

1. BACKGROUND:

This procedure applies to all DF/HCC studies that require RIO EDC developed Electronic Case Report Forms (eCRFs), principally Investigator Sponsored Trials (ISTs.)

2. ASSOCIATED DF/HCC POLICIES:

2.1. [DATA-101](#) Section 5.4.1

3. PROCEDURE:

3.1. Ticket Receipt and Review

3.1.1. Study Team encounters an issue that needs to be addressed and submits an InForm ticket through ServiceNow, addressed to "InForm EDC – DFCI". If the Study Team does not have a Partners login, they send an email to dfciinform@dfci.harvard.edu.

3.1.1.1. Ticket is received in ServiceNow.

3.1.1.2. Once received, tickets are assigned a service tiering, as described below.

3.2. Ticket Tier Assignment

3.2.1. Tier 1 tickets are those requiring minimal technical work, such as user access requests, password help, etc.

3.2.2. Tier 2 tickets are those that require some technical work or team retraining, but do not require Central Designer study modifications.

3.2.3. Tier 3 tickets are more complex tickets that require a significant amount of technical work (e.g. bug fixes, forms not loading correctly, error messages) that may require support from the RIO SAT Team. Tier 3 tickets may require post-production eCRF changes which will require support from the RIO EDC Team.

3.2.4. Tickets related to data cleanup will be removed from the queue and sent to the Office of Data Quality (ODQ) for support.

3.2.5. Tickets related to MFR will be removed from the queue and sent to the MFR team via ServiceNow.

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3.3. Tier 1 Ticket Support and Resolution

3.3.1. Tier 1 tickets are managed and supported by Persistent.

3.4. Tier 2 and 3 Ticket Support and Resolution

3.4.1. Persistent ensures a ServiceNow case is open for all non-tier 1 tickets and forwards them to Salesforce.

3.4.1.1. A case is automatically opened in Salesforce for review by the EDC team member on ticket rotation.

3.4.2. The EDC staff member on rotation will review all tickets.

3.4.2.1. For tickets requiring a post-production change managed through Salesforce, the staff member will select the Change Request option in Salesforce. This will automatically open a Change Request case in Salesforce where an EDC member can support the change through the Change Request workflow.

3.4.2.2. For tickets that do not require a post-production change managed through Salesforce, the staff member will select the option in Salesforce indicating that the ticket is being managed in ServiceNow.

3.4.3. All tickets will exist in Salesforce for timestamps on a case being opened and case closure. All non-change request ticket management activities will occur in ServiceNow. The EDC member on ticket rotation will manage the ticket.

3.4.3.1. If a ticket is submitted that actually requires a protocol amendment, the EDC member on rotation will redirect the ticket submitter to submit a protocol amendment form to OHRS (as documented in the Post-Production Change Requests operation document).

3.4.3.2. If the ticket does not require technical support but requires user retraining, the EDC member on rotation will close the ticket in Salesforce and ServiceNow and will instruct the submitter to schedule training with a Customer Experience Specialist.

3.4.3.3. The EDC member on rotation will assign all appropriate tickets to the appropriate supporter, based on nature of the ticket and RIO staff workload.

3.4.4. The assigned supporter will support the ticket.

3.4.5. After the ticket has been resolved, the ticket will be closed in Salesforce and ServiceNow.

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DF/HCC Operations for Human Research InForm Ticket Support

Appendix 1: InForm Ticket Support Workflow

