

	DATA TEMPLATE NAME	TYPE OF ACTIVITY OR PROJECT	FREQUENCY	UPLOAD FREQUENCY
A	Consulting (HCP Individual_Institution)	Individuals - Advisory Board, Speaker Training , Investigator Meeting, General Consulting; Institutions -Preceptorships, Sponsorships for Boothspace	After Event	30 days after Project/Event completion
B	Receptions_Conventions	Receptions - Attendee meal at company sponsored event Conventions - Item of value received as part of a conference (i.e., meal; educ item)	Quarterly	30 days after calendar Quarter close
C	Patient Benefits & Educational Items	Patient benefit or educational items of value provided to an HCP (e.g. Anatomical Models; Textbook programs, Subscriptions, e-Detail, eXtendRx Sales Optimization Program)	Quarterly	30 days after calendar Quarter close
D	Speaker Bureau (Program Details)	Speaker Bureau - Program Details - Detailed information on the particular Speaker Bureau Meeting/Program (i.e., venue, # attendees, attendee cost/meal, etc)	Quarterly	30 days after calendar Quarter close
E	Speaker Bureau (Speaker Projections)	Full year projections for Speaker Bureau Programs, by Speaker, for Future Confirmed events and Current programs (Completed or Cancelled and paid)	Monthly	30 days after calendar Month close
F	Speaker Bureau Completed Programs (Speaker)	Speaker Bureau Programs - Speaker expenses only (i.e., honoraria, meals, travel)	Monthly	30 days after calendar Month close
G	Speaker Bureau Completed Programs (Attendee)	Speaker Bureau Programs - Attendee expenses only (i.e., meals provided)	Quarterly	30 days after calendar Quarter close
H	Clinical Sites Expenses (Site)	Clinical trial Site payments (i.e., local IRB fees, hospitalization fees, advertising costs, etc). Also includes cost of equipment provided to a site & not required to be returned after a clinical trial (computer, PDA, refrigerator, etc.)	Quarterly	30 days after calendar Quarter close
I	Clinical Sites Visit Expenses	Hospitality (e.g., meal, refreshments) provided to HCP/Primary Investigator and staff during trial site monitoring visits	Quarterly	30 days after calendar Quarter close
J	Consultant Attendee_Indirect Expenses (MD&D)	HCP Indirect expenses; HCP expenses associated with 3rd party distributors or sales agents	Quarterly	30 days after calendar Quarter close

HCP DATA REQUIREMENTS: UPLOAD FREQUENCY

HCP Value Exchange Paid or Provided Through:	March 31	June 30	September 30	December 31
Upload HCP Data Templates By:	April 30	July 31	October 31	JANUARY 31

- (1) All Current Year HCP Activity - Required to be uploaded Quarterly, 30 days after the close of the Quarter, unless designated earlier (i.e., SB SPEAKER activity Monthly; Single event consulting projects, due after event date).
- (2) All Current Year HCP Activity must be uploaded into the Totality system and validated for accuracy no later than **JANUARY 31st** of the following year.
- (3) Current Year HCP Activity is required to be uploaded into the system even if the project is *not yet complete* (i.e., cross year/multi year projects).