***This system should be accessible on I-pad and mobile app***

***Spell check of all field names to be done before Go-Live***

***Support for the following should not be chargable***:

1. Updation of masters by Copernicus
2. Removal of any control as per Menarini requirement

**Event Status Nomenclature**

**For events with Honorarium**

1. Events with advance request – Final pre-event status to show as **Advance approved**
2. Events with no advance request – final status to show as **Approved**
3. Events whose honorarium is not submitted within 2 working days post event date – Final status to show as **Honorarium pending**
4. Once Honorarium details are put in by Finance team – **Honorarium approved**
5. Post 30 days from event date, if there is any advance taken for the event, then status to change into – **Settlement pending**
6. Post 30 days from event date, if there is no advance taken for the event, then status to change into – **Closure pending**
7. Post Settlement in case of advance taken- Final status to show as **Advance Settled**
8. Post Closure in case of no advance taken – Final status to show as **Closure approved**

**For events with no Honorarium**

1. Events with advance request – Final status to show as **Advance approved**
2. Events with no advance request – final status to show as **Approved**
3. Post 30 days from event date, if there is any advance taken for the event, then status to change into – **Settlement pending**
4. Post 30 days from event date, if there is no advance taken for the event, then status to change into – **Closure pending**
5. Post Settlement in case of advance taken- Final status to show as **Advance Settled**
6. Post Closure in case of no advance taken – Final status to show as **Closure approved**

**Notifications:**

1. Immediate email notification to go to the next level of approver
2. If within 1 working day, action is not taken then second reminder to go
3. If within 2 working days , action is not taken then escalation email to go to reporting manager
4. If within 3 working days , action is not taken then escalation email to go to 1 up manager
5. In case of rejection or approval, notification to go to initiator

* If rejection happens, initiator needs to either cancel it or action upon it
* If initiator doesn’t action upon 1 working day, notification to go
* If initiator doesn’t action upon 2 working days, escalation to go to reporting manager
* If initiator doesn’t action upon 3 working days, escalation to go to 1 up manager

NOTE: Access to be given to Sales coordinator (SC) to only download and review documents, in case of 1 up manger is Sales Head. Once initiator submits, email notification goes to SC to open and review

Access to be given to Marketing coordinator (MC) to only download and review documents, in case of reporting manager is Marketing Head. Once initiator submits, email notification goes to MC to open and review.

**Masters**

Master Initial Upload and update from time to time (Once updated by Menarini Admin/Copernicus team shall be available for selection in drop down)

Initially Masters will be shared by Menarini as listed below: (covering fields as mentioned in SOW Ver 1.0)

1. Speaker – Automatically updated once speaker code is created or existing speaker code is updated (Initial master with minimum required information required for selection will be provided by Menarini but as the speaker is selected, rest of the data points will be entered by compliance in the speaker code creation page for an old speaker)
2. Trainer - Automatically updated once trainer code is created or existing speaker code is updated (Initial master with minimum required information required for selection will be provided by Menarini but as the trainer is selected, rest of the data points will be entered by compliance in the trainer code creation page for an old trainer)
3. Employee – Updated by Copernicus within 1 working day ( once intimated by Menarini about the – New joinee, change of designation/reporting manager/designation/function head/vacancy etc.)
4. Brand Master – Updated by Copernicus
5. Slidekit – Updated by Menarini Admin (Once code is expired, cannot be re-used). Text box for 3 data points to be given
6. HCP Master - Updated by Menarini Admin (Any duplication in MIS code should throw error) (either add option or Excel file upload)
7. HCP Role - Updated by Copernicus
8. FMV - Updated by Copernicus
9. Type of Class III - Updated by Copernicus
10. Medical Utility Type- Updated by Copernicus
11. Event Type - Updated by Copernicus
12. Venue Selection Criteria - Updated by Copernicus
13. Product Name for Hands on/Demo Workshops - Updated by Copernicus
14. Class III Limits - Updated by Copernicus
15. Legitimate Need and objective Criteria for Medical Utility and HCP as consultants- Updated by Copernicus

**ATTENDANCE SHEET**

1. Attendance sheet needs to be as per the template shared
2. Once HCPs are selected from dropdown during pre-event stage , it should get converted into a PDF document which is downloadable.
3. If unlisted HCP invited, text box entry for HCP name, speciality drop down and GO/Non-GO selection that also needs to be part of PDF document.
4. All attendees to be marked as Yes/No and if any new attendees are there then it is to be either added from MIS or If unlisted HCP attended, text box entry for HCP name, speciality drop down and GO/Non-GO selection to be given.

**2. Speaker/Trainer Master Creation and Update- (covering details as mentioned in SOW Ver 1.0)**

1. Compliance creates speaker/Trainer code by entering all details on the page

2. There is an approval flow for the same

3. Speaker/Trainer Master can be downloaded by all stakeholders, its viewable by them on their landing page/Dashboard

4. Speaker details can be updated by compliance and there is an approval flow to it

5. Any speaker/Trainer unapproved/rejected by stakeholders should not be available for selection by initiator

**3. Reports**

1. All exceptions happening where a file is uploaded by initiator must be converted into a report that can be downloaded by admin and auto generated email to Sales, Marketing and Compliance Heads (It can be termed as Deviation report and its template is covered in scope of work. For eg. If timeline deviation of 7 days is happening, then system should capture

2. Autogenerated expense report against each HCP covering the following expense heads (honorarium, Travel, accommodation, consultant, medical utility and F&B expenses ) generated and circulated on a monthly basis with vendor code.

