



**VERATO, INC.**

**Technical Support Guide**

**Version 4.1**

**Dated: March 31, 2025**

## Table of Contents

<b>1</b>	<b>PURPOSE OF VERATO TECHNICAL SUPPORT GUIDE.....</b>	<b>3</b>
<b>2</b>	<b>IMPORTANT CONTACT INFORMATION AND EXAMPLES OF USE CASES .....</b>	<b>3</b>
<b>3</b>	<b>VERATO SUPPORT PLAN .....</b>	<b>3</b>
3.1	PRODUCTS AND SERVICES COVERED UNDER THE VERATO SUPPORT PLAN.....	4
3.2	ITEMS EXCLUDED FROM VERATO’S SUPPORT PLAN.....	4
3.3	COVERAGE TIME .....	4
3.4	DESIGNATED SUPPORT CONTACTS.....	4
3.5	CHANGES TO VERATO’S SUPPORT PLAN .....	5
<b>4</b>	<b>TECHNICAL SUPPORT PROCESS.....</b>	<b>5</b>
4.1	OVERVIEW .....	5
4.2	LOGGING A SUPPORT CASE .....	6
4.3	COMMUNICATION RELATED TO A SUPPORT CASE .....	7
4.4	DIAGNOSING AND REPRODUCING ERRORS .....	7
4.5	SEVERITY LEVELS .....	8
4.6	SUPPORT REPLY TIME.....	8
4.7	ESCALATION .....	9
4.8	RESOLUTION MODES .....	9
4.9	PARTNER AND RESELLER SUPPORT .....	9
<b>5</b>	<b>SERVICE LEVEL AGREEMENT.....</b>	<b>10</b>
5.1	DEFINITIONS .....	10
5.2	UPTIME SERVICE LEVEL.....	11
5.3	RESPONSE TIME SERVICE LEVEL .....	11
5.4	THROUGHPUT LEVEL.....	12
5.5	REPORTS AND CREDITS .....	13

## 1 PURPOSE OF VERATO TECHNICAL SUPPORT GUIDE

- a. Define and describe the Verato Support Plan, Verato’s Support Process, and the Service Level Agreements; and
- b. Describe the operation of Verato’s Support Services set out herein.

## 2 IMPORTANT CONTACT INFORMATION AND EXAMPLES OF USE CASES

Contact Info	Details	Example Uses
<a href="https://support.verato.com">https://support.verato.com</a>	<p><b>Verato Support Portal</b></p> <p>Online portal used to submit and monitor support tickets with Verato, as well as access online help articles. Verato will provide access to the support portal for up to three (3) of a customer’s Designated Support Contacts per Section 3.4 below (“DSCs”).</p>	<p>All support requests and severities:</p> <ul style="list-style-type: none"> <li>• General operational questions</li> <li>• Issues significantly or critically impacting performance</li> <li>• Configuration changes</li> <li>• New, or deactivate account requests</li> </ul>
<a href="mailto:customerservice@verato.com">customerservice@verato.com</a>	<p><b>Verato Support Email:</b></p> <p>A customer’s standard user (i.e., a non-DSC user) can reach out to Verato Support via this email address for individual low-impact support issues. Verato does not guarantee SLAs for email support.</p>	<p>Non-critical issues not requiring a DSC intervention, such as:</p> <ul style="list-style-type: none"> <li>• Password reset</li> </ul>
(703) 270-0874	<p><b>Verato Emergency Support Hotline:</b></p> <p>The emergency support hotline can be used by any DSC to alert Verato Support of business critical issues (i.e., issues defined below as Severity Level 1) <i>outside of business hours</i>, which are 9 AM-6 PM EST, Monday - Friday and do not include federal holidays.</p>	<p>Business critical issues, such as:</p> <ul style="list-style-type: none"> <li>• Customer’s access to its Verato Service is impaired</li> <li>• Significantly degraded performance</li> <li>• Time-critical production issue such as security certificate expiring</li> </ul>

## 3 VERATO SUPPORT PLAN

The Verato Support Plan is both a service program and resource program that Verato provides to its customers during the License Term or Service Term (as appropriate) (the “Support Plan”). The Verato Support Plan offers technical assistance to Verato’s customers to ensure correct and continuous access to the Verato Services and any Licensed Data. The Support Plan does not take the place of training and documentation, but instead offers technical assistance, particularly when the customer’s access to the Verato Service is impaired, or the Verato Service appears to be functioning improperly. The Support Plan is also the primary vehicle by which a customer can report suspected product defects, as well as submit requests for defect correction, product extensions, and enhancements (via properly submitted support cases).

