Third Party Access (TPA) Portal – Client Operational Guide

IQVIA licenses syndicated market research data to clients for internal use only. The TPA Program enables clients to obtain limited use licenses for their vendors so these vendors can access and use that IQVIA data for the benefit of the client.

The TPA Portal is the online tool clients use to request these TPA licenses from IQVIA.

Key Topics

Click each topic to know more.

- TPA Program and Portal
- Request Process Flow
- TPA Portal Landing Page
- New TPA Request
- Search Function
- Support
- Data Policy Administrator Access
- Additional Resources

TPA Program and Portal

Click each tab to know more.

TPA Program

IQVIA Data

Licensing

TPA Portal

The Third Party Access program serves two key objectives: It enables our clients to use IQVIA syndicated market research data with other vendors and allows IQVIA to protect its intellectual property.

A vendor is a person or organization that a client has retained to provide certain services for that client. Clients frequently work with many vendors. More than 2,000 vendors participate in the IQVIA TPA program.

By making a request in the TPA portal, a client is asking IQVIA to issue a limited license to the client's vendor to use specific IQVIA data for a specific purpose solely for the client's benefit. Only clients can submit a request to the TPA portal. Vendors cannot request a TPA license.

The vast majority of third party access requests are approved by IQVIA. However, a request may not be approved if there are unreasonable risks to our intellectual property or for certain other legitimate reasons. Only the IQVIA legal team executive responsible for the TPA program may deny a TPA request.

The TPA program is specifically designed to license IQVIA syndicated market research data. The TPA program does not license the use of IQVIA technology.

TPA Program and Portal

Click each tab to know more.

TPA Program

IQVIA Data

Licensing

TPA Portal

What is IQVIA data? Information that has undergone some combination of collection, standardization (e.g., cleansing, editing, bridging to standard identifiers), creation and organization based on (i) a proprietary offering design, (ii) IQVIA panel design and sources, and (iii) IQVIA proprietary methodologies and processes. IQVIA data includes:

- IQVIA data in the form delivered to the client
- Any other information derived from that IQVIA data
  - regardless of whether IQVIA, the client or a third party creates the information (e.g., aggregated data, projected data, data combined with other data), and
  - regardless of which form that information takes (e.g., charts, graphs, tables in documents, data held in CRM or other applications)
- IQVIA data combined with data belonging to others
  - IQVIA retains rights in the combined data
  - combined data remains subject to the IQVIA licensing terms and conditions

IQVIA data available for licensing in the TPA portal includes syndicated national market research audits, subnational data, healthcare professional and healthcare organizational reference data, real-world data and MIDAS data. Only IQVIA data included in the TPA portal is currently available to vendors. If a client would like to request a license to other IQVIA data not currently available in the TPA portal, please discuss the client's requirements with the TPA program team and the IQVIA employee responsible for that offering.

TPA Program and Portal

Click each tab to know more.

TPA Program

IQVIA Data

Licensing

TPA Portal

- IQVIA invests hundreds of millions of dollars annually to bring a wide array of market insights to customers for 100+ countries, a capability built over sixty years.
- Includes national data (including MIDAS), subnational data, real-world data and reference data.
- Like innovative biopharmaceutical research and discovery companies, intellectual property is fundamental to our business.
- Unless we protect these investments, these market insights will not be available to our clients.
- To maximize the value clients obtain from IQVIA market research data while also protecting the substantial investment made and intellectual property created, IQVIA licenses data to clients (i.e., rather than a sale of data) with ***broad internal use rights*** for those clients.
- Since vendors in the TPA program are not paying for their access to IQVIA data, IQVIA issues limited licenses with ***narrow internal use rights*** solely for the benefit of the requesting client.

TPA Program and Portal

Click each tab to know more.

TPA Program

IQVIA Data

Licensing

TPA Portal

Introduction | **Request a Portal Account** | **Login to Portal Account**

The main goal of the Third Party Access Portal is to streamline and simplify the third party access request submission process.

All clients are required to use the Third Party Access Portal to create and submit their requests, which expedites the turnaround time from request to approval. In addition to submitting new requests, you will have the ability to view, edit, clone, cancel, renew, and track requests previously submitted through the Third Party Access Portal.

TPA Program and Portal

Click each tab to know more.

- TPA Program
- IQVIA Data
- Licensing
- TPA Portal

Introduction | Request a Portal Account | Login to Portal Account

To request access to the Third Party Access Portal, please follow the steps below:

- Send an email to your IQVIA Account/Client Service Team member.
- Include 'New Third Party Access Portal Account Request' in the subject line.
- Specify your First Name, Last Name, Title, Telephone, Company email and Office Address.
- Specify if you are a client employee or a client contractor.
  - If you are a contractor, please specify the full name of your client sponsor, their telephone, and their company email.

For more information on Third Party Access Portal accounts, please refer to the "Requesting Data Policy Administrator Access" section of this document. If you forgot your unique TPA Username or password, please refer to the "Support" section.

TPA Program and Portal

Click each tab to know more.

TPA Program

IQVIA Data

Licensing

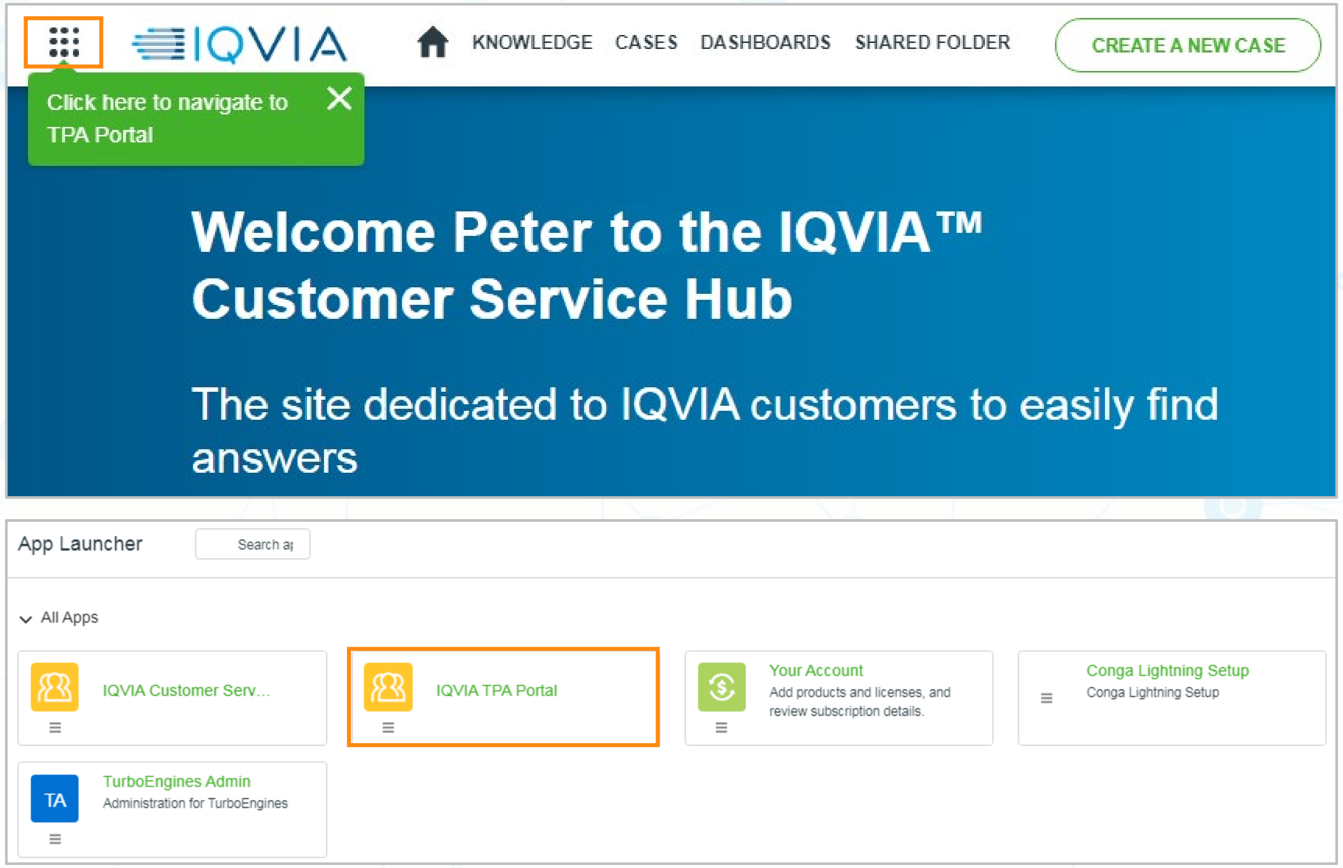
TPA Portal

Introduction

Request a Portal Account

Login to Portal Account

Clients can log onto the Third Party Access (TPA) Portal through the "IQVIA Customer Service Hub" (Customer Service Hub). Once you login to the Customer Service Hub, you will notice the App Launcher (9 dots) in the header of the Customer Portal. A small message box guides you to the portal.



Request Process Flow

Click next to know the next steps.

Client Initiates Request

Client initiates the request in the IQVIA Third Party Access Portal

Vendor Completes Request

Vendor will receive a link by way of email to complete the remaining questions of the request such as where the data will be stored and where, if prescriber information will be shared what elements will be provided, etc.

IQVIA Processes Request

Once the Vendor completes/submits the request it then comes back to IQVIA for review and approval.

IQVIA Sends Agreement(s)

IQVIA then releases the Third Party Limited License Agreement and AMA Agreement (if applicable) to be signed by the Vendor Authorized signer.

Vendor Signs Agreement(s)

Once the signed agreements are returned to IQVIA, we will send a Data Release Notification to both the Client and the Vendor saying that it is now permissible to share the data based on the signed agreement(s).

