

# Opportunity Assessment Request to Medical

## Learning Objectives

After completing this unit, you'll be able to:

- Create a Product Opportunity Team
- Create an Opportunity Assessment for Medical Evaluation

## Introduction



**Haru**  
Global Portfolio Manager

Haru, the Global Portfolio Manager wants to take a project to selection but before doing so he must request an Opportunity Assessment from the Medical Team so they can record Medical Evaluation outcomes that will move the process forward.

The Global Portfolio Team and the Medical Team work closely together during the Medical Evaluation Process to make this happen. If you want to learn about the responsibility of the Medical Team and how they record the outcome of Medical Evaluation, then please read the '[How to Record a Medical Evaluation in SANITY](#)  
(<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0078th>)' module on myTrailhead!

Global Portfolio  
Manager



Medical Manager

# Create an Opportunity Request for Medical

You should start from the same Selection Opp D&D intended for GPC Selection.

Let's follow the process:

1. Click on the "**Team**" tab from the Opp D&D
2. Click on "**New Team Member**" button on the "Product Opportunity Team" object

The screenshot shows the 'Opportunity Detail & Diligence' section for 'Vorinostat HGC (New Selection) -2'. The 'Team' tab is active, indicated by a red circle with the number 1. In the 'Product Opportunity Team' section, the 'New Team Member' button is highlighted with a red circle with the number 2. Other tabs visible include Details, Feedback, Countries, Forecasts, Quip, and Selection Process.

3. In the "**Contact**" field, please choose "**Elena Zakirova**" (Head Global Medical Science and Affairs) who will further assign to the correct Medical Manager on a temporary basis (valid as Dec 9, 2022)
4. In the "**Organization Unit**" field, please choose "**Medical**"
5. In the "**Role**" field, please choose "**Medical Manager**"

New Product Opportunity Team

**Information**

**Contact** i Elena Zakirova X

**Organization Unit** Medical View all dependencies

**Role** Medical Manager View all dependencies

Active Team Member i 
  
 Include in Feedback i 
  
 Include in Approval i

**System**

**\*Product Opportunity Name** Vorinostat HGC -2 X

**\*Product Opportunity Contact Role Number** Vorinostat HGC -2

**System Information**

Contact User Search People... X

Included in DRB Approval i

Included in PSB Approval i

In Approval

Cancel Save & New Save

6. Go back to the Opp D&D and click on the “**Feedback**” tab

7. Click on “**New**”

Global Portfolio Home Portfolio Projects Meetings Tasks Product Targets Opportunity Detail

**Vorinostat HGC (New Selection) -2** + Follow Manage Countries Manage Opportur

Record Type New Selection	Evaluation Status Active	Feedback Average 0.0	Product & Project(s) Links Product: Vorinostat HGC	Originator Product Vorinostat HGC
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Declined → On-hold → **Active** → Under Review

Details Team **Feedback** Countries Forecasts Quip Selection Process

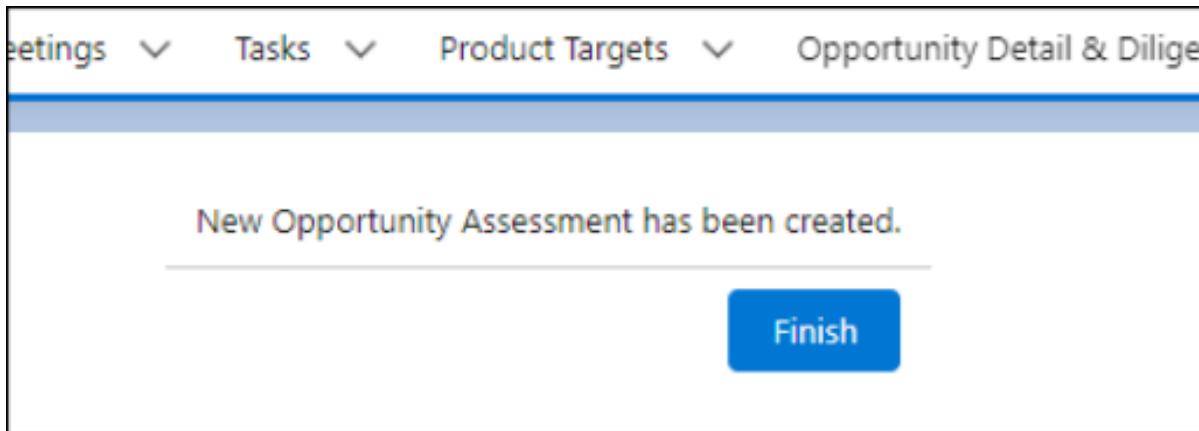
Opportunity Assessment (0) New Change Owner

