

Zimmer Biomet Grants & Donations User Guide

Zimmer Biomet provides educational grant funding to support independent educational conferences that promote scientific knowledge, medical advancement, and the delivery of effective health care. Zimmer Biomet also provides charitable product donations for U.S. charitable surgeries as well as those occurring outside the U.S.

Funding decisions are made by regional team members comprised of Medical Education, Philanthropy, others as requested, and Compliance.

Types of Giving

MEDICAL EDUCATION EVENTS

Support for medical education events is generally limited to grants for non-Zimmer Biomet Educational meeting expenses, facility usage, or product support for training events involving Zimmer Biomet products.

PATIENT AND PUBLIC EDUCATION EVENTS

Zimmer Biomet can support patient and public education, but requests cannot be approved for events sponsored by an HCP's private practice or any affiliated organization.

GRAND ROUNDS AND LECTURESHIPS

Grants may be used for reasonable speaker fees, travel and lodging for speakers, and, only occasionally for modest meals for speakers and attendees. Funding may not be used for lodging if the speaker is a staff member at the requesting organization.

USE OF ZIMMER BIOMET INSTITUTE LAB FACILITIES

Grants for the use of Zimmer Biomet lab facilities may be provided to universities, medical schools, dental schools, and accredited training institutions for student/resident/fellow educational and training purposes.

ATTENDANCE TO THIRD PARTY EDUCATION CONFERENCES (TPECs) (Latin America Only)

Zimmer Biomet may provide TPEC grants to healthcare organizations with a genuine educational or scientific purpose or function for the purposes of supporting HCP attendance at TPECs. Zimmer Biomet may also provide funds earmarked for the advancement of genuine educational purposes to a Professional Conference Organizer (PCO). All of the provisions governing TPEC grants shall also apply to such funds provided to PCOs. The recipient of the TPEC grant is solely responsible for selection of participants.

CHARITABLE PRODUCT DONATIONS AND MEDICAL MISSIONS

Zimmer Biomet considers product donation requests for U.S. charitable surgeries as well as medical mission trips occurring outside the U.S. For U.S. charitable surgeries, applications are submitted to AmeriCares to facilitate the donation process. For Medical Mission trip requests, an application along with required documents must be submitted to Zimmer Biomet at least 90 days prior to the date product is needed.

FELLOWSHIP GRANTS

Zimmer Biomet provides support to third-party non-profit organizations for US fellowship programs and those programs must apply through the third-party application process.

Zimmer Biomet may provide direct funding for Canada Fellowship programs and CMF&T fellowship programs.

RESEARCH GRANTS

Zimmer Biomet provides support to third-party non-profit organizations for medical research initiatives and requestors must apply through those third-party application processes.

In Canada only, Zimmer Biomet may provide direct funding to institutions with independent medical research initiatives that have scientific merit with well-defined objectives and milestones (funding may not be used for salary/benefits of medical professionals).

ENDURING EDUCATION MATERIALS

Grants may be used to develop enduring educational materials (i.e. reusable medical education items that are printed, recorded, or electronic/digital). Requests to develop the content of a live event (e.g., webinars) must be received prior to the event. Participants may not be charged for the materials if the grant covers the full cost of preparing these items.

Educational Grants & Donations Eligibility

EDUCATIONAL GRANTS

Zimmer Biomet may provide grants to organizations and institutions that have a genuine educational or scientific purpose or function to support educational programs and events on scientific, clinical, or healthcare topics. Zimmer Biomet may place restrictions on a grant, but it may not seek to control or influence the content, faculty, educational materials, or methods of the educational program funded by the grant. Similarly, Zimmer Biomet may not select or instruct the organizational or institutional grant recipient to select specific HCPs or other individuals or organizations to benefit from Zimmer Biomet's grant funding.

ORGANIZATIONS AND INSTITUTIONS THAT MAY RECEIVE EDUCATIONAL GRANTS INCLUDE:

- Educational, scientific, and charitable entities and organizations
- Training Hospitals and academic medical institutions
- International, national, regional and specialty medical associations and societies
- Accredited continuing medical education providers and agents
- Public institutions and organizations, such as regulatory bodies
- Accrediting bodies
- Professional conference organizers acting on behalf of grantees

UNSUPPORTED GRANT REQUESTS

While Zimmer Biomet aims to support genuine educational or scientific programs, there are some requests that cannot not be supported, such as, but not limited to:

- Requests from an individual or private practice
- Requests for education that are not within the scope of Zimmer Biomet's treatment solutions
- Requests from an individual who is not in charge of the program or event
- Requests for personal expenses of an HCP

CHARITABLE DONATIONS

Zimmer Biomet provides charitable donations to non-profit organizations. Zimmer Biomet does not make charitable donations to for-profit organizations and individual HCPs and practice groups unless otherwise permitted by established regional or business unit policies and procedures on grants and donations. When considering charitable donations, Zimmer Biomet takes care to ensure the bona fide nature of the charitable organization and/or the charitable mission.