3. Outstanding events details to be autogenerated and circulated on a weekly basis to Sales, Marketing , Finance and Compliance Heads. ( including employees whose names are there in the list)

4. A cumulative report covering all details of all events

5. Closing Loop outstanding report for HCP as consultant events

**VACANT EMPLOYEE**

1. If an employee leaves while his event is in approval stage or may go into rejection stage, then the one up manager should be given a onetime Id and password to update and submit the documents and the same approval process to follow thereafter. The temporary ID and password to remain valid till the event is closed (this is required so that in case of rejection by any stakeholder, corrections can be done).
2. For any vacant employee, his/her name should reflect always with vacant in bracket with date when it was changed in system. For eg. Sybil (Vacant\_22/10/2023)

Aggregate Spend

|  |  |
| --- | --- |
| **Type of spend** | **Aggregate Spend in a year (Jan to Dec)**  **(Amount in INR)** |
| Honorarium as a Trainer | 12,00,000 |
| Honorarium as a speaker | 6,00,000 |
| HCP engaged as a Trainer/speaker/panelist/chairperson/moderator for any meeting (Travel or accommodation) (national) | 3,00,000 |
| HCP appointed as Consultant (Travel or Accommodation, Registration + Travel or Accommodation)  (National / International) | 5,00,000 |
| Medical Utility | 1,00,000 |

NOTE:

1. Aggregate spend is not applicable for HCPs other than country India (Therefore for speaker and trainer code creation, country selection is mandatory
2. If this limit is crossing for any Indian HCP, then system should prompt for an exceptional doc upload

**Controls**

1. All events to be raised before 7 days from the event date- It’s a deviation, then system should prompt for an “exceptional approval from manager” upload and post upload it should allow initiator to raise the event. Also in parallel, deviation approval to go to Sales Head/Marketing/Medical Head (upload NA in case of class III events)
2. If any event is outstanding with initiator for more than 30 days and he/she tries to raise a new event, then it’s a deviation, then system should prompt for an “exceptional approval from manager” upload and post upload it should allow initiator to raise the event. Also in parallel, deviation approval to go to Sales Head/Marketing/Medical Head (upload NA in case of class III events)
3. If food and beverages expense exceeds 1500/- for Class I and 2250/- for Class II/IV excluding taxes at pre-event and post event- - If any deviation happen, then system should prompt for an “exceptional approval from manager” upload and route to it to Finance Head for approval and post that only event status can change to approved or settled
4. If aggregate spend exceeds the limit at pre-event and post event- - If any deviation happen, then system should prompt for an “exceptional approval from manager” upload and route to it to Finance Head for approval and post that only event status can change to approved or settled
5. At settlement stage in class I event, If total expense including BTE and BTC exceeds 50% of budget approved at pre-event stage, it should go to Sales Head for approval
6. Honorarium documentation to be uploaded within 2 working days - - If any deviation happen, then system should prompt for an “exceptional approval from manager” upload and post upload it should allow initiator to raise the event
7. Finance accounts & Treasury to settle events within 5 working days - - If any deviation happen, then system should prompt for an “exceptional approval from manager” ” upload and post upload it should allow to enter any details
8. At Honorarium (in case of events with honorarium or else at settlement stage)Total attendees to be calculated based on no. of yes selected - ( If less than 6 attendees (including speaker), then then system should prompt for an “exceptional approval from manager” upload and post upload and in parellel approval goes to Sales Head and till SD doesn’t approve it, the event will not be approved. Notification to go to SD for approval
9. Change in approved venue, speaker, topic - Deviation upload ( Text box to be given in expense settlement page) then then system should prompt for an “exceptional approval from manager” upload and post upload only event can be submitted
10. Closing loop email notification as reminder to go to initiator every month till one event is done by the HCP as speaker/Trainer under same brand – Following message to go – “ Loop not closed, visit link and update event code for the respective HCP”. Once event codes are entered for all, notification to go to compliance for closure approval.
11. Once PAN card no. is added(text) and uploaded for any HCP (MIS code is unique) and then it sits in the speaker/Trainer master, initiator need not upload again, it comes auto pop up)
12. Whoever rejects and once initiator resubmits, it should go to the person who rejected it
13. Multiple brands can be selected and total allocation cannot exceed 100 %
14. In case of Class III agreement value exceeds 12 Lacs then agreement sign off will be Finance Head
15. Agreement release to be triggered for all meeting where there is a speaker/panelist/chairperson/moderator even when honorarium is 0.

**Finance Related**

1. Under Expense header, expense can be selected under Bill to employee or Bill to company, if Bill to company selected, it will not be calculated in advance to employee whereas Bill to employee will be added for advance.
2. Total budget of the event shall capture all bill to company and bill to employee expense heads at advance stage and total expense of the event at the settlement stage must capture the same.
3. Only bill to employee expense needs to be considered for disbursement of advance, reimbursement, or recovery from an employee.
4. All Bill to company/bill to employee will trigger invoice details entry by Accounts at honorarium and expense settlement stage

**Others**

1. All upload options can be mutiple additions, basically add button to be given
2. Once event is rejected, the initiator should be able to replace the old document with the new one
3. Vendor code data points and flow mentioned in **SOW Ver 1.0**