### 3.1 PRODUCTS AND SERVICES COVERED UNDER THE VERATO SUPPORT PLAN

The Verato Support Plan covers all legacy, new and future Products and Services for Verato customers that are subject to the terms and conditions of an active service agreement with Verato. The Verato Support Plan includes and supports a customer’s use of Verato products and services previously referred to as UMPI or Universal MPI, Auto-Steward, Enrich, hMDM, Patient Identity, Provider Identity and/or Customer Identity as well as other product or service names as set out in customer’s service agreement with Verato. Please note the Verato Support Plan also includes support of the various Services, Packages and Tiers available on the Verato MDM Cloud Platform (released in March of 2025), which are referenced generally on the following webpage link <https://verato.com/verato-mdm-cloud-products>, and which are specifically set out in the customer’s Product Order or Service Order.

### 3.2 ITEMS EXCLUDED FROM VERATO’S SUPPORT PLAN

The Verato Support Plan does not include assistance with non-Verato products, services, or technologies, and specifically does not include customer’s databases or customer’s third-party databases, applications, networks or computer systems.

### 3.3 COVERAGE TIME

The Coverage Time listed in Table 1 below indicates the time windows during which Verato’s Support Representatives are available to respond to a customer’s newly filed support case.

Coverage Time by Support Case Severity	
Severity Level*	Coverage Time
Level 1 – Critical	24x7
Level 2 – High	24x7
Level 3 – Medium	9am-6pm EST, Monday - Friday, excluding federal holidays
Level 4 – Low	9am-6pm EST, Monday - Friday, excluding federal holidays

Table 1

\* – For a description of the various Severity Levels, please refer to Table 2 under Section 4.5 below.

### 3.4 DESIGNATED SUPPORT CONTACTS

To use the Verato Support Plan, customer selects which of its employees will be a Designated Support Contact (DSCs). Customer is permitted to designate DSCs, wherein these individuals will have decision making authority over the customer’s technology environment for permissions and actions. Customer may change its designated DSCs at any time by providing notice of such change to Verato by submitting a Support Case via the case management system at [support.verato.com](https://support.verato.com).

DSCs are authorized by the customer's organization to act as the direct liaison between the customer and the Verato Support Team Member assigned to each Support Case. The DSCs should be properly trained and authorized to access and use Personally Identifiable Information ("PII") or Protected Health Information ("PHI") that might be revealed **only if absolutely necessary** while carrying out the support troubleshooting processes. If the customer absolutely must share PII and/or PHI, such data can ONLY be shared with Verato via SFTP. Customer is not allowed to share PII and/or PHI via a Support Case. For more details, please refer to Sections 4.2 and 4.3 below.

The customer's Designated Support Contacts shall be responsible for:

- a. submitting support cases to Verato;
- b. interacting with Verato Support Representatives to troubleshoot and resolve support cases;
- c. developing and conducting efforts to troubleshoot and resolve the technical issue within customer's organization;
- d. receiving official communications from Verato related to upcoming product changes or operational issues;
- e. providing approval for changes in user permissions and environment actions; and
- f. providing approval for additions and removals of "Standard Support Portal users.

### 3.5 CHANGES TO VERATO'S SUPPORT PLAN

Verato may change certain details or operating parameters of the Verato Support Plan from time to time, and may do so at Verato's sole discretion; however, such changes will not result in any material reduction of the customer's SLAs set out herein.

## 4 TECHNICAL SUPPORT PROCESS

### 4.1 OVERVIEW

The Verato Customer Support Portal allows customer an easy and efficient way to obtain assistance for customer's operational needs. Specifically, the Customer Support Portal allows the customer to:

- a. create new support cases;
- b. communicate with Verato Support Representatives; and
- c. see the full context of all the customer's support cases and the resolution of each:
  - Access documentation for the customer's Verato Services
  - View upcoming planned maintenance windows for the customer's Verato Services
  - Access the Verato blog

- Access the Verato Knowledge Base
- Access various supporting documents, glossary, change log and more.

