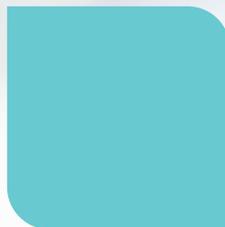




Renewals Management Dashboard





Renewals Management Dashboard

Introducing the new Renewals Management Dashboard! Both agencies and manufacturers can now track and complete renewals from within their respective eFiles logins.

The Renewals Management dashboard will contain your upcoming renewals and help you track them as they approach their respective expiry dates. Alongside the dashboard, we will be sending reminder emails to help you get started on the renewal process early. Our intention is to help ensure your submissions maintain their approval period seamlessly.

Why renew?

Renewals are an important part of the preclearance landscape. While they may seem like simple reacceptances, there are many aspects of APS that can change over the course of a year that may need updating to maintain compliance.

Renewals are also important as they enable you to continue to link appropriate APS to one another. In our highly digitized environment, the ability to compliantly link to all of the APS you put time and effort into is an important reason to renew.

Additionally, there is now an incentive to renew early. When eligible renewals are submitted ≥ 6 weeks prior to the expiry of the APS being renewed, the eFile will qualify for the Early Renewal Discount. The discount is 50% off the associated full fee for the eFile plus applicable taxes. Please see ["Early Renewal Discount"](#) below for more information.

What is considered a renewal that qualifies for submission through the Renewals Management Dashboard?

A submission that is 100% pickup from the previously accepted version. If there are any updates to the piece, beyond the exceptions listed below, it is NOT considered a renewal and should not be submitted within the Renewals Management Dashboard.

Examples of exceptions include*:

- Deletions of content necessary for re-acceptance (e.g. removal of 'new' after first year of initial marketing)**
- Version code changes
- Trademark changes & corporate logo changes
- French language grammar correction that does not alter the claim
- Directly proportional resize of an APS that results in no layout/flow/content/functionality changes

*Please note that circumstances may vary by individual eFile

Renewals Management Dashboard

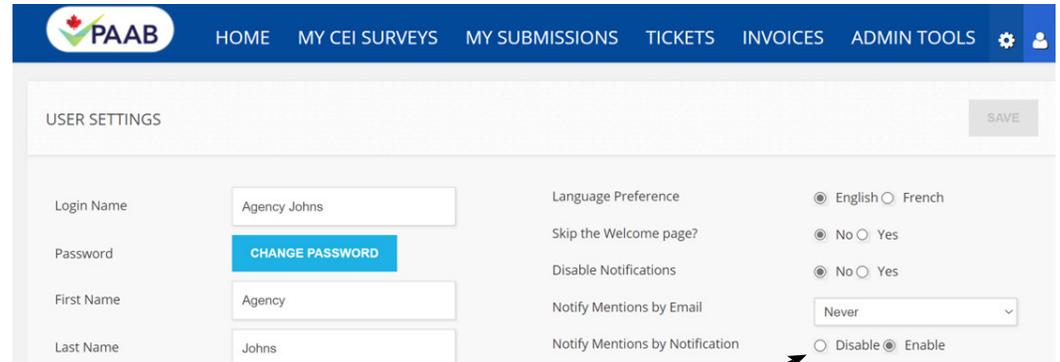
The Renewals Management dashboard appears alongside the My Submissions Dashboard within eFiles. If you are an agency user, the dashboard will track eFiles for which you are listed as a primary or backup contact in the first year of use, and the renewal contact upon resubmission of the eFile. If you are a manufacturer user, you will have access to all eFiles associated with your company whether they are being managed internally or by agency partners.

The dashboard will show you files coming up on expiry of their acceptance periods and allow you to quickly and easily submit for renewal. Upon initiation of a renewal submission, the information from the eFile you will be renewing, including references, will be pulled forward into the new submission for you. You only need to update information or references if anything has changed (e.g. a PM update).

Please see [Appendix A](#) to learn more about how to use the Renewals Management Dashboard.