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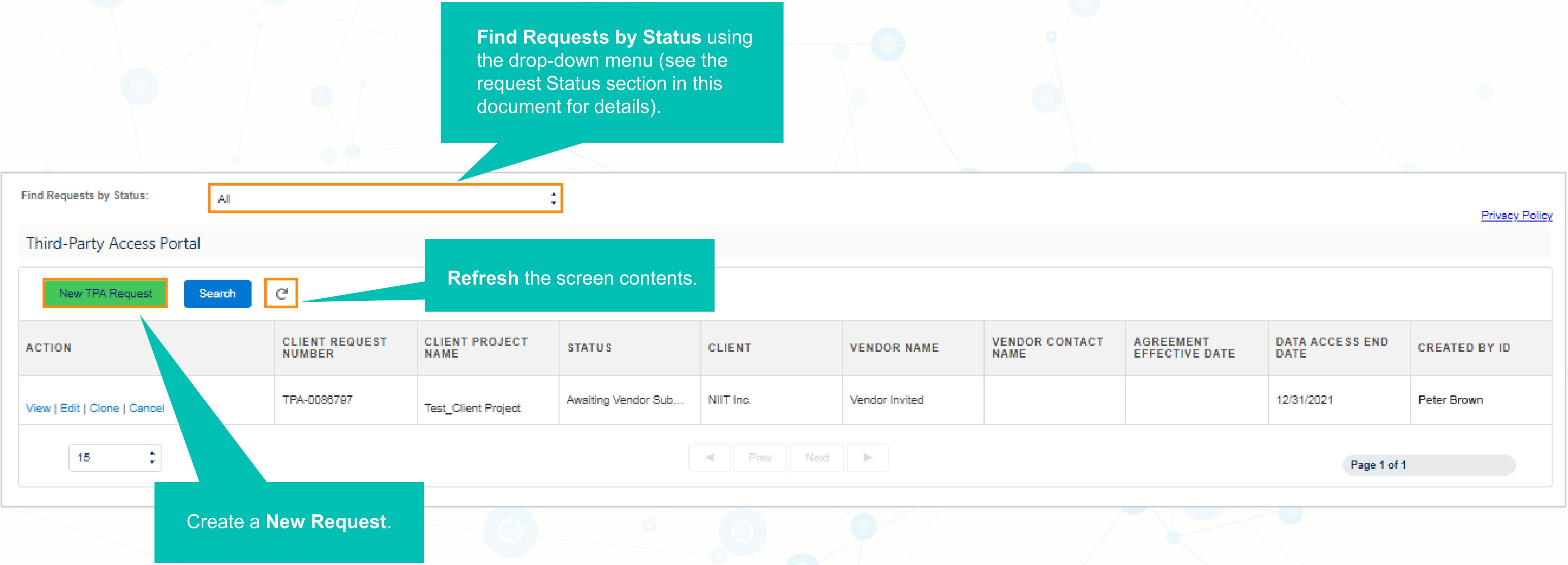
TPA Portal Landing Page

The portal landing page makes it easy to submit, track and manage your third party access requests. You will be able to review expired requests as well as renew or clone existing requests.

Click next to know more details.



TPA Portal Landing Page

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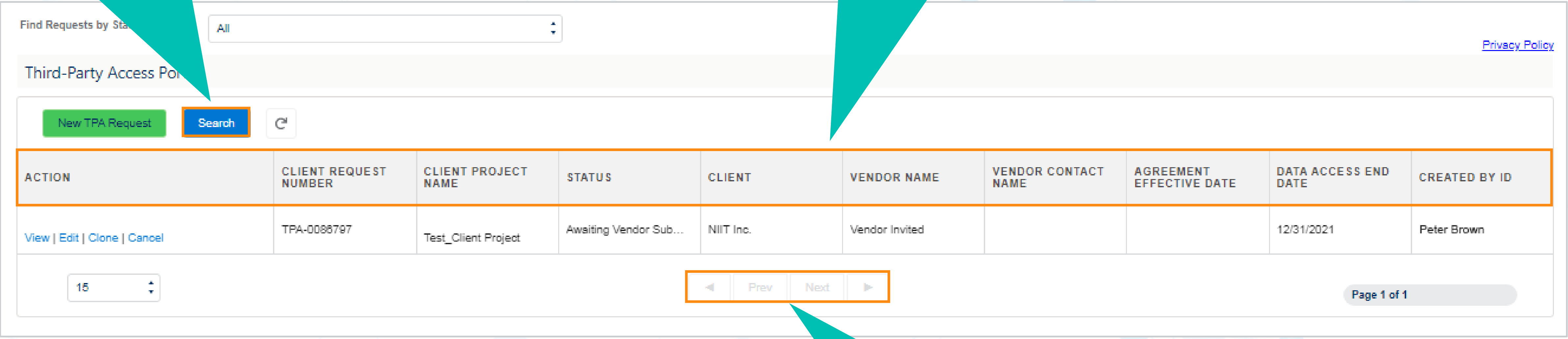
Click next to know more details.

Search TPA requests by Request Number, Project Name, Status, Vendor Name, Vendor Contact Name, Agreement Start / End Dates, and TPA(s) Created By a specific individual.

Header Bar
Select each column to sort the requests by that column's results. ***Note****: Column widths are expandable.*



Navigation Bar
Scroll through multiple pages of TPA requests.

TPA Portal Landing Page

The portal landing page makes it easy to submit, track and manage your third party access requests. You will be able to review expired requests as well as renew or clone existing requests.

Click the highlighted area to know the details of each column.

Find Requests by Status: All

Privacy Policy

Third-Party Access Portal

New TPA Request | Search

ACTION	CLIENT REQUEST NUMBER	CLIENT PROJECT NAME	STATUS	CLIENT	VENDOR NAME	VENDOR CONTACT NAME	AGREEMENT EFFECTIVE DATE	DATA ACCESS END DATE	CREATED BY ID
View | Edit | Clone | Cancel	TPA-0086797	Test_Client Project	Awaiting Vendor Sub...	NIIT Inc.	Vendor Invited			12/31/2021	Peter Brown

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- **Actions:** The actions that are available to help you manage your requests.
- **Client Request Number:** Unique identifier assigned to each submitted request.
- **Client Project Name** Use this field to uniquely identify each TPA request/project.
- **Status:** Current Status of the request.
- **Client:** Client's Company Name.
- **Vendor Name:** Third Party Company Name.
- **Vendor Contact Name:** Contact person identified for the project.
- **Agreement Effective Date:** Date the project starts.
- **Data Access End Date:** Date the TPA expires.
- **Created By ID:** Name of the person who initiated the request and date the request was originally submitted.

TPA Portal Landing Page

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Action

On the landing page, there are five actions that are available to help you manage your requests. You may have to expand the action column when you first enter the portal to view all available actions.

Click each action tab to know more about it.

ACTION	CLIENT REQUEST NUMBER
View | Edit | Clone | Cancel	TPA-0087565
View | Renew | Clone	TPA-0086312
View | Clone	TPA-0086306

View

Edit

Clone

Cancel

Renew

Action

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ACTION	CLIENT REQUEST NUMBER
View | Edit | Clone | Cancel	TPA-0087565
View | Renew | Clone	TPA-0086312
View | Clone	TPA-0086306

View

Edit

Clone

Cancel

Renew

The View action opens previously created requests, regardless of their status, so that the details can be reviewed. No edits can be made while viewing a request.

1. Locate the request you want to view.
2. Click **View**. The selected request displays.
3. Use the **Next** and **Previous** buttons to navigate through the request.
4. To return to the landing page, click **Cancel**.

Action

On the landing page, there are five actions that are available to help you manage your requests. You may have to expand the action column when you first enter the portal to view all available actions.

Click each action tab to know more about it.

ACTION	CLIENT REQUEST NUMBER
View | Edit | Clone | Cancel	TPA-0087565
View | Renew | Clone	TPA-0086312
View | Clone	TPA-0086306

View

Edit

Clone

Cancel

Renew

The Edit action is available only on requests that are not "In Effect." The request displays the previously entered data. All editable fields can be modified. Error messages will still appear for incorrect or incomplete information.

Please be aware that the vendor will need to re-enter their data every time a request is edited and resubmitted by the client

Use edit only when necessary!

1. Locate the request you wish to edit.
2. Click **Edit**. The selected request displays.
3. Use the **Next** and **Previous** buttons to navigate through the request.
4. Update the editable fields, as necessary.
5. When complete, navigate to the Finalize section.
6. Submit the request as shown in the Finalize topic of this document.

An edited request that is finalized will behave as a new request. The status of previously submitted requests will change as a result.

Action

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Click each action tab to know more about it.

ACTION	CLIENT REQUEST NUMBER
View | Edit | Clone | Cancel	TPA-0087565
View | Renew | Clone	TPA-0086312
View | Clone	TPA-0086306

View

Edit

Clone

Cancel

Renew

The Clone action is not available on requests with a Cancelled or IQVIA Denied status. The Clone action duplicates a previously created request. A Cloned request will be assigned a new request number.

1. Locate the request you wish to duplicate.
2. Click **Clone**. A new request displays. All information within the Cloned request will mirror that of the original request.
3. Use the **Next** and **Previous** buttons to navigate through the request and make any changes necessary for the new request.
4. Confirm the accuracy of the details and update, as necessary.
5. When complete, navigate to the Finalize section.
6. Submit the request as shown in the Finalize topic of this document.

Upgrades to portal functionality may have been implemented since the original request was submitted. If this occurs new field(s) may need to be completed prior to submission.

Action

On the landing page, there are five actions that are available to help you manage your requests. You may have to expand the action column when you first enter the portal to view all available actions.

Click each action tab to know more about it.

ACTION	CLIENT REQUEST NUMBER
View | Edit | Clone | Cancel	TPA-0087565
View | Renew | Clone	TPA-0086312
View | Clone	TPA-0086306

View

Edit

Clone

Cancel

Renew

The Cancel action is available only on requests that are not In Effect. The Cancel action nullifies a request and assigns it the status of cancelled. Cancelled requests can only be viewed.

1. Locate the request you wish to cancel.
2. Click **Cancel**. The request is cancelled but still appears on the landing page. The request can only be viewed.

If you need to cancel a TPA that is in effect, please contact IMSTPProgram@IQVIA.com.

Action

On the landing page, there are five actions that are available to help you manage your requests. You may have to expand the action column when you first enter the portal to view all available actions.

Click each action tab to know more about it.

ACTION	CLIENT REQUEST NUMBER
View | Edit | Clone | Cancel	TPA-0087565
View | Renew | Clone	TPA-0086312
View | Clone	TPA-0086306

View

Edit

Clone

Cancel

Renew

The Renew action is only available for In Effect requests within 30 days of expiration or for requests with a status of Expired. A new request number will be assigned to the renewal.

1. Locate the request you wish to renew.
2. Click **Renew**. A new request displays. All information within the renewed request will mirror that of the original request.
3. Use the **Next** and **Previous** buttons to navigate through the request in order to make any changes.
4. Confirm the accuracy of the details and update, as necessary.
5. Submit the request as shown in the Finalize topic of this document.

Upgrades to portal functionality may have been implemented since the original request was submitted. If this occurs new field(s) may need to be completed prior to submission.

Status

On the landing page, there are five actions that are available to help you manage your requests. You may have to expand the action column when you first enter the portal to view all available actions.

