

Foundation of the call

- ☐ Check request type, scope and PLR (for correspondence or invoices) before making call
- ☐ Notes must be detailed
- ☐ What needs to be covered on the call?
 - Confirm entity name, address, and fax number
 - Who do I speak to?
 - Confirmed receipt of request
- ☐ If not received, ask if we can fax it.
 - Turnaround time (TAT)
 - If copy service is used or in-house
 - Do they charge for records? If so do they accept payment via credit card or check?
 - Is notary needed? (only applies to some requests)
 - Covered legals?