

Phone ---- GET THE JOB!!!!!!!!!!!!!!

Call ---rush to the job site - show up and give to sign the paperworks

30 MINUTES emergency response

Jeremy to give equipment like air movers

AJ needs to keep some equipment to his basement

ENCIRCLE TRAINING

PRINT PAPERWORKS

Get the Job or Earn the Job

SOMEONE IS ON THE WAY

Promise someone is on the way

of it within 30 min.

Recognize the emergency nature.

YourSGIHub has scripts

FIRST TEAM -- EMERGENCY REPOSE TEAM

24/7 ANSWERING SERVICE -- SOMEBODY HAS TO DO THE CALL

JC ANSWERING SERVICE / TELEMESSAGE (METROCALL)

SCRIPT AND TEST TO MAKE SURE THEY KNOW HOW TO RESPOND -- "THEY NEED TO USE 30 MINUTES RESPONSE TIME", SERVICE FEE AND BRIEF DESCRIPTION OF WHAT THE DISPATCH TEAM WILL DO

OFFICE STAFF --- WEEKDAYS --- WEEKEND SCHEDULE -- PHILIPPINE TEAM

VOLUNTEER

EMERGENCY RESPONSE TEAM --- ASSIGN PEOPLE TO GO THE JOB SITE

LA COUNTY - AJ

ORANGE COUNTY -- JEREMY, ZAMIRA AND LORENA

SECOND TEAM - PRODUCTION TEAM

EXPLAIN ASBESTOS AND LEAD TESTING

INSURANCE ONLY COVERS IMMEDIATE ACCIDENTS, EDUCATE, CALIFORNIA STATE LAW, MOLD, ASBESTOS, BIOHAZARD, DANGER AND BENEFITS OF HAVING A CLEAN AIR, PEOPLE WHO ARE SICK, WHY IT TAKES 3 MONTHS FOR EXAMPLE, OUR GOAL IS TO MAKE YOUR HOUSE HEALTHY, HEALTHY HOME

FLAMES

FIRE

LEAD

ASBESTOS

MOLD AND MOISTURE

ENVIRONMENTAL FACTORS, DANGES

SMOKE

TEA

TESTING

ESTIMATE

ABATEMENT

DOCUMENTATION/PAPERWORK -- EDUCATE HOMEOWNER ABOUT THE PROCESS AND TESTING -- FLAMES AND TEA -- QUICK SUMMARY DOCUMENT

CHECKLIST OF THE THINGS WE NEED TO DO -- "HEALTHY AND SAFE HOME" FLAMES AND TEA

WEBSITE --- DOCUMENTS, DANGERS OF FIRE (PAGE INFO) FIRE HAZARD

-- WAY TO EXPLAIN AN INSURANCE CLAIM COVERS TO THE CUSTOMER CUSTOMER NEEDS TO SIGN --- TO HIRE US!!!!!!!

SECOND TEAM - PRODUCTION TEAM

DOCUMENTATION -- THEY NEED TO DO ELECTRONICALLY

DISPATCH TEAM TO DO DOCUSKETCH

CLIENT TO SIGN PAPERWORKS -- WORK AUTHORIZATION

DOCUMENTATION TO PUT THE EQUIPMENT

ELECTRICITY -- GET THE COPY OF THE BILL SAME WITH WATER

Request the Client Help in Gathering Facts about the Job

Do not overwhelm the client

Only collect a few pieces of information

Ask Permission and use words like please help me get the best team over to the job site

Encircle App has the Policy Holder Request Photos and Videos by simply using their Smartphone.

You need Cell phone and Email address. Be gentle and collect it. Explain it will save them a lot of time.

<https://ec.ecrpro.com/encircle-download/Call-Intake-Web-Basics.pdf>

1. Collect Policy Holder Cell and Email and Name to be able to send them the link to get photos and videos

2. Send Encircle Policy Holder the link only for photos and videos
3. Thank them
4. Ask them - Collect Insured Name - Owner, Tenant, Onlooker and Type of Property, Source of the Loss, Any History etc..

Onsite Dispatched

Classes and Category can be discussed at the start of the process - part of the job inspection

Get Onsite with Equipment and Start the Emergency Jobs

Use forms provided by servpro called FNOL

<https://drive.google.com/file/d/1TOOCJ70UIYBVfKjNI0EQM3QS3RYp7wxz/view?usp=sharing>

Job Management Checklist 28527

https://drive.google.com/file/d/1wFx-oFbMlnxNjJ7wd_vPH9mOn3C8GiE5/view?usp=sharing

Job Flow according to Encircle

<https://encircleapp.zendesk.com/hc/en-us/categories/360002773011-Restoration-Contractors>

Encircle Primer Videos

<https://encircleapp.zendesk.com/hc/en-us/articles/360053613311-Introduction-and-Primer-Videos>

Documenting the Jobs Encircle

<https://encircleapp.zendesk.com/hc/en-us/articles/360051465411-1-Inbox-Overview-Mobile>

Encircle in Spanish

<https://encircleapp.zendesk.com/hc/en-us/articles/360058291452-Mobile-Basics-Spanish>

Scope Sheets

24 Hours Tech Mitigation Scope Sheets

https://ec.ecrpro.com/24hr-Tech-Mit-Pack-7_3.pdf

NetClaim Scope Sheet

<http://netclaims.ecrpro.com/>

Encircle Scope Sheet to add

After Work Authorization is signed

We can start the initial Emergency work to make the environment safe and stop further damage

Furniture blue block to protect, shut off the main water source

Collect the key contacts including Plumbers, Contractors, Land Lords, Adjusters and other info

Since we have work authorization signed we can contact the adjuster with no risk of losing the job.

