Reconciliation Guide- Medical Education

How to Complete a Post-Program Reconciliation Report

Olympus Grants Team- Americas| grants-americas@olympus.com

Last Updated: January 2026

Important Information

- If your organization received grant support from Olympus for a medical education event, you are required to submit a post-program Reconciliation Report for that event.

- Reconciliation Reports must be submitted no later than 90 days from the Program End Date. If you miss this deadline, we will not consider any new applications until the Reconciliation Report is submitted, and any pending requests may be denied.

- Complete your report online in the Olympus Medical Grants Portal, the same portal in which you created and submitted your original request.

If you have questions about the reconciliation process or are experiencing technical difficulties, please contact Olympus Grants Team – Americas at +1- 484-896-3939 or grants-americas@olympus.com

System Functionality Notes

- **Preferred Browser:** For optimal performance, please use Google Chrome when accessing the portal.

- **Saving Your Work:** The system does not auto-save. Be sure to click the SAVE button regularly to avoid losing progress.

- **Troubleshooting:** If a page becomes unresponsive, try clicking SAVE to refresh the form. Do not refresh your browser unless you've saved your work, as unsaved changes will be lost.

- **Language Availability:** The portal supports English, Spanish, and Portuguese. However, due to system limitations, some buttons and error messages may appear only in English.

Reconciliation Email Notification

Important: You will receive an email notification from Olympus Corporation of the Americas approximately one day after the last date of your grant-supported program. Follow the instructions provided in the notification to complete and submit your post-program reconciliation.

Email Example

Olympus Corporation of the Americas <do-not-reply.grants07-us-east-1@fluxx.io>
to Heather, me

Request ID: MED-FY-26-00234
Program Title: Testing for email language
Requesting Organization: Sociedade Brasileira de Urologia
Program Start Date: February 9, 2026
Program End Date: February 11, 2026
Monetary Grant Approved Amount: $10,000.00

Dear Heather Buss,

We hope your educational program was a success.

Follow the steps below to complete your required post-program reconciliation report:

1. Log in to your account at https://grants-olympus.fluxx.io/
2. Under the Reconciliations Section, you will find the request under Reconciliations Due.
3. After you complete your report, click Submit on the summary page.

Reconciliation reports must be submitted no later than 90 days from the Program End Date. If you miss this deadline, Olympus will not consider new applications until you submit the Reconciliation.

Review the Olympus Grants Reconciliation Guide for step-by-step screen shots and helpful tips.

Please contact us with any questions.

Kind regards,

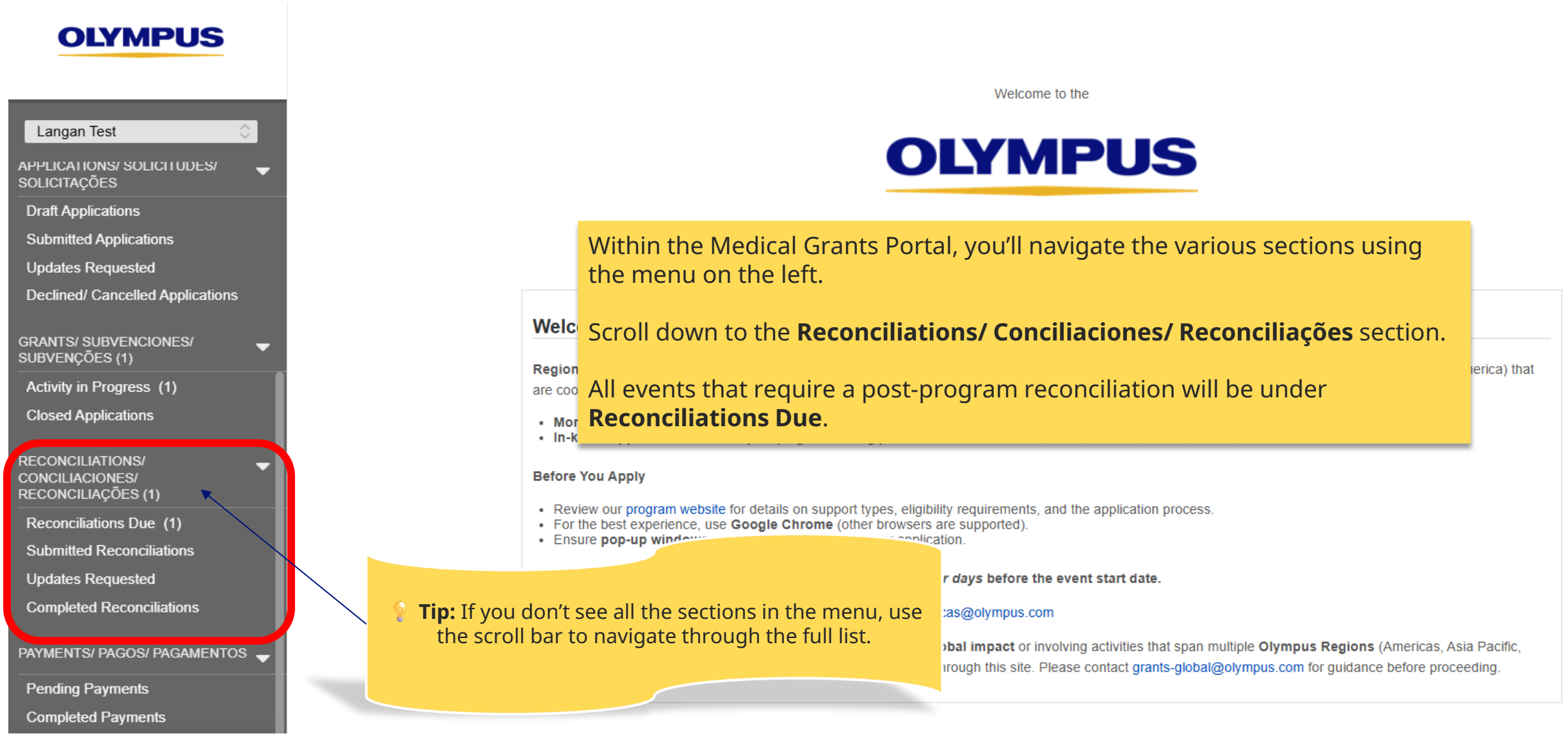
Olympus Grants Team-Americas
grants-americas@olympus.com
+1-484-896- 3939

Note: A reminder email will be issued 42 days after the program end date.

