

SPECTRA MedComms & Research Consulting Operational Menu

KEY CORPORATE POLICIES – ToS Established

- **14-Day Evaluation Period:** Applies strictly to all delivered services and technical outputs
 - **2-Revision Limit:** Maximum of two structural rounds of adjustments permitted per project deliverable
 - **100% Client IP Ownership:** The client retains complete, exclusive intellectual property rights over all raw research datasets
-

CLIENT ON-BOARDING WORKFLOW – Operational Mechanics

The step-by-step workflow tailored specifically to our operational mechanics, data-retention frameworks, and payment structures. This end-to-end framework maps out exactly how a prospective researcher, educator or corporate life scientist transitions into an active project while protecting their proprietary assets across **five core phases**:

Phase 1: Intake & Secure Financial Capture

1. **Initial Booking & Verification:**
 - The client visits the website and selects an available slot using the **Wix Booking** calendar portal.
 - Full upfront payment for the initial consultation session is completed via Wix Payments, PayPal, Apple Pay, or Google Pay.
 - The intake form dynamically captures the client's billing address to legally calculate provincial or international sales tax rates.
2. **Automated Trigger (Wix Backend):**
 - The system immediately fires the **Client Onboarding Confirmation Email** alongside a secure cloud download link to the zipped **Kick-Off Package**.

Phase 2: Material Review & Data Governance Opt-In

3. **Materials Transmission:**
 - The client downloads the Kick-Off Package and populates the **Client Intake-Billing-Retention Form (C-IBR Form)**, detailing personal/corporate information, billing address for Canadian tax verification, requested project scope, and 'initial' data retention preference (Default Standard Zero-Retention vs. Optional 3-Year Archival).
 - The client returns the completed C-IBR Form via secure email attachment to Google Workspace (**Secure Gmail**) prior to the scheduled consultation.
4. **Mandatory Consent Capture:**
 - Before or during the first interaction, the client must explicitly select their preferred Data Retention Pathway. The SPECTRA backend logs this choice directly into the client's localized folder profile.

Phase 3: Project Kickoff & Deep Assessment

5. The Launch Consultation:

- SPECTRA holds the initial consultation meeting (serving as the contract's official project kickoff) to evaluate project parameters, review incoming files, and to determine the optimal path forward.

6. Milestone Scoping & Secondary Invoicing:

- If the project extends into complex secondary scopes (e.g., full-scale systematic review, or long-form medical writing), SPECTRA issues a formal **Statement of Work (SOW)** enclosing the approved Terms of Service and Confidentiality Clauses via direct secure email.
- For these high-volume milestones, SPECTRA distributes an invoice explicitly enabling corporate payment channels: **Interac e-Transfers, domestic bank wires, or global electronic fund transfers (EFT)**.

Phase 4: Delivery, Review Window, and Evaluation

7. Secure Deliverable Upload:

- Upon completing the tasks stipulated in the SoW, the output files (e.g., manuscript, advisory report, or digital assets) are securely uploaded or transmitted via Google Workspace or Microsoft OneDrive for client evaluation.

8. The 14-Day Clock Activation:

- **Timeline Trigger:** The moment final files are delivered—An automated **14-day calendar countdown** begins.
- **Revision Cap:** Client requests are limited to a maximum of two rounds of structural revisions matching the initial project scope.
- **Mid-Point Notice:** An automated email reminder is triggered exactly 7 days post-delivery, prompting review action and reminding the client of the remaining 7 days on the countdown.
- **Automated Closure:** If the client stays silent or explicitly signs off within those 14 calendar days, the project status is contractually updated to "Assumed Complete".

Phase 5: Offboarding & Data Destruction Execution

9. Final Balance Settlement:

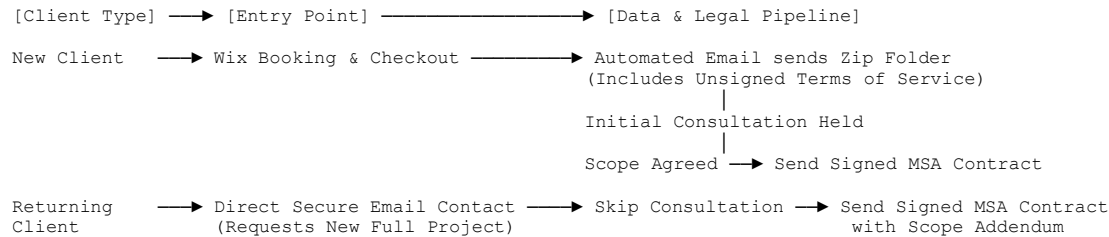
- The client remits all final invoice milestone balances within a **strict 30-day window** following project wrap-up.

10. Data Framework Resolution:

- **Pathway A (Standard Zero-Retention):** The localized physical data folder is systematically purged, and files are permanently erased across all Wix and Google Cloud storage nodes. An automated system receipt is issued stating: *"Project files permanently destroyed in line with your Zero-Retention agreement."*
 - **Pathway B (Optional Archival):** The client's records are transferred to a secure, encrypted archive folder, locked down for exactly **three (3) years** to form a continuous historical baseline for their future project submissions.
-

DUAL-CLIENT WORKFLOW MECHANICS — Two-tiered document strategy

The workflow accommodates both new and returning clients flawlessly:



1. The New Client (Wix Booking) Path

Clients book their initial consultation online and automatically receive the baseline, unsigned **Terms of Service (ToS)** reference file within their download zip folder. During the kickoff session, SPECTRA maps out the custom project parameters. If the client chooses to proceed with an active service tier, SPECTRA issues a customized **Statement of Work (SOW)** wrapped inside a formal, signed **Master Service Agreement (MSA)** containing Section X (Confidentiality & IP Protection).

2. The Returning Client (Direct Contact) Path

Because returning institutional partners or individual clients frequently skip the initial consultation phase, they contact SPECTRA directly via secure email to request a new project cycle. They bypass the automated Wix ecosystem completely. SPECTRA replies directly with the milestone invoice, an updated project-specific **SOW Addendum**, and a fresh **MSA** copy for digital signature to lock in the project kickoff immediately.

End-of-Document