

PROCUREMENT CHECKLIST

# Recorded Statement Evidence Software Review Packet

Use this checklist to organize a ClaimAudio evaluation across claims operations, legal, security, finance, and IT. Final obligations should be governed by the applicable pilot or services agreement.

## Security and Legal Review

### DPA and data-use terms

Confirm approved sample material, confidentiality, customer-data use, deletion handling, and pilot boundaries.

### Subprocessor list

Review providers involved in hosting, storage, transcription, processing, support, and lead-routing workflows.

### Retention and deletion policy

Define how long recordings, transcripts, findings, and exported memos remain available.

### SOC 2 status

Document current readiness or audit status. Do not treat certification as complete unless it can be verified.

## Architecture Review

### 1. Intake

Approved recorded statement audio enters a controlled workspace.

### 2. Processing

Transcript, speaker labels, and claim-specific findings are generated.

### 3. Review

Human reviewers approve, edit, or reject findings before export.

## Commercial Quote Checklist

### Plan scope

Plan tier, monthly statement allowance, reviewer seats, and admin controls.

### Overage rules

Next-volume tier trigger, added recordings, or expansion path.

### Pilot criteria

Evaluation statement count, success metrics, timeline, and rollout owner.

### Commercial process

Billing contact, invoice timing, renewal owner, security review owner, and implementation owner.

## Pilot Success Criteria

- Evidence memo quality compared against current manual summary process
- Exact quote, timestamp, speaker, and audio jump verified by reviewer

- Contradictions and follow-up questions reviewed before claim-file use
- Security, retention, and data-use questions captured before rollout
- Pricing, reviewer seats, volume, and expansion path understood by finance and operations

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ClaimAudio Evidence Studio. Procurement checklist for evaluation only. No certification is claimed unless completed and verifiable.