Reminder Emails

Both agency and manufacturer users will receive reminder emails for upcoming eFile expiries. These reminders will be sent to the renewal contacts at **14 weeks and 10 weeks prior to the expiry of the discount period for the APS (6 weeks prior to expiry of the acceptance period)**. If more than one APS is expiring in the same period, the reminders will be batched into a single email. You can opt out of receiving these reminder emails by clicking "Disable" within the Renewal Reminders by Email field within your user settings as shown to the right.



Early Renewal Discount

If submitted ≥ 6 weeks prior to the end of the original 1-year acceptance period, a discount of 50% of the corresponding full fee will apply. For example, if submitted as a standard submission for renewal in English and French, where the full fee is \$473, your discounted fee on renewal would be \$236.50 + applicable taxes. Please note that extensions do not prolong the discount period.

If submitted ≤ 6 weeks prior to the end of the original 1-year acceptance period, the full corresponding fee will apply.

Why a threshold of 6 weeks? As per s.1.6.D.2 of the code, all advertising scheduled for presentation beyond 12 months must be resubmitted for preclearance at least 6 weeks prior to the expiry of the applicable preclearance period. We strongly encourage taking advantage of the early renewal discount to ensure your APS maintains a seamless acceptance period.

Please note that it remains the manufacturer or its agent's responsibility to resubmit to PAAB if there are changes to the Product Monograph or market changes that impact the piece.

Submission and Formatting Requirements

For renewal submissions where the submission information, copy, layout, PM and NOC and references remain identical to the previous submission:

- No additional documents are required to be submitted. This includes not requiring a cover letter unless there are details to the submission that require clarification. An example of this includes banner ads where media placement or targeting has changed.
- All relevant final versions of each APS document, references, PM and NOC will be pulled forward from the previous eFile with no additional effort required by the submitter.
- Please see the requirements from the section **“For all renewals”**.

For renewal submissions with minor changes that meet the definition of a renewal in “What is considered a renewal” of this document:

- Only new documents need to be uploaded to the renewal submission. Everything else will be pulled forward as in the previous scenario for identical submissions.
 - **Example 1:** The copy and layout for the APS has not changed, but there have been minor revisions to the PM that are not expected to change the content of the APS. In this case you would only upload the new, referenced PM, the annotated version of the PM that shows the changes since the last version, and the new NOC.
 - **Example 2:** You have changed your copy and layout to remove the time-sensitive claim of “New” and revised the trademark year. In this case you would upload the updated copy and layout for review. All other references and the PM/NOC will be pulled forward from the previous submission and do not need to be re-submitted.
- Please see the requirements from the section **“For all renewals”**.

For all renewals

- A cover letter is not required unless the submission details have changed since the previous submission. If a cover letter has not been provided, the reviewer may ask clarifying questions in the first response.
- If there has been a minor change to the copy that meets the definition of a renewal, you now will only need to highlight what has changed since the previous approval. You are not required to shade previously accepted content in light yellow. This is a change to previous procedures, and renewal copydeck will now be treated similarly to the highlighting used for minor update submissions.
- If there have been changes to the copy, a new layout that reflects these changes will also be required.
- If a PM update has occurred, please update the latest version cross-referenced to the content of the APS. Please also upload a version that shows annotations since the previous approval and the updated NOC.

Renewal Contacts

“Renewal contacts” is a new field included in both new and renewal submissions. These contacts are necessary to ensure that the appropriate person is linked to the eFile for tracking of the renewal. If you are listed as a renewal contact on an eFile, the eFile will appear in your Renewals Management Dashboard. Multiple people can be listed as renewal contacts on a single file, and they will all be able to see and track the eFile as it moves towards expiry.