Logging into your account

1) Enter your email address and password
2) Click on the Sign in button

Navigating the Grants Portal Menu



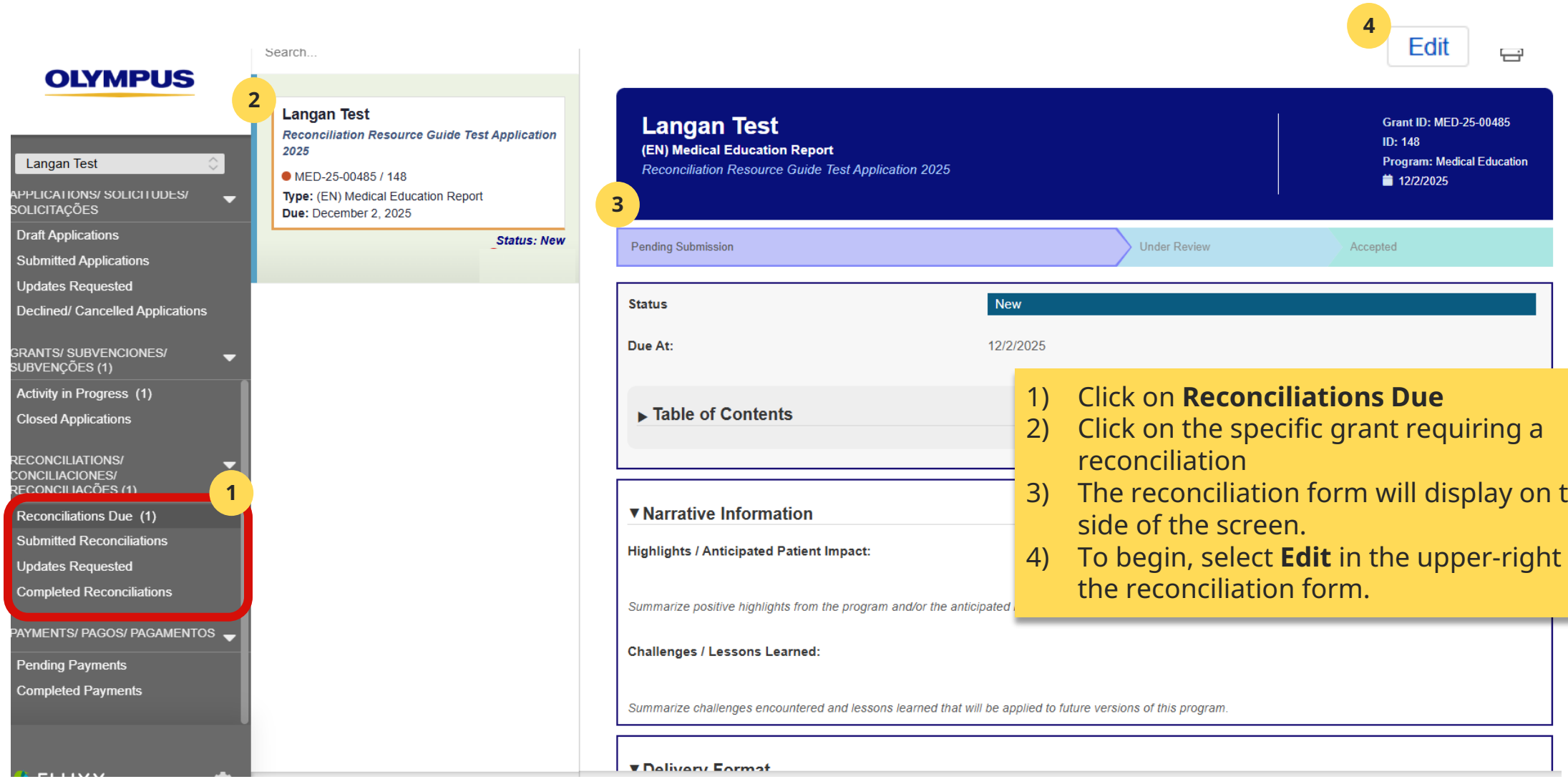
Within the Medical Grants Portal, you'll navigate the various sections using the menu on the left.

Scroll down to the **Reconciliations/ Conciliaciones/ Reconciliações** section.

All events that require a post-program reconciliation will be under **Reconciliations Due**.

Tip: If you don't see all the sections in the menu, use the scroll bar to navigate through the full list.

Step 1: Access the Reconciliation Forms



1) Click on **Reconciliations Due**
2) Click on the specific grant requiring a reconciliation
3) The reconciliation form will display on the right side of the screen.
4) To begin, select **Edit** in the upper-right corner of the reconciliation form.

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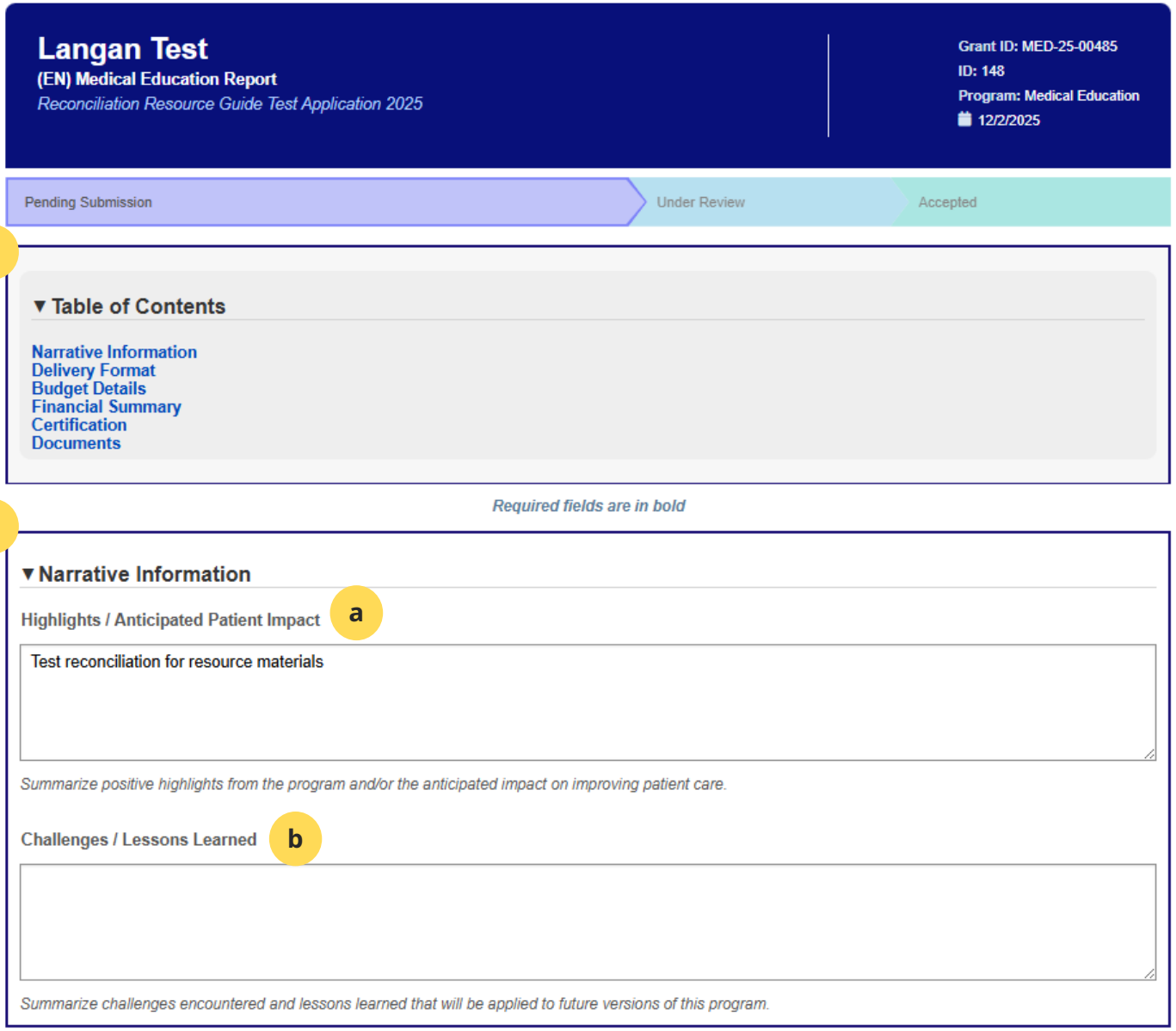
Step 2: Complete the Narrative Information



Follow the on-screen instructions to update the **Narrative Information Section** of the Reconciliation form.

