



Innovative Medicines Initiative

# IMI's simplified procedures

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# What this presentation will cover

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- Background
- Application and reporting procedures
- SOFIA: Submission OF Information Application
- IMI Grant Agreement



# Background



- **Objective:** To ensure that IMI is a truly competitive partnership
- **Task Force** set up (industry, European Commission, IMI JU)
- **Review** of all processes and procedures with 4 objectives:
  - allow conducting in IMI framework projects from company's mainstream research
  - shorten time from idea generation to publication
  - reducing bureaucracy which discourages applications
  - reducing bureaucracy for project teams
- Work carried out 2nd half of 2011 completed beginning 2012



# Application and reporting procedures

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- Streamlined process from idea generation to review of project proposals to achieve several calls launch per year



- Peer review process streamlined without compromising on quality in order to reduce the timelines
- Ethical screening at Stage 1 to help the preparation of the FPP



# Application and reporting procedures

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- Negotiation of the Project Agreement carried out in parallel to the Full Project Proposal (FPP).
- All financial and administrative details necessary to complete the Grant Agreement to be defined and completed starting from the preparation of the FPP.

 *Full implementation within Call 5*

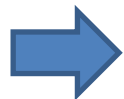


# Application and reporting procedures

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- Project application Administrative and Scientific sections reviewed  
e.g. redundant information removed  
Information structured



New Guidance and Template for the submission of the Expressions of Interest and Full Project Proposals



# Application and reporting procedures

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- Reporting forms shortened/simplified without compromising on the quality of information
  - ➔ Periodic Report template & Introduction and Q/A document
  - ➔ Interim review report template & Introduction and Q/A document

[http://www.imi.europa.eu/content/documents#project\\_documents](http://www.imi.europa.eu/content/documents#project_documents)



# Application and reporting procedures

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In summary...

An electronic “live” file for all projects to accompany the project from application, through contracts to reporting and closure to avoid reentering administrative and general information and help generating automatically parts of reports necessary for scientific and financial reporting

***SOFIA ...***





# Submission OF Information Application



A screenshot of a web browser window showing the login page for the Innovative Medicines Initiative (IMI) Submission of Information Application (SOFIA). The browser's address bar is highlighted with an orange box and contains the URL `http://sofia.imi.europa.eu/pages/Login.aspx`. The page features the IMI logo and the text "Innovative Medicines Initiative" on the left. On the right, there is a navigation menu with links for "[ Log In ]", "Helpdesk | Request Access | Forgot your password?". Below the header, the page is titled "LOG IN" and contains a form with the following elements:

- A prompt: "Please enter your e-mail and password."
- An "E-mail:" label followed by a text input field.
- A "Password:" label followed by a password input field.
- A checkbox labeled "Keep me logged in".
- A "Log In" button.
- A link for "Forgot your password?".

At the bottom of the page, there is a paragraph of text: "The Innovative Medicines Initiative (IMI) is Europe's largest public-private initiative aiming to speed up the development of better and safer medicines for patients." and a footer with links for "Specific Privacy Statement | SOFIA: Submission OF Information Application, Copyright © 2012 IMI."