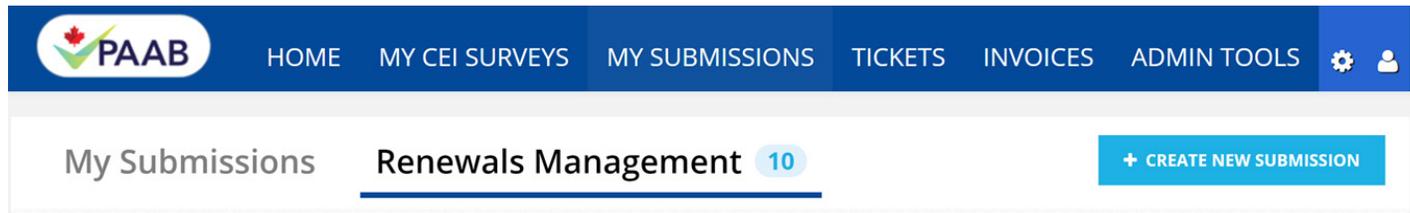
NOTE: For the launch of this dashboard, renewal contacts have been prepopulated with the primary contact on the previous submission of the file. We strongly encourage manufacturers and agency users to review their renewal contacts to ensure the information is up-to-date and relevant. Manufacturers have the ability to change both internal renewal contacts, as well as contacts related to agencies they work with.

For agencies: We encourage you to regularly review your dashboard to ensure that all of the relevant team members are captured in the renewal contact field.

For manufacturers: You will receive a monthly report of all of the upcoming efile expiries for your company. We encourage you to sort and filter the report to what is relevant to you and review your renewal contacts regularly. Whether your organization completes renewals internally, or works with agency partners, this is a crucial step in ensuring the smooth tracking of your eFiles.

1. Accessing your Renewals Management Dashboard in eFiles

To locate your Renewals Management Dashboard, login to your eFiles account and click on the 'My Submissions' tab in the blue navigation bar at the top of the home screen. Within this section, you will now have a 'Renewals Management' tab next to your 'My submissions' tab.

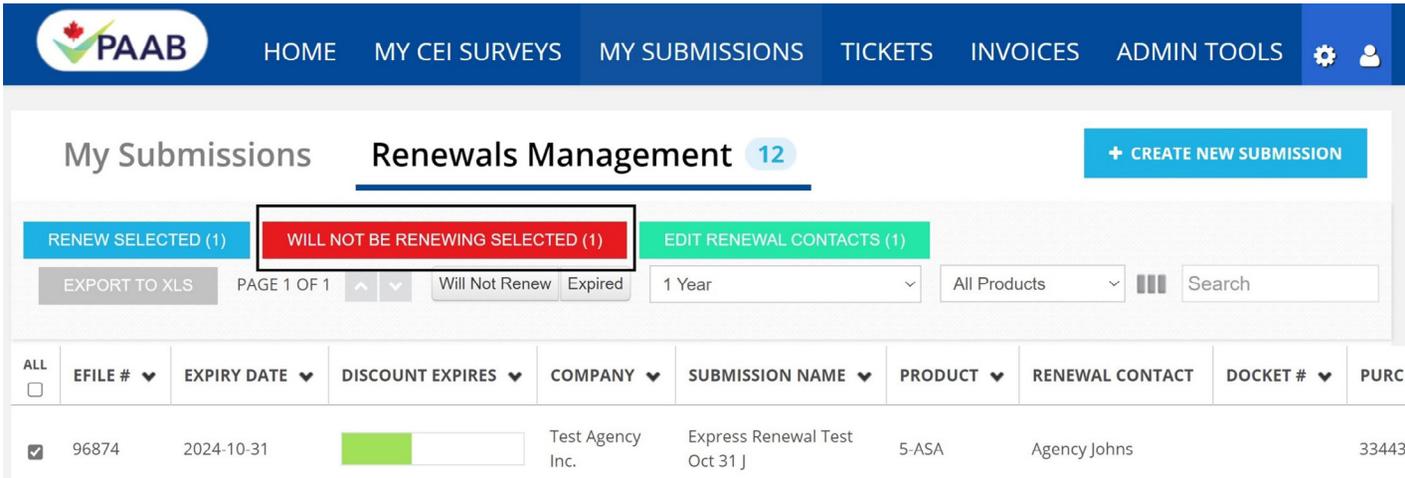


2. Get to know your dashboard

The Renewals Management Dashboard includes new functionality to help you easily complete a single renewal, or multiple renewals with a few clicks. Please see the [“Submitting a Single Renewal”](#) section.

Filters

The dashboard also gives you the ability to choose to not renew a file.

