

Medrio's Support Handbook

***Medrio Support Policy:** This handbook outlines the Medrio Support Policy and is a guide to using Medrio's Support Services. We reserve the right to change the policy and stay aligned with our goal of offering an outstanding support experience.*

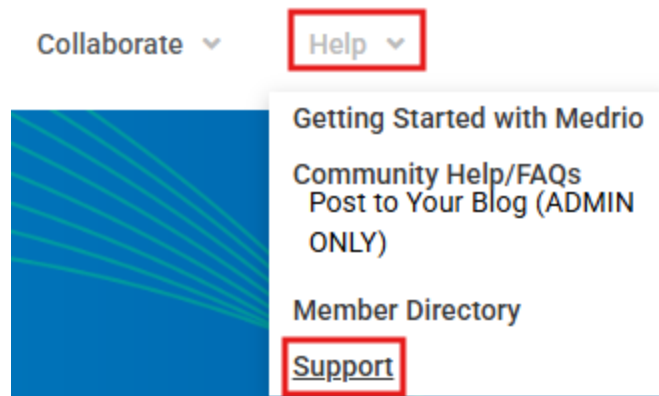
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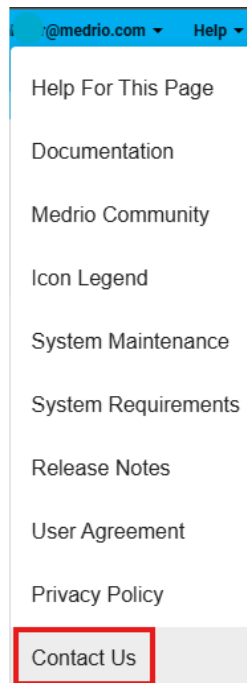
Contacting Medrio Support

For your convenience we have multiple options to open support cases:

- Via email at support@medrio.com or rtsm.support@medrio.com
- Through the Medrio Community page (community.medrio.com/help/support247) under the Help drop-down menu.



- From within the Medrio EDC, click on the **Help** menu located in the top-right hand corner of the page, and select the “Contact Us” option at the bottom of the list.



- Toll-free by phone at **+1 877-763-3746** (*Option 1 for RTSM Support or Option 2 for EDC Support*). Country specific freephone numbers are available for some countries. Please refer to the table below for the number to call for your country. Please note that phone service provided by Medrio Support is English-speaking only.

If an agent is not available when you call, please leave a message that includes:

- The name of the study.
- The nature of the concern.
- Your name, email address, and phone number.
- Any other relevant details and someone on the Support team will call you or email you back as soon as possible.

If your country is not listed or you are having problems with the freephone number, please use one of our other contact methods.

Country	Freephone	Country	Freephone
Argentina	+54 (800) 345 5420	Israel	+972 (1809) 533 163
Australia	+61 (1800) 002 962	Italy	+39 (800) 126 379
Austria	+43 (800) 070 486	Latvia	+371 (800) 056 86
Belarus	+375 (882) 004 910 07	Mexico	+52 (800) 269 4541
Belgium	+32 (800) 82 246	Netherlands	+31 (800) 350 1008
Bulgaria	+359 (800) 46 050	New Zealand	+64 (800) 039 840
Canada	+1 (888) 315 3079	Poland	+48 (800) 012 027
China (Beijing local)	+86 (10) 8524 1241	Portugal	+351 (800) 506 137
Czech Republic	+420 (800) 022 531	South Africa	+27 (800) 060 113
Denmark	+45 (808) 30 109	South Korea	+82 (308) 640 192
France	+33 (805) 321 062	Spain	+34 (900) 670 014
Georgia	+995 (706) 777 218	Switzerland	+41 (800) 789 124

Country	Freephone	Country	Freephone
Germany	+49 (800) 181 0173	Taiwan	+886 (801) 491 345
Hungary	+36 (800) 16 267	Ukraine	+380 (800) 501 698
India	+91 (800) 443 0047	United Kingdom	+44 (800) 046 5835
Ireland	+353 (800) 814 126	United States	+1 (877) 763 3746

24/7 support

Medrio’s first level of Support is provided 24/7, 365 days a year (weekends and holidays included).

Some inquiries do require in-depth research and review and may take time to resolve. Issues are prioritized based on priority and criticality. Please see below for prioritization classifications.

Standard support

Medrio shall provide the following support services as appropriate to address your issues:

- A Technical Support Representative to answer your help desk questions regarding Medrio’s software applications
- Assistance with errors related to product releases
- Troubleshooting of Medrio software integration issues
- Help identifying and isolating the source of errors or failures, to the extent practicable
- A bridge between you and the third-party software support department, if purchased through Medrio
- Medrio’s published product documentation

Standard maintenance

Medrio shall provide the following maintenance services as appropriate to address your issues:

- Updates to Medrio's software applications as soon as reasonably possible
- The use of commercially reasonable efforts to correct reported errors or failures
- Workarounds in lieu of the availability of a product fix

Opening a support case

Once a ticket is opened, please provide responses by replying to the email message received from the Medrio Support team, as the tracking number to the case or identifying the case by number in direct communications to help us track all relevant information on the issue.

When providing a solution, we may ask to set up a mutually convenient conference call and/or a live meeting to better understand the issue or to walk you through addressing the problem.