1) **Table of Contents** provides links to bring you to different sections of the reconciliation.
2) Complete the Narrative Information section:
    a) The **Highlights / Anticipated Patient Impact** must be a summary highlighting the impact on improving patient care and positive outcomes of the grant event.
    b) The **Challenges / Lessons Learned** must summarize any learned lessons that can be applied to the success of future events.

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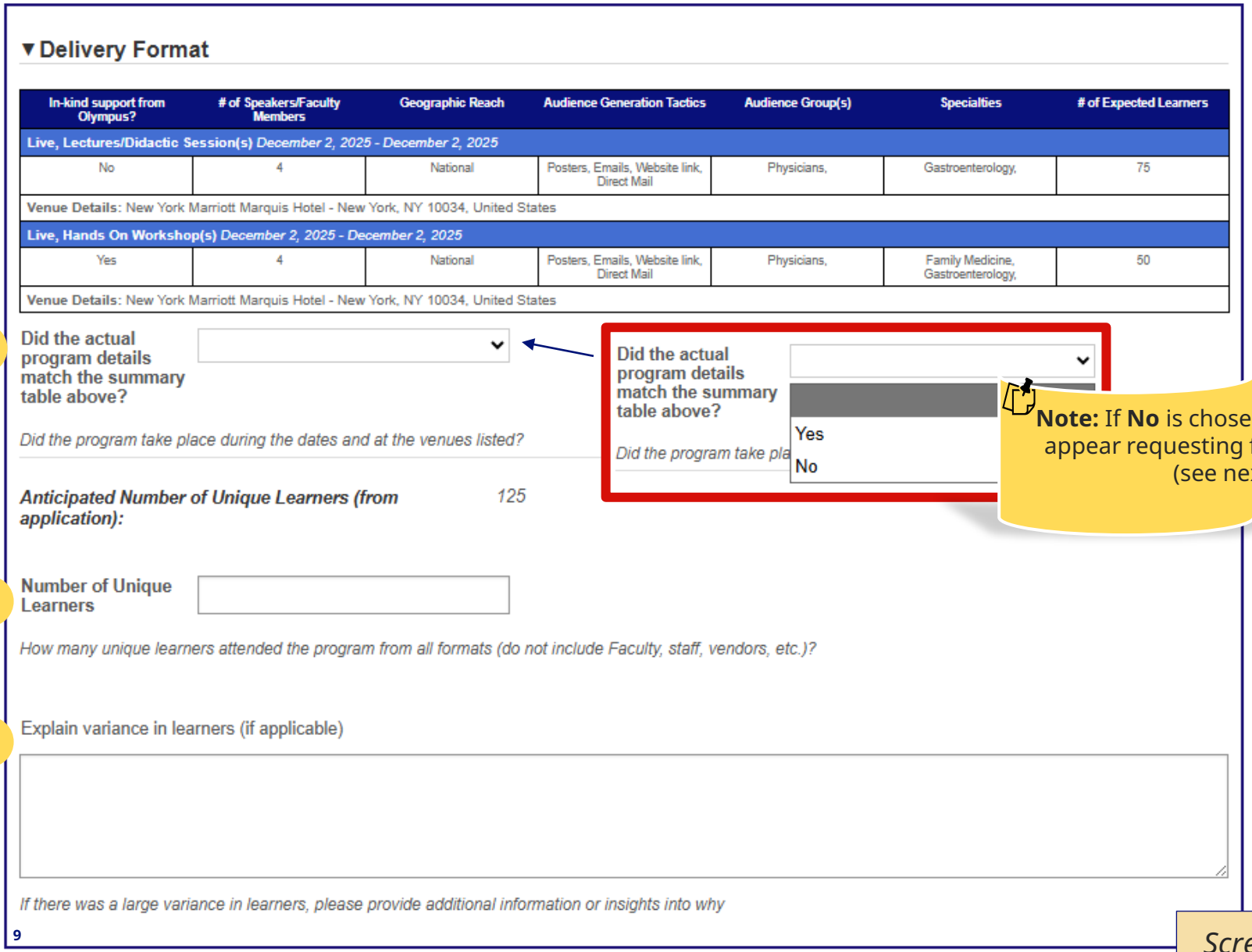
Step 3: Complete the Delivery Format Section



▼ Delivery Format

In-kind support from Olympus?	# of Speakers/Faculty Members	Geographic Reach	Audience Generation Tactics	Audience Group(s)	Specialties	# of Expected Learners
Live, Lectures/Didactic Session(s) *December 2, 2025 - December 2, 2025*						
No	4	National	Posters, Emails, Website link, Direct Mail	Physicians,	Gastroenterology,	75
Venue Details: New York Marriott Marquis Hotel - New York, NY 10034, United States						
Live, Hands On Workshop(s) *December 2, 2025 - December 2, 2025*						
Yes	4	National	Posters, Emails, Website link, Direct Mail	Physicians,	Family Medicine, Gastroenterology,	50
Venue Details: New York Marriott Marquis Hotel - New York, NY 10034, United States						

1 Did the actual program details match the summary table above?

Did the program take place during the dates and at the venues listed?

Anticipated Number of Unique Learners (from application): 125

2 Number of Unique Learners

How many unique learners attended the program from all formats (do not include Faculty, staff, vendors, etc.)?

3 Explain variance in learners (if applicable)

If there was a large variance in learners, please provide additional information or insights into why

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Follow the on-screen instructions to update the **Delivery Format Section** of the reconciliation.

1) Choose the appropriate option from the drop-down menu to respond to the question: **Did the actual program details match the summary table above**?

Note: If **No** is chosen, a new text box will appear requesting further clarification. (see next slide)

2) Enter the **number of confirmed unique learners.** This figure should represent the total count of all participants across all associated formats.
3) If the confirmed number of attendees differs from the anticipated number provided in the application, additional clarification will be required.

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Step 3: Complete the Delivery Format Section (Cont'd)

▼ Delivery Format

In-kind support from Olympus?	# of Speakers/Faculty Members	Geographic Reach	Audience Generation Tactics	Audience Group(s)	Specialties	# of Expected Learners
Live, Lectures/Didactic Session(s) *December 2, 2025 - December 2, 2025*						
No	4	National	Posters, Emails, Website link, Direct Mail	Physicians,	Gastroenterology,	75
Venue Details: New York Marriott Marquis Hotel - New York, NY 10034, United States						
Live, Hands On Workshop(s) *December 2, 2025 - December 2, 2025*						
Yes	4	National	Posters, Emails, Website link, Direct Mail			
Venue Details: New York Marriott Marquis Hotel - New York, NY 10034, United States						

Did the actual program details match the summary table above? No

Yes

No

Did the program take pl ?

Provide details on what differed and why

Provide information on what details did not take place as planned and why.

If **No** is selected in response to the question **Did the actual program details match the summary table above?**, a text box will appear. In this field, provide an explanation of the differences between the anticipated formats outlined in the application and the actual formats implemented during the program.