When triggered by a DSC, the Verato Support Portal generates a new support ticket and assigns it a unique ticket number. Then, as described in greater detail in Section 4.5 below, Verato will work with the DSC to determine the Severity Level that will be assigned to each new support ticket. The Severity Level determination will be accomplished using both the descriptions in Table 2 below, and the impact the issue is having on the customer's business operations.

For each support ticket classified as Severity Level 1, 2 or 3: i) Verato will assign a Support Representative; ii) the Verato Support Representative will contact the customer's DSC within the response time set out in Section 4.6 below; and iii) Verato will resolve each such support ticket in the manner set out in Section 4.8 below.

## 4.2 LOGGING A SUPPORT CASE

The Verato Support Portal can be accessed at <https://support.verato.com>. A "Sign In" option is seen at the top of the Support Portal. The customer's DSC will log in to the Support Portal using the credentials provided by Verato Customer Support to gain access to additional functionality, including the ability to submit support tickets.

The home page of the Verato Support Portal displays an interface containing:

- a. a "Submit" Button for use in submitting a new support ticket to Verato Support;
- b. the customer's name, which in turn provides a dropdown box allowing the customer to access:
  1. the customer's Support Profile information ("Profile")
  2. previous Support Tickets ("Requests")
  3. "Activities" conducted in the Support Portal (e.g., reviewing previously posted comments)
  4. An option to change customer's password ("Change password")
  5. An option to sign out of the Support Portal ("Sign out");
- c. Documentation – access Verato's documentation for each of the customer's Verato Products, Verato Services and/or Verato Domains; and
- d. Upcoming Maintenance Alerts – information on Verato's upcoming scheduled maintenance events.

To submit a new support ticket, a DSC will first "Sign In" to the Support Portal, then click "Submit Case" positioned at the top of the page. The "Submit A New Support Case" form will then be presented. Customer must input the following information into the webpage (items on the form with an asterisk (\*\*)) are mandatory):

- a. Subject – Brief description of the issue or question;

- b. Description – Detailed description of the issue or question, including as much supporting information as possible;
- d. Severity – customer’s perceived issue Severity Level (as defined in Section 4.5 below);
- e. Product / Service / Domain – The main Verato Product, Verato Service or Verato Domain for which the request is being submitted;
- f. Component – The Verato Product / Component for which the request is being submitted;
- g. Environment – the operational environment for which the DSC is submitting the Support Case, multiple environments can be selected as an option;
- h. No PHI/PII added or included in the Support Case – a confirmation that the support ticket information being submitted does not contain or have any PHI or PII attached to it (to the best of the DSC’s knowledge);
- i. Reproduction Steps – Steps to reproduce the issue to aid in troubleshooting (if applicable);
- j. Impact on Operations – Description of the issue’s impact on the customer’s operations (if applicable); and
- k. Attachments – Supporting documentation/files (if applicable).

**IMPORTANT NOTE:** Although the Verato Support Portal is HIPAA compliant for absolute security, the most secure way to share PHI/PII with Verato is via secure FTP. **The Support Portal is not to be used for submitting any PHI/PII in support tickets. Customers must not add or insert PHI/PII on or into comments included in existing tickets.** If PII, PHI or PAN (including but not limited to name, address, birthdate, SSN, or medical record number) are required to describe or troubleshoot an issue, the DSC and the Verato Support Representative will agree upon and use a separate secure FTP, or secure email, or some other secure process to communicate that information. Verato can provide the customer with secure FTP credentials when necessary and appropriate.

### 4.3 COMMUNICATION RELATED TO A SUPPORT CASE

When the new support ticket is submitted, a ticket number will be provided that the DSC can use to reference that new support ticket in the Requests section of the Help Center. The DSC will receive a confirmation email containing the Ticket Number, and a link to the case in the Support Portal. The DSC will also be notified by email any time a Verato Support Representative adds a comment or an update to that support ticket. The DSC can respond to comments directly in the Support Portal, or by replying to the notification email generated by the Support Portal. **At no time should PHI/PII be included in any email.**

### 4.4 DIAGNOSING AND REPRODUCING ERRORS

In certain cases, Verato must be able to reproduce the errors at issue in order to resolve them.

