

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 our Technology Solutions customers.

In many ways, the successful resolution of 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 an incident is reported until the incident is resolved. Similarly, our Customer Support team will communicate with you regularly to keep you apprised of incidents detected internally, scheduled maintenance events, and product enhancements.

We are committed to offering 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 an Account Executive; access to a Self-Service Portal, a web-based ticketing system to help facilitate the reporting of issues, and a Learning Management portal containing help documents, product release notes and application tutorials.

The purpose of this Guide is to provide a basic overview of how the Technology Solutions Customer Support system operates and to answer preliminary questions about the incident and service request reporting process. It is our hope that you will view this Guide as an indispensable resource for informing you about TS Customer Support procedures.

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, can report application issues to TS Customer Support.
- A definition of incident priority levels and expected target resolution times.
- Hours of operation, including regular business hours, weekends, and holidays.

Types of Support Provided by Technology Solutions

Customer Support is the primary contact for users of Technology Solutions applications and services. We provide a gateway for your product questions, incident 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:

- Incident Analysis and troubleshooting.
- Incident resolution.
- Escalation of product enhancements or defects.
- Incident and Service Request logging, tracking, and communication.

The Customer Support Team

TS Customer Support provides you with direct access to our industry-leading team of application experts. Examples of direct support include:

- Answering “How do I...?” or “Where do I find...?” questions.
- Explaining Product use and functionality.
- Integration and Interface Support.
- Enrollment Assistance.
- Assisting with configuration, use, and maintenance of peripheral equipment provided by Lynx® 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. The AE / AM develops a deep understanding of your business and will help identify opportunities for improvement within your organization to accomplish these objectives:

- Understand your organization's expectations and provide best practice workflow solutions.
- Facilitate direct, productive, and mutual communication.
- Act as your liaison with TS on product upgrades and new technology integration.

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.

Priority Levels and Response Times

We want to ensure the most urgent incidents receive our immediate attention. We accomplish this aim by assigning levels of priority to all incoming incidents and service requests.

NOTE: Incidents that impact your ability to provide patient treatment are given highest priorities. Incidents with less urgency are assigned a lesser priority. We process each request based on the most critical impact.

Definition of Service Levels

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

Tier 1

Addresses general queries and application Service Requests. Provides assistance with “How To’s,”. Explains Product use and functionality.

Tier 2

Manages Service Requests and Priority-1 or Priority-2 Incidents escalated from Tier 1 that may affect the product application's ability to perform properly.

Tier 3

Refers to an engineering group that triages and troubleshoots application enhancements or defects of a highly technical nature.

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 product enhancements to our Product Management Team.

Issue Resolution

All identified incident resolutions will be communicated promptly and 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 and communicated with other resources to collectively work on the incident.

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

- The steps required to reproduce the incident.
- Reports, error-logs, or screen prints.
- Hardware or network performance logs.

If the incident 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, and resolution may depend on the ability to re-create the problem. 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.

Software Release

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

Customer Notifications

TS will send customer notification via email to announce the deployment of upgrades, follow up on application incidents, including identified resolutions, and to share other valuable information about our products. You can register to receive customer notifications about our products [here](#). **It is vitally important that you provide the correct email address(es) for your organization.**

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

Customer Reporting Responsibilities

Every customer-reported application issue or enhancement is documented in our ticketing system as an Incident or Service Request. We ask that you help us provide solutions as quickly as possible by following certain established procedures.

Hours of Operation

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

How to Report an Issue or Enhancement:

Application enhancements or issues can be reported to TS Customer support using the following methods:

- Toll-free phone number: 1.888.338.8445
 - Please use this number for all **Priority-1 (SEV-1)** issues.
 - For an explanation of Priority Levels, see [Priority Levels and Response Times](#) below.
- Self Service Portal: <https://servicenow-uson.mckesson.com>
- Chat Services - iKnowMed G2 only
- Lynx® and Ontada Health customers may also contact support via email for the following products:
 - Clear Value Plus: CVPSupport@McKesson.com
 - Glide Health: glidehealthsupport@mckesson.com
 - Lynx®: msh.techsupport@mckesson.com
 - Ontada Health: ontadahealthsupport@mckesson.com

As part of the Service Request and Incident 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?
- Description for your enhancement request or issue.
- Expected Behavior.
- Date/Time issue occurred, if necessary
- Business impact/urgency.
- **Provide examples when applicable.**
- Please avoid the use of personal health information (PHI) in your transmittal of information.

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.

Application Testing and Enhancement

TS always welcomes suggestions on how to enhance our products, including proposed improvement involving new functionality and features, added information, or overall design recommendations.

To ensure 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.

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

- Customers interest in a specific enhancement.
- Product focus and long-term strategic needs.
- 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 we can develop product enhancements that are truly responsive.

