

Line item	Parameter
1	Recording statement - (Auto fail)
2	HIPAA Compliance (Auto Fail)
3	Call Avoidance (Auto Fail)
4	Customer service skills were below Ontellus standards (Auto fail if not)
5	Introduction (Team member Name, Company)
6	Entity verifications (Includes Fax, Facility name, Address, Direct line for Custodian)
7	Requesting records of (Covered full name, date of birth, SSN (if required))
8	Verified order #, Type of Records, Date of Service, Copy service
9	Share Due date on call * If passed due must be used to drive TAT *
10	Name of the last person spoken with
11	All updated information must be verified and read back to custodian
12	Did the team member make assumptive demand utilizing previous notes
13	Were documents use to aid in creating forward progress
14	Requested TAT while applying stairstep method
15	Speak at receiveable pace and used power words
16	AHT optimization and exhibit call control - Active listening
17	Instructions in previous notes followed (Auto fail)
18	Did the agent adhere Rule of 2 (Auto Fail)
19	If applicable, Request Sent * If past 30 days attempt to confirm received *
20	Request Supervisor *If no forward progress has made after 45 days*
21	All applicable fields marked in Smartrieve (Auto Fail)
22	Was rejection process followed? (Auto Fail)
23	Legals covered
24	Accurate comments with proper spelling/punctuation/grammar/capitalization