

Technology Solutions Customer Support Guide

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Welcome to Technology Solutions (TS) Customer Support

We take great pride in providing world-class customer support for all our Technology Solutions product customers.

In many ways, the successful resolution of Technology Solutions application issues depends on a close collaboration between your organization and ours. To that end, our Customer Support team will partner directly with you from the time that you first report an issue until the time that the issue is successfully resolved. Similarly, our Customer Support team will communicate with you regularly to keep you apprised of application issues detected internally, scheduled maintenance events, and product enhancements.

We take seriously our commitment to offer you the highest service levels in the industry. To achieve this goal, we have implemented several channels of communication designed to promote close interaction between our organizations. These channels include direct contact with a support representative, consultation with a designated Account Executive; access to a Self-Service Portal, a web-based ticketing system to help facilitate the reporting of issues, help documents and application tutorials; and a process by which you can escalate unresolved issues to our Customer Support Management team.

The purpose of this Guide is to give you a basic overview of how the TS Customer Support system operates and to answer some of your preliminary questions about the application issue reporting process. It is our hope that you will view this Guide as an indispensable resource for informing you about TS Customer Support procedure.

How to Use This Guide

In this Guide, you will find detailed information about many TS Customer Support procedures, including:

- A description of the types of customer support provided by Technology Solutions.
- A summary of TS Customer Support roles and responsibilities.
- An explanation of how you, the customer, should report application issues to TS Customer Support.
- A definition of application issue severity levels and expected response times for resolving issues.
- Hours of operation for TS Customer Support, including regular business hours, weekends, and holidays.

Types of Support Provided by Technology Solutions

The TS Customer Support Team is the primary contact for users of Technology Solutions applications. We provide a gateway for your product questions, application issue resolutions, and suggestions for product enhancements.

Maintaining quality of information and following a standardized process are essential to ensure that TS can respond to you quickly and efficiently. Support services include:

- Troubleshooting and issue analysis.
- Issue follow-up and resolution.
- Escalation within Technology Solutions when needed.
- Issue numbering, logging, tracking, and communication.

The Customer Support Team

TS Customer Support provides you with direct access to our industry-leading, user-level team of experts for all TS applications. Examples of this direct support include:

- Answering “How do I...?” or “Where do I find...?” questions.
- Explaining TS Product use and functionality.
- Application Integration and Interface Support.
- Password administration.
- Assisting with configuration, use, and maintenance of peripheral equipment provided by Technology Solutions

The Account Executive (AE) or Account Manager (AM)

As part of the TS Customer Support initiative, an AE / AM may be assigned to your organization. This person will work diligently to develop a deep understanding of your business and to identify the specific challenges facing your organization. The Account Executive is responsible for driving customer satisfaction and retention.

To accomplish these objectives, the AE / AM will:

- Build relationships with your key personnel.
- Facilitate direct, productive, and mutual communication.
- Act as your liaison with TS on issues that require prompt escalation and deft action.

This comprehensive approach to relationship management will help you gain the knowledge, confidence, and strategic advantage necessary to keep your business operations running at optimal levels.

Severity Levels and Response Times

The TS Customer Support process is built around providing you with the very best service possible every day. We want to ensure your most urgent issues receive our immediate attention. We accomplish this aim by assigning levels of priority/severity to all incoming support requests.

NOTE: Issues that impact your ability to provide patient treatment are given one of our two highest priorities. Issues with less urgency are assigned a lesser priority. (These lesser issues are still important to us, but we prioritize each support request based on your most urgent issues.)

Definition of Service Levels

TS Customer Support employs a graduated system to escalate application incident reports. Below is a brief explanation of the different levels of support that a Service Request may go through prior to reaching a successful resolution.

Level 1

Addresses general customer queries and application Service Requests fielded by the TS Helpdesk. Provides assistance with “How To’s,” explains Product use and functionality, and serves as a direct path to Level 2 support for all other escalations.

Level 2

Deals with Service Requests that have been escalated from Level 1 and with incident reports of Severity-1 and Severity-2 issues that may affect the ability of the product application to perform properly.

Level 3

Refers to a development group that troubleshoots application incidents of a highly technical nature which could not be resolved at the Level 2 stage of the Technology Solutions Customer Support process.

TS Support Responsibilities

We regard our customers as our partners in the support process. Such a partnership requires open communication and relationship-building between our organizations. To this end, TS will provide:

- Professional, highly trained support representatives.
- Timely and accurate resolutions.
- Timely routing/escalation of unresolved cases to appropriate TS resources.
- Ongoing product knowledge transfer from our team to yours.
- Communication of your product changes/suggestions to our Product Management Team.

Issue Resolution

All identified issue resolutions will be communicated promptly to you as soon as they are available.