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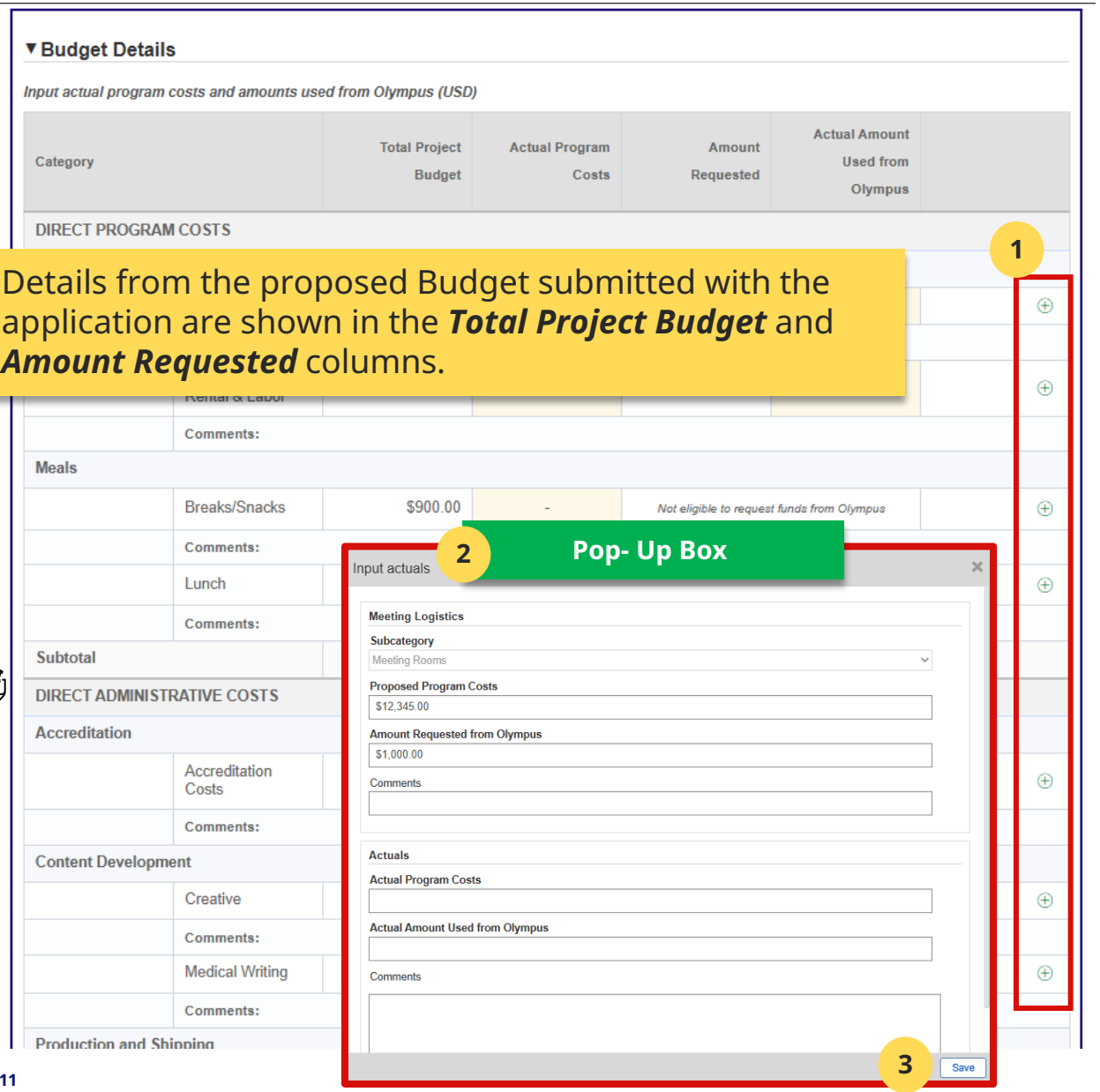
Step 4: Complete the Budget Details Section



Details from the proposed Budget submitted with the application are shown in the ***Total Project Budget*** and ***Amount Requested*** columns.

Follow the on-screen instructions to update the **Budget Details Section** of the reconciliation.

1) Click the green + button next to <u>each</u> section of the budget that requires actual amounts for the reconciliation.
2) A pop-up box will appear. Please complete all required fields (indicated in **bold**).
   - For each **<u>Proposed</u> Program Cost**, enter the corresponding **<u>Actual</u> Program Cost**.
   - For each **<u>Requested</u> Amount from Olympus**, enter the corresponding **<u>Actual</u> Amount Used from Olympus**.
   - Comments: Notes on variances are strongly encouraged and used by the Grants Team to understand past activities and evaluate future requests.
3) Ensure that you click **Save** to ensure that your entry is saved.

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Step 4: Complete the Budget Details Section (Cont'd)

▼ **Budget Details**

Input actual program costs and amounts used from Olympus (USD)

Category		Total Project Budget	Actual Program Costs	Amount Requested	Actual Amount Used from Olympus	
DIRECT PROGRAM COSTS						
Meeting Logistics						
	Meeting Rooms	$12,345.00	$13,000.00	$1,000.00	$1,000.00	Edit
	Comments:					
	A/V Equipment - Rental & Labor	$3,000.00	$3,000.00	$2,500.00	$2,500.00	Edit
	Comments:					
Meals						
	Breaks/Snacks	$900.00	$900.00	*Not eligible to request funds from Olympus*		Edit
	Comments:					
	Lunch	$1,875.00	$1,875.00	*Not eligible to request funds from Olympus*		Edit
	Comments:					
Subtotal		**$18,120.00**	**$18,775.00**	**$3,500.00**	**$3,500.00**	

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4) Ensure all yellow highlighted fields within the '**Actual Program Costs** and '**Actual Amount Used from Olympus**' columns are completed.

DIRECT ADMINISTRATIVE COSTS						
Accreditation						
	Accreditation Costs	$1,500.00	$1,500.00	$1,500.00	$1,500.00	Edit
	Comments:					
Conte Development						
						Edit
						Edit
Produ						
	Postage	$400.00	$400.00	$0.00	$0.00	Edit
	Comments:					
Subtotal		**$18,900.00**	**$18,900.00**	**$1,500.00**	**$1,500.00**	
Total		**$37,020.00**	**$37,675.00**	**$5,000.00**	**$5,000.00**	

Tip: Summary totals are only updated when application is saved. Please click **Save** and confirm these totals are accurate before proceeding.

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Summary totals below only update when application is saved. Please click "Save" and confirm these totals are accurate before proceeding.

Olympus Monetary Award: $5,000.00

Olympus Monetary Award Utilized: $0

Refund Due (unused monetary award funds): $5,000.00

5) As you enter actual costs and allocate actual amounts used from Olympus in the Budget Details Section, the system will keep a running tally of the amounts you enter.

