ACCOUNT SET-UP AND ENCODING CHECKLIST

CONTRACTOR – EC – HOMEOWNER – CONTRACTOR - INSURANCE COMPANY – EC

When a contractor referred a job to Exclusively Contents - It can be via phone call, text message or thru email, technicians must:

1. **Set-up a client profile in iCat account for the new job**
It should contain:
    1.1 Client's complete name or complete job name
    1.2 Client's home address
    1.3 Client's phone number
    1.4 Claim number
    1.5 Insurance Company
    1.6 Adjuster's name
    1.7 Adjuster's phone number
    1.8 Adjuster's email address

2. **Set-up a client profile (Sub-Customer) in QuickBooks Online**
It should contain:
    2.1 Client's complete name or complete job name
    2.2 Client's home address and phone number
    2.3 Client's email address *(critical if self-pay or if payment was issued to the home-owner by the insurance company)*
    2.4 Claim information (adjuster's information insurance company and claim no.)
    2.5 Contractor's information (make sure it is set up billed as customer)

3. **Set-up a client profile (Project) in QuickBooks Online**
It should contain
    3.1 Client's complete name or complete job name

4. **Set-up a job name as customer and project in T-Sheets**
It should contain:
    4.1. Customer name synced with the same name set-up in QuickBooks Online
    4.2. It should have the correct address to sync in the T-Sheets location for the job
    4.3 The actual hours should be based on the added approved estimated hours

5. **Set-up a Voxer group that is named after the job name – name of the customer and the contractor**
It should contain:

5.1. All information sent by the contractors and adjusters

5.2. All job related and billing and collections updates

5.3. All information related to the customer's issues and concerns such as (schedules, approval, payment, repairs, replacement and damages)

JOB-INSPECTION CHECKLIST

1. **Approval confirmation from the home-owner or contractor on the scheduled job-inspection**
   1.1. Call the home-owner and inform about the scheduled job inspection
   1.2. Confirmed date and time should be added in T-Sheets
   1.3. Confirmed date and time should be posted in Voxer

2. **What-to-bring check-list**
   2.1. Make sure to bring Assignment of Benefits to be signed by the home-owner
   2.2. Make sure to bring the Work Authorization form to be filled out and signed by the home-owner
   2.3. Make sure iPhone Battery life is at least 90%
   2.4. Make sure to bring PPEs (Facemask, Face-Shield, Alcohol, Gloves)
   2.5. Make sure the vehicle to be used is in good condition
   2.6. Must bring the auto insurance papers if using the company car
   2.7. Make sure that iCat app is working and up to date
   2.8. Make sure that iCat Rooms are set-up
       1. **IW** for photos taken from the job inspection
       2. **DG** Damage Room
       3. **TLC** for contents and rooms that need special handling such as art work, crystals
       4. **SP** rooms are for specialty appliance and items
       5. **Office** for generic room name
       6. **TL** for total loss

3. **Actual job-inspection checklist**
   3.1. Make sure to put notes on the pre-existing damaged contents in every IW rooms in iCat
   3.2. Make sure that all forms are signed by the client
   3.3. Make sure that the supervisor already discussed to the home-owner a brief summary of the service to be performed.
   3.4. Make sure all missing information in iCat like email address or phone# and insurance information should be asked to the home-owner

4. **After job inspection checklist**
   4.1. Make sure that all IW photos are uploaded in iCat
   4.2. Make sure that all signed work forms are uploaded under iCat documents
   4.3. Make sure to send the total number of hours consumed in Job Inspection in Voxer
   4.4. Make sure to share how the job inspection went – In Voxer
   4.5. Make sure to send an update to the contractor about the job inspection via email or text message or phone call
   4.6. Make sure to send the packing materials, list of rooms need to be packed, labor hours needed for the job for the Xactimate Estimate