Calls received by TS Customer Support can often be resolved during the initial conversation. If not, details will be gathered so that we can communicate with other internal departments/resources and collectively begin to work on the issue.

To maximize first-call resolution, it is most beneficial for you if the person placing the support call to Customer Support has some in-depth understanding of the product. For issues that are highly technical in nature, we may ask for additional details that include:

- The Steps required to reproduce the issue; resolution may depend on the ability to re-create the problem.
- Providing reports, error-logs, or screen prints to TS.

If the issue cannot be resolved, it will be evaluated to determine whether it is an application defect or an enhancement request. Urgent defects will be immediately escalated for final disposition. Correction of defects will be implemented as early as commercially practical. Enhancements will follow our enhancement request process (see Application Enhancement Process below).

If your issue involves TS provided hardware/peripherals configuration, use, or maintenance, your call will be evaluated and promptly referred to appropriate resources for resolution.

Application Release

Application Releases are base product modifications that may include defect corrections, contractual commitments, integration updates, and regulatory requirements that must be installed before the next scheduled release of a TS Product. Patches may be delivered periodically throughout the release cycle. TS will provide you as much notice as possible in advance of each patch or release.

Customer Notifications

TS will send you customer notification via email to follow up on application issues (including identified resolutions), to announce the deployment of upgrades, and to share other important information about your product applications. Customer notifications will be our primary means of communication with you. **It is vitally important that you provide us with the correct email address(es) for your organization.**

NOTE: Please read all customer notifications and communicate them to your team.

Customer Issue Reporting Responsibilities

Every customer-initiated issue with the product application is documented in our ticketing system as an Incident Request or Service Request.

We ask that you help us provide solutions as quickly as possible by following certain established procedures.

How to Report an Issue:

You can quickly report any application issues to TS Customer Support using the following communication methods:

- Toll-free phone number: 1.888.338.8445
 - Please use this number for all **Severity-1 (SEV-1)** issues. For an explanation of Severity Levels, see [Severity Levels and Response Times](#) below
- Self Service Portal: <https://msh.my.salesforce.com>
- Lynx and My Care Plus customers only you may Phone or Email:
 - (Lynx) mshtechsupport@mckesson.com
 - (My Care Plus) supportmycareonline.com

NOTE: It is a good practice to copy your AE / AM on your issue for their general awareness and oversight, particularly when Severity-1 issues arise.

As part of the Service Request logging process, please provide the following information to the Customer Support representative:

- Practice Name or Account Number.
- Primary Contact Name and Phone Number.
- Which Application are you reporting on?
- Problem Description.
- Expected Behavior.
- Date/Time issue occurred.
- Urgency Expectations to ensure proper escalation.
- **Provide examples when applicable.**
- Please avoid the use of personal health information (PHI) in your transmittal of information.
- Implement steps to resolution as defined by your Customer Support representative.
- You may be asked to test or validate various application tools and information as requested by your Customer Support representative or implement workaround resolutions where appropriate.

NOTE: If your issue involves TS provided hardware/peripherals configuration, use, or maintenance, your call will be evaluated and referred to appropriate resources for resolution.

Incident Priority and Determination Schedule

The table below illustrates how priority for incidents will be calculated based on impact and urgency.

Impact →	High Entire Agency or System	Medium Multiple Users	Low Single User
Urgency			
High - Patient Impact	1	1	2
Medium - Business Impact (No Workaround)	1	2	3
Low - Business Impact (With Workaround)	2	3	4

Priority	Response	Target Time to Assign	Target Time to Resolve
1 – Major Incident	Affecting a major service. An immediate and sustained effort using all available resources until resolved. Major Incident Management procedures activated, and vendor support invoked as required.	Immediate action/resolution as soon as possible but will vary depending on the situation.	Target is within 4 hours
2 – High	Customer is unable to work, or their work is severely impaired. An immediate and sustained effort using all necessary resources until resolved. Escalation management procedures activated, and vendor support invoked as required.	Immediate action/resolution as soon as possible but will vary depending on the situation.	Target is within 8 hours
3 – Medium	Customers may or may not have a work around available. Customers are able to continue to work though slightly impaired. Technicians respond immediately, assess the situation, and may engage other staff as necessary.	Action within 1 hour	Target – 1 business day
4 – Low	Customers may be inconvenienced, but a suitable workaround is available to allow the customer to continue working, or a delay in resolution is considered acceptable. Technicians respond using standard service level targets.	Action within 4 hours	Target – 3 business days

Service Request Priority and Determination Schedule

Like Incidents, Service Requests are also based on a combination of Impact and Urgency, however, Service Requests are generally planned and do not require the same prioritization. Service Requests that are defined with the same priority are worked on a first-in first-out basis. Exception: VIP service requests are worked first over service requests with the same priority level. Service Requests may be escalated in urgency based on deadline requirements.