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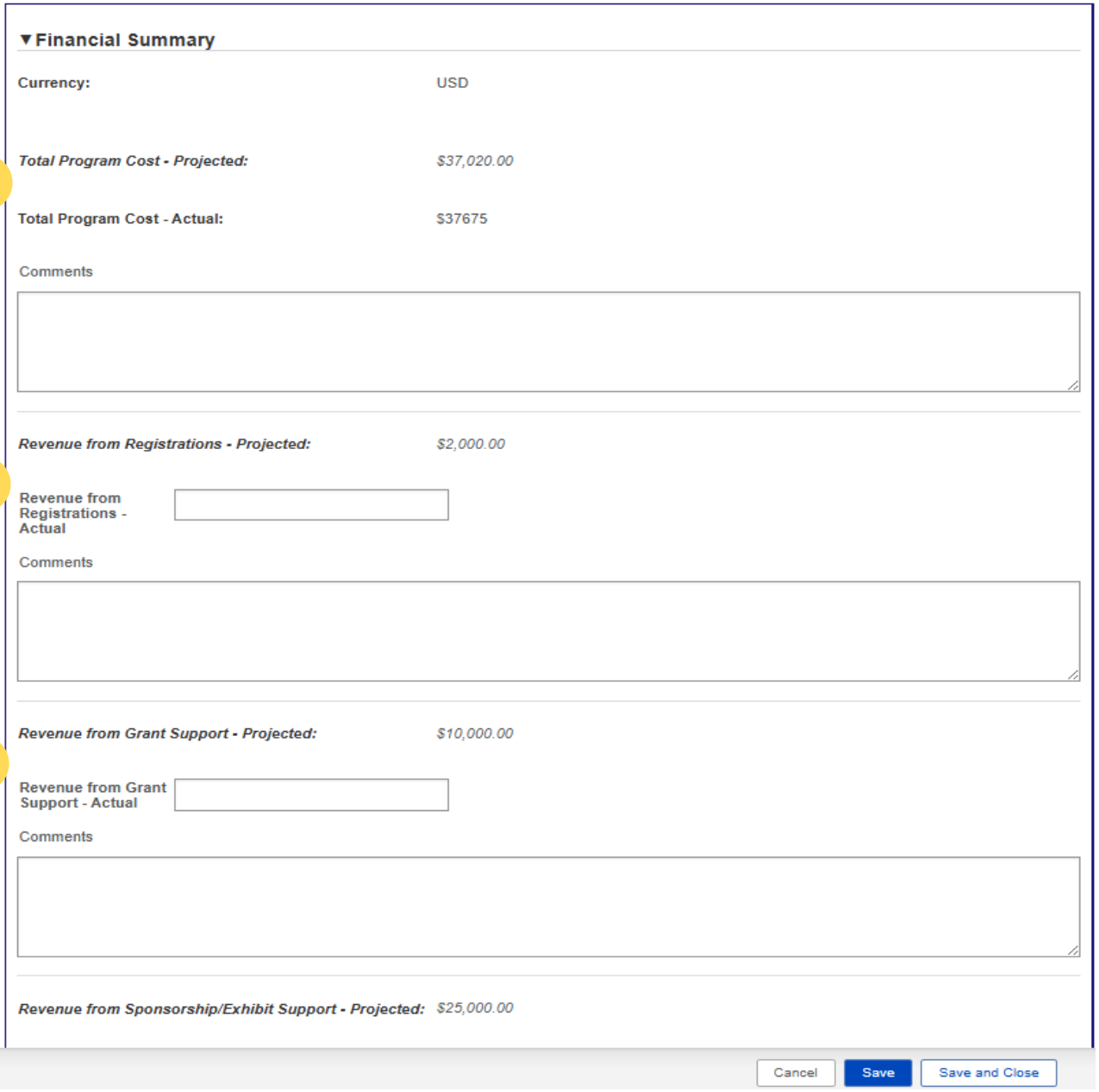
Step 5: Complete the Financial Summary Section



Follow the on-screen instructions to update the **Financial Summary Section** of the reconciliation.

1) The **Total Program Cost – Projected** and **Total Program Cost – Actual** will automatically populate.

   If applicable, enter any comments that will provide clarification on potential variances in the total program amounts.

2) Enter the **Revenue from Registrations – Actual** and include any comments clarifying any potential variances from the Projected Revenue amount from Registrations as outlined in the application.

3) Enter the **Revenue from Grant Support – Actual** and include any comments clarifying any potential variances from the Projected Revenue amount from Grant Support as outlined in the application.

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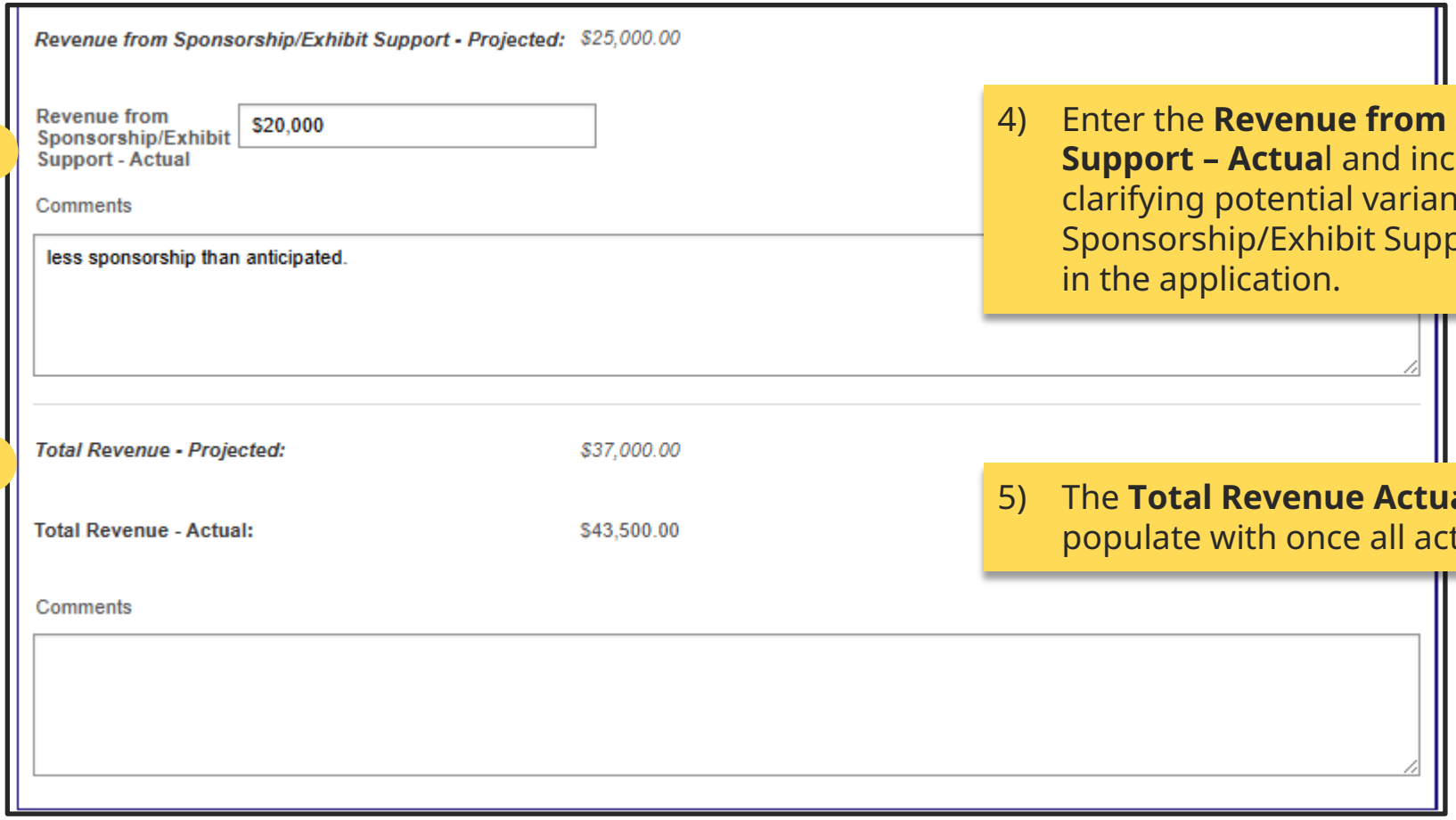
Step 5: Complete the Financial Summary Section(Cont'd)



4) Enter the **Revenue from Sponsorship/Exhibit Support – Actua**l and include any comments clarifying potential variances from the Revenue from Sponsorship/Exhibit Support – Projected as outlined in the application.

