

Notes Log Criteria

A. Follow-Ups:

1. Use the label *FOLLOW-UP* preceded by the attempt number. For Example:
 - a. **1st FOLLOW-UP**: spoke with Jane in ROI, our request was received on 9/16.
Typical turnaround time is 7-10 business days. Invoice will come from CIOX.
 - b. **2nd FOLLOW-UP**: spoke with Tom, our request has not been received. Re-send request to the same fax number

B. Re-sends:

1. Use the label *REQUEST SENT* preceded by the attempt number. For Example:
 - a. **1st REQUEST SENT**: faxed request to 888-888-8888, attn: Medical Records at 10:55am.
 - b. **2nd REQUEST SENT**: Per Tom, re-sent request to same fax number. Sent at 2:00pm.
 - c. **3rd REQUEST SENT**: Emailed request to Tom at abc@provider.com. Sent at 3:15pm.

C. Escalations:

1. Use the label *ESCALATED*, for example:
 - a. **ESCALATED**: Provider refusing to provide us with records.
 - b. **REVIEW**: {*Summary of Notes/Collection Progress*}
 - c. **NEXT STEPS**: *Specialist to Rep*. Please contact provider and speak with a supervisor.