				
	Financial supporting documentation (e.g., detailed invoices and receipts)			✗		
Sponsorships of Third-Party Activities	A copy of the draft sponsorship agreement	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Original sponsorship request detailing the list of benefits for the sponsorship and information regarding the third party organizer	✗				This can be an event prospectus or brochure, or outreach message
	Activity agenda/program including venue and location	✗				
	Final presentation materials, if relevant to the event			✗		
	Signed sponsorship agreement			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Proof that the activity has taken place (e.g., benefits for Teva in exchange for the Sponsorship, final version of all presentations, brochures, or other materials utilized)			✗		

R&D Required Documentation for Activities in EngageMate (14/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Corporate Memberships	Original membership invitation describing membership activities, other members, the organization's goals, and the governance structure	✗				
	Information regarding the organization inviting Teva to join	✗				
	Description of how/where member activities will occur, including frequency, and locations	✗				
	Description of how the membership fees will be used	✗				
	Signed membership agreement			✗		
	Proof that the designated Teva representatives have participated in the member activities (e.g., meeting dates, names of Teva attendees, meeting minutes.)			✗		

R&D Required Documentation for Activities in EngageMate (15/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Support to Patient Organizations	Copy of patient organization support request including the need and description of how funding will be used with detailed budgets	✗				
	Information regarding the recipient patient organization including tax status for not for profit organizations	✗				
	Draft agreement	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully executed support agreement			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Documentation that the support was received and utilized as intended			✗		
	Financial supporting documentation (e.g., proof of payment)			✗		

R&D Required Documentation for Activities in EngageMate (16/16)

Activity Type	Document Type	Submission Documentation		Closeout Document		Comments
		Engage Mate	Other Database	Engage Mate	Other Database	
Fee for service Engagements with Patient Organizations	Qualifications of the patient organization to perform the services and support for FMV	✗				
	Draft contract	✗				This is required for EngageMate submission in certain countries. Check with your Local Compliance Officer to understand this requirement.
	Fully executed contract			✗		If the fully executed contract is available in the Global Legal Repository, it does not need to be uploaded to EngageMate.
	Proof of service, such as key deliverables			✗		
	Invoices and receipts, electronic invoices report with the approved hours and rates per invoice			✗		