Appendix

Incident Priority and Determination Schedule

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

Ontada Incident Prioritization Matrix

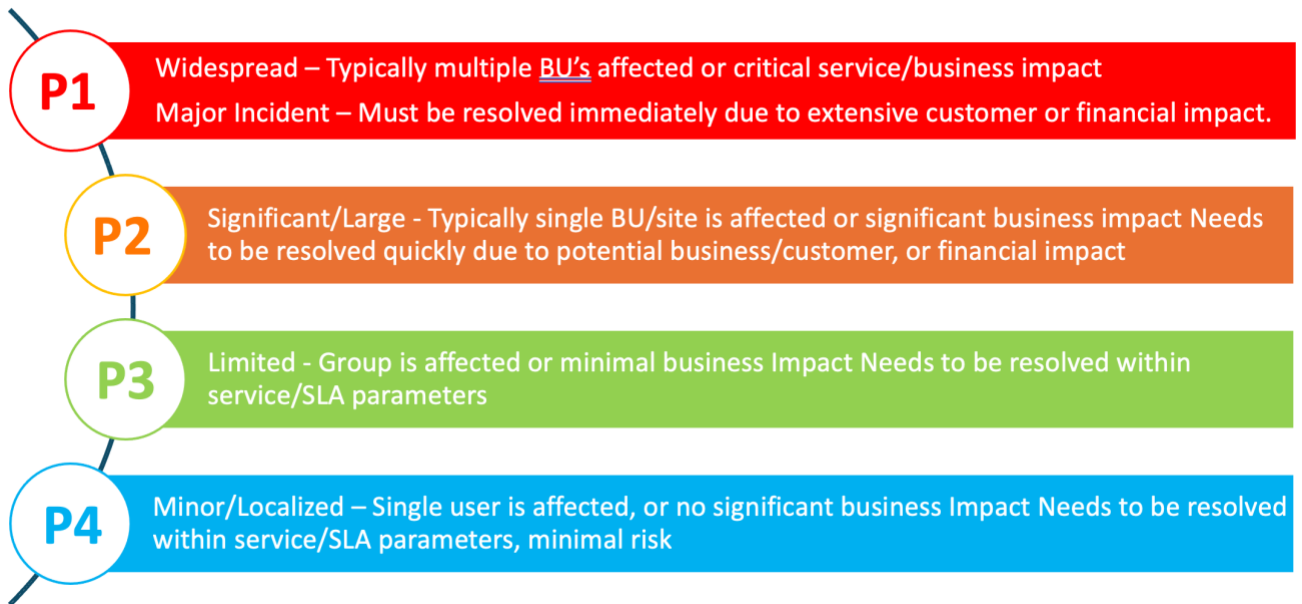
Priority	Response	Target Time To Assign	Target Time To Resolve
P1 – Critical Incident	Widespread issues affecting highly critical systems that are directly impacting business outcomes, for which there isn't an acceptable short-term workaround.	Immediate action/resolution as soon as possible but will vary depending on the situation.	Target is within 4 hours
P2 – High	Issues affecting critical systems for which there is an acceptable short-term workaround in place.	Immediate action/resolution as soon as possible but will vary depending on the situation	Target is within 8 hours
P3 – Medium	Issues will affect individuals or groups, and their work will be protracted, inconvenienced, or delayed because of the issue, but do not directly impact core business outcomes.	Action within 1 hour	Target is 1 business day
P4 – Low	Issues will typically be impacting a single individual and are not directly impacting our ability to deliver business outcomes. There will be some P4 incidents that impact groups of colleagues, but these would have only a very limited impact to the group.	Action within 4 hours	Target is 3 business days
Service Request	Requests to be responded to based on scope, timeline, and other competing priority requests.	Action within 4 hours	Target - 90% within 3 business days

Ontada Impact/Urgency Prioritization Matrix

IMPACT →		Critical: Entire Business or System Work Stopped at peak time No viable workaround	High: Multiple Users Complex Workaround Work stopped is near peak time.	Medium: Work stopped is inconvenient. Workaround available	Low: Single User Work stopped is not time sensitive
		URGENCY	Critical: Widespread Impact Multiple Sites/Applications	① MIM Critical business systems outage. Critical patient treatment system outage. Severe reputation damage. Major financial impact	① MIM Multiple services degraded Probable customer/business impact. Probable reputational damage or financial impact
High: Large Impact Application/Sites	① MIM Critical business systems outage. Critical patient treatment system outage, significant reputational damage or financial impact		② Service degraded Probable customer/business impact. Probable reputational damage or financial impact	③ Service degraded Moderate customer/business impact	④ Customer/Business impact Easy alternate solution
Medium: Moderate Impact Group	② Service outage Group directly impacted Reputational damage or financial impact is limited		② Service degraded Potential customer/business impact. Potential reputational damage or financial impact	③ Service degraded Minor customer/business impact	④ No relevant urgency for group issue
Low: Minor Impact Individual	③ Single user can no longer perform work No business impact		③ Single user work disrupted Not business impact	④ Single user work inconvenienced	④ No relevant urgency for single user issue

- P1 -Critical
- P2-High
- P3-Medium
- P4-Low

Incident Prioritization Cheat Sheet



Service Request Priority and Determination Schedule

Like Incidents, Service Requests are also based on a combination of Impact and Urgency. Service Requests that are defined with the same priority are worked on a first-in first-out basis. Service Requests may be escalated in urgency based on deadline requirements.

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.