5) The **Total Revenue Actual** will automatically populate with once all actual values are entered.

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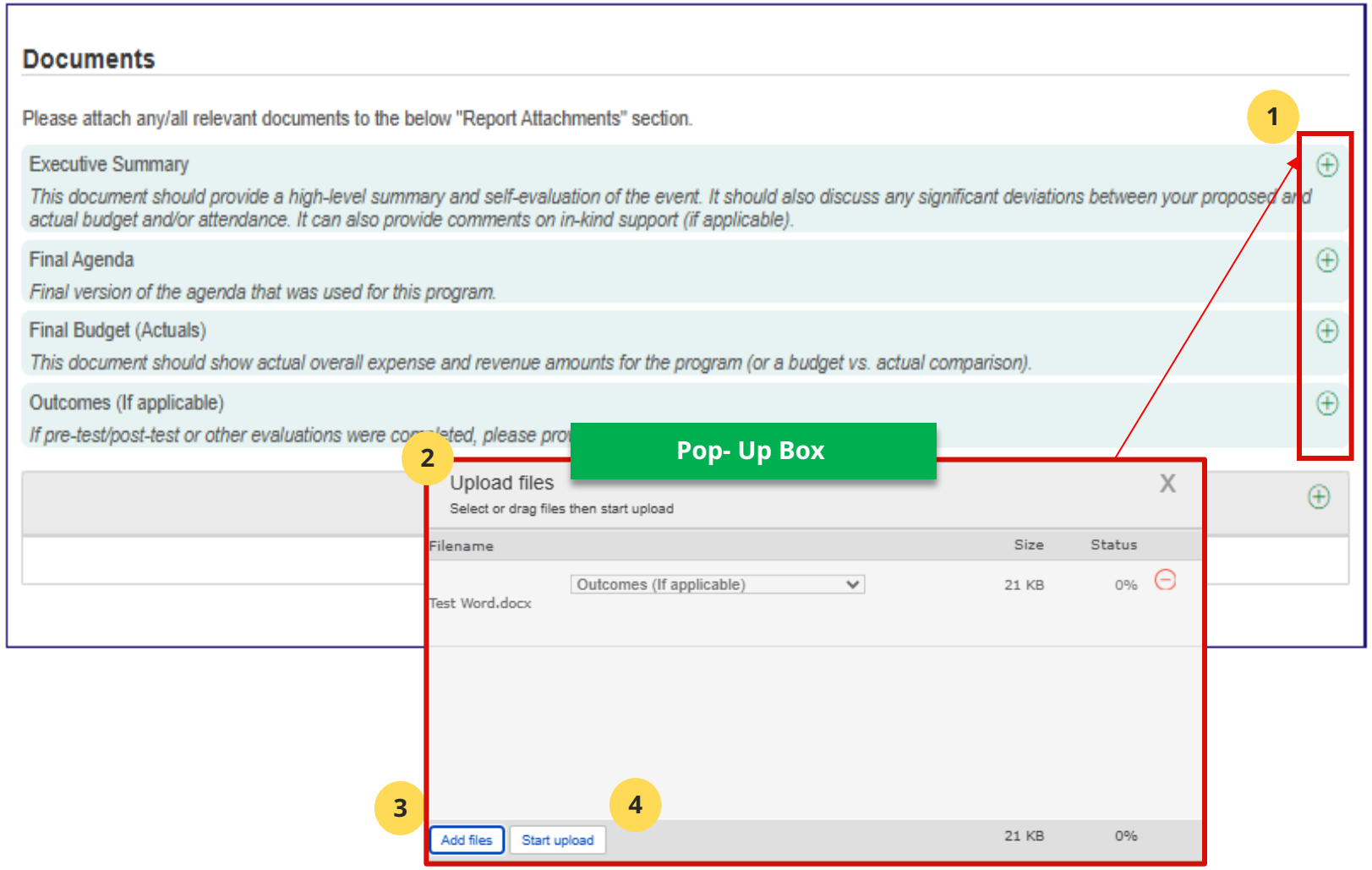
Step 6: Upload Required Documents

Follow the on-screen instructions to update the Documents section of the reconciliation.



1) Click the green + button next to each required document.

2) A Pop-Up Box will appear when you click the green + button.

3) Click **Add Files** and another pop-up will appear for you to navigate to the file location on your computer and choose the appropriate file.

4) Once you have chosen the appropriate file, click **Start Upload**.

   This will attach the required document to the Upload Files pop-up box.

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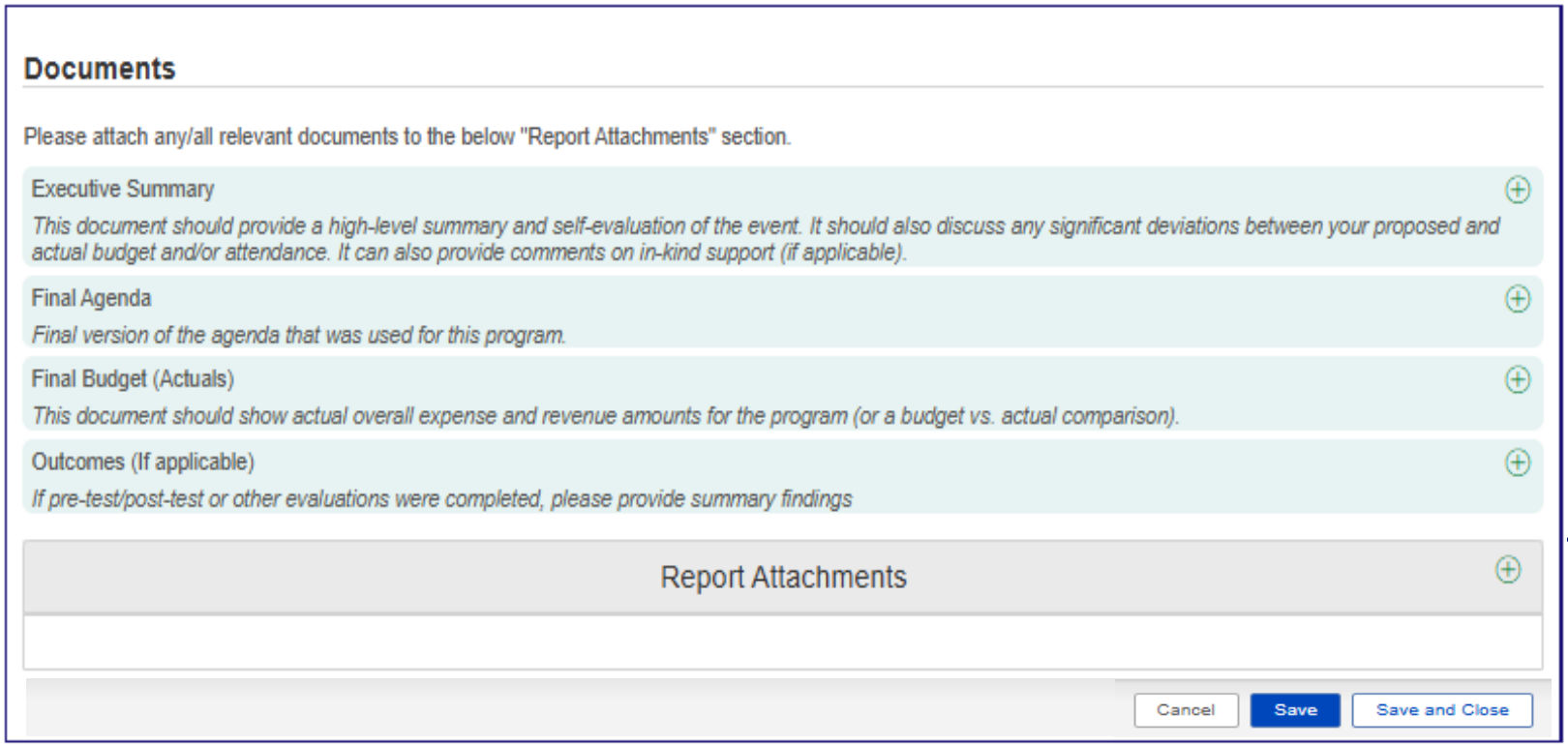
Step 6: Upload Required Documents(Cont'd)