Accordingly, the customer’s DSC must be available to work closely with the Verato Support Representative to reproduce/demonstrate the errors, including conducting diagnostic or troubleshooting activities as reasonably requested and appropriate via agreed-upon secure mechanisms.

#### 4.5 SEVERITY LEVELS

When logging a support ticket with Verato, the customer’s DSC should select the most appropriate Severity Level, referencing the information in the table below.

During initial response and problem description review, the Verato Support Representative and the customer’s DSC will reasonably agree on a determination of the Severity Level for each support ticket before troubleshooting commences.

Severity Levels Assigned To Customer’s Support Cases	
Severity Level	Description
Level 1* – Critical	Business operations are severely impacted because the issue is causing critical aspects of the customer’s applications or business processes to be unavailable.
Level 2 – High	Business operations and processes are significantly impacted or degraded. Issue is persistent and affects many users and/or major important business functionality. No reasonable business or technical workaround is available.
Level 3 – Medium	Business operations and processes are degraded because of lower performance or non-availability of functionality. Short-term workarounds are available, or it is possible to operate at lower capacity for a period of time.
Level 4 – Low	Inquiry regarding a routine technical question or issue not affecting immediate Business operations or only affecting a very small number of users; or an enhancement request for the product.

Table 2

\* - If the customerDSC uses the Verato Emergency Support Hotline to report a Severity 1 situation, the Verato Support Representative will create a new Severity 1 support ticket to track the issue and communications. This will be visible to the DSC on the Verato Support Portal.

#### 4.6 SUPPORT FIRST REPLY TIME

Verato will use commercially reasonable efforts to reply to each new support ticket within the applicable reply time set out in the table below.

Reply Time by Support Case Severity	
Severity Level	Verato’s Reply Time
Level 1 – Critical	2 hours
Level 2 – High	2 hours



Level 3 – Medium	2 business days
Level 4 – Low	5 business days

Table 3

The measurement of Verato’s Reply Time: a) begins when Verato is first notified by the customer of the issue by submitting a Support Case on the Verato Support Portal; and b) ends at the point in time when the Verato Support Representative replies to the customer’s DSC via phone, email or comment.

The SLA for Critical Severity 1 cases originating via phone call on the Verato Emergency Support Hotline is measured the same as cases created via the Support Portal.

#### 4.7 ESCALATION

Issues that Verato cannot promptly resolve may be escalated to higher support tiers for further investigation, analysis, and resourcing by Verato. Table 4 below outlines the Escalation Levels that are available to the customer upon request and as necessary.

<b>Escalation Of An Unresolved Support Case</b>	
<b>Escalation Level</b>	<b>Title of Verato Employee That The Issue Is Escalated To</b>
1	Support Manager or customer’s Technical Success Manager (TCSM)
2	Senior Engineering Manager
3	VP of Engineering
4	CCXO/CTO

Table 4

#### 4.8 RESOLUTION MODES

Verato will use commercially reasonable efforts to resolve each support ticket that is submitted by the customer, as expeditiously as possible with regard to the Severity and the impact on the customer’s business. In resolving a given issue, Verato has the options of, among other things, updating the software code, changing the configuration of the software, recommending changes to the customer’s configuration, or providing patches or workarounds.

#### 4.9 PARTNER AND RESELLER SUPPORT

Verato Technical Support will also be provided to Verato’s customers that (a) are being integrated onto the Verato Services by Verato’s partners (i.e., entities that Verato may have contracted with to provide integration support), and/or (b) are receiving the Verato Services because they contracted with a reseller of Verato’s services. As a standard practice, both such integrators and resellers will provide the customer the first tier support. Then the integrators and resellers will escalate all other support issues to Verato for resolution. Such standard practice is either set out, or has been customized, by the terms set out in the

customer's Product Order or Service Order and/or the respective reseller agreement. Although Verato's partners and resellers will adhere to the SLA targets set out herein using commercially reasonable efforts, Verato is not liable for a partner's or reseller's inability to meet such SLA targets.