8. Please select the “**Product Opportunity Team Member**”

9. Please choose a “**Feedback Status due date**” by when you want the Medical Evaluation to be ready

The screenshot shows a software interface for creating a new opportunity assessment. At the top, there's a navigation bar with links like Global Portfolio, Home, Portfolio Projects, Meetings, Tasks, Product Targets, Opportunity Detail & Diligences, and a specific tab for 'Assessment-107944'. Below the navigation is a message: 'New Assessment record for Opportunity: Vorinostat HGC -2' and a note: 'Please select a Product Opportunity Team member. If there are no active team members or to skip this step simply click next'. A dropdown menu labeled 'Product Opportunity Team Member' is open, with one item selected. Step 8 is highlighted with a yellow circle and a number 8. Below it is a field for 'Feedback Status due date' containing '01-Dec-2022', with a calendar icon and step 9 highlighted with a yellow circle and a number 9. A 'Next' button is at the bottom right.

You will receive a “**New Opportunity Assessment has been created**” message.



Congratulations!

You will need to wait until the Medical Team takes action on the Opportunity Assessment to record the Medical Evaluation.

## Follow-up with Medical Team

Let's follow up on the Medical Evaluation to see if the Medical Team has completed the request.

Let's follow the process:

1. You should check the “**Opp DD Joint Files**” section to see if the assigned Medical Manager already uploaded the assessment. You will see the same also in the Files section in the Opp D&D
2. You can use the “**Chatter**” function to communicate with the assigned Medical Manager

Global Portfolio Home Portfolio Projects Meetings Tasks Product Targets Opportunity Detail & Diligences \* Assessment-107944 \* More

Opportunity Assessment  
Assessment-107944

Function Medical Status Risks Likelihood Value Opportunity Diligence Vorinostat HGC -2

**Details**

- Opportunity Diligence: Vorinostat HGC -2
- Product Therapeutic Area: Oncology
- ATC: L1X (All Other Antineoplastics)
- Feedback Type: Portfolio Selection
- Summary: Overall Assessment
- Assessment Status: Draft
- Feedback Value: Not Assessed
- Risks
- Detailed Feedback
- Risk Overview

**Opp DD Joint Files**

Files dropped here will be visible on all Assessments and on the main Opportunity Detail & Diligence record

Files for Parent Opportunity Detail & Di... (0)

Upload Files Or drop files

**Chatter**

Activity

Post Poll Share an update... Share

Search this feed...

Once the Medical Manager uploads the Medical Assessment and sets '**Assessment Status**' to '**Final**', the GPfM owning the Opp D&D will get an email notification with a link to the related Opportunity.

Sandbox: Feedback is finalized

noreply@salesforce.com on behalf of [REDACTED]

To [REDACTED]

Retention Policy My Personal Archive (3 years) Expires 20/09/2025

Dear SANITY User,

The feedback assessment requested by you has been finalized. You can now view it by clicking on this [link](#) related to Opportunity :

Thank you

Your SANITY Team

Excellent!

You can now proceed with taking your project to selection at GPC.