

Supplier “Tip Sheet”

Completing HCP Data Templates

General Requirements for Completing Templates:

1. All Standard Data Templates available for download under the “**Download Templates**” link on the Extranet.

Note: Always download a *new* file for each new project to ensure the most up to date template
2. **Do Not** Add or Delete any columns/fields in a standard data template.
3. **Never** reload a data template record/line that was previously uploaded and “successfully accepted” by the Totality system (i.e., record/line had no errors). Only re-load corrections for records that *were in error*.
4. The two “**Header Rows**” in every data template are *required*. Data placed on row 1 or row 2 of a data template will not be processed and an error notification will not be provided. Always start input on first row following header rows.
5. All data fields in a template are REQUIRED unless otherwise noted (i.e., denoted as “Optional”)

Note 1: Scroll the cursor over the template column header rows to reveal “optional” footnote

Note 2: OIG/EPLS/FDA verification checks are required to be completed for each contracted HCP prior contract/event. However, entering the “DATE” in the template “validation date field” is “optional”.

Note 3: “**# Hotel Nights**” and “**# Gifts Distributed**” fields: leave blank if “none”, do Not enter “Zero”
6. All **Required** data fields on a template must be completed for each new line/record of data (e.g.: Purchase Order number must appear on every data line)
7. “**Pick List**” columns include drop down lists with pre-selected entries. These selections Can be overridden, under limited circumstances/if appropriate, by copy/pasting text from another cell.
8. **Purchase Order (PO) or Check Requisition (CR) number** – only one of these fields need to be completed based on the type information received from J&J procurement system

Note: PO/CR # must match # entered on the “**Upload Document/Data Template**” login screen
9. Only one PO/CR allowed per template – multiple PO/CR’s cannot be included on the same template
10. PO # must be associated with a valid internal Totality project.

Note: The “**View Projects**” tab will confirm if a PO is “Active” and associated with a Totality ID.
11. Include only HCP related expenses. Do not include Supplier or J&J employee expenses, logistics costs, etc.
12. A **JNJ ID #** must be associated with every HCP payment/value exchange. This unique number facilitates tracking of value exchange activity to the appropriate HCP.

NOTE: Templates may be submitted for processing “With” or “Without” a JNJ ID # populated. Totality will perform an automatic search of the database for missing **HCP Individuals, (Not Institutions)**. However, there is a high likelihood that multiple/no match will be returned if the HCP is a “non-prescriber” type/classification.
13. Include only expense information not previously submitted (i.e., expense data must not be Year-to-Date)
14. “**Company Paid Expenses**” Section – Expenses paid by J&J/supplier on behalf of an HCP

