

## How to Initiate a Charitable Contribution Funding Request, Respond to an RFI, and Enter Evaluation Information

### Before you begin:

- Register as a user of GFRS

And have the following available for upload or entry into the system:

- A signed copy of your organization's current W-9 or W-8BEN form (if not yet on file with Genentech)
- Any promotional or event advertisement
- The meeting agenda
- Detailed budget information, and
- The name and e-mail address of an "authorized signer", someone authorized to sign a Letter of Agreement (LOA) for your organization. The authorized signer will take a role in the process if the request is approved.

### To initiate a funding request:

1. Log in to GFRS from [funding.gene.com](http://funding.gene.com) with your registered user name and password.

#### User Login

User Name	<input type="text"/>
Password	<input type="password"/>
	<input type="button" value="Log in..."/>

2. From your GFRS home page, click **Create a New Funding Request**.

3. If this is your first request, provide your organization's:
  - a. **Tax ID number** and **Tax status** (first time only)  
Note you must enter the dash in your **Tax ID** (XX-XXXXXXXX)
  - b. **Name, type, website, mission, and number of employees**
  - c. **Office location**
  - d. Current, completed **W-9** or **W-8BEN** form

▼ Tax ID	
Where is this organization located?*	United States
* Tax ID	12-345678B1
* Tax status	501 (c)(3)
<input type="button" value="Continue"/>	

4. Select the purpose of your request and click **Save and Continue**.

5. Page through the application forms, clicking **Save and Continue** at the bottom of every page.

6. Provide the total program budget, adding line items for each necessary category (making sure to scroll over and enter comments in the **Notes** section) and click **Calculate & Total** when finished to sum up.

\* Total Overall Budget

Entered so far

▼ Budget for Live

Actions	Category	Subcategory	Amount	Unit
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Budget Total \$0.00

7. If you are not an authorized signer, enter the name and email address of the authorized signer who will execute the LOA if the request is approved.

8. Click **Submit** to complete the process.

## To respond to a Request for Information (RFI):

If you receive an email notification of an RFI:

1. Log in to GFRS from [funding.gene.com](http://funding.gene.com) with your registered user name and password.

### User Login

User Name	<input type="text"/>
Password	<input type="password"/>
	<input type="button" value="Log in..."/>

2. Your GFRS home page will list any outstanding RFIs, including a description of the information requested, in the “My Required Tasks” section. Identify the request with a status of “RFI” and click **View**.

<a href="#">View</a>	G-00917	Beyond the Grid: Emerging Pharmacological Options for the Treatment of Diabetic Macular Edema	08/26/2011	\$226262.33	RFI
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3. Click **Continue** until you have access to the fields requiring additional information.
4. Provide the requested information and then click **Save & Continue**.

▼ Application - Healthcare-Related Charitable Support

Request ID	G-00383
* Requested amount	<input type="text" value="35,274.45"/>
* Non-charitable amount (If applicable, please enter the portion of the requested cash amount that will not be used for charitable purposes e.g. inclusion of a charge or expense to Genentech)	<input type="text"/>
* Event/program's overall budget	<input type="text" value="75,687.57"/>
* Therapeutic area	<input type="text" value="Diabetes"/>
If you selected "other", please specify which therapeutic area applies to this request	<input type="text"/>
* Event / program type	<input type="text" value="Patient education"/>
* Event / program title	<input type="text" value="Education and Diabetes"/>
Is this program accredited? (An accredited program has met quality standards set by the applicable profession)	<input type="text" value="Yes"/>
* Purpose of the support/program description (Provide a description of the program including format, scope, number of programs covered; given limited space in this section, you'll be given an opportunity to upload additional documentation, later if needed.)	<input type="text" value="Patient education for diabetics."/>

5. On the screen that follows, choose whether or not you are an authorized signer and then click **Re-Submit**.

### Funding Request Final Submission

Review your funding request. Click the "Print Preview" button. Click "Submit" to send your request to Genentech for review. Upon submitting, changes can not be made to the funding request application.

All approved funding requests require a signed letter of agreement (LOA) prior to funding. Please indicate below whether you are authorized to sign a LOA on behalf of your organization.

Print Preview

<< Back

Re-Submit

6. Click **OK** to confirm.
7. Visually confirm the response was accepted: the status of the request on your GFRS home page should read "RFI Response Received".

<a href="#">View</a>	G-00917	Beyond the Grid: Emerging Pharmacological Options for the Treatment of Diabetic Macular Edema	08/26/2011	\$226262.33	RFI Response Received
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Note: Respond to an RFI within 10 days of notification or your request may be canceled.

## To provide evaluation information:

You will receive an email requesting that you provide evaluation information once your project end date has passed. You will have 90 days to supply this information.

1. Log in to GFRS from [funding.gene.com](http://funding.gene.com) with your registered user name and password.

### User Login

User Name

Password

2. Under the **Action** menu select **Evaluations**.

<b>View</b>	<b>▼ Actions</b>	G-00969	Si
<b>View</b>	<b>Status</b>	G-00967	in
<b>View</b>	<b>Report</b>	G-00966	in
<b>View</b>	<b>Letter of Agreement</b>	G-00965	Tr
<b>View</b>	<b>Evaluations</b>	G-	
<b>View</b>	<b>Delete</b>	G-	

3. Complete the evaluation form and click **Submit** to complete the process.

**▼ Evaluation**

\* Expected evaluations at time of request:

\* Your description of how your organization will measure success at the time of request:

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\* Please briefly describe goals that have been met to date:

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\* Please briefly describe lessons learned and goals unmet to date:

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