

DATA USE POLICY

SOLVE Research, LLC, referenced herein as “SOLVE,” encourages public awareness of healthcare technology product and service vendor performance. SOLVE’s name, data, and published materials are subject to trademark and copyright protection, regardless of where or how the information is obtained. Any public use of SOLVE Data must be made with clarity and integrity, as well as maintain the intent of the data. SOLVE reserves the right to modify this policy at any time.

The following applies to vendor press releases and other marketing collateral including presentations, brochures, flyers, articles, newsletters, email campaigns, email signatures, event signs, and social media (including but not limited to blogs, Facebook, Twitter, etc.)

General Policy

The following outlines SOLVE’s general data use policy:

- SOLVE Data may be shared within a subscribing organization and a purchased SOLVE report can be shared within a purchasing organization without limit.
- “SOLVE Data,” as used in this Policy, means any information, opinions, evaluations, or data contained online, in SOLVE presentations, and/or in SOLVE written reports.
- SOLVE Data is copyrighted and trademarked. Access to SOLVE Data is available through a subscription to SOLVE Data and/or through purchasing a report.
- An organization or person sharing SOLVE Data must be authorized to access and share the data before sharing it.
- An organization or person that accesses or shares SOLVE Data without authorization may be liable and responsible, at a minimum, for the applicable full annual online subscription or report fee.
- Any use of SOLVE Data should specifically and accurately represent the data and/or its intent.
- Content on SOLVE webpages cannot be reposted on a vendor’s website without express permission from SOLVE.
- Public use of SOLVE Data must specify the information source. (See Referencing SOLVE Data section below)

- SOLVE will use appropriate means to stop unauthorized use or misrepresentations of the SOLVE name, logo, or data at the expense of the violating party. SOLVE may issue a public clarification press release in response to any unauthorized use, display, or misrepresentation of SOLVE Data.
- SOLVE reserves the right to impose bans of varying duration on using SOLVE Data. In addition, SOLVE may seek additional remedies available under contract, copyright, and other applicable law.

SHARING SOLVE DATA

When sharing SOLVE data, please adhere to the following:

- Vendors may use up to three charts or diagrams (or a mix of the three) of the report. If a vendor would like to use more charts or diagrams, authorization is required.
- Vendors may promote their own score. Comparative scores are also allowed as long as they are in the report.
- Up to four commentaries from the report are allowed, but only if they are extracted from the same report in which the charts, diagrams, and or rating scores used by the vendor appear.
- Vendors can only use commentaries regarding their own product or service.
- Vendor press releases and other marketing collateral that reference a SOLVE report must maintain the intent of the report.
- The SOLVE Data source information must be included. See Referencing SOLVE Data section below for specific information about documenting SOLVE Data.

VENDOR WEBSITE

- Vendor marketing collateral (including press releases, brochures, flyers, postcards, slideshow presentations, etc.) that contains SOLVE data may be posted to a vendor website for download if it has been reviewed and approved by SOLVE as being compliant with the SOLVE Data Use Policy.
- Date-stamped vendor marketing collateral (including press releases, blog posts, etc.) that contains SOLVE data can be published on a vendor webpage if it has been reviewed and approved by SOLVE as being compliant with the SOLVE Data Use Policy.
- Vendor marketing videos and audio files containing SOLVE data may be used if they have been reviewed and approved by SOLVE as being compliant with the SOLVE Data Use Policy.

- A SOLVE award or ranking may be displayed on a website. See Referencing SOLVE Data section below on how to document SOLVE Data.
- User Commentary about a vendor’s own products and services may be posted to the website.
- A SOLVE quote may be extracted from a public article as long as the quote maintains the intent of the statement in the article and is clearly attributed.

USER COMMENTARY

- Any use of User Commentary MUST include a prominent note stating, “The following are selected commentaries that may not represent the whole of provider sentiment related to this product or service. Visit SOLVEscores.com for a complete view.”
- Up to 1 page or 500 words of user commentary can be extracted from SOLVE Data and included, verbatim, in promotional or marketing material about a vendor’s own product or service.
- SOLVE Data User Commentary documentation should include the product or service name, version number (as applicable), title of person giving the comment, date SOLVE collected the comment, and the SOLVE copyright statement.

Please indicate that the comment was collected by SOLVE.