To facilitate the support process, please ensure the person requesting technical support has:

- Received the proper training in the related area on the training materials located in our [eLearning platform](#)
- Referred to and reviewed proper documentation and reference materials
 - Medrio's [User Guide](#) pages
 - The [Knowledge Base](#) within the Medrio Community
 - If the concern is performance related, the user has checked the [Medrio Status](#) page for any known system-wide performance concerns
- Performed due diligence in addressing the issue

When requesting assistance and to ensure a timely response, please provide the following upon opening a support case:

- Product Name (Medrio EDC platform, ePRO/eConsent, Randomization & Trial Supply Management (RTSM), Cross Study Portal, etc...)

- Subject of the issue
- Your assessment of the IMPACT to your business
- Study Title as listed in Medrio
- Description of the issue:
 - Visit, Form, and/or Subject ID(s) impacted (if applicable)
 - Module or area of the product (eConsent, ePRO, Queries, Reporting, etc...)
 - The steps taken to replicate/reproduce issue or the error
 - Product Version
 - (RTSM only) Hosted/On Prem
- Attachments
 - Screenshots of error message/error text
 - Supporting documentation for a specific configuration or a business process that is not functioning as designed

Issue Priority & Response Time

Blocker: Issue being reported has brought a complete stop to study operations and is preventing all users taking any action or activity on the study. Medrio Support will begin review as an immediate priority and will provide regular updates on status.

- Example: All users at a site or within a study are experiencing error message or loading timeouts when attempting to take any action within the application. Users cannot enter data for any participant on any form, CRA's cannot perform any monitoring activity, and administrators are unable to generate reports or change/access any study data.

Critical: Application is not operational, not reachable, or unresponsive to the point of being unstable. Medrio will respond as soon as possible no later than one (1) hour from the time the incident is detected by our monitors or reported by our client. Diagnosis and repair of the issue will commence immediately thereafter and will continue until a solution has been developed.

- Example: A study administrator is attempting to complete a deployment for the first go-live for the study, or are pushing through a study-critical mid-study update but are encountering an error that is preventing the deployment from completing.

High: Application is operational, but a serious fault prevents the execution of business critical process affecting the progress of a study, a halt in operation. Respond within 2 hours from receipt and provide next steps within 24 hours.

- Example: A study is approaching a deadline for reporting or study closeout and are attempting to perform monitoring activities, but the monitor is unable to update the monitoring status for some/all participants.

Medium: There is a fault that doesn't prevent the execution of a business critical process and doesn't impact data integrity, also circumvented using an available workaround. Respond within 24 hours and provide next update within 48 hours of receipt.

- Example: The study administrator is attempting to update a configuration setting on the study, but the changes are not displaying as expected during UAT testing.

Low: Cosmetic or an inquiry, low business impact. Respond within 24 hours.

- Example: Administrative request, such as adding a newly released feature to an existing study, changing the study's name as it is displayed in Medrio, or requesting a study archival.

Medrio Support Ticket Status

New: Received and is in Triage review

Under Investigation: The inquiry is currently under investigation by Support to determine resolution/workaround

Waiting on Customer: A response has been sent to the inquiry, or Merio Support is in need more information from the contact that reported issue to continue investigation

Pending Engineering: Engineering investigation is underway to determine the root cause and solution/workaround for the issue.

Bug Identified: A systemic issue has been identified that requires a software update within the platform to address. No release date available.

Pending Release: A systemic issue that requires a software update within the platform to address and will be implemented in the next Medrio Release.

Resolved: Solution confirmed and provided, awaiting confirmation from client.

Closed: Resolution and/or workaround provided.

Support Case Priorities

Cases are prioritized and escalated based on the priority of the issue as well as its overall impact, feasibility of a workaround, and the effort required for resolution. It is important for us to balance our available resources, and case prioritization is the key to allowing us to provide the most impact possible across the client base.

If you feel the need to raise the priority of a case or if you are not satisfied with the course of action taken to address your issue, please inform your Technical Support Representative (TSR). The TSR will take appropriate steps to meet your expectations. You are always free to contact the Technical Support Lead to voice your concerns and request that your case be re-prioritized.

Please see the escalation contacts for Support below.

Escalation Level	Name, Location, Time zone	Title	Email
1.	Ildiko Vargova (EU - CEST)	Technical Support Lead	ivargova@medrio.com
	Matthew Salazar (US - MST)	Senior Manager, Technical Support	msalazar@medrio.com
2.	Darshan Kansagara (US - EST)	Solutions Optimization Director	dkansagara@medrio.com
	Melissa Miller (US - CST)	Senior Solutions Optimization Consultant	mmiller@medrio.com
3.	Jeff Johnson (US - PST)	Senior Director, Support & Education	jjohnson@medrio.com

Product Release Policy

Medrio is committed to delivering regular feature-rich releases of our products. Between major releases that involve significant updates to the platform to micro releases which are also made available to address important bugs and new functionality that cannot wait for the next scheduled release based on urgency.

It is our policy to release an unplanned patch only when there is a defect that affects the stability of the software, a degradation of major functionality, or a significant impact to performance. In these events, after analyzing the risks and effort involved in providing such a fix, we will release a patch.

Customer Experience Feedback

Upon the close of each Support request, we will send a survey to measure our performance and overall client satisfaction. We encourage you to participate in these surveys so that we can make improvements to provide a better service to you and the Medrio user community. We typically address the following topics:

- The overall quality of Technical Support services
- Timeliness and accuracy of service

- Friendliness and professionalism of Technical Support staff
- Provision of emergency fixes when required
- Quality of articles on the Community

We appreciate your participation and look forward to collaborating with you!