Customer Service Site Survey Check List

All standards must be met for BOC Accreditation along with meeting the additional standards for the Five Star Customer Service Distinction Certificate in this survey list.

Customer Service Culture & Values

- ☐ Company values, goals or mission statement outlines the organization's customer service principles.
- ☐ Leadership's commitment to customer service is evident by reinforcement of customer service values. (e.g., staff meeting minutes, email communications or staff presentations).

Customer Engagement

- ☐ Customer service survey measuring satisfaction level with the service engagement across all modes of operations (e.g., walk-ins, home delivery, drop ship, or facility contracts).

Staff/Contractor Training & Performance

- ☐ Company policies and/or procedures outline the customer service processes.
- ☐ Any changes in the customer service process are updated in the company policies or procedures. Staff and contract service companies are made aware of changes (e.g., meeting notes, email, or policy memo)
- ☐ For contract services, customer service requirements are documented and provided to the contract service company. Evaluation of the contract service company for implementation of the customer service requirements is evident (e.g., survey, evaluation form, or audit).
- ☐ Staff training documentation includes evidence on training of customer service values.
- ☐ Employees are reviewed on their performance of customer service values.

Supplier Plan of Care

- ☐ Customers are informed of the plan of care related to the service or product provided by the supplier. The plan of care includes evaluation and use of the product including if appropriate monitoring of usage and maintenance tracking. (e.g., patient file, plan of care, electronic health record, or documentation communication with patient).
- ☐ Patients or providers are provided information regarding benefit coverage for the products and services.

Product Information, Delivery and Documentation

- ☐ Customer inquiries for product and/or delivery information are responded to within two business days and documented (e.g., order log, patient file, or delivery tracking file).
- ☐ Delays in timely responses to product or delivery inquiries are documented with alternative resolution (e.g., patient file, order log, or delivery tracking file).
- ☐ Customer service follow-up should be specific to the product. Customer service follow-up should occur upon the initial delivery and for rental use should occur at the appropriate interval for the product. (e.g., patient file, email, or delivery log).

Complaint Resolution

- ☐ Posting of contacts for customer complaints to include supplier manager, BOC, and CMS contact information.
- ☐ All customer complaints to suppliers should be responded to within two business days with documentation of complaint and resolution noted. (e.g., log tracking system, email, or patient file).

Performance Improvement Plan

- ☐ Customer service metrics (e.g., satisfaction, delivery timeliness, complaint resolution targets) to be established for the organization.
- ☐ Performance improvement plan includes annual evaluation of opportunities for improvement in customer service based on monitoring of key customer service metrics established for the organization.
- ☐ Performance plan outlines action plan to address areas identified for improvement.
- ☐ Documentation for monitoring of action plan to be evident (e.g., summary document, or metric trending).

BOC Five★Star Customer Service Distinction