The follow table shows the resulting priority based on impact and urgency for Service Requests.

	Impact →	High Entire Agency or System	Medium Multiple Users	Low Single User
Urgency				
High - Patient Impact		1	1	2
Medium Business Impact – No Workaround		1	2	3
Low Business Impact – With Workaround		2	3	4

Priority	Response	Target Time to Assign	Target Time to Resolve
1 – Major Incident	Affecting a major service. An immediate and sustained effort using all available resources until resolved. Major Incident Management procedures activated, and vendor support invoked as required.	Immediate action/resolution as soon as possible but will vary depending on the situation.	Target is within 4 hours
2 – High	Customer is unable to work, or their work is severely impaired. An immediate and sustained effort using all necessary resources until resolved. Escalation management procedures activated, and vendor support invoked as required.	Immediate action/resolution as soon as possible but will vary depending on the situation.	Target is within 8 hours
3 – Medium	Customers may or may not have a work around available. Customers are able to continue to work though slightly impaired. Technicians respond immediately, assess the situation, and may engage other staff as necessary.	Action within 1 hour	Target – 1 business day
4 – Low	Customers may be inconvenienced, but a suitable workaround is available to allow the customer to continue working, or a delay in resolution is considered acceptable. Technicians respond using standard service level targets.	Action within 4 hours	Target – 3 business days
5 – SR	Requests to be responded to based on scope, timeline, and other competing priority 5 requests.	Action within 4 hours	Target - 90% within 3 business days

Application Support Coverage

Hours of Operation

The TS Customer Support is available 24/7 with the core operating hours being from 6:00am CST to 6:00pm CST. If there are issues after hours, there is always someone on call to respond to emergencies as needed.

Escalation Process

The TS Customer Support escalation process gives you the ability to contact our Support Team when our service does not meet your expectations. Please contact us at Toll-free phone number: 1.888.338.8445 and ask that your concern be directed to the TS Customer Support management team.

NOTE: It is a good practice to notify your AE /AM in addition to Customer Support if you experience any issues with the TS Product application, particularly Severity-1 issues.

Application Testing and Enhancement

TS always welcomes suggestions on how to improve our products—whether the proposed improvement involves new functionality and features, added information, or overall design recommendations.

Some of the factors we consider when evaluating requests for changes include:

- Number of requests for a specific enhancement
- Product focus and the long-term strategic needs and interests of the market in general
- Technological and hardware considerations

We will work closely with you to ensure that the application satisfies your business requirements. Our approach is to involve our customer-users early in the enhancement lifecycle by soliciting detailed feedback about your key business processes and your experience with the product. This feedback gives us a better understanding of your requirements so that we can develop product enhancements that are truly responsive.

To ensure that we receive enhancement requests in an organized and timely fashion, TS has established a formal process for receiving and evaluating your suggestions. This process allows us to analyze and prioritize such requests methodically so that we can plan and initiate product improvements that complement our overall business strategy.

How to Request Enhancements

- Contact our Customer Support Toll-free phone number: **1.888.338.8445**
- **Describe the Enhancement** you'd like to see added to our product and **provide a description of the business problem you'd like the Enhancement to resolve.** The more detail you can provide, the better

Appendices

Appendix I: TS Customer Support Glossary

The TS Customer Support Glossary includes a list of frequently used acronyms, definitions, and terms employed by support representatives during the issue resolution process.

Term	Definition
Enhancement Request	Any requested change to the application not classified as a Material Defect.
Self Service Portal	A support website that allows the user to submit new Incidents/Service Requests and/or view the status of existing Service Requests 24 hours a day.
Issue/Enhancement Reporting	Software error or enhancement request that is used to identify and track items reported from a customer, as well as internally generated software errors and enhancement requests.
Jira	Ontada' s internal defect- and issue-tracking software.
Application Defect	Any reported malfunction, error, or other defect that: 1) can be reproduced by both support and a customer; 2) constitutes a material nonconformity with the documentation; and has a negative impact on a customer's ability to process transactions.
Product (PROD) Environment	The application environment that hosts live, current data and day-today business activities (as opposed to a test environment).
Release	Updated version of a product that may include some or all the following: defect correction, contractual commitments, regulatory enhancements, customer-requested enhancements, or TS enhancements.
Patch	Delivered periodically throughout the Release cycle. Patches are base product modifications that may include defect corrections, contractual commitments, integration updates, and regulatory commitments that must be delivered before the next release.
Incident / Service Request Logging	A log of interaction between a TS Customer Support representative and a customer. All customer calls are logged into the TS call tracking system and assigned a corresponding tracking number.