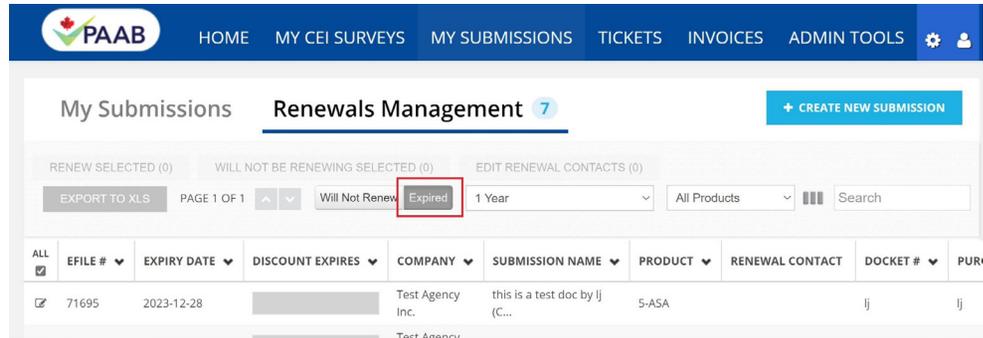


The screenshot shows the PAAB dashboard's Renewals Management section. At the top, there is a navigation bar with links for HOME, MY CEI SURVEYS, MY SUBMISSIONS, TICKETS, INVOICES, and ADMIN TOOLS. The main heading is "My Submissions" with a sub-heading "Renewals Management" and a notification badge showing "12". A blue button labeled "+ CREATE NEW SUBMISSION" is located in the top right. Below the heading, there are three buttons: "RENEW SELECTED (1)", "WILL NOT BE RENEWING SELECTED (1)", and "EDIT RENEWAL CONTACTS (1)". The "WILL NOT BE RENEWING SELECTED (1)" button is highlighted with a red box. Below these buttons are filters for "EXPORT TO XLS", "PAGE 1 OF 1", "Will Not Renew", "Expired", "1 Year", "All Products", and a search bar. A table below displays submission details with columns: ALL, EFILE #, EXPIRY DATE, DISCOUNT EXPIRES, COMPANY, SUBMISSION NAME, PRODUCT, RENEWAL CONTACT, DOCKET #, and PURCH. The first row shows a checked checkbox, EFILE # 96874, EXPIRY DATE 2024-10-31, a green progress bar, COMPANY Test Agency Inc., SUBMISSION NAME Express Renewal Test Oct 31 J, PRODUCT 5-ASA, RENEWAL CONTACT Agency Johns, and DOCKET # 334432.

This option can be selected when you do not wish to renew a previous APS. When the file is selected and the 'will not be renewing selected' button is chosen, the APS will no longer appear in the main dashboard queue. It will instead be moved to a folder that can be found by clicking the 'Will not renew' filter. If you ultimately decide to renew the file, you can still renew from the 'Will not renew' filter.

Appendix A How to use the dashboard

Upon expiry of the approval period of an eFile in either the main queue, or within the 'Will not Renew' filter, the files will move to the 'Expired' filter.



The screenshot shows the PAAB dashboard interface. The top navigation bar includes links for HOME, MY CEI SURVEYS, MY SUBMISSIONS, TICKETS, INVOICES, and ADMIN TOOLS. The main content area is titled 'My Submissions' and 'Renewals Management' with a notification badge '7'. Below the title, there are filters for 'RENEW SELECTED (0)', 'WILL NOT BE RENEWING SELECTED (0)', and 'EDIT RENEWAL CONTACTS (0)'. A search bar and a '1 Year' dropdown are visible. The 'Expired' filter is highlighted with a red box. Below the filters is a table with columns: ALL, EFILE #, EXPIRY DATE, DISCOUNT EXPIRES, COMPANY, SUBMISSION NAME, PRODUCT, RENEWAL CONTACT, DOCKET #, and PUR.