In Processing Statuses	Meaning	Final Statuses	Meaning
Draft	Client initiated a start of a request but has not clicked 'Submit' for the request to continue in TPA process. After 45-days, this draft will auto-delete.	Cancelled	The request has been cancelled or was never executed prior to the data access end date.
Awaiting Vendor Submission	The request is currently with the vendor contact to complete the vendor details.	In Effect	No further action needed. The Third Party Agreement has been executed.
In Review by IQVIA	The request is under review awaiting approval.	Expired	A previously In Effect Third Party Agreement has passed the data access end date.
TPA Approved Awaiting AMA Approval (U.S. only)	The request is approved by Our Company pending AMA approval.	IQVIA Denied	The request has been denied by Our Company.
Awaiting Vendor Signature	The contract has been sent to the vendor for signature.	Client Discontinued	Our Company was notified by the client that the project was discontinued / ended early.
Signature Under Validation	The vendor has chosen to manually sign the agreement and Our Company is in the process of validating the signatures.	AMA Cancelled	Vendor failure to pay AMA data supplier license fees associated with certain U.S. provider level offerings.
		AMA Discontinued	Vendor cancelled or failed to renew the required AMA data supplier license fees associated with certain U.S. provider level offerings.

Submitting a New Third Party Access Request

Prerequisites

You should be prepared with the following information before you begin:

- Vendor Contact Information [Name and email address]
- Use and IQVIA Data Offering Details [What will the Vendor do on your behalf; using which IQVIA offering(s)]
- AMA Details [If applicable; U.S. prescriber-level offerings only]
- Finalizing Details

For projects in which you will utilize multiple vendors, you will need to complete a separate request for each Vendor.

A request will only be “saved” upon confirming the submission. It is recommended that you gather all required information prior to initiating the data access request data entry process; however, you will be able to ‘save’ a ‘Draft’ in the middle of initiating a request.

Submitting a New Third Party Access Request

Multilingual Support

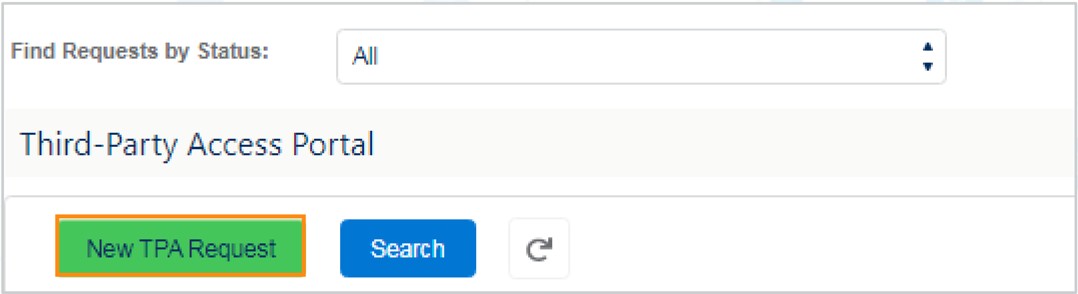
When you first enter the Third Party Access portal, you may be able to select the language in which you want to complete the request. English and Japanese are currently available, with more languages to be supported over time.

Navigation

There are four buttons at the bottom of each screen that allow you to navigate through each section of a request:

Cancel	Previous	SAVE FOR LATER	Next
Exit request, do not save.	Go to prior page	Save as a DRAFT	Proceed to next screen

From the landing page, select the New TPA Request button to initiate a new third party access request.

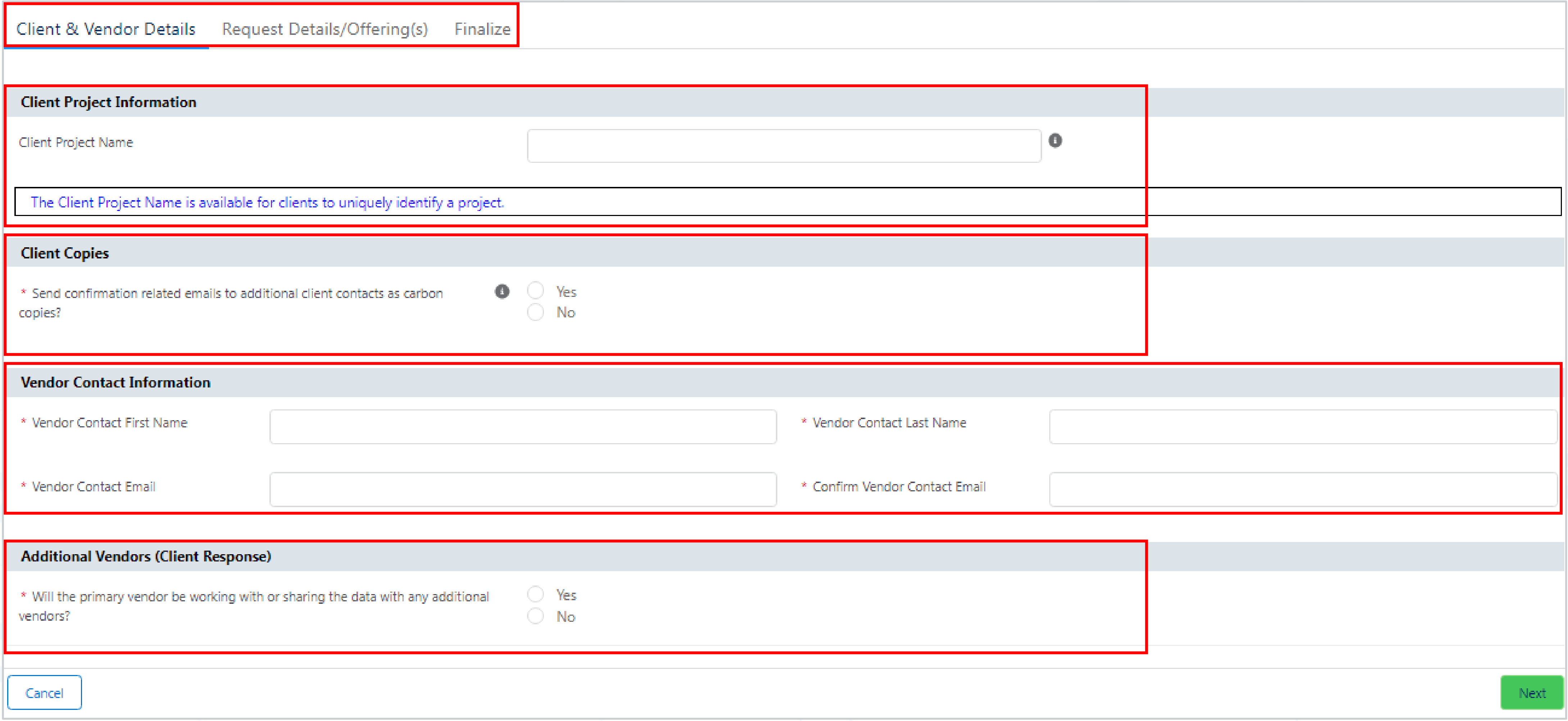


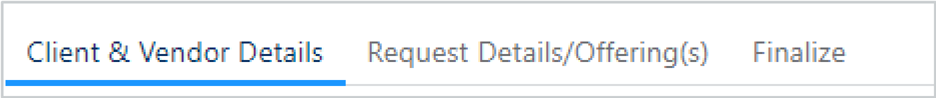
Submitting a New Third Party Access Request

Client & Vendor Details Section

On clicking New TPA Request, the **Client & Vendor Details** section is displayed.

Click each of the highlighted sections to know their details.

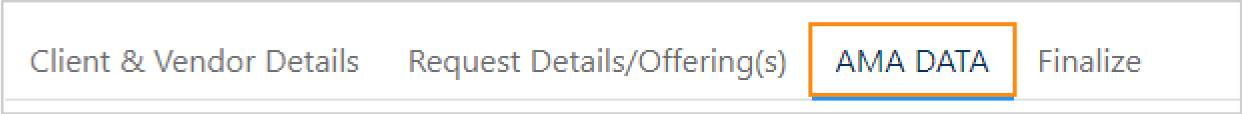




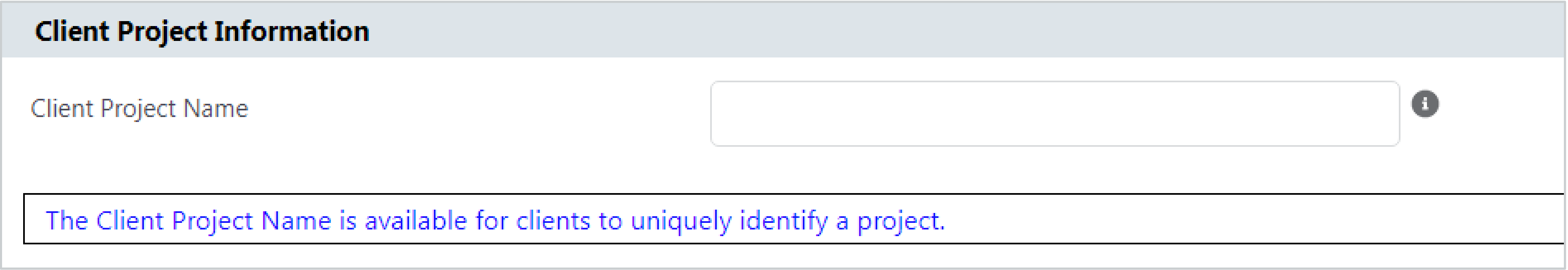
The TPA Request form has 3 main sections:

- Client & Vendor Details
- Request Details/Offering(s)
- Finalize

Depending on the selection of Offerings (if U.S. prescriber level data is selected), the AMA Data section will also get activated .



Submitting a New Third Party Access Request



This field is available for clients to uniquely identify a project, which can be useful when managing multiple TPA requests. This information entered in this section will not amend, modify or influence the terms or interpretation of any Third Party Access Limited License Agreement between IQVIA and a vendor.

Client Copies

* Send confirmation related emails to additional client contacts as carbon copies?

- (•) Yes
- ( ) No

Action	Contact Name	Contact Title	Contact Phone	* Contact Email	* Confirm Contact Email
Delete	XYZ	PQRS	123	XYZ@abc.com	XYZ@abc.com

Add Contact

Select **Yes** to create an email distribution list. This feature provides the client requestor the ability to include additional client contacts on subsequent email notifications from the system.

All persons on the email distribution list will receive **every** electronic client communication related to this request.

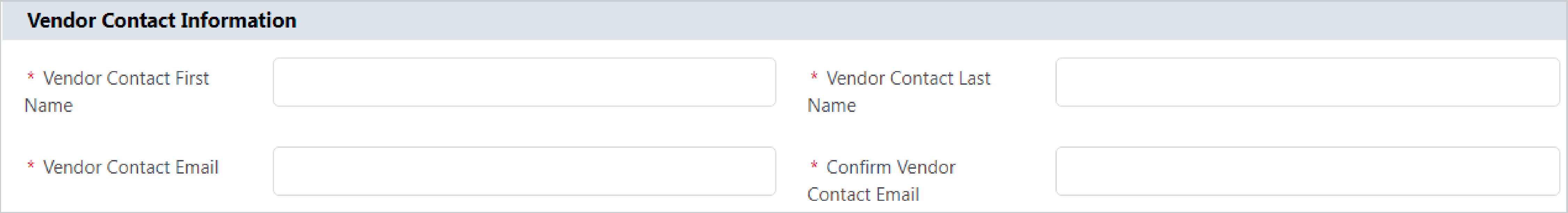
Otherwise, select **No**.