ZIMMER BIOMET PRODUCT DONATION REQUESTS FOR MEDICAL MISSIONS TRIPS

- Requestor is affiliated with a non-profit organization interested in medical missions
- Request is submitted at least 90 days prior to the date the items are needed
- Requestors are qualified medical professionals with the ability to use and prescribe the product requested
- Products requested will only be used for patients who are uninsured and unable to afford the services
- All required authorization for regulatory, import, and export requirements with confirming documentation provided, are obtained by the requesting non-profit
- The hospital in the country where your trip will occur will likely need to assist with obtaining the Ministry of Health (MoH) authorization letter, as they will be more familiar with the local government and contacts
- The MoH authorization letter allows registered and unregistered products into the country for charitable purposes

Zimmer Biomet Grants & Donations Request Process

Requests are initiated by submitting a written request through the online Grants Portal. Zimmer Biomet utilizes the platform “MediSpend” as our Grants Portal. For best outcome, utilize Google Chrome as your Search Engine.

Select the appropriate portal link below to align with the type of request you want to submit.

Charitable Donations

Monetary charitable donation requests, charitable product donations/medical missions

Educational Grants

Non-Zimmer Biomet educational meetings, resident/fellow scholarship support, in-kind educational product, use of lab facilities, Direct Research Grants (Canada Only), TPECs (Latin America Only)

Direct Fellowship Funding (Canada Only)

Direct funding for Canada fellowship programs during open application cycle

New Applicant Registration **Applies to every portal link above**

Applicants will be taken to the Login screen which will provide instructions on the left-hand side. If you are already registered, you may simply log in via your email address and password. If you are new, you will need to click the **Sign Up** button and complete the sign up form.

The screenshot shows the Zimmer Biomet Educational Grants Portal login and sign-up interface. At the top left is the Zimmer Biomet logo, a blue 'Z' inside a circle, followed by the text 'ZIMMER BIOMET' and 'Moving You Forward.™'. To the right of the logo is the text 'Educational Grants Portal'. Below the header is a light gray horizontal bar. The main content area is divided into two columns. The left column is titled 'Sign In/Sign Up Instructions' and contains two sections: 'For New Users:' with instructions on how to create an account by clicking 'Sign Up', and 'For Returning Users:' with instructions on how to log in using an email address and password, and a link for 'Forgot your password?'. The right column is titled 'Sign In' and contains a form with an 'Email' input field, a 'Password' input field with an eye icon for visibility, a blue 'Log In' button, and a 'Need an Account?' section with a 'Sign Up' button.

ZIMMER BIOMET
Moving You Forward.™

Educational Grants Portal

[Return to Login](#)

Sign In/Sign Up Instructions

For New Users:
By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you have chosen your password, your account will be created and you will gain access to the portal.

For Returning Users:
Sign into the portal using the email address and the password you created when you originally signed up for the portal. If you have forgotten your password, click "**Forgot your password?**" and follow the prompts to reset your password.

Sign Up
Enter an email address and choose a password to create a new account.

Email

Password

- Must contain at least one lowercase letter
- Must contain at least one uppercase letter
- Must contain one number
- Must be between 8 and 32 characters
- Must not be an email address

Confirm password

Passwords must match

[Sign Up](#)

New Applicant Profile Setup *Applies to every portal link above*

Once you have registered for the first time, you will be requested to complete your user profile and will be able to access the **Dashboard**.

The system will not let you proceed to create a new request unless you have completed your profile.

ZIMMER BIOMET
Moving You Forward.™

Fellowship Grants Portal

Homepage Welcome, britney72113@gmail.com

[Medical Educational Grant Requests](#)
[Charitable Donation Requests](#)

Fellowship requests are current only supported in Canada

Please click "+Create a Profile to Get Started" to begin. You can always edit your Profile by clicking "Edit".
You cannot move forward until you have completed your Profile.

[Create a Profile to Get Started](#)

The screenshot shows the 'Profile' page of the Fellowship Grants Portal. At the top left is the Zimmer Biomet logo with the tagline 'Moving You Forward.™'. To the right of the logo is the text 'Fellowship Grants Portal'. Below the logo is a breadcrumb trail: 'Homepage > Profile' with a 'Draft' status indicator. On the right side of the header, it says 'Welcome, brittnay72113@gmail.com' with a settings gear icon. The main heading is 'Profile' with a dropdown arrow. To the right of the heading are 'Save Draft' and 'Create Profile' buttons. The profile form contains the following fields, all marked as required with an asterisk (*):

- First Name *
- Last Name *
- Email *
- Job Title *
- Organization Name *
- Country * (dropdown menu)
- Address Line 1 *
- Address Line 2
- City *
- Postal / Zip Code *
- Tax ID #
- If applicable, Organization URL

Access to Other Request Dashboards

Navigation to other request portals will be displayed on the **Dashboard**. Once registered, you can pass between dashboards easily. Simply click on the other grant type to be taken to that dashboard.