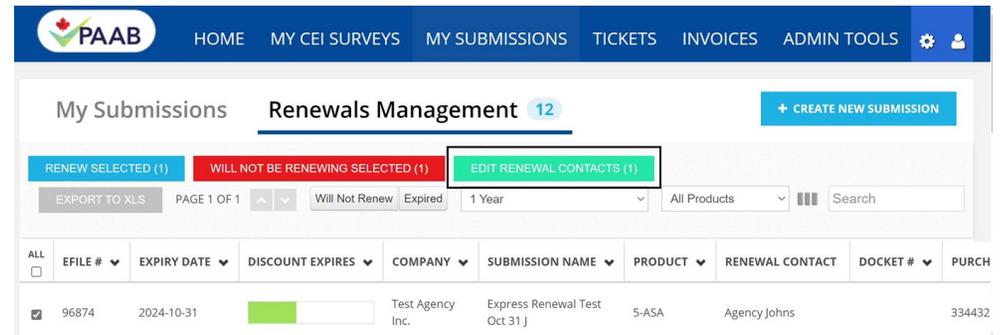
ALL	EFILE #	EXPIRY DATE	DISCOUNT EXPIRES	COMPANY	SUBMISSION NAME	PRODUCT	RENEWAL CONTACT	DOCKET #	PUR
<input checked="" type="checkbox"/>	71695	2023-12-28		Test Agency Inc.	this is a test doc by lj (C...	5-ASA		lj	lj

Similar to the functionality in your 'My Submissions', you can drag and drop your dashboard columns to your preferred order or remove and add columns to suit your preferences.

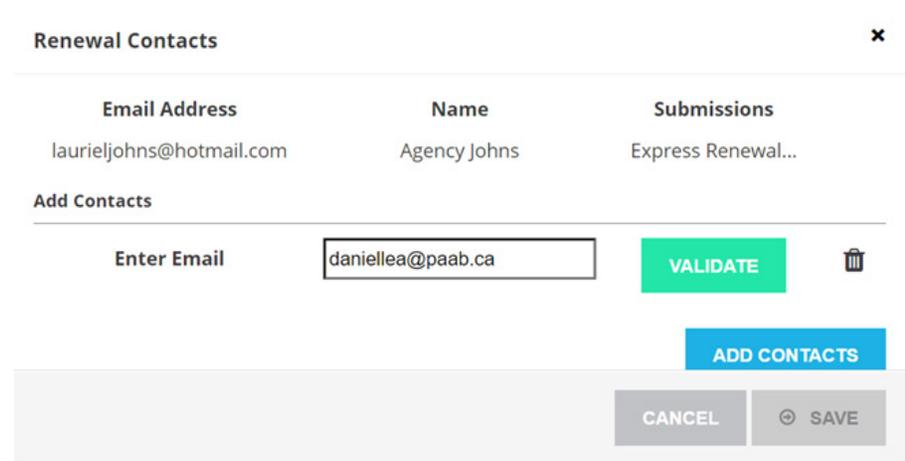
3. Updating renewal contacts

In order to ensure your renewals list stays as up-to-date as possible, we encourage you to regularly review the 'renewal contact' field in your dashboard. Please see "Renewal Contacts" for more information on the importance of renewal contacts.

Renewal contacts may be updated at the time of submission of the renewal. Alternatively, you can update renewal contacts without starting a submission by selecting the file or files you wish to update the contact for and clicking 'Edit Renewal Contact'.



A modal will pop-up where you can add or delete renewal contacts. First click 'add contact' and then add a valid eFiles user's email address. Your renewal contact should be a person or people you wish to get renewal emails for this eFile and will have the ability to track it through this dashboard.



Once you have added the email, click 'validate' and the user will be added as one of the eFile's renewal contacts if they are a validated user.

Please note that you must have at least one renewal contact per eFile. As a result, you will only be given the option to delete a renewal contact if there is already more than one renewal contact on the file.

Once you have completed your revisions to the renewal contact field, click 'save' and the changes will be applied to all of the selected files.

Tips:

You can update more than one renewal contact at once!

If you select more than one eFile where the renewal contacts will be the same, you can apply your change in renewal contact to all selected files. For example, you have a new team member who will work on BrandX and you would like them to have access to the upcoming renewals. You can multi select all BrandX submissions and add that contact once to have it applied to all selected submissions.