All email recipients must be within the same client company. Additional recipients may not be able to view this request.

Cancel

Next

Submitting a New Third Party Access Request


Vendor Contact Information

* Vendor Contact First Name

* Vendor Contact Last Name

* Vendor Contact Email

* Confirm Vendor Contact Email

Enter responses to provide the vendor contact's information here, including:

- Vendor contact's full name
- Vendor contact's company email

Additional Vendors (Client Response)

* Will the primary vendor be working with or sharing the data with any additional vendors?

- (•) Yes
- ( ) No

Each third party will be treated as a separate vendor. You will need to submit a third party access request for each vendor that will be receiving IQVIA Data.

If the primary vendor intends to provide access to secondary vendors, select **Yes** to indicate the primary vendor's intent to share IQVIA data offerings with other third parties. Otherwise, select **No**.

For Example:

You (the **CLIENT**) plan to share data with a primary third party service provider (the **VENDOR**) who will need to share the IQVIA data with a secondary vendor (the **ADDITIONAL VENDOR**) who will be performing a detailed statistical analysis. The statistical analysis vendor is an example of an Additional Vendor (other third parties). The additional vendor indicator would need to be set to **Yes** in this example.

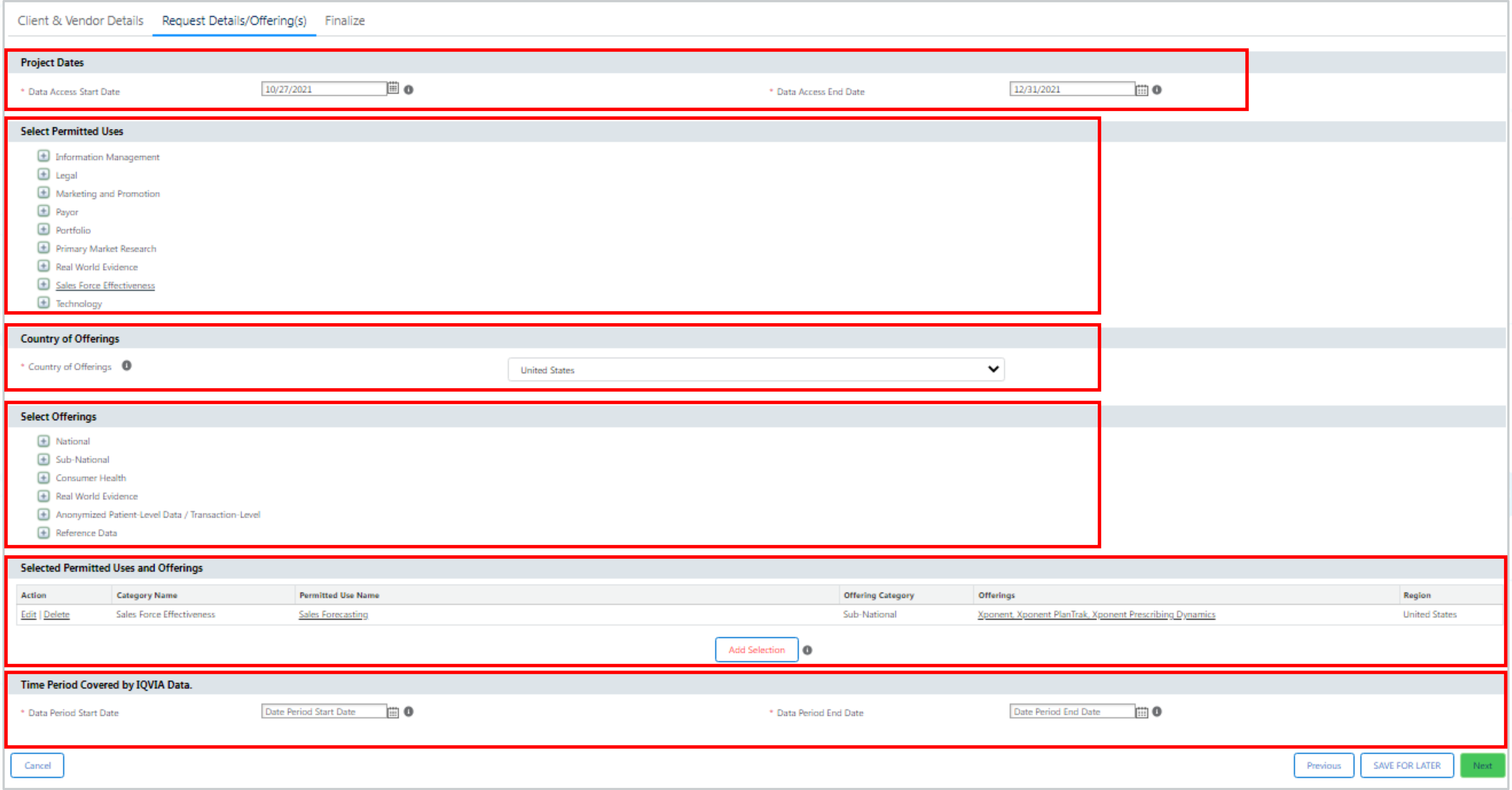
A separate third party access request must be submitted by the client for each secondary vendor the primary vendor intends on utilizing.

Submitting a New Third Party Access Request

Request Details/Offering(s) section

Next is the **Request Details/Offering(s)** section.

Click each of the highlighted sections to know their details.



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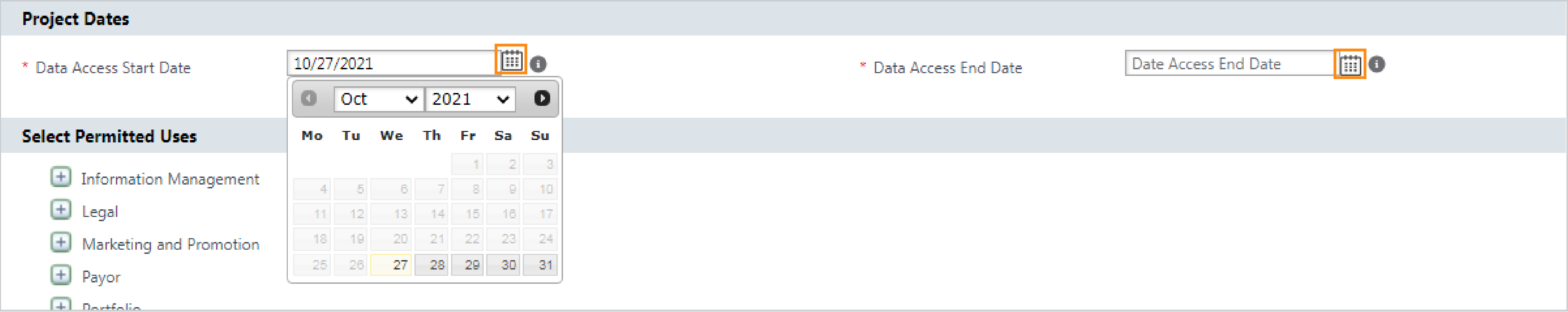
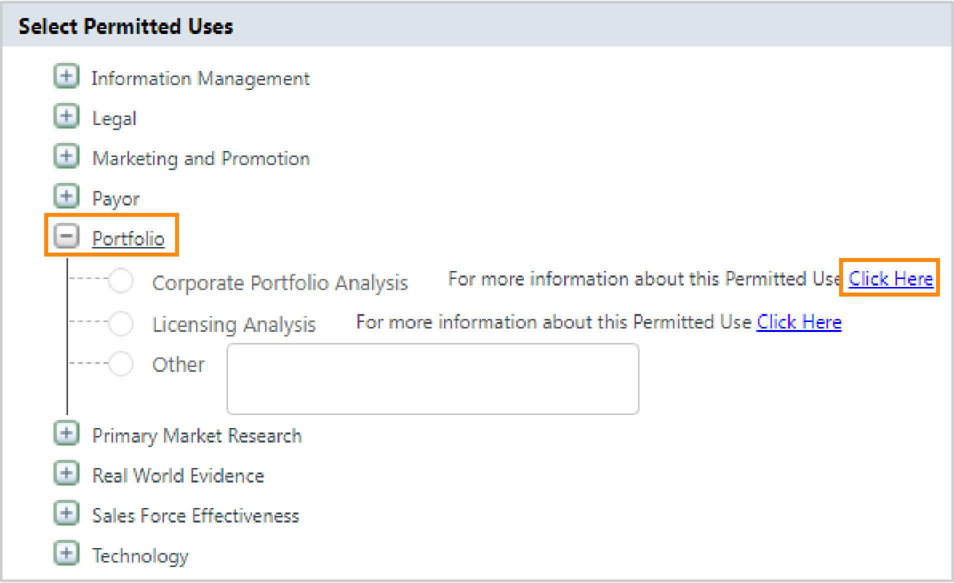


Data Access Start Date: Click the calendar icon to choose the date when the data offerings will be shared with the vendor. Start Date cannot be prior to today's date and should reflect the date that the data offerings will be shared with the vendor.

Data Access End Date: Click the calendar icon to choose the end date. The third party limited-use license agreements cannot exceed one year or the project end date, whichever is earlier. If it is a renewal, the end date cannot be more than one year from the previous expiry date.



Use the + button to expand the use categories. Select the desired use(s). Use the **Click Here** hyperlinks next to each use to view the detailed Permitted Use description that will be included in the third party limited license agreement.

Click the following hyperlink to see a categorized List of Permitted Uses, as well as a List of Permitted Use Definitions.