Example:

“We have been thrilled with XYZ General EMR. Our physicians think all systems are a little difficult to use, but we have put a lot of time and work into customizing the system, and we have it working really well for us. XYZ has been a great partner to work with.”– CIO

Collected about XYZ General EMR version 3.6.1c by SOLVE in March 2020 © SOLVE Research, LLC. All rights reserved. www.SOLVEscores.com

LEVERAGING SOLVE AWARDS

Trusted Partner, Provider’s Choice, and other official SOLVE awards may be used as follows:

- The “Trusted Partner” report is the only source for the “Trusted Partner” award designation and the “Provider’s Choice” report is the only source for the “Provider’s Choice” award designation.
- Award recipients may use the award logos in conjunction with the product or service that received the award rankings only when the year of the award is also on the logo.

- When announcing Trusted Partner, Provider’s Choice or other SOLVE awards, vendors must include the documentation of the full report name; the vendor and product or service name; the year of the award; and the market segment as it appears in the report.
- Only the market segment recipient of an award from the most recently published report may announce their award in larger-than-life posters, billboards, and electronic screens.
- A market segment’s current award recipient can refer to historical rankings in the same market segment. Example: 2011, 2009, 2007, 2004, and 2001.
- Early Data or SOLVE Data that is asterisked may be included only when it is accompanied by the approved SOLVE disclosure statement: “Products marked with an asterisk (*) do not meet the minimum SOLVE confidence levels.” Early data or asterisked products or services should not compare themselves to other products or services in the market segment.
- Products or services that are not ranked in a report cannot compare themselves to other products or services in the market segment, i.e. component, superseded, not primary, or regional products.

SOLVE LOGOS AND ARTWORK

Only approved SOLVE logos and artwork can be used. The following applies to using SOLVE logos:

- SOLVE logos and artwork cannot be altered in any way, including but not limited to changes in font, color, and design.
- SOLVE logos and artwork must maintain legibility. Logos cannot be used in a manner that causes the images to become distorted, blurry, or illegible.
- Request award ribbons and other special award logos by emailing your SOLVE contact.

REFERENCING SOLVE DATA

The first use of a SOLVE Data reference should be documented.

Source the full report name, market segment (as applicable), month and year of the report publication, the SOLVE URL (www.SOLVEscores.com), and the SOLVE copyright statement, which is “© [year] SOLVE Research, LLC. All rights reserved.”

Sourcing information should be legible and accurate and included as near to the KLAS Data as possible. Any footnotes and sourcing information should be clear and maintain the intent of the report.

Example:

“2020 Trusted Partner,” December 2020. © 2020 SOLVE Research. All rights reserved.
www.SOLVEscores.com

“2021 Top SCRIPT Scores: Software & Professional Services,” December 2021. © 2021 SOLVE Research. All rights reserved. www.SOLVEscores.com

RECOURSE

If SOLVE data is improperly cited on a press release, the vendor organization issuing the press release may be required to issue another press release through the same original channels within a week of notification from SOLVE. The new press release must specifically cite the infraction and make the proper correction.

FOR EXAMPLE:

1. Infraction – Vendor X, an early data vendor with a high score, improperly cites in a press release issued through BusinessWire that “Vendor X was ranked number 1 in the most recent Trusted Partner Report—beating out Vendor Y and Z.”
2. Recourse – Vendor X may be required to issue another press release through BusinessWire stating, “In a press release issued on (date) entitled (headline), Vendor X stated, ‘Vendor X was ranked number 1 in the most recent Provider’s Choice —beating out Vendor Y and Z.’ The release should have stated, ‘Vendor X received a high score of (score) in the (year) Provider’s Choice Report’ but is not ranked against Vendor Y and Z.”

Email, direct mail – If SOLVE data is improperly cited in an email or through direct mail, the vendor organization that owns the content of that communication may be required to issue through the same original channels a correction within a week of notification from SOLVE.

All other marketing channels – The same rules outlined above apply to other marketing channels such as advertising, social media, video, website, etc.

Noncompliance – Noncompliance with any part of the SOLVE Data Use Policy may result in SOLVE making various efforts to correct the matter. Depending on the severity of the infraction, a public SOLVE clarification may be issued through the following channels, detailing the specific vendor and its improper use(s) of SOLVE data:

- Email(s) to SOLVE’s entire database of providers, vendors, and investors.

- Posting(s) on SOLVEresearch.com.
- Press release issued by SOLVE through broad media channels.
- SOLVE may also use blogs, Alerts, and other means (not to exclude legal) to address the Data Use issues.