It is important to ensure your renewal contacts stay up to date. The renewal contacts are how we ensure that the renewals are captured in the appropriate user's dashboard. Both agencies and manufacturers have the ability to modify and add renewal contacts. We encourage review of these contacts on a regular basis and when there is a change in personnel responsible for a file or brand. Please note that you can add multiple renewal contacts to each file.

4. Submitting a Single Renewal

To submit a single renewal, please follow the steps in the instructions below:

1. Select the APS you wish to renew by ticking the box in the far-left column of the dashboard.

MY SUBMISSIONS **RENEWALS MANAGEMENT 6**

RENEW SELECTED (1) WILL NOT BE RENEWING SELECTED (1) EDIT RENEWAL CONTACTS (1)

EXPORT TO XLS PAGE 1 OF 1 Will Not Renew Expired 14 Weeks

ALL	EXPIRY DATE	DISCOUNT EXPIRES	EFILE #	SUBMISSION NAME	PRODUCT	COMPANY	REI
<input type="checkbox"/>	2024-05-08	<div style="width: 50%; background-color: green;"></div>	127285	Innovasium Test Please disregard	Unbranded	Test Agency Inc.	
<input checked="" type="checkbox"/>	2024-04-17	<div style="width: 50%; background-color: yellow;"></div>	127290	Testing after ARO updates M...	Unbranded	Test Agency Inc.	

2. Click the blue 'Renew Selected' box to open the renewal screen.

MY SUBMISSIONS **RENEWALS MANAGEMENT 6**

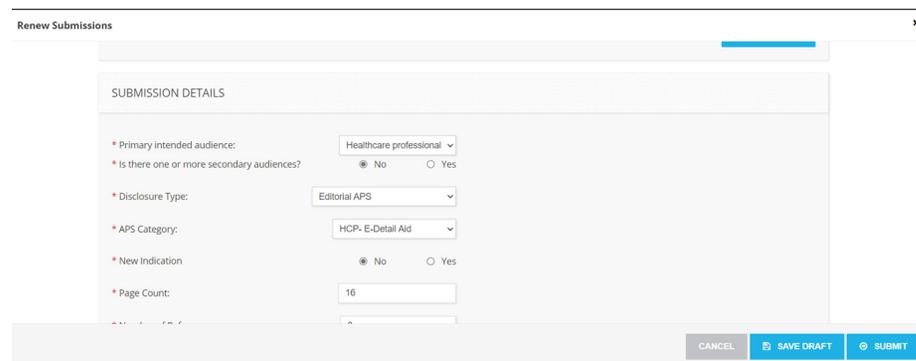
RENEW SELECTED (1) WILL NOT BE RENEWING SELECTED (1) EDIT RENEWAL CONTACTS (1)

EXPORT TO XLS PAGE 1 OF 1 Will Not Renew Expired 14 Weeks

ALL	EXPIRY DATE	DISCOUNT EXPIRES	EFILE #	SUBMISSION NAME	PRODUCT	COMPANY	REI
<input type="checkbox"/>	2024-05-08	<div style="width: 50%; background-color: green;"></div>	127285	Innovasium Test Please disregard	Unbranded	Test Agency Inc.	
<input checked="" type="checkbox"/>	2024-04-17	<div style="width: 50%; background-color: yellow;"></div>	127290	Testing after ARO updates M...	Unbranded	Test Agency Inc.	

Appendix A How to use the dashboard

3. You will see that much of the information in the submission form has been prepopulated from what was provided in the previous submission. Confirm that the pre-populated submission information is correct, and provide the outstanding information required within the pop-up (e.g. manufacturer contact, etc.).



