Virginia Notation Template Examples: Client Log Notes

(**ALWAYS**: Update information based on TREDS and SOP)

VA IID TREDS:

Note template when TREDS has been Received:

- TREDS REFERRAL RECEIVED ON (date you received TREDS) - Event Date: (09/13/2022) - Order Type: (Court/DMV) - Program Length: (6 Months) - Monitoring Agency: (Southeastern Virginia ASAP) - Court Name: (Suffolk General District) – (your initials)

- Let me walk you through how the cost works so everything is clear upfront. Do you have a pen and paper handy?

  When you arrive for installation you will pay a *Installation LABOR price of $65 along with a $20 STATE FEE - Your first 14 days of service, including startup costs and the Loss Protection Plan, will be automatically billed the night of installation, totaling $38.20. - The next 14 days after, your payment will be (2nd Pay Cycle) $38.20 autobilled to your card on file, The required $20 state fee is charged on every other autobill payment. In other words, the FIRST payment of the month is $58.20 and the second payment is $38.20. * there is no calibration fee but the client must come back to monitoring and calibration every 28 days.

- Advised client to bring: Photo ID (if not available, must provide by 1st appt) Current registration, Proof of insurance, Payment and VASAP Consent to Install Form *If applicable.

Note template when TREDS has NOT been Received:

No TREDS:

- No TREDS referral received… advised client to have ASAP send over TREDS referral.

- Let me walk you through how the cost works so everything is clear upfront. Do you have a pen and paper handy?

  When you arrive for installation you will pay a *Installation LABOR price of $65 along with a $20 STATE FEE - The first 14 days of service Your first 14 days of service, including startup costs and the Loss Protection Plan, will be automatically billed the night of installation, totaling $38.20. - The next 14 days after, your payment will be (2nd Pay Cycle) $38.20 autobilled to your card on file, The required $20 state fee is charged on every other autobill payment. In other words, the FIRST payment of the month is $58.20 and the second payment is $38.20. * there is no calibration fee but the client must come back to monitoring and calibration every 28 days.

- Advised client to bring: Photo ID (if not available, must provide by 1st appt) Current registration, Proof of insurance Payment, and VASAP Consent to Install Form *If applicable.

VA ISA TREDS:

Note template when TREDS has been received:

- TREDS REFERRAL RECEIVED ON (date you received TREDS) - Event Date: (09/13/2022) - Order Type: (Court/DMV) - Program Length: (6 Months) - Monitoring Agency: Commission on VASAP - Court Name: (Suffolk General District) – (your initials)

NOTE - Do not modify the Monitoring Agency

- Let me walk you through how the cost works so everything is clear upfront. Do you have a pen and paper handy?

- When you arrive for installation, you will pay a *Installation LABOR price of $100 - The first 14 days of service, including startup costs, the $10 state cost and the Loss Protection Plan, will be automatically billed the night of installation, totaling $68.89. - The next 14 days after, your payment will be (2nd Pay Cycle) $58.89 autobilled to your card on file, The required $10 state fee is charged on every other autobill payment. In other words, the FIRST payment of the month is $68.89 and the second payment is $58.89. * In order to stay compliant, please return to the service center for a device inspection every 60 days.

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No TREDS:

- No TREDS referral received… advised client to have ASAP send over TREDS referral.
- Let me walk you through how the cost works so everything is clear upfront. Do you have a pen and paper handy?

- When you arrive for installation, you will pay a *Installation LABOR price of $150 - The first 14 days of service, including startup costs, the $10 state cost and the Loss Protection Plan, will be automatically billed the night of installation, totaling $68.89. - The next 14 days after, your payment will be (2nd Pay Cycle) $58.89 autobilled to your card on file, The required $10 state fee is charged on every other autobill payment. In other words, the FIRST payment of the month is $68.89 and the second payment is $58.89. * In order to stay compliant, please return to the service center for a device inspection every 60 days.