CASELEAD AGENCY · SAMPLE DELIVERY ARTIFACT · REAL-TIME WEBHOOK FORMAT

# SMS OTP-Verified Exclusive MVA Lead & TCPA Sheet

Exact lead payload, 6-digit SMS verification proof, consent certificate metadata, and replacement rules delivered to your firm's CRM.

**ILLUSTRATIVE SAMPLE RECORD — FICTIONAL CLAIMANT DATA. Produced by CaseLead Agency to demonstrate field structure before pilot launch.**

### Claimant & Incident Profile

| | |
|---|---|
| CaseLead Matter ID | CL-OTP-2026-8841 |
| Delivery Exclusivity | 100% EXCLUSIVE · SINGLE FIRM |
| Claimant (Fictional) | Elena M. Alvarez (Bilingual: EN / ES) |
| Incident County / State | Dallas County, Texas (75201) |
| Incident Date | 11 days prior to inquiry (within 30-day rule) |
| Liability Screen | Rear-ended at red light · Police report #26-44190 |
| Injury & Treatment | ER visit + cervical MRI scheduled |
| At-Fault Insurance | Confirmed commercial auto carrier |
| Prior Counsel | No attorney retained (confirmed twice) |

### SMS OTP & TCPA Compliance Audit

| | |
|---|---|
| SMS OTP Status | VERIFIED (6-DIGIT PIN · 19 SEC) |
| Phone Line Type | Mobile · Active Wireless Carrier |
| Consent Timestamp | 2026-11-27T14:22:08-06:00 (CST) |
| Consent Certificate | TrustedForm Cert ID: tf_sample_99184a2c |
| Ad Creative / Funnel | Firm-identified Meta Lead Flow (TX-MVA-04) |
| TCPA Disclosure | 1:1 express written consent naming buyer firm |
| Duplicate Check | SHA-256 hash cleared against 90-day firm log |
| CRM Delivery Latency | 1.8 seconds post-OTP via HTTPS POST |

## Structured CRM Webhook JSON Payload (Filevine · Lead Docket · Litify · Lawmatics)


```
{
  "matter_id": "CL-OTP-2026-8841",
  "cohort_id": "TX-OTP-PILOT-2026-11",
  "caselead_source": "caselead_otp_mva_tx",
  "delivery_type": "exclusive_sms_otp_lead",
  "claimant": { "first_name": "Elena", "last_name": "Alvarez", "language": "en_es", "state": "TX", "county": "Dallas" },
  "incident": { "type": "rear_end_mva", "days_since_accident": 11, "police_report": true, "at_fault_insured": true,
"prior_attorney": false },
  "medical": { "er_visit": true, "ongoing_treatment": "chiropractic_mri_referral" },
  "verification": {
    "sms_otp_verified": true,
    "otp_seconds_to_confirm": 19,
    "trustedform_cert_url": "https://cert.trustedform.com/sample-illustrative-id",
    "duplicate_sha256": "8c41f0b9e2d4a7c1...f902"
  }
}
```


## Written Replacement Rules & Speed-to-Lead Standard

### Eligible 48-Hour Credit / Replacement Triggers

- Disconnected or non-working phone despite OTP timestamp
- Claimant already represented by another PI firm at inquiry
- Accident occurred outside contracted state/county radius or SOL
- Duplicate record already active inside firm's 90-day CRM log

### Recommended Firm Intake Desk SLA

- Trigger automated call/SMS alert under **2 minutes** of webhook post
- Execute 6-attempt call + bilingual SMS cadence across 72 hours
- Log outcome disposition code to tune ad targeting weekly
- Modular 25–75 lead starter packs · Target 72-hour launch



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