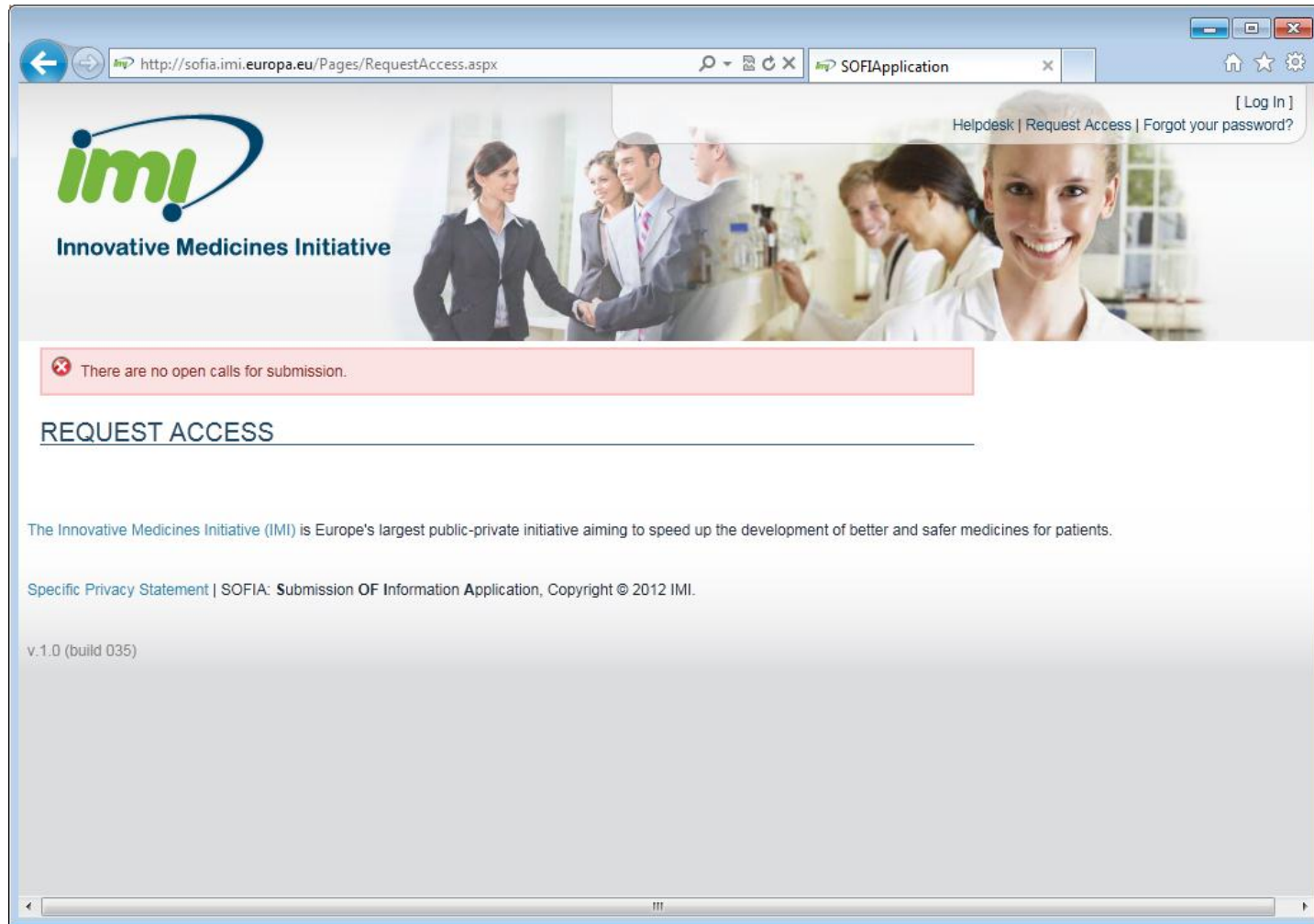
# SOFIA: Request Access for applicants



A screenshot of a web browser window displaying the IMI Sofia website. The browser's address bar shows the URL 'http://sofia.imi.europa.eu/Pages/Login.aspx'. The page features the IMI logo and the text 'Innovative Medicines Initiative' on the left. On the right, there is a navigation menu with links for 'Helpdesk', 'Request Access', and 'Forgot your password?'. The 'Request Access' link is highlighted with an orange box and an orange arrow. Below the navigation menu is a 'LOG IN' section with a form for entering an email address and password, a 'Keep me logged in' checkbox, and a 'Log In' button. At the bottom of the page, there is a link for 'Forgot your password?' and a footer containing the text 'The Innovative Medicines Initiative (IMI) is Europe's largest public-private initiative aiming to speed up the development of better and safer medicines for patients.' and 'Specific Privacy Statement | SOFIA: Submission OF Information Application, Copyright © 2012 IMI.' The browser's status bar at the bottom shows the URL 'http://sofia.imi.europa.eu/Pages/RequestAccess.aspx'.



# SOFIA: Request Access when no call is opened



The screenshot shows a web browser window with the URL <http://sofia.imi.europa.eu/Pages/RequestAccess.aspx>. The browser tab is titled 'SOFIAApplication'. The page header includes the IMI logo and the text 'Innovative Medicines Initiative'. A navigation menu contains links for 'Helpdesk', 'Request Access', and 'Forgot your password?'. A red error message box states: 'There are no open calls for submission.' Below this, the page is titled 'REQUEST ACCESS' and contains the following text: 'The Innovative Medicines Initiative (IMI) is Europe's largest public-private initiative aiming to speed up the development of better and safer medicines for patients.' It also includes a link for 'Specific Privacy Statement | SOFIA: Submission OF Information Application, Copyright © 2012 IMI.' and the version information 'v.1.0 (build 035)'.



# SOFIA: Request Access when a call is opened



[ Log In ]  
Helpdesk | Request Access | Forgot your password?