15. **“Direct Reimbursables”** Section – Expenses incurred/paid directly by the HCP for which the HCP is seeking reimbursement (and must submit an original receipt)
16. **“Miscellaneous” Expenses**– Include ONLY valid “miscellaneous” expenses not covered under other columns (i.e., **parking, tolls, etc**). Honoraria, Meals, Lodging, etc should be entered in the appropriate data fields
17. No Dollar signs (\$) or Commas (“,”) must be placed in any “Expense/Amount” column
18. Expense information must be in **US** dollars
19. *Negative* amounts can be entered into Expense columns (i.e., for data template error corrections)
20. No “Text” should be included in any “Amount/Expense” columns
21. Do not insert "hard" carriage returns (e.g. ALT+ENTER) in a “Text” cell (i.e., no separate lines in one cell).
22. “Date” fields must be in **mm/dd/yyyy** format
23. **“Payment Date or Date Gift/Meal Provided”** field – should include following dates:
 - Actual Check Date for honoraria and/or reimbursable expenses paid to Speakers or actual Date of Distribution of the meal/gift to Attendees (speaker bureau; receptions/conventions).
 - Multiple checks (i.e., one for the speaker honoraria and a separate for speaker reimbursable expenses), separate records/lines must be reported on the data template for each payment date.
 - **Exception:** Clinical Site payments – may combine multiple payments made to a site during the same Quarter into one total payment per site, using a “Quarter End” date as the payment date (i.e., 3/31 6/30, etc)
24. **# Hotel nights:**
 - If there are no HCP lodging expenses, the “# hotel nights” **field should be left BLANK (not Zero)**. If any number, including Zero is populated in this field, an Amount (\$) will be **Required** in the “Lodging” field. **TIP** – Do NOT populate this field with a ZERO, leave the field Blank IF no hotel nights apply.
 - **Enter “1”** in this column **Only If** specific documentation/information (i.e., hotel bill) is not available to identify the actual # of hotel nights incurred for historical projects only (i.e., *projects that occurred before the new Templates were rolled out on April 20th*). If actual # of nights exceeded 1, the \$ amount in the “Lodging” field may be flagged as an exception to the J&J policy “lodging rate limits” for further monitoring/review. The Monitoring Team will f/u as needed to document an explanation/exception.
25. **# Gifts Provided:**
If no gifts were provided, the “# of Gifts Provided” **field should be left BLANK (do not enter Zero)**. If any number, including Zero, is populated in this field, all other associated “Gift” fields become Required (i.e., Description, Purchase Value, Retail Value). **TIP** – Do NOT populate any of the Gift Fields with ZERO.
26. The **“Verify Data”** Button performs basic template validation for “required” fields and “formatting” errors (i.e., numeric, date, y/n, etc). **Always** use the “Verify Data” button before converting to CSV format and uploading.

Note: If the macro does not work, the file Security Level must be reset to **“Medium”**

	A	B	C	D	E	F	G
	Verify Data	Save File For Upload	Please click the “Verify Data” before converting to a csv file	If the “Verify Data” does not work please change your Macro security level to medium or “Enable all macros”			
1							
2	Purchase Order Number	Check Requisition Number	Protocol Number	Project/Event Name	Project/Event Start Date	Project/Event End Date	Venue Location Name
3			optional field not required				
4							
5							
6							

27. Data template files are available for download in MS Excel format (*.xls). A *completed* project template file must be converted to a **Comma Delimited format (*.csv)** to be accepted for upload into the Totality system.
28. **“Associated HCP”** – Applicable only to certain states for reporting purposes (i.e., Maine and Vermont, etc). Required to report the person who received the gift (i.e. office staff) and the “associated prescriber”

Are non-prescribing office staff covered by the law? The Attorney General will treat gifts to an office or office staff as gifts to the prescriber. Example: If the gift is a \$60 luncheon for an office of two physicians and three non-prescribing office staff, the gift amount is to be divided per prescriber, or \$30 each and is reportable. The gift may not be divided by five and considered as five separate and unreportable \$12 gifts. Gifts are to be apportioned in this manner regardless of the number of attendees at the event.

29. **“Read HCP Information”**: *For certain states (VT, ME) there is a reporting requirement that if a non-prescribing office staff (Non-HCP) receives a “gift” (e.g. meal) then their “gift” cost must be associated to the prescriber(s) for whom they work. If Non-HCP information was provided in the attendee information then there may be a need to provide associate prescriber information.*

Reference: Vermont Pharmaceutical Marketing Disclosure Law
http://www.atg.state.vt.us/upload/1128096590_Pharmaceutical_Marketing_Disclosure_Law_Guide.pdf
{section: Are non-prescribing office staff covered by the law?}

- ❖ If associate prescriber information is required place a **“Y”** in his column and provide the associate prescriber information.
 - ❖ If associate prescriber information is not required place a **“N”** in this column and all remaining “required” fields will become non-required
30. **Protocol #** - Pertains to/required only for clinical trial activities. If a Protocol # is Not available (limited circumstances), **“N/A”** may be entered in the data template data field.
 31. **Site Number** – For clinical trial activities only. This would be the unique “site” number assigned by the vendor/CRO where the investigator and/or staff is performing the clinical trial work. If no unique site number is available, can enter “1” in the data field.