

The Lead-Source Documentation Template Pack

The record layout that lets one call recording answer both the CMS question and the ROI question. Built for your ops lead. Companion to the ClaimFlow whitepaper — claimflow.health/whitepaper

1 • The unified lead-source record

One row per lead, one lineage per enrollment. Whatever system holds it (CRM field set, warehouse table, or ClaimFlow), these are the fields an audit or a chargeback dispute will ask for:

FIELD	TYPE	WHY IT EXISTS
lead_id	unique ID	The spine every other record hangs off.
source	text	Vendor or channel (e.g. facebook-aep, vendor-a-transfers, direct-mail). Persistent — never renamed mid-year.
campaign / ad_id	text	Paid lineage down to the creative. Blank is a finding, not a default.
consent_source	text/URL	Where consent was captured (form URL, vendor doc ref). The "logically and topically related" test lives here.
consent_timestamp	timestamp	When. Paired with a stored snapshot of the consent language.
first_touch_at / last_touch_at	timestamp	Journey bounds; feeds every attribution model.
call_id / recording_url	ID + URI	The artifact itself. Retention: 10yr enrollment / 6yr non-enrollment.
disclaimer_timestamp	timestamp (in-call offset)	Proof the TPMO disclaimer fired before benefits — the new timing rule's evidence.
soa_id / soa_captured_at	ID + timestamp	Scope of Appointment lineage, same-call capture permitted from Oct 1.
agent_id	ID	Who sold; joins to licensing and appointments.
enrollment_id / carrier / plan_id	IDs	The outcome, joined to the carrier's world.
email_verification_status / email_verification_date	text + timestamp	Verified-at-capture stamp; re-verify anything older than 90 days before contact.

FIELD	TYPE	WHY IT EXISTS
<code>persistence_month_12</code>	boolean/date	Still on the books at month 12 — the field that makes ROI renewal-grade.
<code>chargeback_at</code> / <code>chargeback_amount</code>	timestamp + number	Losses traced to their source, so vendors are judged on what sticks.

2 · CSV header template

Drop-in header for lead imports and vendor deliverables (require vendors to fill the consent columns — blanks are a contract conversation):

```
lead_id,source,campaign,ad_id,consent_source,consent_timestamp,first_touch_at,last_touch_at,call_id,recording_url,disclaimer_timestamp,soa_id,soa_captured_at,agent_id,enrollment_id,carrier,plan_id,email,email_verification_status,email_verification_date,persistence_month_12,chargeback_at,chargeback_amount
```

3 · The chargeback-dispute packet

When a carrier claws back a commission, this is the packet that reverses it. Assemble per disputed enrollment:

1. **The enrollment record** — ID, carrier, plan, effective date.
2. **The lineage chain** — source → campaign → ad → call, from the unified record above.
3. **The recording** — with the disclaimer timestamp and SOA capture point marked.
4. **The consent trail** — source, timestamp, and the language snapshot.
5. **The agent's standing** — license + appointment valid on the sale date.
6. **A one-paragraph cover note** — what the records show, in plain English, dated and signed.

If any of the six can't be produced, that gap — not the carrier — is the real dispute. Fix the field, not the argument.

4 · Vendor onboarding addendum (checklist)

Before a new lead vendor's first delivery:

- ☐ Consent documentation format agreed (fields above) with a hand-over SLA.
- ☐ Source identifier assigned; vendor uses it on every transfer.

- ☐ Sample file passed a dry-run import with zero blank consent columns.
- ☐ Contract names who owns the consent records if the relationship ends.

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