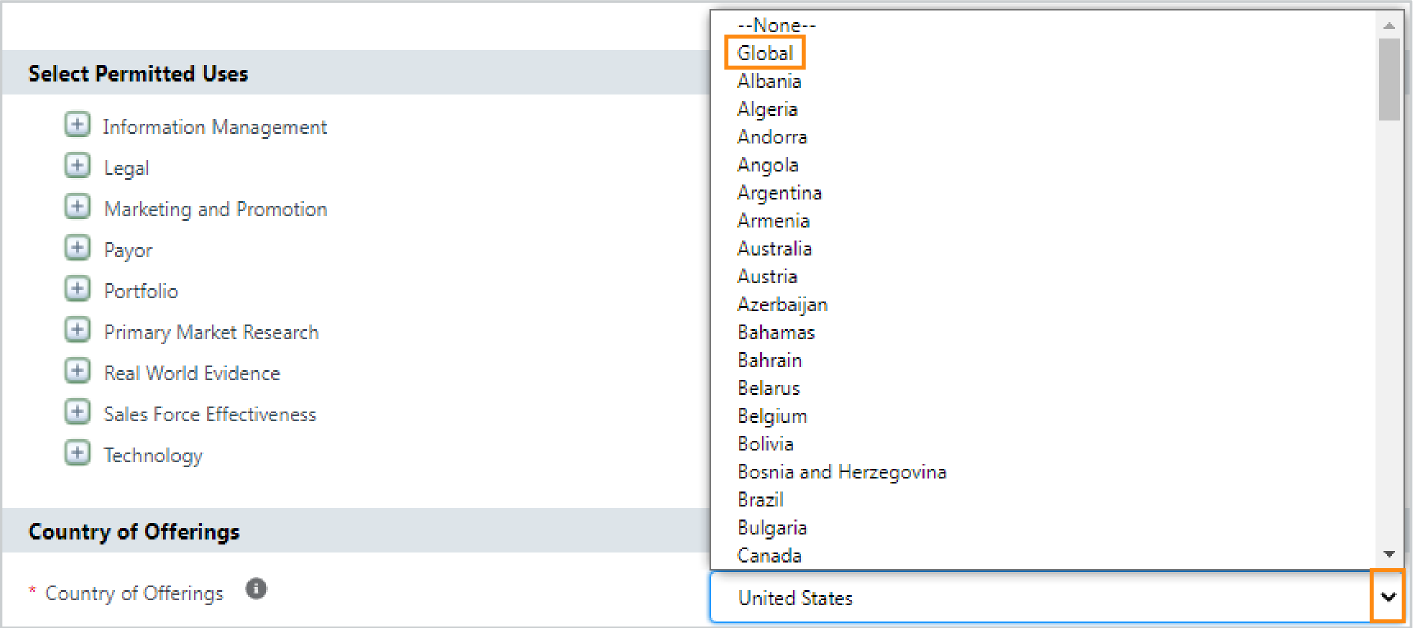
Permitted Use defines the purpose for which the vendor will use the IQVIA offering(s) to meet your business objective. For each Permitted Use, one or more of the licensed offerings can be identified (see the Offerings section). If the vendor will be supporting multiple Permitted Uses on behalf of the client, each use and the corresponding licensed offerings must be specified separately.

If you are not able to find an appropriate Permitted Use, select Other and provide a detailed description of the project use. The selection of Other will:

- Delay the processing of your request as a manual review will be required by Our Company
- Most likely result in a follow-up call from the assigned third party processor for further clarification
- Significantly affect turnaround times while Our Company commercially validates and approves the proposed use.

Please confirm the intended use is not already pre-defined in one of the pre-approved Permitted Uses prior to specifying Other.

Submitting a New Third Party Access Request



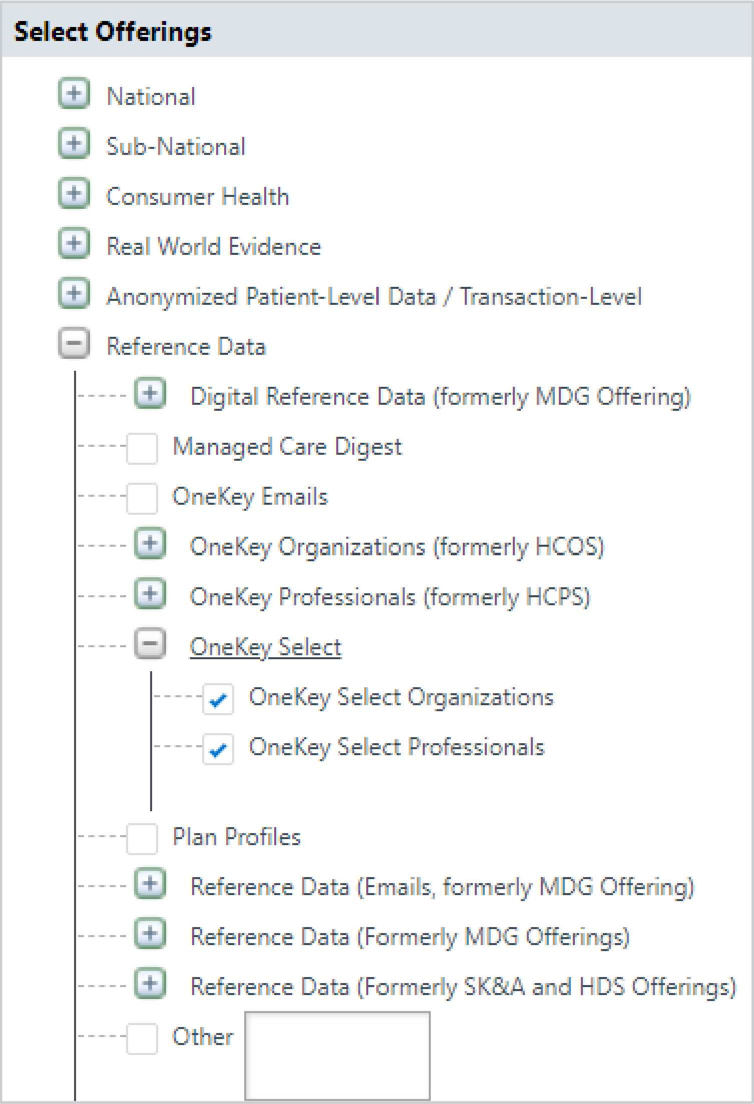
From the drop-down menu, select the country where the IQVIA data to be shared originates.

For Example:

You (the **CLIENT**) are in London. However, you license both U.K. and U.S. based IQVIA data offerings from Our Company. You are requesting to share a U.S. licensed IQVIA data offering with a third party service provider (the **VENDOR**). Since you intend to share a U.S. licensed IQVIA data offering, select U.S. as the Country of Offering. The list of U.S. IQVIA data offerings will then be displayed and available for selection.

Select **Global** as the Country of Offerings to access Global Offerings such as MIDAS.

Submitting a New Third Party Access Request



The list of offerings shown will be those for the single Use and Country of Offerings selected in the earlier section.

To view all Offerings, use the + button to expand the IQVIA data offerings categories until only check boxes appear. Select the desired offerings(s). Once you have finished selecting the offering(s), select **Add Selection**. The use and IQVIA data offering combinations that were previously selected will now be summarized under the Selected Permitted Uses and Offerings header.

If the desired IQVIA data offering is not found, it may originate from a different data region.

For example, IQVIA global data offerings are located under the global region. If you are looking to share MIDAS, it will be under the data region of Global and not your local country. Contact your account team to help identify the country of origin for the licensed IQVIA data you wish to share.

The process above can be repeated for the desired use and IQVIA data offering combinations under this specific third party access request until all combinations have been captured.

Submitting a New Third Party Access Request

Selected Permitted Uses and Offerings

Action	Category Name	Permitted Use Name	Offering Category	Offerings	Region
Edit | Delete	Sales Force Effectiveness	Sales Reporting	Reference Data	OneKey Select Organizations, OneKey Select Professionals	United States
Edit | Delete	Sales Force Effectiveness	Sales Forecasting	Sub-National	Xponent, Xponent PlanTrak, Xponent Prescribing Dynamics	United States

Add Selection

Once you have finished selecting the offering(s) and clicked **Add Selection**, the use and IQVIA data offering combinations that were previously selected will now be summarized under the Selected Permitted Uses and Offerings header.

Submitting a New Third Party Access Request

Time Period Covered by IQVIA Data.

* Data Period Start Date | Date Period Start Date

* Data Period End Date | Date Period End Date

Use the calendar icons to select the desired dates.

Data Period Start Date: This specifies the starting date for the actual data extracts that will be provided. It indicates the beginning / earliest date that the data extract will be applicable to the offering and use. For example, if the data to be shared covers 1/1/2021 to 12/31/2022, the Data Period Start Date would be 1/1/2021.

Data Period End Date: This specifies the end date for the actual data extracts that will be provided. This cannot exceed the Data Access End Date (maximum 1-year out). Data Period End Date indicates the end date that the data extract will be applicable to the offering and use. For example, if the data to be shared covers 1/1/2021 to 12/31/2022, the Data Period End Date would be 12/31/2022.

Submitting a New Third Party Access Request

Use/Offering(s) Confirmation Page

Once you have finished adding all Use/Offering(s) combinations and click Next, a Use/Offering(s) Confirmation window will be displayed listing all the selections made for the request.

Please review carefully to ensure the accuracy and completeness of your request. To make additional selections, click “Go Back to Prior Screen.” If you are finished, click “Confirm” to continue.

Please confirm the selected Permitted Use and Offerings combinations below are completed.

Selected Permitted Uses and Offerings

Category Name	Permitted Use Name	Offering Category	Offerings	Region
Sales Force Effectiveness	Sales Reporting	Sub-National, Reference Data	Xponent, Xponent PlanTrak, Xponent Prescribing Dynamics, HCPS Demographics (inc. best address)	United States
Sales Force Effectiveness	Sales Force Size and Structure	Sub-National, Reference Data	Xponent, Xponent PlanTrak, Xponent Prescribing Dynamics, HCPS Demographics (inc. best address)	United States

