

Sample Quality Assurance Form

Call Center Review Review Date:

Reviewer:

Review Type	Review Class	Review Month	Case Number	Call Date	Duration (mins)
MLTC Call	Supervisor				
Worker Last Name	First Name	Supervisor Last Name	First Name	Administrator	

Performance Areas	Call Reasons	Review Action/Comments
OPENING		
Used proper greeting	YES NO N/A N/R	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Verified callers identity		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Identified reason for the call		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Comments Add		
FULFILLING CLIENT NEEDS		
Asked questions to establish caller`s needs	YES NO N/A N/R	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Diagnosed reason for the call		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Paraphrased and recapped reason for call		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Asked permission to place caller on hold if needed, and refreshed hold appropriately		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Provided complete and correct information (first call resolution, avoid additional calls)		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Provided client with external resources (food bank, churches, etc.)		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Preempted future questions		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Updated caller`s personal information		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Provided instruction on next steps		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Explained timelines		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Asked clarifying questions		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Resolved reason for the call		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Transferred call appropriately		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Client did not call back within two business days		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Comments Add		
SOFT SKILLS		
Did not use slang or industry jargon	YES NO N/A N/R	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Allowed the caller to explain the situation without interruption		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Spoke in a clear, easy to understand voice at a moderate pace, maintains professional tone		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Communicated information and action clearly and with confidence		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Acknowledged, apologized and/or empathized		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Managed silence, used hold correctly		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Used name in conversation		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Demonstrated call control		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Took ownership of the call and case actions		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Followed through on assurances made on the call		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Comments Add		
CLOSING		
Summarized results of the call	YES NO N/A N/R	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Asked if there was anything else		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Thanked caller, used appropriate close statement		<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>
Comments Add		
<p>Any of the following will result in a call score of ZERO and may include further disciplinary action:</p> <p><input type="checkbox"/> Intentional call disconnect</p> <p><input type="checkbox"/> Use of profanity</p> <p><input type="checkbox"/> Releasing information to unauthorized 3rd party</p> <p><input type="checkbox"/> Failure to resolve client`s concern</p>		

Guide	Find	Print	Add	Edit	Delete	Cancel	Save	Close
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