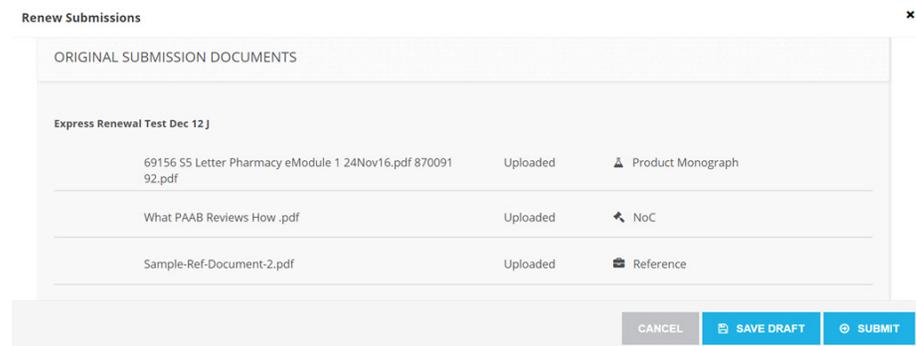
Renew Submissions

SUBMISSION DETAILS

- * Primary intended audience: Healthcare professional
- * Is there one or more secondary audiences? No Yes
- * Disclosure Type: Editorial APS
- * APS Category: HCP- E-Detail Aid
- * New Indication: No Yes
- * Page Count: 16

CANCEL SAVE DRAFT SUBMIT

4. All APS documents, references and PM/NOC will be carried forward from your previous submission. **You only need to upload documents if something has changed.** If a new document/reference needs to be uploaded, add the required document/reference. **You do not need to delete any of the outdated documents/references that have been carried forward** as our system will track the new document so that it's clear it supersedes the previous version of the reference. Please see the section for **“Submission and Formatting Requirements”** for any updated documents.



Renew Submissions

ORIGINAL SUBMISSION DOCUMENTS

Document Name	Status	Category
Express Renewal Test Dec 12 J		
69156 S5 Letter Pharmacy eModule 1 24Nov16.pdf 870091 92.pdf	Uploaded	Product Monograph
What PAAB Reviews How .pdf	Uploaded	NoC
Sample-Ref-Documents-2.pdf	Uploaded	Reference

CANCEL SAVE DRAFT SUBMIT

5. Submitting a Batch Renewal

To submit more than one renewal at the same time, please view the instructions below and note the considerations for batch renewals:

1. Select the APS you wish to renew by ticking the box in the far-left column of the dashboard. You may select as many as you wish, however please see ["Considerations for a batch renewal"](#) at the end of this section.

MY SUBMISSIONS **RENEWALS MANAGEMENT 6**

RENEW SELECTED (3) WILL NOT BE RENEWING SELECTED (3) EDIT RENEWAL CONTACTS (3)

EXPORT TO XLS PAGE 1 OF 1 Will Not Renew Expired 14 Weeks

ALL <input type="checkbox"/>	EXPIRY DATE ▼	DISCOUNT EXPIRES ▼	EFILE # ▼	SUBMISSION NAME ▼	PRODUCT ▼	COMPANY ▼	RENEWAL CONTACT
<input checked="" type="checkbox"/>	2024-05-08	<div style="width: 25%; background-color: green;"></div>	127285	Innovasium Test Please disregard	Unbranded	Test Agency Inc.	
<input checked="" type="checkbox"/>	2024-04-17	<div style="width: 25%; background-color: yellow;"></div>	127290	Testing after ARO updates M...	Unbranded	Test Agency Inc.	
<input checked="" type="checkbox"/>	2024-03-13	<div style="width: 25%; background-color: gray;"></div>	136375	Testing after ARO updates M...	Unbranded	Test Agency Inc.	

2. Click the blue 'Renew Selected' box to open the renewal screen.

MY SUBMISSIONS **RENEWALS MANAGEMENT 6**

RENEW SELECTED (3) WILL NOT BE RENEWING SELECTED (3) EDIT RENEWAL CONTACTS (3)

EXPORT TO XLS PAGE 1 OF 1 Will Not Renew Expired 14 Weeks

ALL <input type="checkbox"/>	EXPIRY DATE ▼	DISCOUNT EXPIRES ▼	EFILE # ▼	SUBMISSION NAME ▼	PRODUCT ▼	COMPANY ▼	RENEWAL CONTACT
<input checked="" type="checkbox"/>	2024-05-08	<div style="width: 25%; background-color: green;"></div>	127285	Innovasium Test Please disregard	Unbranded	Test Agency Inc.	
<input checked="" type="checkbox"/>	2024-04-17	<div style="width: 25%; background-color: yellow;"></div>	127290	Testing after ARO updates M...	Unbranded	Test Agency Inc.	
<input checked="" type="checkbox"/>	2024-03-13	<div style="width: 25%; background-color: gray;"></div>	136375	Testing after ARO updates M...	Unbranded	Test Agency Inc.	