PRE-JOB ESTIMATE CHECKLIST

Sample Xactimate estimate based on this job scope is printed in a separate PDF

1. **Make sure to create a pre-job estimate based on the shared labor hours and packing materials by the team lead in Voxer**
   1.1   There should be a Xactimate copy of the estimate in QuickBooks
2. **What the estimate contains**
   2.1. Job Inspection
   * Total number of hours consumed in job inspection should be added in one separate folder
   * A brief description of what happened in the job inspection should be added
   2.2. Pack-Out Materials
   * Make sure to add the PPEs
   *Make sure to add more materials that will be based on the uploaded IW photos in iCat
   2.3. Pack-Out Labor Hours
   * Make sure to add Pack-Out total hours for both the team lead and the regular technicians
   *It should contain responsibilities of each technician that involves barcoding and inventory scanning before packing and boxing.
   * It should contain a disclaimer that travel time is always included in every technician total hours
   * It should contain the number of days needed for the job
   * It should contain the total number of hours per technicians/per day on every description per line item
   CPS LABS – Supervisor
   CPS LAB – Packing Technician
   CPS LAB – Moving Technician
   2.4. **Unload Truck from residence/job site to Exclusively Contents Warehouse to Storage Vaults**
   * It should have a description about scanning inventory of boxes to justify the total unloading of contents' labor hours.
   2.5. Storage Service
   *Standard is to add 1 month of storage
   *Base the total storage vaults to be occupied on the iCat Room photos
   2.6. **Pack-Back**
   *Pack-Back hours should be patterned to the pack-out hours but not higher
   *It should be on a separate Xactimate Estimate and is optional to send to the contractor or insurance adjuster's depending on the estimate request
   2.7. **VENDOR IS NEEDED FOR THE FOLLOWING:**
   *Sub-Zero Refrigerator Special Handling
   *Art Work Crating, Uncrating and Storage
   *POD Container
   *Electronics Related Manipulation, Storage and Removal
   *Piano Moving
   *Special Carpets and Area Rugs Valuation

3. **"Estimate is Ready" Checklist**
   *Send the pre-job estimate to the contractor that referred the job
   *Job Inspection Room Photo Report generated from iCat should be printed and attached to every estimate to be sent to the contractor and insurance adjuster
   *There should be mail confirmation from the contractor and insurance adjuster regarding authorizing the pack-out service and email approval on the estimate
   *No email confirmation from the adjuster to authorize the pack-out means no scheduling of the Pack-Out
   4. **Xactimate Estimate Should be added in QuickBooks Online**
   *Estimate should be added in QuickBooks Online and should have a status of PENDING.
   * Attach the PDF copy of the estimate
   *Change the status from Pending to Accepted once approved
   * Create an invoice out of the estimate amount
   *Make sure to add the insurance or contractor's email address for QuickBooks Automated Follow-up

PRE-PACK-OUT CHECKLIST (Job Coordinator)

(If the estimate has been approved by the Insurance Adjuster, home-owner, contractor, proceed with this checklist)

1. **Add Pack-Out Schedule to T-Sheets**
   1.1. Call and confirm to the home-owner the Pack-Out schedule
   1.2. Make sure number of technicians and number of approved labor hours are higher or matched with the T-Sheets hours
   1.3. Add the correct customer or project that was set up in T-Sheets that is synced to QuickBooks Online
2. **Call or email the vendor needed for the job if there is any like for Sub-Zero, Piano Moving etc.**
3. **Call or Email a reminder to the homeowner on the scheduled pack-out (24hours before schedule)**
4. **Do not schedule a pack-out unless work authorization is signed**
5. **Do not schedule a pack-out unless submitted estimate is approved by the insurance adjuster**

PRE-PACK-OUT CHECKLIST (Team Lead)

6. **Print a list of materials needed for the Pack-Out**
7. **Print barcodes for boxes and tags/labels for large and unboxed contents**
8. **Make sure that vehicles to be used has no scheduled maintenance**

PACK-OUT DAY CHECKLIST (Team Lead)

1. **PREPARATION (1-2 HOURS BEFORE THE SCHEDULED TIME)**
   *Make sure that the truck has no scheduled maintenance
   *Make sure that there is enough gas to and from the job site
   *Make sure that materials needed for the job is 100% loaded in the truck
   *Make sure that PPEs are complete
   *Make sure to have the exact correct address of the job
   *Call the home-owner to inform that the pack-out team will arrive on or before a 3-hour-window of the start Pack-Out scheduled time
   *Call to confirm schedule to the vendor needed for the job if there is any
   *Make sure to bring un-signed work forms
   *Make sure to have the vehicle insurance
   *Make sure to bring any gate pass (if required)
   *Make sure that iPhones have enough battery to document the pack-out day

2. **Job Site Arrival – Unloading of Materials from the truck to the respective rooms need to pack-out**

3. **Inventory Scanning and Barcoding**

   *Make sure that all contents should be in a correct category and status
   *Make sure that pictures of the contents are in the correct room assignment set up in iCat
   *Taking Notes is crucial – Make sure to capture pre-existing damages and put it under room notes in iCat.