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## REQUEST ACCESS

Title  
 Mr.  Ms. \*  
 Prof.  Dr.

First Name  \*

Last Name  \*

E-mail  \*

Confirm E-mail  \*

Phone

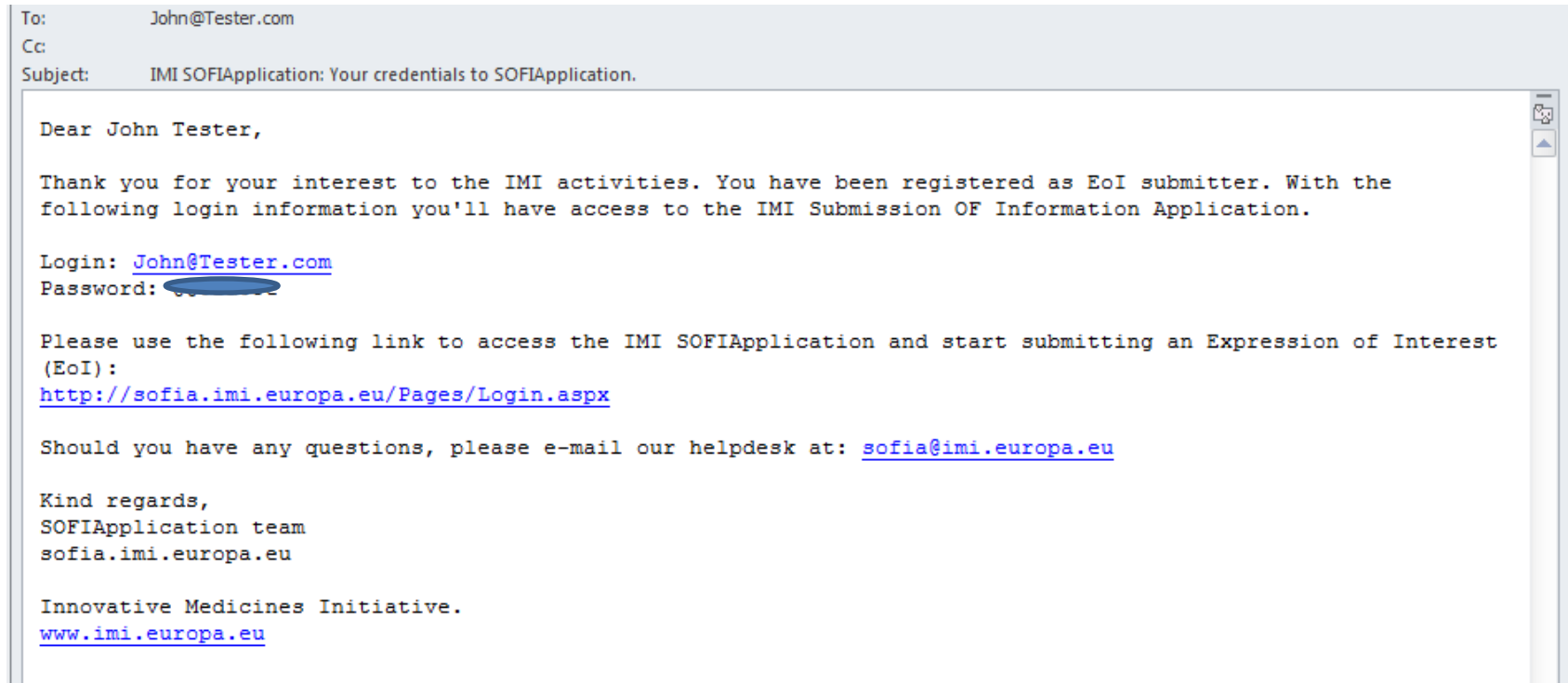
Enter Code

**Umsf Master.** stop spam. read books. \*

\* indicates required fields



# SOFIA: Applicant login & password



# SOFIA: Start the EoI Submission



# SOFIA: Start the EoI Submission



Welcome John@Tester.com [ Log Out ]  
Print | Helpdesk | User Settings | Change Password

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- SOFIApplication
  - Public Area
  - Expert Review
  - IMI-JU-6-2012
    - EoI Submission Overview**
    - FPP Submission Overview

IMI-JU-6-2012 > EoI Submission Overview

## EOI SUBMISSION OVERVIEW OF JOHN TESTER

EoI Number	EoI Acronym	Call Identifier	Call Topic	Pillar	Add new EoI
<b>Add new Expression of Interest</b>					
Call Identifier	Select Call Topic	<input type="text" value="Select Call Topic"/>			
Expression of Interest Acronym	<input type="text"/>				
					<input type="button" value="Cancel"/> <input type="button" value="Save"/>

The Innovative Medicines Initiative (IMI) is Europe's largest public-private initiative aiming to speed up the development of better and safer medicines for patients.