## 5 SERVICE LEVEL AGREEMENT

Verato offers an Uptime Service Level Agreement ("SLA") program, a Response Time SLA program, and a Transactions Per Second SLA program to the customers that are compliant with the terms of their licensing subscription, Product Order or Service Order, and this Technical Support Guide (collectively the "Controlling Documents"). A customer's environment that is non-compliant with the Controlling Documents are not covered by Verato's SLAs set out below.

### 5.1 DEFINITIONS

- (a) "Downtime" means the amount of time (measured in full minutes) that the Verato Service that the customer is attempting to use is not available due to an Unplanned Outage, wherein the duration of such unavailability is aggregated over a given calendar-month (e.g., all Downtime occurring in a given month is aggregated into a single sum).
- (b) "Response Time" means the amount of time measured from when an interactive request is received by the API assigned to the customer's selected Verato Service, until the point in time when a response is sent by Verato to the customer through that same API. Response Times will not be measured during periods of Unplanned Outages.
- (c) "Scheduled Maintenance" means periods of time when Verato renders the Verato Service that the customer desires to use unavailable to the customer so as to allow Verato to perform routine maintenance. Verato will notify the customer at least seven (7) calendar days in advance of Verato performing such Scheduled Maintenance through multiple communication channels such as email and the customer's service portal (see [support.verato.com](https://support.verato.com)).
- (d) "Transactions Per Second" and "TPS" means the number of transactions processed by a customer's respective Verato Product or Verato Service in one second.
- (e) "Unplanned Outages" means the situation where the Verato Service that the customer wishes to use is unavailable for one (1) minute or more on any given occasion other than when Scheduled Maintenance is occurring, but does not include an event where a customer's Transactions Per Second are exceeded. Unplanned Outages must conform with Section 4.4 of this Technical Support Guide wherein both the customer and Verato agree that the Unplanned Outage constitutes a Level 1 – Critical case. Unplanned Outages do not include times when the customer is not using the desired Verato Service or is unable to access or use the desired Verato Service due to: i) issues the customer is experiencing with the customer's own network or systems; ii) improper use of the Verato Service by the customer (for example, untested code in production, sudden increase in volume of transactions, unrecognized integration points, repeated submission of calls/flaws in retry logic); and/or iii) force majeure events as set out in the customer's respective master service agreement.

- (f) “Uptime” means the amount of time the Verato Product or Verato Service was available for the customer’s access and use in a given month, and accounts for both Scheduled Maintenance and for the amount of Downtime the customer experienced in that given month; and thus Uptime is calculated as (the total number of minutes in a given calendar month) minus (any Scheduled Maintenance) minus (any Downtime).
- (g) “Uptime Percentage” means the percentage of time that the specific Verato Service that the customer wishes to use is available for the customer in a given month; wherein the Uptime Percentage is calculated by dividing (the Uptime in a given month) by (the sum of the Uptime and the Downtime in a given month).

## 5.2 UPTIME SERVICE LEVEL

Should Verato not deliver one hundred percent (100%) Uptime Percentage in a given month, Verato shall credit the customer according to the formula set out in Table 6 below (the “Uptime Service Credit”).

Monthly Actual Uptime Percentage	Uptime Service Credit
Uptime Percentage is less than or equal to 100%, but equal to or greater than 99.5% in a given month.	No credit.
Uptime Percentage is less than 99.5%, but equal to or greater than 95% in a given month.	Twenty percent (20%) of the amount equal to one-twelfth of the Annual License Fee (as set out in the applicable Service Order) for the given Contract Year.
Uptime Percentage is less than 95%, but equal to or greater than 90% in a given month.	Thirty percent (30%) of the amount equal to one-twelfth of the Annual License Fee (as set out in the applicable Service Order) for the given Contract Year.
Uptime Percentage is less than 90% in a given month.	Fifty percent (50%) of the amount equal to one-twelfth of the Annual License Fee (as set out in the applicable Service Order) for the given Contract Year.

Table 6

Verato will undertake commercially reasonable measures to ensure that Uptime equals 100% during each calendar month provided that any Unplanned Outage occurring as a result of circumstances beyond Verato’s reasonable control shall not be considered Unplanned Outage. Unplanned Outage will not include, without limitation, any downtime arising from: i) telecommunication or transportation difficulties; ii) public internet; or iii) force majeure events.