4. **Packing and Boxing of Contents**
   *Make sure that items should be categorized according to descriptions and locations
   *Make sure that the correct packing materials are added in the description
   *Make sure that boxed and un-boxed items are properly labelled
   *Make sure that all labelled items are properly packed inside the box
   *Make sure that there is a content items list with Images per room
   *Make sure that all inventoried items with Images are uploaded properly in iCat

5. **Loading of Boxes from affected rooms to the moving truck**
   *Moving technicians to deliver contents from the affected rooms to the moving truck
   *Make sure to make inventory of the boxes before loading in the moving truck.
   *Truck loaders to properly arrange boxes and make sure unboxed furniture are properly secured with blankets

POST PACK-OUT DAY CHECKLIST (Team Lead)

1. Team Lead to post completion of the pack-out in Voxer
2. If the team exceed from the estimated number of hours submitted to the insurance, they need to report it in Voxer for the estimator to revise the estimate
3. Supporting documentation and reasons for overtime should be uploaded in iCat
4. If there were issues like damaged items or any accidents on the road or in the job site
5. If there are last minute changes happened in the job-site such as
   1. Over Time – Team lead should share in Voxer the reason for additional hours
   2. If Pack-Out was suddenly changed to Pack-On-Site so estimate should be revised and eliminate initial storage service included
   3. If there are vendors added that are not included

POST PACK-OUT DAY CHECKLIST (Job Coordinator)

1. Job Coordinator to communicate with the team lead on how the service went
2. Should inform the public adjuster/contractor that pack-out has been finished
3. Should inform the insurance adjuster that the pack-out has been finished
4. Should revise estimate if there are line items that need to be deleted or included such as:
   1. Additional vendors hired on the day of the pack-out (Rocket Shell for POD containers, piano movers, artwork expert)
   2. Additional hours approved by the home-owner
5. Job Coordinator to check iCat if there are missing important information like
   1. Pack-Out photos
   2. Customer's basic information (email address, phone number)
6. Job Coordinator should call the home-owner and get the email address where to send
   1. iCat portal access
   2. Invoices – If check will be endorsed to the home-owner
   3. Work Authorization for the home-owner to sign via docusign and file in iCat
7. If job is based on actual labors, job coordinator should send the following information to the insurance adjuster or the contractor:
   1. Exclusively Contents signed W-9 form
   2. Signed work authorization form from the home-owner
   3. Adjuster's iCat log-in – system generated username and password should be given to the insurance adjuster
   4. Room List with Images Report from iCat
   5. Contents List with Images from iCat
8. Once job is completed, create an invoice out of the pending estimate created in QuickBooks and start sending payment follow-ups via email and phone calls
9. Job Coordinator to confirm the secured email address to send invoices are correct and should be recorded in QuickBooks
10. 1 week – Adjuster should respond within a week thru email or else give a call the following week to know what is going on with the claim

11. Job Coordinator to contact the home-owner and ask assistance to contact the insurance adjuster and follow-up payment on Exclusively Content's behalf.
12. If the adjuster confirmed that payment is processed, ask if:
    1. They can send a photo of the check via mail so we can process it electronically
    2. Confirm if it is named and will be mailed directly to Exclusively Contents or to the home-owner
    3. If the check will be endorsed to the home-owner, call the home-owner to confirm if they already received it and if they can issue EC a check (can be picked-up, mailed or just to attach the photo of the check in the email)
13. Storage service invoices should always be up to date and will be sent out every 5th of the month as agreed, regardless of the storage period
14. Pack-Back estimate should be prepared immediately regardless of the pack-back date and should be:
    1. Total hours should be not less than 75% of the pack-out hours or should be the same
    2. Total move-back estimate amount should be 75% of the pack-out estimate amount
    3. Move-back Estimate should be created in QuickBooks and PDF Xactimate copy should be attached.
    4. Move-Back estimate should be in PENDING status and will only be changed to ACCEPTED and an invoice should be created out of the pack-back estimate amount once Move-Back estimate is approved, on schedule or already finished.

PRE MOVE-BACK DAY CHECKLIST

1. When the home-owner called to inform that repairs have been completed and he/she is ready for the scheduled move-back, job coordinator should check:
    1. Check if there is a pending payment from the pack-out and storage services.
    2. Final Prorated Storage invoice until the day before the move-back schedule should be created and be sent to the insurance adjuster
    3. Job Coordinator should send the move-back estimate together with the unpaid invoices including the final prorated storage invoices.
    4. If there is no clear approval of the submitted estimate, move-back schedule will not be granted unless the adjuster will inform Exclusively Contents that check is mailed out.