3. The renewals screen will appear differently than it does in a single submission. This is because it is representing different information from each APS that has been selected for renewal.



Because you are unable to edit many of the submission form values, batch renewals are most effectively used for renewals where nothing is changing, and no new references are required. Please note that for batch renewals, any information added or revised (e.g. Purchase order) will apply to all selected files.

Another use for batch renewals is a grouping of submissions where nothing is changing except a PM update that does not affect the copy and layout for the piece. In this instance, all desired submissions for the brand may be selected, and the PM and NOC documents can be uploaded just once and will apply to all selected eFiles.

Considerations for a batch renewal:

- Appropriate for renewals for any brand/product where nothing has changed for any of the submissions and there is nothing new to upload.
- Does not allow for unique inputs to pre-populated submission fields (e.g. page length, APS type, etc), therefore this should only be used when submission details are not changing for the selected pieces.
- Does not allow for unique references for each submission so this should only be used where common references are being uploaded (e.g. an updated PM and NOC would be appropriate, but not APS with different copydecks being uploaded due to trademarking updates).

6. Adding a reference to >1 submission

There may be instances where a new reference is required for more than one renewal APS. A common example of this would be that your product has an updated Product Monograph since the last submission of the APS. In this instance, all of your renewals for the product would require submission of this updated PM (clean and annotated) and NOC.

The Renewals Management Dashboard allows for references to be added to multiple submissions with only one upload.

To do so, follow the instructions for opening up the modal for a batch submission. Once you are in the submission modal, scroll down to the Resource Drop Zone. You will see a list of the original documents provided for all selected submissions, and also have the opportunity to upload a new reference. Please note that as per **“Considerations for Batch Submissions”**, this approach is only applicable where the same reference is required to be uploaded to all selected submissions.

Q1: If I renew early and receive acceptance earlier than my old APS expiry date, won't I be losing months on my prior acceptance period?

A: No. Efiles will automatically populate your acceptance date to start after the expiry of your previous eFile so you will maintain a seamless acceptance period with no overlap. For example, if you submitted for renewal on November 1, 2023, for an APS that does not expire until December 31, 2023, if your APS renewal is accepted prior to December 31, 2023, your new acceptance period will be January 2024 to December 2024. If your renewal is accepted after December 31, 2023, your acceptance period will reflect the current month.

Please note that it remains the manufacturer or its agent's responsibility to resubmit to PAAB if there are changes to the Product Monograph or market changes that impact the piece and would cause a need for resubmission.

Q2: Can I continue to submit renewals via the "Create New Submission" button in the "My submissions" tab?

A: We understand that you may be accustomed to the way you have historically submitted renewals. To help ease the transition, you will continue to be able to renew via the 'new submissions' button until the end of Q1, at which point this option will be removed from the 'new submissions' form. With that in mind, once you try the new renewals management dashboard, we believe you will appreciate the simplicity.

Q3: What renewals will appear in my dashboard?

A: The answer to this question varies by eFiles user type:

Client User eFiles account (most agency-user accounts): These users will see eFiles where they have been listed as a renewal contact.

Agency users with a Client Admin User eFiles account: These users will see all eFiles for their company where an employee has been named as a renewal contact.

Manufacturer User account: These users will see all eFiles for their company. These users will also receive a monthly report of all active eFiles and upcoming expiries for their company for review of renewal contacts.

Manufacturer Admin User account: These users will see all eFiles for their company. These users will also receive a monthly report of all active eFiles and upcoming expiries for their company for review of renewal contacts.

Q4: Can I still submit my renewal as an ARO?

A: Yes! By definition, a renewal is an APS with 'little new content'. It will therefore be eligible for ARO if you wish to expedite your timelines. The Early Renewal Discount also applies to qualifying ARO renewal submissions and is 50% off the associated ARO fee for your piece.