A verification to continue to the dashboard will be displayed, select continue, you will be taken to the other request type dashboard.



Applicant Dashboard and Request Tracking *Applies to every portal link above*

The applicant dashboard will allow you to do the following:

- **Profile Edit** – update profile information.
- **Get Started/Add Another** button – create a new request within the same portal
- View and track previously submitted requests:
 - Statuses will be displayed for each request.
 - Requests that are returned for more information will indicate in the status bar. If a request is approved, but close out documentation is required after the event, the status will remain in the **Closeout Needed** status until final documentation is provided.

Once you've completed the required information within your request, you will need to select the green, **Submit** button.

The screenshot shows the 'Educational Grants Portal' interface. At the top, it says 'Moving You Forward.' and 'Educational Grants Portal'. Below the header, there's a navigation bar with 'Homepage > Test - Educational Grant Title | 2022-09-02' and a welcome message 'Welcome, brittney.seman@zimmerbiomet.com'. The main content area is titled 'Test - Educational Grant Title | 2022-09-02' and has a dropdown menu set to 'Newest to Oldest'. The primary section is 'Application in Progress', which includes instructions: 'When every step in this submission is complete, the "Submit" button to the right will become green and clickable. The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.' A green 'Submit' button is circled in red. Below this is an 'Education Details' section with a 'Complete' status and an 'Edit' button. The details text reads: 'We kindly ask that grants requests be submitted with at least 60 days in advance of the event/need date in order for appropriate review and processes to occur.'

You should then see the status change to **This has been submitted.**

This screenshot shows the same portal interface after submission. The 'Application in Progress' section now displays 'Thank you for submitting. Your submission is now under review and you will be contacted if any additional information is needed.' The green 'Submit' button has been replaced by a green box containing the text 'This has been submitted.', which is circled in red. The 'Education Details' section now has a 'View' button instead of 'Edit'.

Once you've submitted a request, you should receive an email notification of submission. You will also be able to see the status of each submitted request on your homepage as shown below.

Educational Grant Request Dashboard

Please click "+Create a Profile to Get Started" to begin. You can always edit your Profile by clicking "Edit".
You cannot move forward until you have completed your Profile.

Profile Complete

To begin, click "+Get Started" below. When you return to this Homepage, you can see the status of your submission by the colored status bar below the submission card.

- If the status bar is gray, your submission is under review, and no action needs to be taken.
- If the status bar is blue, there is an action required. Click on the Submission Card to complete.
- If the status bar is red, there is an error. Please reach out to the Administrator of this program.

Test - Educational Grant Title | 2022-09-02
Created on 09/02/2022
Grant Request Under Review

If additional information is needed to evaluate or complete the application, you will be contacted by Zimmer Biomet and the status of the request will be updated.

The organization will receive written notification once the application has been reviewed and a funding decision has been made.

NOTIFICATION

You will receive a written notification of the request's funding decision. If the request is approved, a written agreement will be routed for review and authorized signature. Your request Dashboard should also reflect the funding decision and if reconciliation information is required.

RECEIPT OF PAYMENT/DONATION

Zimmer Biomet is responsible for payment of all approved grants and donations. Product donations must be provided directly to the charitable entity or educational institution with which Zimmer Biomet has executed the approved written donation agreement.

(Continued on next page)

Zimmer Biomet Grants & Donations Post Approval

TRANSPARENCY REPORTING LAWS

- **PHYSICIAN PAYMENTS SUNSHINE ACT**

The Sunshine Law applies to all of the following types of doctors, as long as they hold a current U.S. license to practice: Doctors of Medicine, Doctors of Osteopathy, Dentists, Podiatrists, Optometrists, and Chiropractors. This list is subject to change based on current U.S. laws and regulations.

- **OTHERS**

There are also transparency laws in some other countries/states within Latin America and Canada that require to report transfers of value between medical device companies or their distributors. This support may be subject to reporting to those government agencies

MANUFACTURERS ARE REQUIRED TO REPORT:

- a) Direct payments and transfers of value
- b) Indirect payments and transfers of value
- c) Payments and transfers of value that are made to a third party at the request or on behalf of a physician

What are the nature of Payment Categories that must be used to describe payments and transfers of value?

The Payment/Transfer of Value must be categorized as one of the following:

- Travel and lodging (including specifying the destination)
- Education
- Research
- Charitable contributions
- Grant
- Space rental or facility fees

Most of what is provided in the Transparency Reports is published annually on a searchable CMS public website (www.cms.gov/openpayments).

If you have any questions or require further information on the application process, please email: Grants.AMER@zimmerbiomet.com