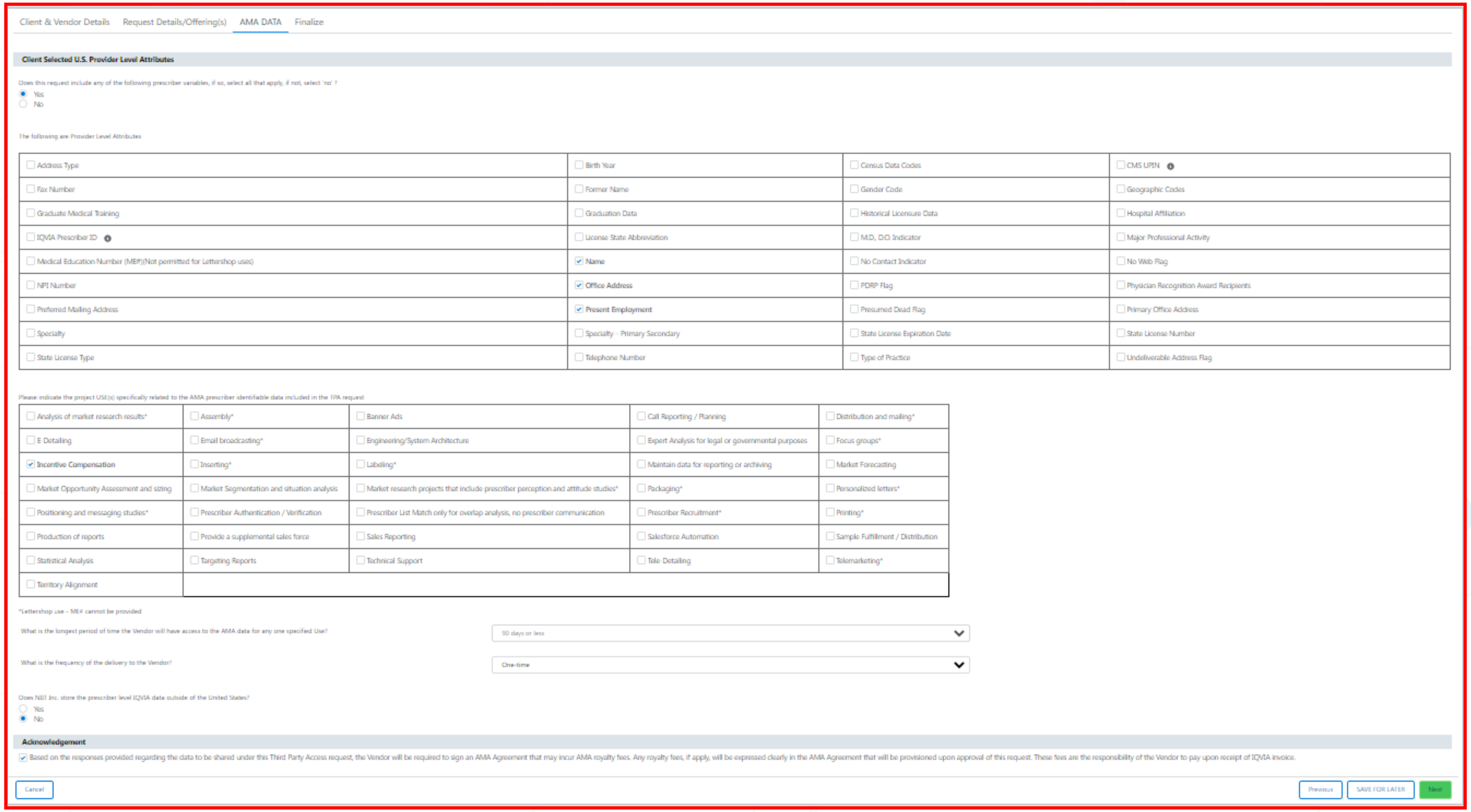
Go Back To Prior Screen   Confirm

Submitting a New Third Party Access Request

AMA Data Section (U.S. Only)

Next is the **AMA Data** section that only appears for clients who select AMA-related data at the sub-national or lower level of aggregation.

Click the image to know more.



Client & Vendor Details | Request Details/Offering(s) | AMA DATA | Finalize

Client Selected U.S. Provider Level Attributes

Does this request include any of the following prescriber variables, if so, select all that apply, if not, select 'no' ?

- ◉ Yes
- ○ No

The following are Provider Level Attributes

☐ Address Type	☐ Birth Year	☐ Census Data Codes	☐ CMS UPIN
☐ Fax Number	☐ Former Name	☐ Gender Code	☐ Geographic Codes
☐ Graduate Medical Training	☐ Graduation Data	☐ Historical Licensure Data	☐ Hospital Affiliation
☐ IQVIA Prescriber ID	☐ License State Abbreviation	☐ M.D., D.O. Indicator	☐ Major Professional Activity
☐ Medical Education Number (ME#)(Not permitted for Lettershop uses)	☑ Name	☐ No Contact Indicator	☐ No Web Flag
☐ NPI Number	☑ Office Address	☐ PDRP Flag	☐ Physician Recognition Award Recipients
☐ Preferred Mailing Address	☑ Present Employment	☐ Presumed Dead Flag	☐ Primary Office Address
☐ Specialty	☐ Specialty - Primary Secondary	☐ State License Expiration Date	☐ State License Number
☐ State License Type	☐ Telephone Number	☐ Type of Practice	☐ Undeliverable Address Flag

Please indicate the project USE(s) specifically related to the AMA prescriber identifiable data included in the TPA request

☐ Analysis of market research results*	☐ Assembly*	☐ Banner Ads	☐ Call Reporting / Planning	☐ Distribution and mailing*
☐ E Detailing	☐ Email broadcasting*	☐ Engineering/System Architecture	☐ Expert Analysis for legal or governmental purposes	☐ Focus groups*
☑ Incentive Compensation	☐ Inserting*	☐ Labeling*	☐ Maintain data for reporting or archiving	☐ Market Forecasting
☐ Market Opportunity Assessment and sizing	☐ Market Segmentation and situation analysis	☐ Market research projects that include prescriber perception and attitude studies*	☐ Packaging*	☐ Personalized letters*
☐ Positioning and messaging studies*	☐ Prescriber Authentication / Verification	☐ Prescriber List Match only for overlap analysis, no prescriber communication	☐ Prescriber Recruitment*	☐ Printing*
☐ Production of reports	☐ Provide a supplemental sales force	☐ Sales Reporting	☐ Salesforce Automation	☐ Sample Fulfillment / Distribution
☐ Statistical Analysis	☐ Targeting Reports	☐ Technical Support	☐ Tele Detailing	☐ Telemarketing*
☐ Territory Alignment				

*Lettershop use - ME# cannot be provided

What is the longest period of time the Vendor will have access to the AMA data for any one specified Use? — 90 days or less

What is the frequency of the delivery to the Vendor? — One-time

Does NIIT Inc. store the prescriber level IQVIA data outside of the United States?

- ○ Yes
- ◉ No

Acknowledgement

☑ Based on the responses provided regarding the data to be shared under this Third Party Access request, the Vendor will be required to sign an AMA Agreement that may incur AMA royalty fees. Any royalty fees, if apply, will be expressed clearly in the AMA Agreement that will be provisioned upon approval of this request. These fees are the responsibility of the Vendor to pay upon receipt of IQVIA invoice.

Cancel | Previous | SAVE FOR LATER | Next

Submitting a New Third Party Access Request

This section will only appear for clients who select AMA-related data at the sub-national or lower level of aggregation. AMA data must have express permission by the American Medical Association (AMA) prior to being shared (access or stored) outside of the United States. You will be prompted regarding additional actions, questions, or acknowledgements required based on your selected Use/Offerings combinations.

Fees may apply when data from the American Medical Association (AMA) is requested in a Third Party Request; the Third Party Vendor is liable for the AMA fees.

AMA data may include lists of prescribers, with or without IQVIA prescription data appended, regardless of whether the prescribers (and/or prescribers' addresses) are identified or de-identified.

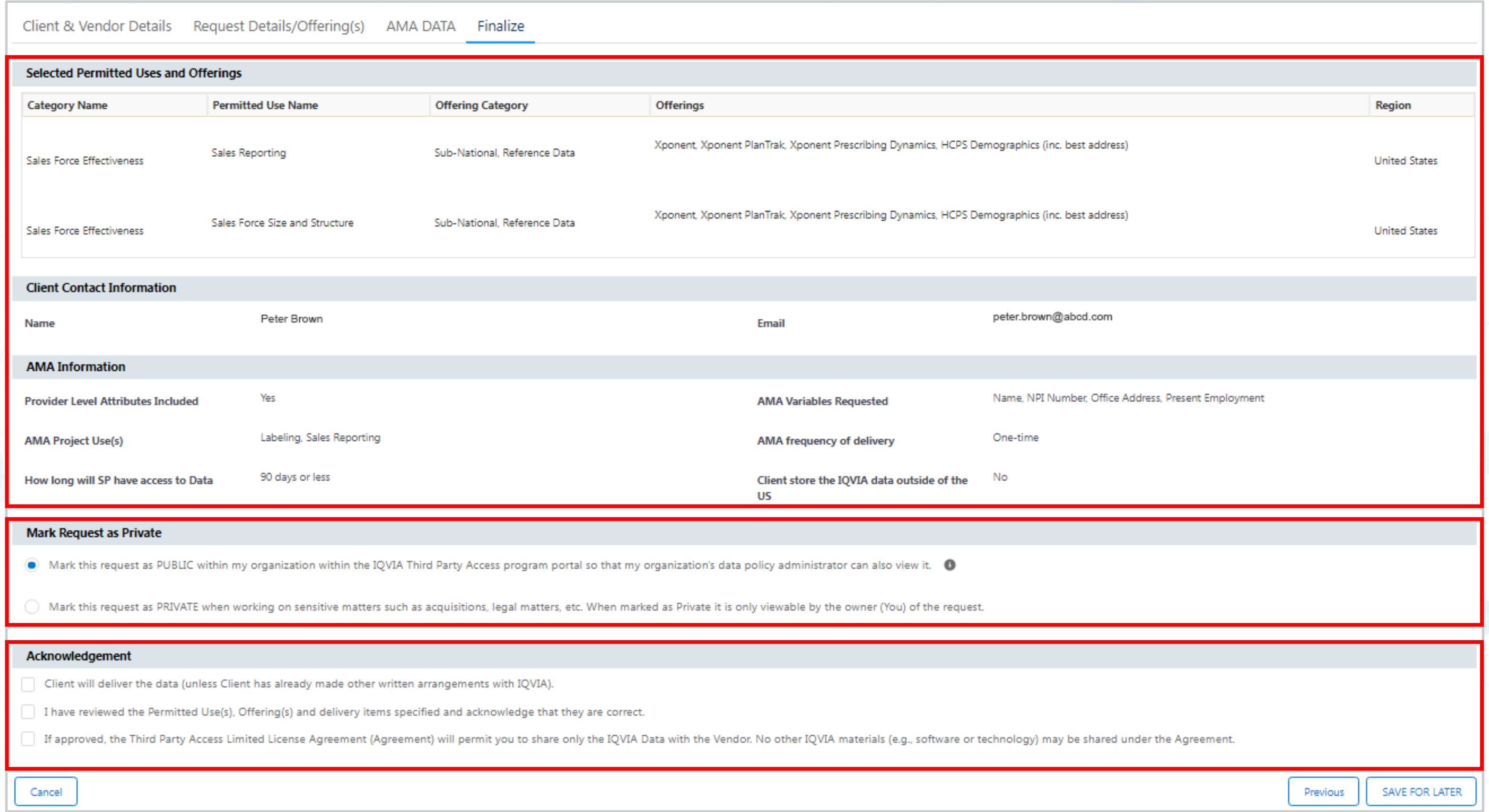
For further details, please select the following link to access the <u>Completing the AMA Data Section</u> Job Aid.

Submitting a New Third Party Access Request

Finalize Section

The last section is **Finalize**. Before the finalize section can be accessed, a message will appear indicating that your TPA request, if approved, will permit you to share only the data you requested. It will not permit you to share any other IQVIA materials, software or technology with a third party or allow any third party to access any other IQVIA materials, technology or software. Select OK to continue to the finalize section.

Click each of the highlighted sections to know their details.



