

1. Submission Requirements

The following items are required for submission.

Independent Medical Education

- Organization and Requestor contact information
- Title of Program Event
- Program Date (if applicable)
- Program Description, Learning Objectives, and Needs Assessment
- Outcome Measures/Plan
- Audience Description and Methods of Recruitment
- Activity Details (Number, Faculty, and Venue information)
- Total Program Budget and Amount Requested from Agios
- Grant Request Letter/Activity Description (on Organization Letterhead)
- Program Agenda
- W8/W9

Only fully completed grant requests will be considered.

Note: Event start dates less than 60 days from submission date may be declined.

2. How to Access the Agios Request Management System

Applications are submitted via the Agios Request Management System.

Visit the Agios Request Management System at https://agios.envisionpharma.com/vt_agios/

3. Register for an Account

Create a New Account

Use the registration link on the left panel of the homepage

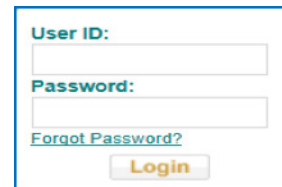


A **Registration** window will open; complete all required fields marked with an asterisk, then click **OK**.

You will receive an email providing your User ID and a temporary Password.

4. Log in to System

Input your User ID and Password in the upper left panel of the homepage.



User ID:
Password:
[Forgot Password?](#)
Login

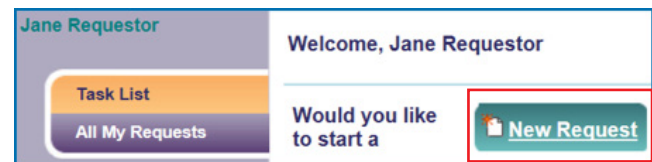
Note: The password will expire upon first log in and you will be prompted to create a new password. Passwords require a minimum of 8 characters and must contain at least 3 of 4 categories: uppercase letter, lowercase letter, number, or special character.

For password help, please call Visiontracker Helpdesk at 1-860-266-4944 (8:30am–8:30pm EST).

5. Application Submission

Submit a New Request

To begin a new application, click the **New Request** button at top of Task List page.



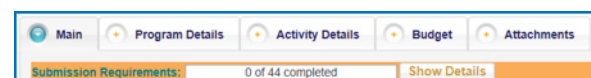
In the New Request window, select the Request Type for which you are applying and click OK.



New Request
*Request Type:
Investigator-Sponsored Trial (IST)
Medical Education
Charitable Giving / Research Grants
Named Patient Program/Expanded Access
OK Cancel

Navigate the Application

Move between application tabs using the menu at the top of the screen. The completion status will update as the application progresses.



Applications do not have to be completed all at once. Click Save to return at a later time. A temporary ID will be assigned for applications that are saved. Once completed, click Submit. You will receive an email confirming the submission and the assigned tracking number. Please ensure that your submission is complete before submitting. Incomplete submissions will not be considered.

6. Request Evaluation

AgiOS will review your submission and you will be notified regarding the decision. If approved, a Letter of Agreement (LOA) must be signed prior to release of funding.

7. Request for Reconciliation

Per Agios grant guidelines, activity and budget reconciliation is required for each request. Following the program end date, you will receive an email requesting reconciliation of the program activities and outcomes.

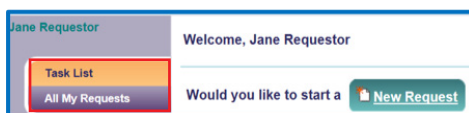
The reconciliation request will be added to your **Task List** and the **Activity Recon** and **Outcomes Recon** tabs will be available in the application.

The activities and outcomes reconciliation is **due within 30 days** of the program end date.

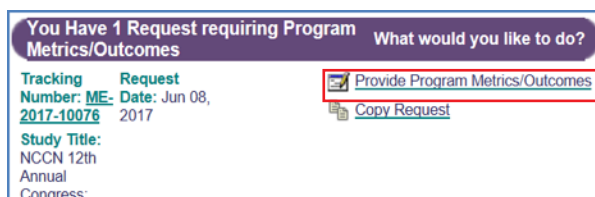
Note: If reconciliation is not received within 90 days of the program end date, you will be considered ineligible to apply for educational grant support until reconciliation is complete.

Upon logging in, the **Welcome** window will be displayed. The menu on the left side of the **Welcome** window provides access to your **Task List** and **All My Requests**

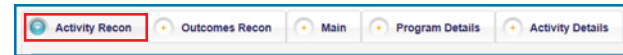
- **Task List** shows tasks that require your attention
- **All My Requests** shows all your requests and your request history



To access the application requiring reconciliation from the **Task List**, click the **Provide Program Metrics/Outcomes** link on the right-hand-side of the application under **What would you like to do?**



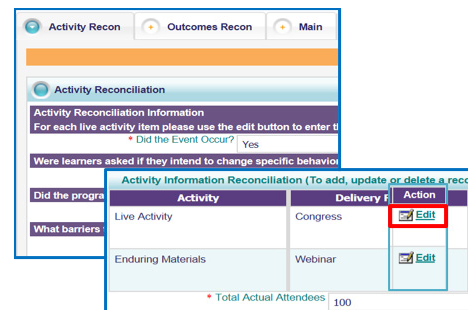
This will open the application on the **Activity Recon** tab.