# SOFIA: EoI Submission

## Add & Edit Participants



Address (if different from the legal address in form A2)

Street name  Number

Town

Postal Code / Cedex

Country

Phone 1  Phone 2

E-Mail  Fax

Costs and funding			
Organisation	Estimated costs (k€)	Estimated requested IMI contribution (k€)	
	0	0	<input type="button" value="Add Participant"/> <input type="button" value="Leading"/> <input type="button" value="Finalize"/> <input type="button" value="Edit"/>
	0	0	<input type="button" value="Finalize"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
	0	0	<input type="button" value="Finalize"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Total	0	0	

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v.1.0 (build 035)





# SOFIA: EoI Submission Simplified data entry



IMI-JU-6-2012 EoI Submission Overview

## EoI SUBMISSION OVERVIEW OF JOHN TESTER

With the applicant invitation button, the applicant will have access to its A2 forms only and will be able to enter its organisation data into the fields.

Expression of interest number	115509-1
EoI Acronym	Test EoI
<b>If registered for FP7, enter your Participant Identity Code (PIC)</b>	
If your organisation has participated to at least one FP7 indirect action (project), you have received a Participant Identity Code (PIC).	
Participant Identity Code (PIC)	<input type="text" value="999903840"/>
<input type="button" value="Retrieve"/>	(This will load the most recent data entered for that PIC)
<b>Estimated costs &amp; contribution</b>	
"Estimated costs" must be greater than "Estimated requested IMI contribution"	
Estimated costs (in €)	<input type="text" value="0"/>
Estimated requested IMI contribution (in €)	<input type="text" value="0"/>

### Information on the applicant organisation

Legal name	<input type="text" value="The University of Manchester"/>		
Organisation short name	<input type="text" value="UniMan"/>		
<b>Legal Address</b>			
Street name	<input type="text" value="Oxford Road"/>	Number	<input type="text" value="-"/>



# SOFIA: EoI Submission Finalisation



Welcome John@Tester.com [ Log Out ]  
Print | Helpdesk | User Settings | Change Password

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IMI-JU-6-2012 EoI Submission Overview

## EoI SUBMISSION OVERVIEW OF JOHN TESTER

EoI Number	EoI Acronym	Call Identifier	Call Topic	Pillar	
<a href="#">115509-1</a>	Test EoI	IMI-JU-6-2012	IMI-JU-6-2012_02	Efficacy	<a href="#">Add new EoI</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Finalize</a>

- SOFIApplication
  - Public Area
  - Expert Review
  - IMI-JU-6-2012
    - EoI Submission Overview
    - FPP Submission Overview

The Innovative Medicines Initiative (IMI) is Europe's largest public-private initiative aiming to speed up the development of better and safer medicines for patients.

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# SOFIA: FPP Submission



- Following the Eol Evaluation, the administrative information, inserted at the time of the Eol Submission, is copied over to the FPP for the successful application



# IMI Grant Agreement

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## What's new for beneficiaries

- Direct costs may be also reported based on:
  - Actual or average personnel costs
  - Flat rate for SME owners
- Possibility to charge actual indirect costs
- No impact on IMI financial contribution for beneficiaries losing their status in the course of an IMI project
- Clarifications to the procedures performed by auditors when certifying financial statements, especially for actual or average personnel costs



# IMI Grant Agreement

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## What's new for EFPIA companies

- Certified methodology on in-kind contribution based on normal accounting and budgeting principles
- EFPIA direct financial contribution to all participants are reported as EFPIA in-kind contribution / receipt for beneficiaries
- Acceptance of non-EU EFPIA in-kind contribution as matching contributions under pre-defined conditions



# IMI Grant Agreement

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## Simplified accounting/reporting

- Clarifications to financial forms
- No certificate for yearly periodic financial reports when:
  - cost calculations based on a certified accounting methodologies within FP7
  - total participant's amount <€375.000
- Yearly periodic reports either on July or December



# Thank you!

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## Questions?

### Visit us

- IMI Info Booth (in the catering area)

### E-mail us

- IMI Helpdesk: [infodesk@imi.europa.eu](mailto:infodesk@imi.europa.eu)
- SOFIA Helpdesk: [sofia@imi.europa.eu](mailto:sofia@imi.europa.eu)



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