Client AC
AUTOMATED CLIENT ACQUISITION

The Drop-Ship Patient File Checklist

Signatures and proof of delivery, in the order they happen

A surveyor or auditor opens the file and asks two things: is every signature here, and can you prove the item was delivered? Use this list on every shipped order. The file is not closed until every box is checked.

Before you ship

- ☐ Order verified with the prescriber's office
- ☐ Patient agreed, on the call, to receive a signing link by text or email
- ☐ Start-of-service forms signed by the patient **before** the item ships (the forms your accreditor and payers require before service begins, such as the Beneficiary Authorization (AOB) when a claim will be billed)
- ☐ How the patient was measured or sized is written down: the tool, the measurement and the size chosen
- ☐ The text or email carried only the secure link, never patient information
- ☐ Signed forms and the audit trail saved to the patient's folder the same day

When you ship

- ☐ Shipped only after the start-of-service forms were signed
- ☐ Carrier, tracking number, ship date and lot or serial number recorded
- ☐ Shipping invoice saved to the patient's folder
- ☐ Carrier's delivery record saved once tracking shows delivered, and linked to the shipping invoice

Follow-up call

- ☐ Call made inside your policy's follow-up window after delivery (ours is 3 business days)
- ☐ Use and care instructions reviewed with the patient
- ☐ Return demonstration recorded step by step: how the patient showed or told you each step (put on, adjust, check the fit and skin, take off), not one Yes box
- ☐ Delivery, instruction, return demonstration and warranty signed off by the patient on the call
- ☐ Signed forms and the audit trail saved to the patient's folder the same day

Close the file

- ☐ Every signature is in
- ☐ Carrier delivery record, shipping invoice and signed proof of delivery form are filed together
- ☐ Follow-up call documented: date, who called and the result
- ☐ File reviewed and marked complete by a named person, with the date

If the patient does not sign

- ☐ Try again on business days 2 and 5
- ☐ Send it to your Compliance Officer at 10 business days
- ☐ The file stays open until it is complete

Want this running in your company?

ComplySigned sets up this process in your own account, under your own BAA. Patients sign on their phone while your staff is on the call, and the file closes only when everything is in.

Book a 20-minute call: complysigned.com/call