8. Activity Reconciliation

Enter all applicable Activity Reconciliation information. Fields indicated with a red asterisk (*) are required:

- Did the Event Occur?
- Were learners asked if they intend to change specific behaviors when treating patients?
- Did the program address strategies to overcome barriers to optimal patient care?
- What barriers to care were discovered?
- For each live activity item, please use the **Edit** button to enter the actual start/end dates and actual number of attendees
- Total Actual Attendees

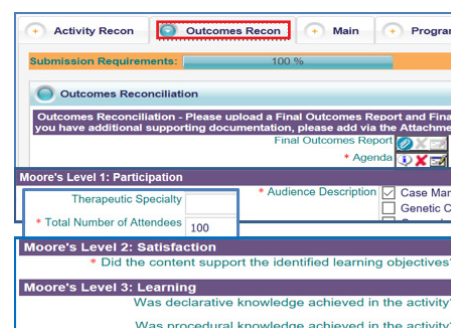


9. Outcomes Reconciliation

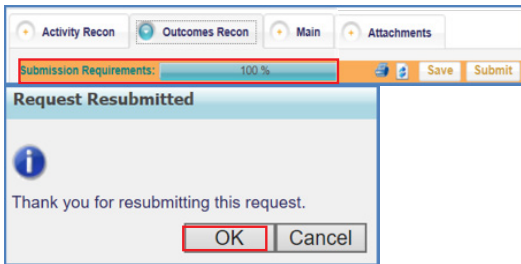
Enter all applicable Outcomes Reconciliation information. Fields indicated with a red asterisk (*) are required:

- Attach Agenda
- Audience Description
- Total Number of Attendees
- Did the content support the identified learning objectives?

Where applicable, provide responses to all other questions under each of the Moore's Level sections.



When the **Activity** and **Outcomes** reconciliations are complete, the **Submission Requirements** bar will indicate 100% and the application can be submitted for review. Click **Submit**, and then **OK** to close the **Request Resubmitted** window.



10. Budget Reconciliation

Once Agios has completed the Activity and Outcome Reconciliation review, an email will be sent to request submission of the program's actual expenses and revenue.

The request will be added to your **Task List**, and the **Budget Recon** tab will become available.

To access the application from the **Task List**, click the **Provide Budget Recon** link on the right-hand-side of the application under **What would you like to do?**

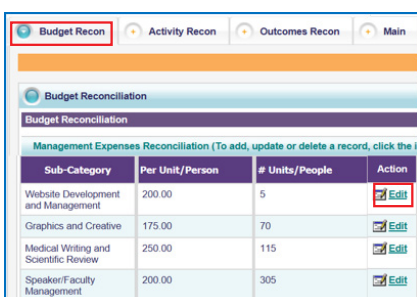


Budget reconciliation is **due within 60 days** of the program end date.

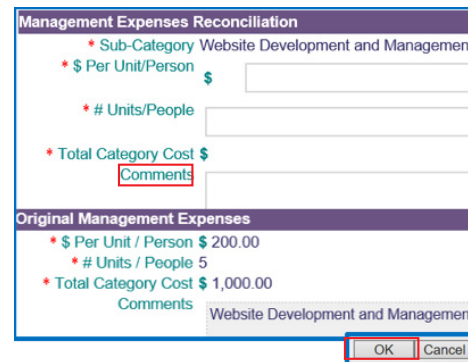
Note: If reconciliation is not received within 90 days of the program end date, you will be considered ineligible to apply for educational grant support until reconciliation is complete.

Budget Reconciliation

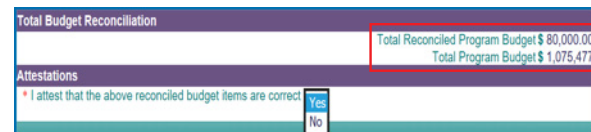
Budget reconciliation is required for each budget line item. To enter the budget reconciliation details, click **Edit** for each line item and enter the actual amount per unit, actual number of units/people, and total cost for each category.



Please use the **Comments** text box to explain any significant differences between the planned and actual costs. Click **OK** to complete.



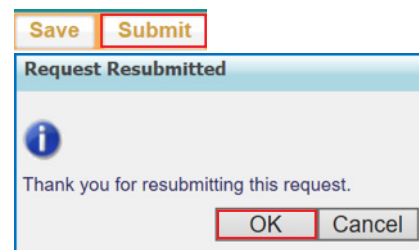
Continue this process for all budget line items. The **Total Reconciled Program Budget** will be calculated and will appear at the bottom of the page.



Be sure to upload all required documents and reports, and complete the **Attestations** response.

Budget Recon Submission and Review

Click **Submit**, and then **OK** to close the **Request Resubmitted** window.



11. Reconciliation Approval/Grant Closed

Once Agios has reviewed and approved all reconciliation requirements, you will be notified via email when the reconciliation has been approved.

Once all closure requirements have been met, you will be notified via email that the grant has been closed.