QUALITY ASSURANCE REVIEW

Team Member:	
Client:	
Date:	4/5/16

Outlook Inflow Management	Possible Score	Your Score
Total Number of Inbox emails (including inbox subfolders)		
Total Number of Unread items in Outlook Inbox (including subfolders)		
7 Day Rule – Items over 7 days old in Outlook Inbox (including subfolders) = None	+2	
7 Day Rule – Items over 7 days old in Outlook Inbox (including subfolders) = 1 to 5	-0	
7 Day Rule – Items over 7 days old in Outlook Inbox (including subfolders) = 6 to 10	-1	
7 Day Rule – Items over 7 days old in Outlook Inbox (including subfolders) = 11 to 20	-2	
7 Day Rule – Items over 7 days old in Outlook Inbox (including subfolders) More than 20	-4	
60 Day Deleted Items Rule – Items over 60 days old in Deleted Items =		
Any items found that seem to violate the "spirit" of the CSI inflow rules? =		
Notes:		
Section Total:		

Unrouted Attachments (Epic Scanned item inbox) Inflow Management	Possible Score	Your Score
Total Number of unrouted attachments =		
7 Day Rule – Unrouted attachments over 7 days old = None	+1	
7 Day Rule – Unrouted attachments over 7 days old = 1 to 5	-1	
7 Day Rule – Unrouted attachments over 7 days old = 6 to 10	-2	
7 Day Rule – Unrouted attachments over 7 days old = 11 to 20	-3	
7 Day Rule – Unrouted attachments over 7 days old = More than 20	-4	
Notes:		
Section Total:		

Activities: Follow-up Management	Possible Score	Your Score
Total Number of open activities =		

Average # of days between activity entry and follow up dates =			
7 Day Rule – Open activities over 7 days old = None		+2	
7 Day Rule – Open activities over 7 days old = 1 to 5		-1	
7 Day Rule – Open activities over 7 days old = 6 to 10		-2	
7 Day Rule – Open activities over 7 days old = 11 to 20		-3	
7 Day Rule – Open activities over 7 days old = More than 20		-4	
Notes:			
		Section Total:	

Activity & Attachment Utilization		Possible Score	Your Score
Total number of Activities Entered in last complete month			
Total number of "unique" Activity Notes Entered in last complete month			
Attachments added to an existing activity without adequate activity note additions		-1	
Attachments added to an existing activity without adequate attachment descriptions		-1	
Notes:			
		Section Total:	

Account Detail		Possible Score	Your Score
Account Type is not correct (Prospect vs. Insured)		-2	
Line of business is not correct (Commercial, Personal, Benefits, etc.)		-1	
Service Roles on the Account Detail servicing tab are not accurate		-1	
Relationships are present and being used appropriately		+2	
Incorrect use or absence of an appropriate Agency Defined Category		-1	
Notes:			
		Section Total:	

Contacts		Possible Score	Your Score
Individual has not been setup with a contact designated as Primary		-2	
Company has not been setup with a contact designated as Business		-1	
Quality of information on Contact screens is low		-1	
Quality of information on Contact screens is excellent		+1	
Notes:			
		Section Total:	

Policy / Line Screens & Invoicing	Possible Score	Your Score
Action => Renew is not being done in a timely manner	-1	
Service Summary Rows & Stages are not being used properly	-1	
Policy Level Annualized Premium & Commission not entered properly	-2	
Status is not correct	-1	
Service Roles are not accurate and consistent across all Lines and for all policies	-1	
Producer / Broker Commissions are not accurate and up to date	-1	
Notes:		
	Section Total:	

Coverages & Forms (The presence and quality of the Applications, Custom Forms, and other areas used as the reference for current coverages in force)	Possible Score	Your Score
Incomplete or sloppy maintenance of coverage info	-2	
No Coverage Info	-5	
Notes:		
	Section Total:	

Activities: Quality of activities entered	Possible Score	Your Score
Lack of adequate documentation. Activities/Activity Notes are not adequate for the type & size of account.	-2	
Descriptions are not adequately descriptive	-1	
Descriptions have not been changed from the default description	-1	
Attachments added to an existing activity without adequate activity note additions	-1	
Attachments added to an existing activity without adequate attachment descriptions	-1	
Conversations are not well documented	-1	
Change Request done without appropriate and timely use of CHGR activity	-2	
Notes:		
	Section Total:	

Report Review: Activity Tracking Procedures – Commercial Lines Renewals	Possible Score	Your Score
Renewal process not being completed within prescribed time frames	-2	
Non Compliance with Procedures indicated by codes used – Minor	-2	
Non Compliance with Procedures indicated by codes used – Major	-4	

Compliance with Procedures indicated by codes used is very good	+2	
Notes:		
	Section Total:	

Grand Total:	