Additional documents to support the outcomes of the event can be included with the reconciliation if desired.



Click the green + next to **Report Attachments** and follow the same steps outlined in the previous page.

Tip: After uploading all required documents, you must click **Save and Close** before you can submit the reconciliation.

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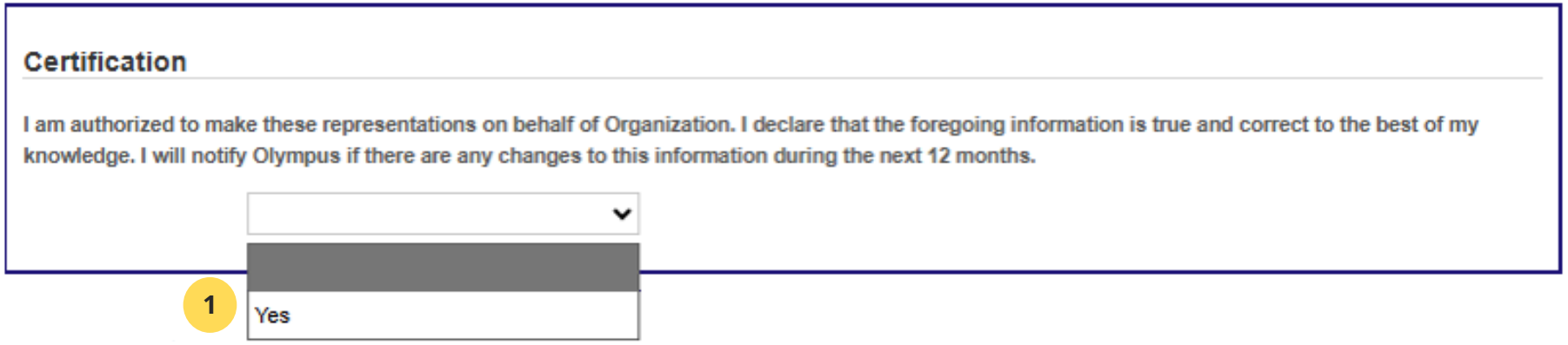
Step 7: Complete the Certification

It is required to certify that all information entered into the reconciliation is true and accurate.

1) Choose **Yes** from the drop-down to confirm certification.



Tip: The system will not allow you to submit the reconciliation if you do not choose 'Yes' to certify.

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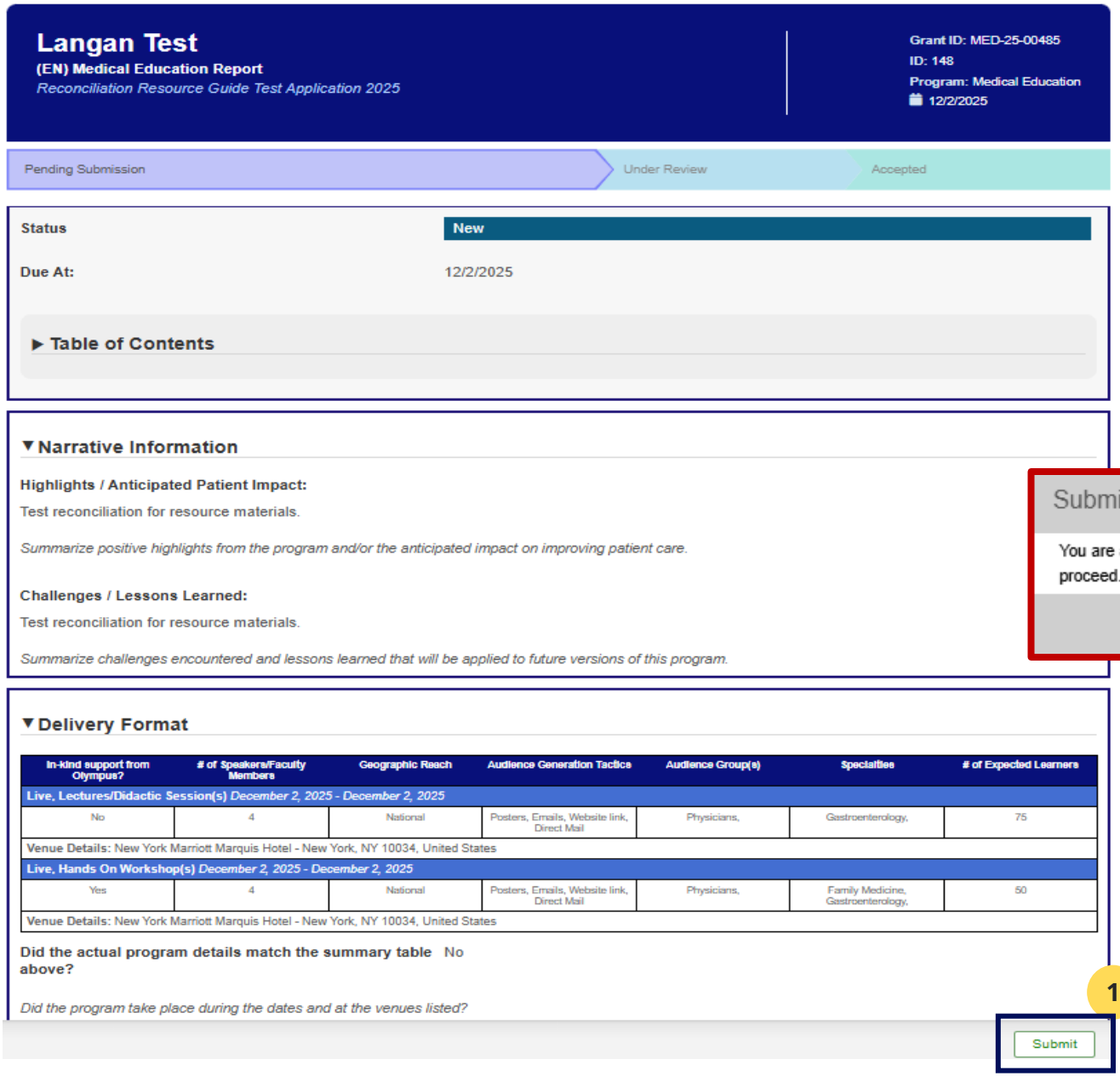
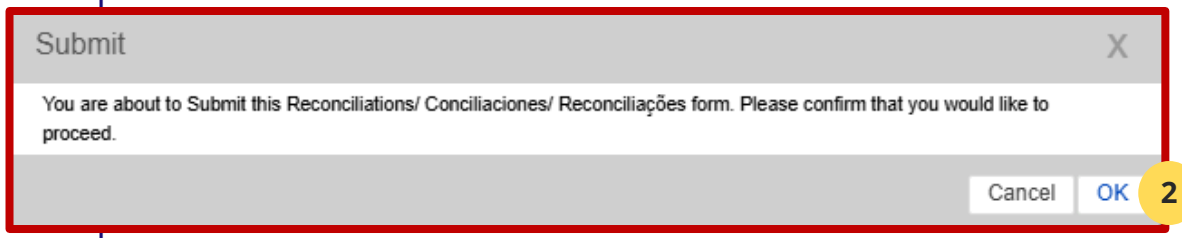
Step 8: Submitting Reconciliation



1) Click Submit and a confirmation pop-up will appear to finalize the submission of the reconciliation report.

