

# Record Retrieval Solution

amazing

## ORDER ENTRY

## ORDER PERFECTION

## FACILITY SCHEDULING

## ROUTING & FIELD OPERATIONS

## QUALITY ASSURANCE

## ORDER COMPLETION & BILLING

**START**

**1** Client Submits Request



THIS IS PERFECT!

**2** Order Validation & Assembly



**3** Provider Coordination & Scheduling



**4** Field Operations



**5** Document / Material Processing



**6** Assembly, Delivery or Upload & Billing



**FINISH**

Ordering via Website  
www.cpxlegal.com or via - Email, Phone, Fax, Mail

### Online ordering:

- Authorized user logs in via their secure account
- Confirms Ordering and Bill-to party
- Selects Providers from our extensive nationwide database
- If required, attaches Authorization or other legal documents to order
- Enters additional deliveries, special instructions and submits order.
- Receives Confirmation with Order # and due date

- Checks order for accuracy and completeness
- If necessary, conducts research
- System embeds data into legal forms to generate order packets for Client, Counsels and Provider
- Confirmation package sent to Client via repository, email or mail
- Assembles order packet and distributes to respective parties

- Facility expeditors have knowledge of civil codes and relationships with Major Providers
- Contacts provider to confirm receipt of request and records exist
- Obtains information from Provider relating to ETA for producing records, gets film breakdown, invoice for fees, sets appointment to obtain documents
- Coordinates request for fee/X-ray breakdown approvals through customer services
- Communicates Provider delays or non-responsiveness through customer service

- COMPEX field agent hand serves Notice to Consumer
- Serves Authorizations & Subpoena to Provider
- After Stat Hold period visits Provider to obtain documents and original items (films, etc)
- Scans documents received via fax/mail
- Securely transmits scanned images to QA system for processing

- Images processed, indexed and enhanced to increase legibility
- Performs QA check of record subject, record types, completeness, and date range
- Approves documents to be electronically delivered and/or printed (or routes to rework)
- Coordinates QA and reproduction of original items

- Prints and Assembles orders
- Secure image servers directly transmit encrypted records in desired format (TIFF, PDF, SPDF) to online repository
- Notifies clients records are available to view/download from Online repository
- Routes paper records for hand delivery or mail service
- Invoices orders based on client pricing, format and frequency

## Customer Service

- Sets up Client accounts and preferences. Work closely with Clients to provide assistance throughout the order life cycle.
- CS teams are assigned to clients geographically and support each other

- Acts as liaison between Provider and Compex departments to ensure efficient, accurate processing and timely deliver of records
- Handles special requests from Clients and monitors rush, critical and escalated orders

- Obtains fee approvals, provides breakdowns and authorizes payment of fees
- Ensures complete client satisfaction