2. Once estimate has been approved and payment is already mailed out
    1. Job Coordinator to post in Voxer, informing the team that move-back estimate has been approved
    2. Team Lead or the Job Coordinator will call the following:
        1. Home-owner – tell the home-owner that estimate has been approved. Confirm the move-back schedule to the home-owner
        2. Job Coordinator or Team lead to post in Voxer group the confirmed schedule
        3. Confirmed schedule should be added in T-Sheets
        4. Inform the contractor on the confirmed move-back schedule
        5. Check the estimate if there are vendors involved

1. If there is a POD container – schedule a pick up on the same date of the move-back
2. If there are re-installation of appliances – call and schedule with Tom's Moving
3. Whichever vendor is involved, make sure to have them scheduled before or after the move-back schedule.

LOADING OF TRUCK - MOVE-BACK DAY CHECKLIST

1. Team lead will prepare a pick-up through iCat and will make sure to match all the boxes from the storage vaults
2. Loading of Truck hours should match the submitted estimated hours

MOVE-BACK DAY CHECKLIST

1. PREPARATION (1-2 HOURS BEFORE THE SCHEDULED TIME)

*Make sure that the truck has no scheduled maintenance
*Make sure that there is enough gas to and from the job site
*Make sure that all boxes from storage vaults are 100% loaded in the truck
*Make sure that PPEs are complete
*Make sure to have the exact correct address of the job
*Call the home-owner to inform that the move-back team will arrive on or before a 3-hour-window of the start Pack-Out scheduled time
*Call to confirm schedule to the vendor needed for the job if there is any
*Make sure to bring un-signed work forms
*Make sure to have the vehicle insurance
*Make sure to bring any gate pass (if required)
*Make sure that iPhones have enough battery to document the move-back day

2. Job Site Arrival – Unloading of boxes from the moving truck to the original room location

3. Inventory Scanning and Barcoding

*Make sure that all contents should be in a correct category and status
*Make sure that all boxes will be delivered to the original room they were placed or depending on the customer's request.

4. Un-Packing and Un-Boxing of Contents

1. Make sure to un-box and un-pack all items carefully and place them in the original location. Refer to iCat photos and information
2. If there are unexpected damages happened during the move-back – list down and add the items in the MB Damage Room in iCat.
3. Make sure that the home-owner is aware of the current value of the item/s

    Make sure that move-back hours should matched with the insurance approved hours, any overtime should be subject for approval unless supported by the insured and additional hours should be requested to the insurance adjuster.

    If there are damaged items:

4. Team Lead or Job Coordinator to check on the market value of the items and check if the home-owner wanted it to be replaced or reimbursed.
5. Team Lead to explain the replace or reimburse process of Exclusively Contents and to give an assurance to the customer to avoid holding up of the pack-back check.
6. Make sure to issue the home-owner a check with an agreed replacement value amount

Wrap up with the home-owner

1. Team Lead should have a final checking of the rooms after unpacking
2. Team Lead should communicate to the home-owner and ask if there are pending questions, issues and request before the team leaves the job-site.
3. Team Lead should let the home-owner answer the Customer Satisfaction Survey and if possible to have a group photo from the move-back team with Exclusively Contents banner for testimonials purposes.

POST MOVE-BACK DAY CHECKLIST

Billing and Collections
1. Make sure that all payment is cleared. If check is endorsed to the home-owner, prepare a FedEx pick-up or ask for a photo of the check and send it via email to process electronically.
2. If promised arrival of the check exceeded 1 month after the move-back has been performed, 2% late fees will be applied
3. 2 months after the promised date of the check's arrival/ 2 months after the pack-back has been performed, Demand Letter from Legal Shield will be issued to the insured or who over's responsible for the final payment.
4. Make sure that all payment is properly applied in QuickBooks Online

Jobs

1. Before closing the job in iCat, make sure that all items for repairs and items for reimbursement and replacement should be returned to the home-owner.
2. Make sure to send all move-back photos to the handling adjuster as well as the copy of the actual labor logs if requested.
3. Make sure that all recurring payment from the vendors should be stopped.
4. Inform the handling insurance adjuster as well as the contractor that the service has been finished.

Commission:

1. Create a bill in QuickBooks every time there is a payment received from the insurance or from the insured.
2. Make sure to remove storage services from the total service invoice.
3. Make sure to issue a check based on the professional discount percentage
4. Make sure to update the commission tracker
5. Make sure to share and send the professional discount tracker to the contractors