2) Click **OK** in the pop-up to submit the reconciliation report.



Tip: If any fields are incomplete, error messages will appear to guide you in correcting them. You must resolve these issues before you can submit your reconciliation.

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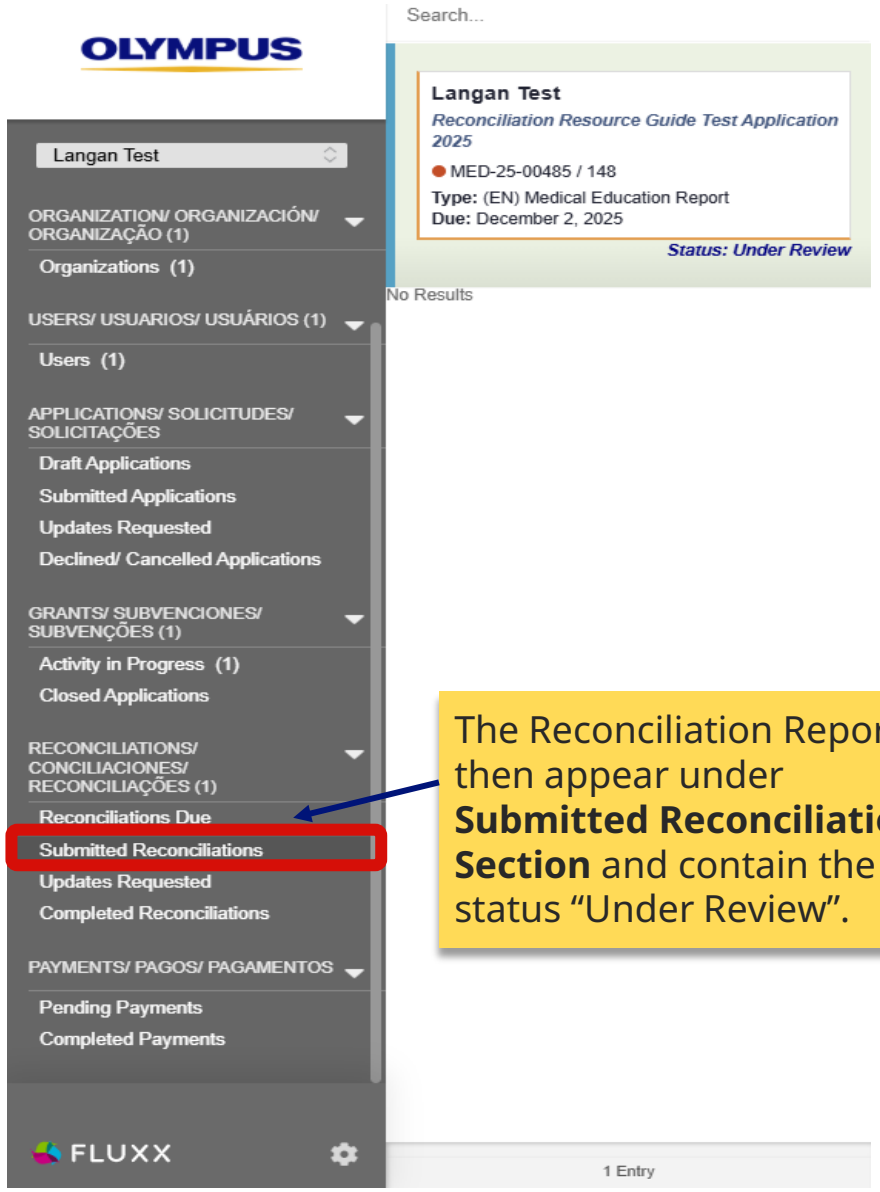
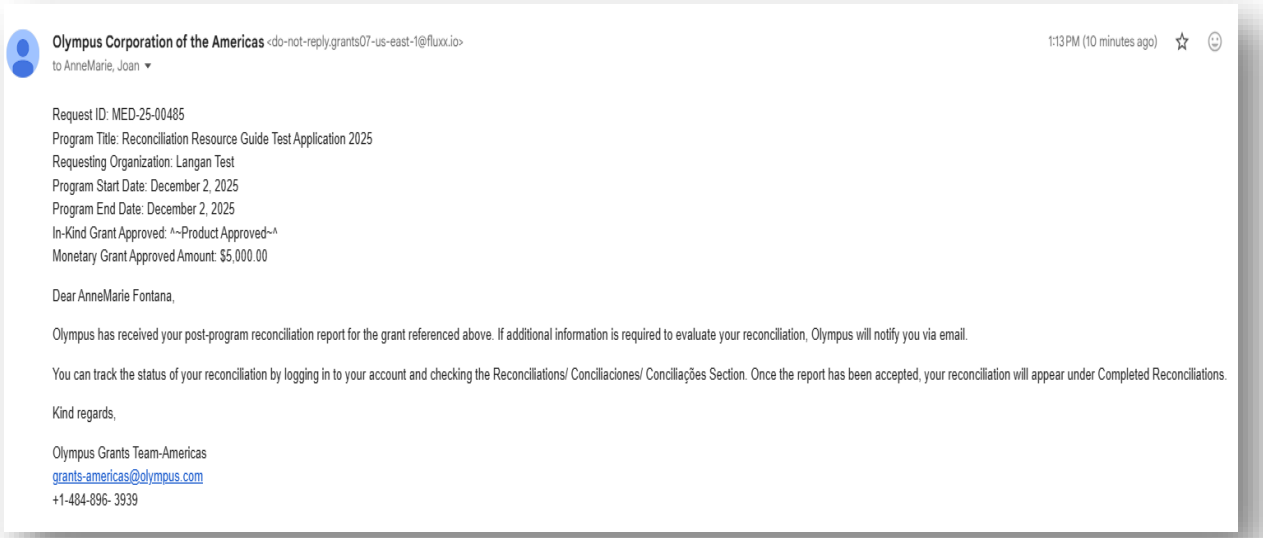
Step 8: Submitting Reconciliation(Cont'd)



The Reconciliation Report will then appear under **Submitted Reconciliations Section** and contain the status "Under Review".

You will receive an email from Olympus Corporation of the Americas confirming the submission of your reconciliation.



Thank you for using the Olympus Medical Grants Portal to complete the reconciliation. The Grants Team- Americas will review your report and contact you if there are additional questions regarding your submission. Further instructions will be provided if a refund to Olympus is necessary.

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Questions?

Grants Team- Americas

grants-americas@olympus.com

+1-484-896-3939

www.olympusamerica.com/grants

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