



## Key Elements of a Clear Customer Progress Report

- ✓ Clearly identifies the goal established in the ISP and the Service Agreement.
- ✓ Clearly understandable by all participants and can be understood by third parties not directly involved.
- ✓ Reports on or summarizes activity during the reporting period.
- ✓ Reports outcomes based on criteria established and identified in the Service Agreement.
- ✓ Reports on challenges or issues identified in the service period.
- ✓ Reports on Customer Satisfaction (as needed at least annually)
- ✓ **IF SUBMITTED SEPARATE FROM AN INVOICE, PROVIDES ALL ESSENTIAL IDENTIFYING INFORMATION**
  - Customer and Agency Names
  - Service Period
- ✓ **Desirable**- Addressed to and sent directly to a customer with a copy to the PA.