Selected Permitted Uses and Offerings

Category Name	Permitted Use Name	Offering Category	Offerings	Region
Sales Force Effectiveness	Sales Reporting	Sub-National, Reference Data	Xponent, Xponent PlanTrak, Xponent Prescribing Dynamics, HCPS Demographics (inc. best address)	United States
Sales Force Effectiveness	Sales Force Size and Structure	Sub-National, Reference Data	Xponent, Xponent PlanTrak, Xponent Prescribing Dynamics, HCPS Demographics (inc. best address)	United States

Client Contact Information

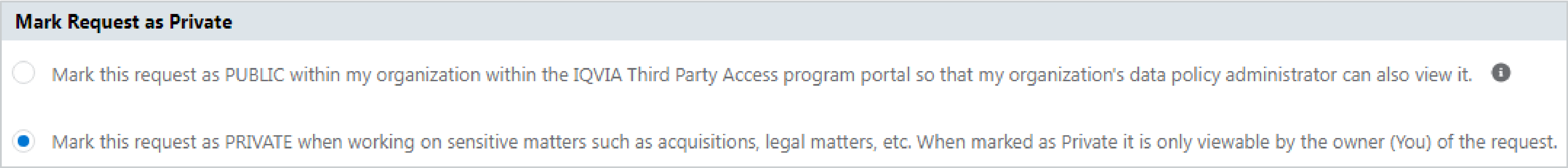
Name	Peter Brown	**Email**	peter.brown@abcd.com

AMA Information

Provider Level Attributes Included	Yes	**AMA Variables Requested**	Name, NPI Number, Office Address, Present Employment
AMA Project Use(s)	Labeling, Sales Reporting	**AMA frequency of delivery**	One-time
How long will SP have access to Data	90 days or less	**Client store the IQVIA data outside of the US**	No

A summary of selections from previous sections will again be provided in the Finalize Submission area. If any of this information is incorrect, use **Previous** to revisit previous sections and make your corrections. If you are not sure about any of the details and want to finish them later, you can use SAVE FOR LATER to save your progress and submit the request later.

Submitting a New Third Party Access Request



Requests will only be visible by the individual requestor. In some organizations, a central Data Policy Administrator may require visibility to all requests submitted by their organization. A Data Policy Administrator is an individual within your organization who has received permission to view all third party access requests submitted by your organization that have been marked as public. The use and identification of a Data Policy Administration is driven by your organization's policies and procedures.

In certain circumstances where an organization utilizes a central Data Policy Administrator (Please refer to the Requesting Data Policy Administrator Access section of this document), a request may need to be kept confidential even from that person. By selecting **private**, it indicates that only the requestor should be able to view the access request moving forward.

Submitting a New Third Party Access Request

Acknowledgement

- [x] Client will deliver the data (unless Client has already made other written arrangements with IQVIA).
- [x] I have reviewed the Permitted Use(s), Offering(s) and delivery items specified and acknowledge that they are correct.
- [x] If approved, the Third Party Access Limited License Agreement (Agreement) will permit you to share only the IQVIA Data with the Vendor. No other IQVIA materials (e.g., software or technology) may be shared under the Agreement.

Submit Request

Delivery: Click to check the box that acknowledges you (Client) will deliver data based on executed agreement permissions.

Accuracy: Click to check the box that acknowledges that the request is correct.

Access: Click to check the box to acknowledge this request only permits you to share the data offering(s) you requested. A Third Party Agreement does not permit you to share or provide access to any other IQVIA materials, software or technologies.

Once all the acknowledgments have been selected, the **Submit Request** button will appear. Your entries will **not** be saved until the request is submitted.

It may take up to 30 seconds for the request to submit. Please take your hand off the mouse during this time to ensure the process completes successfully.

Next Steps

Once the request is submitted, the first step is completed. In the event of a manual review, we may contact you to provide additional information and, possibly, ask that you edit the request. Please see below to find out more about the remaining process.

Client Initiates Request

Client initiates the request in the IQVIA Third Party Access Portal

Vendor Completes Request

Vendor will receive a link by way of email to complete the remaining questions of the request such as where the data will be stored and where, if prescriber information will be shared what elements will be provided, etc.

IQVIA Processes Request

Once the Vendor completes/submits the request it then comes back to IQVIA for review and approval.

IQVIA Sends Agreement(s)

IQVIA then releases the Third Party Limited License Agreement and AMA Agreement (if applicable) to be signed by the Vendor Authorized signer.

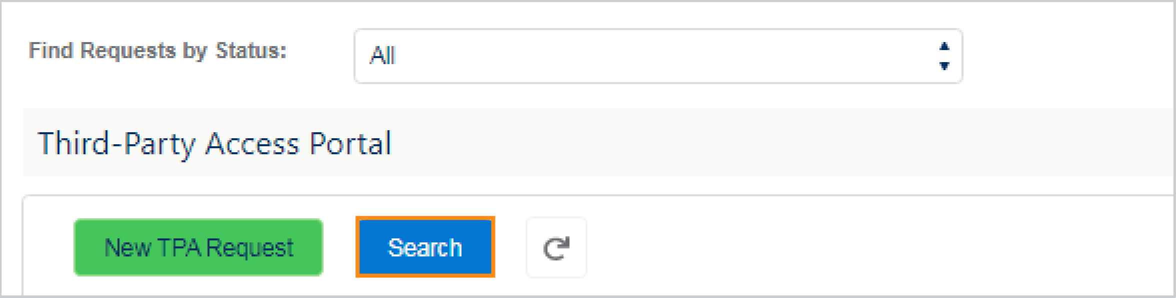
Vendor Signs Agreement(s)

Once the signed agreements are returned to IQVIA, we will send a Data Release Notification to both the Client and the Vendor saying that it is now permissible to share the data based on the signed agreement(s).

Using the Search Function

Overview

The **Search** feature allows you to search through multiple TPAs, display only those containing specified elements, and sort the results. To access the search feature, select the search button on the Portal landing page.



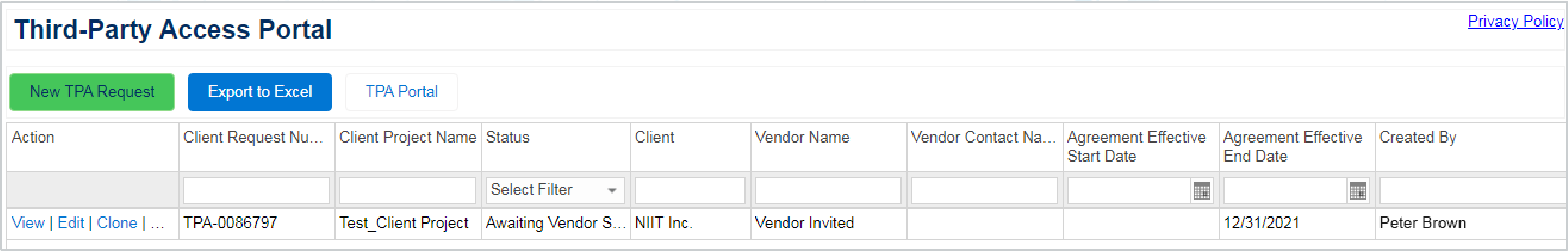
Using the Search Function

Search Page

From this screen, you can perform the Actions such as View, Edit, Clone, Cancel, and Renew an existing TPA request. In addition, you can:

1. Create a New TPA Request
2. Export results to an Excel spreadsheet
3. Return to the Portal landing page

You can search the portal on Client Request Number, Client Project Name, Status, Client, Vendor Name, Vendor Contact Name, Agreement Effective Start Date, Agreement Effective End Date, and Created By variables.



Using the Search Function

Navigation

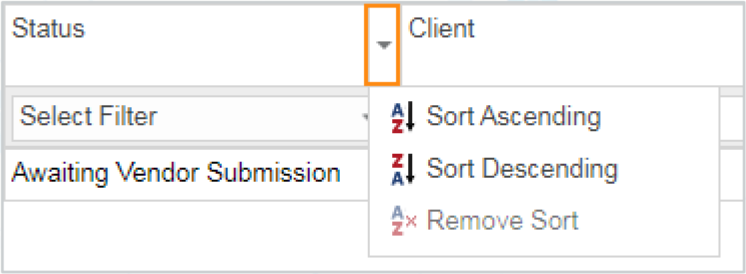
To navigate through multiple pages of TPAs, use the navigation bar to:

1. Go to a specific page
2. Show a specified number of rows
3. Go back or go forward using the Previous and Next arrows

Using the Search Function

Sorting the Search Result

To sort your results, hover your cursor to the right of any column header to reveal a down arrow. Select the down arrow and make your selection: Sort Ascending, Sort Descending, or Remove Sort (if applicable).

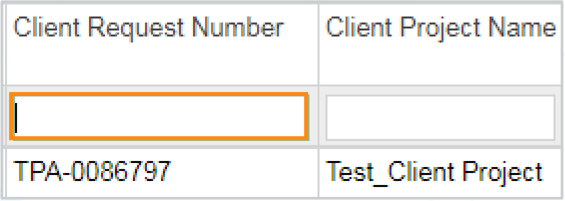


Using the Search Function

Three Ways to Perform Searches

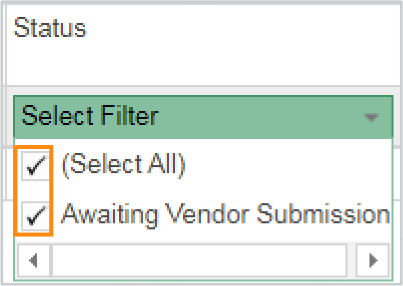
1 Search on Client Request Number, Client Project Name, Vendor Name, Vendor Contact Name, and Created By

To search on Client Request Number, Client Project Name, Vendor Name, Vendor Contact Name, and Created By, enter the desired information in the boxes beneath these column headers. The TPA(s) containing that information will display.



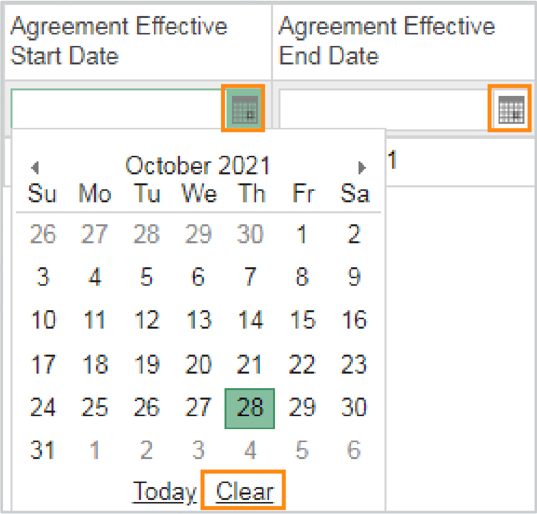
2 Search on Status

To search on Status, choose Select Filter in the Status column. Select the desired status checkboxes, and the TPA(s) with that status or statuses will display. To deselect a filter, click again to toggle the check mark off and on. Note: To de-select the filter(s), and view all TPAs, click (Select All) twice.