It should be noted that the performance and availability of the Verato Services are directly dependent upon the quality of the customer’s internet connection. Failure of the customer’s internet connection to maintain satisfactory throughput and latency is outside the scope of Verato’s responsibility and should be addressed by the customer directly with the customer’s internet service provider. Verato is not responsible for internet infrastructure failures, and as such the customer’s ability to receive Uptime Service Credit only applies to those components within the Verato’s hosting obligations and server farm.

## 5.3 RESPONSE TIME SERVICE LEVEL

- (i) Response Time Targets

The response times under which the Verato Service is expected to perform (the “ Response Time Targets” or “RTTs”) for certain specific transactions are set out in the table below.

Types of Transaction	Response Time Targets
Demographics Query, Post Identity	< 1.5 seconds
Enrich Query	< 1 second
Identity ID Query, Link Identity Query, Native ID Query	< 400 milliseconds

Table 7

Note: Verato offers add-on services that add latency to a given response time, and will not be covered by Verato’s Response Time Targets. For example, the listed Response Time Targets for a Post Identity transaction and/ or a Query API transaction are only applicable when the customer is requesting a single Smart View, or when the customer is requesting a response using the DEFAULT, GROUP\_BY\_SOURCE API response formats.

(ii) Response Time Service Level Credits

Should Verato not meet the Response Time Targets listed in Table 7 above, Verato shall credit the customer according to the formula set out in Table 8 below (the “Response Time Service Credit”).

Monthly Response Time Service Levels	Response Time Service Level Credit
Monthly average of transaction Response Times at or below their respective RTTs in Table 7.	No credit.
Monthly average of transaction Response Times is above their respective RTTs in Table 7, but below 1.25x of those RTTs.	Twenty percent (20%) of the amount equal to one-twelfth of the Annual License Fee (as set out in the applicable Service Order) for the given Contract Year.
Monthly average of Response Times above 1.25x of their respective RTTs in Table 7, and below 1.75x of those RTTs.	Thirty percent (30%) of the amount equal to one-twelfth of the Annual License Fee (as set out in the applicable Service Order) for the given Contract Year.
Monthly average of Response Times above 1.75x of their respective RTTs in Table 7.	Fifty percent (50%) of the amount equal to one-twelfth of the Annual License Fee (as set out in the applicable Service Order) for the given Contract Year.

Table 8

5.4 TRANSACTION SERVICE LEVEL

The standard Transaction Per Second for each of a customer’s respective Product or Service is (a) ten (10) TPS for a production environment, and (b) three (3) TPS for a non-production environment. For additional information regarding Verato’s non-standard Transactions Per Second, please reference the

support article entitled “Throughput and Infrastructure” available at <https://support.verato.com/hc/en-us/articles/29858952950420-Throughput-and-Infrastructure>.

A non-standard Transaction Per Second allocation is available for custom requirements for an additional fee; wherein (a) for customers not participating in the Verato MDM Cloud Platform, such customized TPS is set out in the customer’s respective Product Order or Service Order, and (b) for customers that are participating in the Verato MDM Cloud Platform, such customized TPS will be determined by the Platform Tier set out the customer’s Service Order (the TPS for each type of Platform Tier can be referenced here: <https://verato.com/verato-mdm-cloud-products>).

## 5.5 REPORTS AND CREDITS

(i) Reports – Upon request from the customer, Verato shall deliver reports that detail the amount of Uptime for any of the six (6) months prior to such request (the “Uptime Report”), wherein the Uptime Report will detail the Uptime Percentage, as well as any Scheduled Maintenance and Unplanned Outage events that occurred during that six (6) month time period. Also, upon request from the customer, Verato shall deliver reports that set out the monthly average of the Response Time Service Levels for any of the six (6) months prior to such request (the “Response Time Report”).

(ii) Credits – The Uptime Service Credit is calculated pursuant to the formula set out in Table 6 above, and the Response Time Service Credit is calculated pursuant to the formula set out in Table 8 above (collectively the “Calculated Credit”). So long as the customer has obtained an Uptime Report and/or a Response Time Report, and such Report(s) evidence that the customer is entitled to a credit, upon the customer’s request to Verato’s accounting department, the customer will receive the appropriate Calculated Credit(s) due; however, the customer will not receive a Response Time Service Credit if an Uptime Service Credit is available for the same event.