Share the Encircle Information

Share Encircle Photos specific rooms

Share Jobs with Contractors and Adjusters

Safety and Compliance

BLAM

B - BioHazard - Pet and Human Waste, Rotting Food, Sewage (Cate 1-3 and Class)

L - Lead testing in paints

A - Asbestos - Affect the lungs, tiny fibers and cause lung cancers - It is part of the manufacturing

M - Mold - Black and toxins. Cause headaches etc

Third-Party Testing and Safety Reporting

Required by Law

California Law, OSHA, CalOSHA, EPA

Need Third Party Testing and Abatement Approval

Need Consent Form

<https://drive.google.com/file/d/1DTpW39LipFNccTiQmEt1u3yASBzvU-JO/view?usp=sharing>

Customer Information Form 25801

<https://drive.google.com/file/d/1KhCnUaTTY2ohi2u6SZLN4liQ4ooZXS3K/view?usp=sharing>

Education is critical

Start the Job of Drying

1. Remove contents
2. Detailed Docusketch detailed notes affected areas including blue tapes
3. Flood Cuts - Access the wood behind the drywall

<https://ec.ecrpro.com/encircle-download/Basic-Documenting-Encircle-MobileVisual-WorkFlow.pdf>

<https://ec.ecrpro.com/encircle-download/Moisture-Visual-Workflow.pdf>

Moisture

<https://encircleapp.zendesk.com/hc/en-us/articles/360051964491-Preview-of-the-Moisture-app>

<https://encircleapp.zendesk.com/hc/en-us/articles/360051964671-Step-3-Creating-a-Moisture-Map-Points-and-Dry-Standards>

Job Estimate

Prepare Estimate for Jobs

Points 86 -116

Job Management Checklist 28527

https://drive.google.com/file/d/1wFx-oFbMlnxNjJ7wd_vPH9mOn3C8GiE5/view?usp=sharing

24 Hours Tech Mitigation Scope Sheets

https://ec.ecrpro.com/24hr-Tech-Mit-Pack-7_3.pdf

Encircle Moisture Reading as well as drying information is critical for Xactimate and Karena

Close of Jobs

140-164

Job Management Checklist 28527

https://drive.google.com/file/d/1wFx-oFbMlnxNjJ7wd_vPH9mOn3C8GiE5/view?usp=sharing

Testimonial and Initial Emergency Response Review from Insured

<https://drive.google.com/file/d/1-a9Y4U5AJtx8Z1UIIBTrD33luBfdSzAX/view?usp=sharing>

You will be penalized if every vendor and subcontractor does not have a 1099-MISC form. Penalties could be anywhere from \$50 to \$270 for every missing form. If you are a contractor, vendor, or payee of a business then failing to fill out a W-9 form may attract IRS penalties.

<https://www.basis365.com/blog/risk-exposure-and-penalties-for-not-collecting-form-w-9-from-vendors>

<https://insurify.com/blog/home-insurance/leftover-money-from-insurance-claim/>

Homeowner Insurance Policy

<https://uphelp.org/claim-guidance-publications/faqs-about-home-insurance-claims-in-california/>

1. Subcontractor and the law about W9, Workers comp insurance, General Liability - BluSky, Celco and other companies.. what we need from subcontractors
2. Homeowner Insurance and the different section that describes claim, deductible, limits, exclusion...
3. California Law about Homeowner profiting from insurance claims

https://pro.housecallpro.com/pro/log_in_coastviewplumbing@gmail.com Packout@786

1. Admin - creates the job - icat
2. Prod - Scheduling
3. Prod - Documentaion
4. Admin - Close the job

Encircle -

1. Admin - Add the job in Housecall pro and encircle
2. Admin - send policy holder the link
3. Admin - Prod - Policy holder found - special room in Policy holder photos
4. Prod - Source of the leak - Photos - Docusketch - Identify rooms affected and unaffected - Work Authorization

EC - Initial Walk through - Blue Tape mean readings and affected areas.. - Contractor has handled everything - told pack certain rooms and certian stuff.. we take photos of those items and we exit .. with a signed work authorization

HO - who will call me insurance

Ho - who will pay for this

HO - does my insurance cover this

Ho - how long will this take

HO - do i need to move out

Ho - is this dangerous for my health

HO - who will pay my hotel, if I move out

HO - what will be the first step and the rest of them..

Ho - do you have a help me understand the entire process flow

Admin - It is going to complete the entire job..

<https://docs.google.com/document/d/1E9lpaVTmzNPwnswX9YKoaDaiT1eR105Me4B9NWOPdA/edit>

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