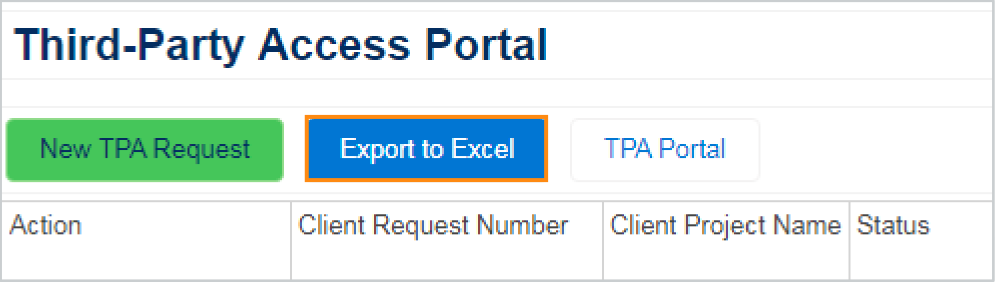
3 Search on Agreement Effective Start Date or Agreement Effective End Date

To search on Agreement Effective Start Date or Agreement Effective End Date, select the calendar icon in the appropriate column. The TPA(s) with the chosen start or end date will display. To clear your selection, select Clear (beneath the calendar).



Exporting to Excel

To export the TPA table to Excel, select the Export to Excel button.



Support

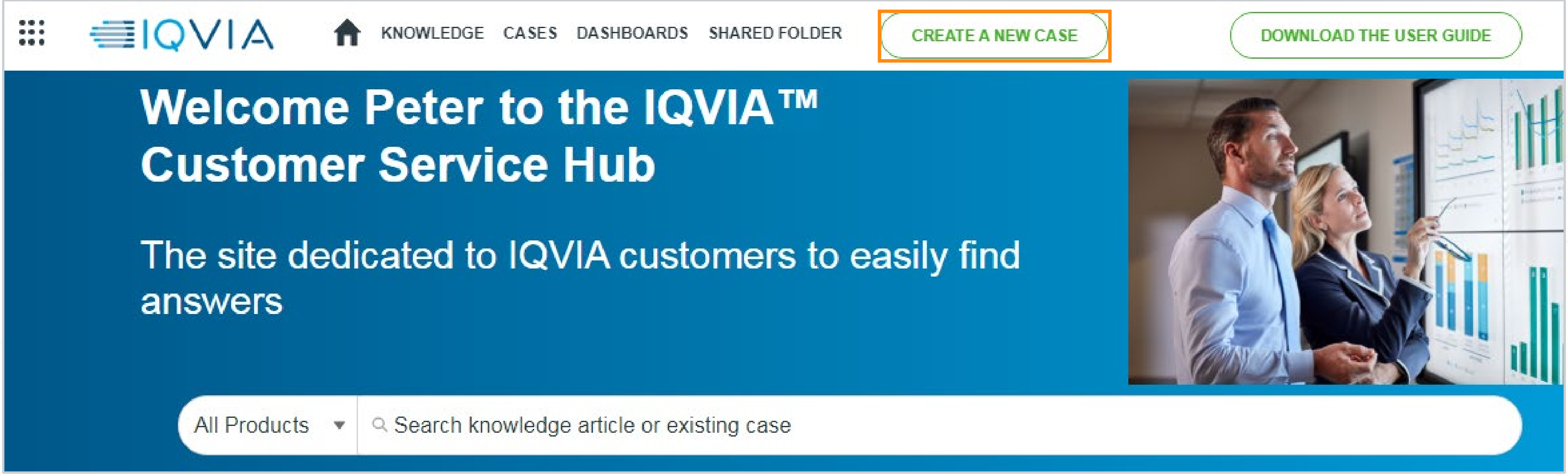
Asking a Question/Reporting an Issue

Forgot Username Request

Forgot Password Request

Inquiries can be created right from the Customer Service Hub where you enter the TPA Portal. Use the “Create a New Case” option.

- Click ‘Create a New Case’ within the Customer Service Hub
- Select ‘TPA’ as the category of question
- Describe your specific question in detail. If applicable:
  - Include the name(s) of the field(s) that your question is related to
  - Describe your specific issue
  - Describe step by step what you did prior to encountering the issue
  - Provide a screenshot of the area in question



Support

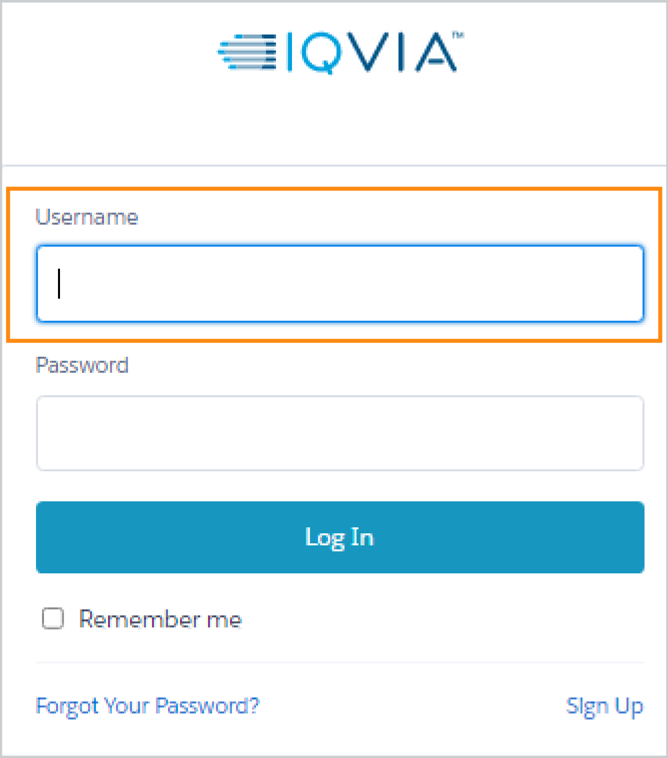
Asking a Question/Reporting an Issue

Forgot Username Request

Forgot Password Request

Just enter your company email address if you know you have TPA Portal access.

If you are still having trouble, please send an email to IQVIATPProgram@IQVIA.com to advise of your issue.



Support

Asking a Question/Reporting an Issue

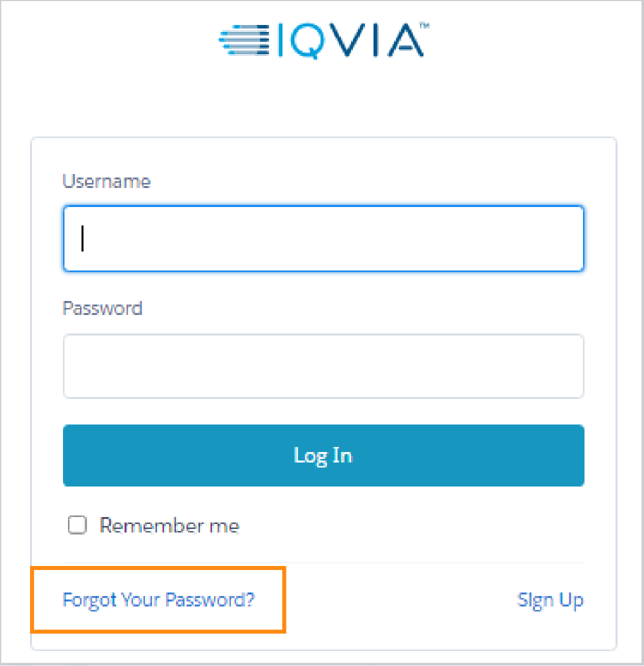
Forgot Username Request

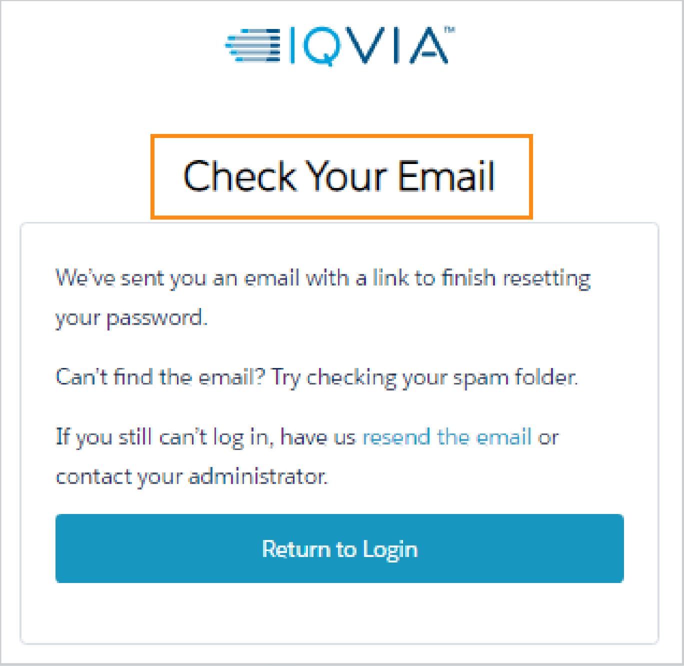
Forgot Password Request

If you forgot your password, please use the link on the logon page to reset your password.

Remember to use your **assigned Third Party Access Portal username**, your company email address.

Check your email for the reset password link.





Requesting Data Policy Administrator Access

Several IQVIA clients utilize a centralized Data Policy Administrator to oversee the third party access requests for their company. Within the Third Party Access Portal, Data Policy Administrators can view and manage ALL public requests created by themselves and others in their organization. Public requests are limited to those submitted solely by the client legal entity. The portal provides the flexibility for each client to set up their own standard operating procedures on who is permitted to view third party access requests.

Most portal users are not data policy administrators. Before requesting this access ensure that you have the authority to view/manage third party access requests submitted by others in your organization. Please confirm with your management team that you have this authorization before submitting your request.

Please contact your IQVIA Account Team to request data policy administrator access. Please provide:

- Your name, title, telephone, and company email
- Your supervisor’s name, telephone and company email

Our Company requires written confirmation from an authorized client point of contact. You will be contacted with the status of your request.

The portal provides the ability to submit a third party access request that is only accessible by the original client requestor.

Additional Resources

Job Aids

- List of Permitted Uses and Categories: List of Third Party Permitted Uses organized by Use Categories.
- List of Use Definitions: List of Permitted Uses and their Definitions in alphabetical order.
- Third Party Program Client Worksheet: Worksheet for information gathering prior to initiating a TPA in the TPA Portal.

Online Training Videos (Brainshark)

- Third Party Program Overview: This module provides a high-level overview of the Third Party Access Portal.
- Initiating Third Party Requests: This module provides training for the client on how to initiate a third party access request.
- Checking third Party Request Status: This module demonstrates how to check the status of third party access requests.
- Managing Existing Third Party Requests: This Client module demonstrates how to manage existing Third Party Requests using Actions, as well as how to use the search function.

This is not an exhaustive list of resources.