REVX

Overview: This article provides a step-by-step guide to reviewing the estimate and supplement package from the estimator.

What You Need:

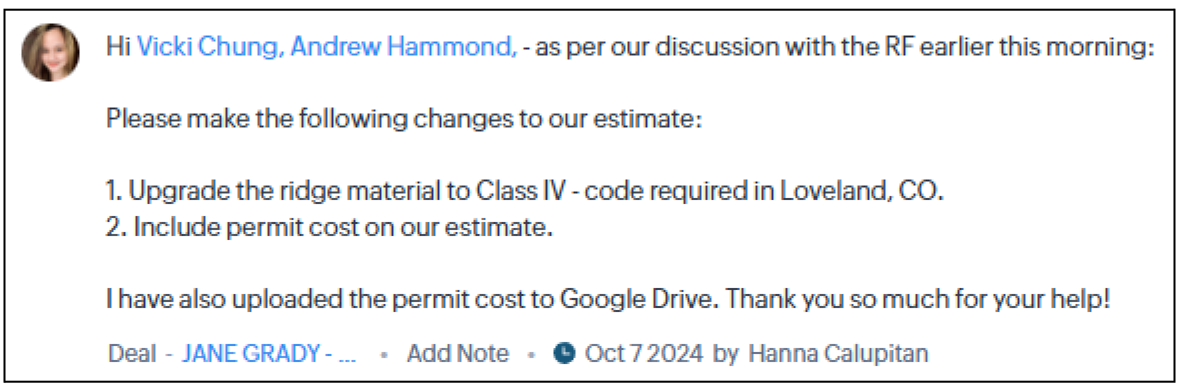
- CRM Deal
- Supplement
- 1-Work Drive for photos, MR and code documents

Contents:

Process in Reviewing the Estimate

STEP 1: Make sure to review and pay attention to the notes/supplement package from the estimator. Because of the following reasons:

❖ Estimators might have missed some items requested by the client.



Hi Vicki Chung, Andrew Hammond, - as per our discussion with the RF earlier this morning:

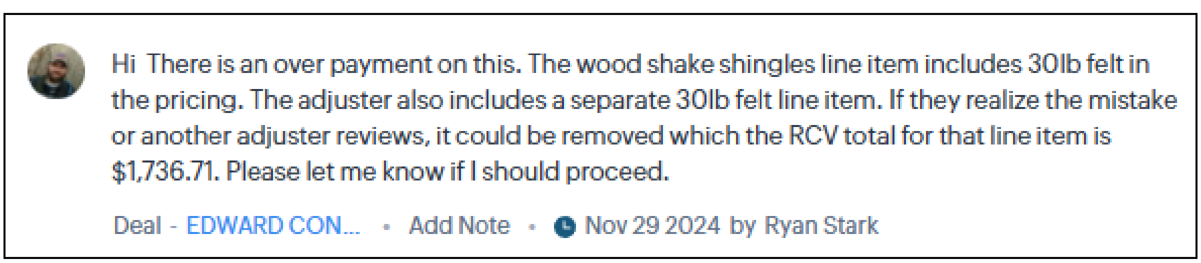
Please make the following changes to our estimate:

1. Upgrade the ridge material to Class IV - code required in Loveland, CO.
2. Include permit cost on our estimate.

I have also uploaded the permit cost to Google Drive. Thank you so much for your help!

Deal - JANE GRADY - ... • Add Note • Oct 7 2024 by Hanna Calupitan

❖ We are not pushing for supplement due to **Overpayment**.



Hi There is an over payment on this. The wood shake shingles line item includes 30lb felt in the pricing. The adjuster also includes a separate 30lb felt line item. If they realize the mistake or another adjuster reviews, it could be removed which the RCV total for that line item is $1,736.71. Please let me know if I should proceed.

Deal - EDWARD CON... • Add Note • Nov 29 2024 by Ryan Stark

❖ We are not pushing for supplement due to **Low Potential** claim.

Vicki Chung, Vannesa Cano, There seems to be only one garage correct? It is connected to the house by the causeway and they counted it under the house roof then have a separate roofing section they titled garage where they estimated for it's roofing (unless there is a separate garage not connected to the house which I do not believe to be the case). So they've estimated for the garage roof twice which is around $8k. If this is the case I don't believe this is worth supplementing. Please let me know how to proceed

Deal - BRIAN GOLDE... • Add Note • Oct 24 2024 by Andrew Hammond

STEP 2: The following needs to be correct on the estimate from estimators:

1. Client's Logo
2. Client's address
3. Homeowner's info - correct name and address
4. Estimator - should be yourself (the deal owner)
5. Your (deal owner's) phone number and our email. **For Liberty Mutual/SafeCo, it should be the Frontline (for GGR)/Client email we created for Liberty Mutual/SafeCo.** You can find the Client's email in **CSP Management Tools** on **CSP Passwords** tab: **[LINK]**
6. Claim number
7. Type of Loss
8. Price List

1 GREATER GOOD RESTORATION

Greater Good Restoration Inc.

799 Roosevelt Rd, #3-108 2
Glen Ellyn, IL 60137

3 Insured: Kennedy, Pamela
Property: 4602 Cresthaven Ln
Decatur, IL 62526-9364

4 Estimator: Ivy Fiel
Company: Greater Good Restoration Inc.
Business: 799 Roosevelt Rd, #3-108
Glen Ellyn, IL 60137

5 Business: (847) 220-7206
E-mail: info10.csp@gmail.com

6 **Claim Number:** 1366F393Q **Policy Number:** 7 **Type of Loss:** Hail & Wind

Date of Loss:
Date Inspected:
Date Received:
Date Entered: 6/18/2024 12:15 PM

8 Price List: ILDE8X_MAR24
Restoration/Service/Remodel
Estimate: PAMELA_KENNEDY_4602

9. Scroll all the way down on the estimate and make sure the pictures added on the estimate are all correct and labeled. (Ex. Gutters, Shingles, Flashing and etc.)

2-ROOF TOP Date Taken: 10/31/2024

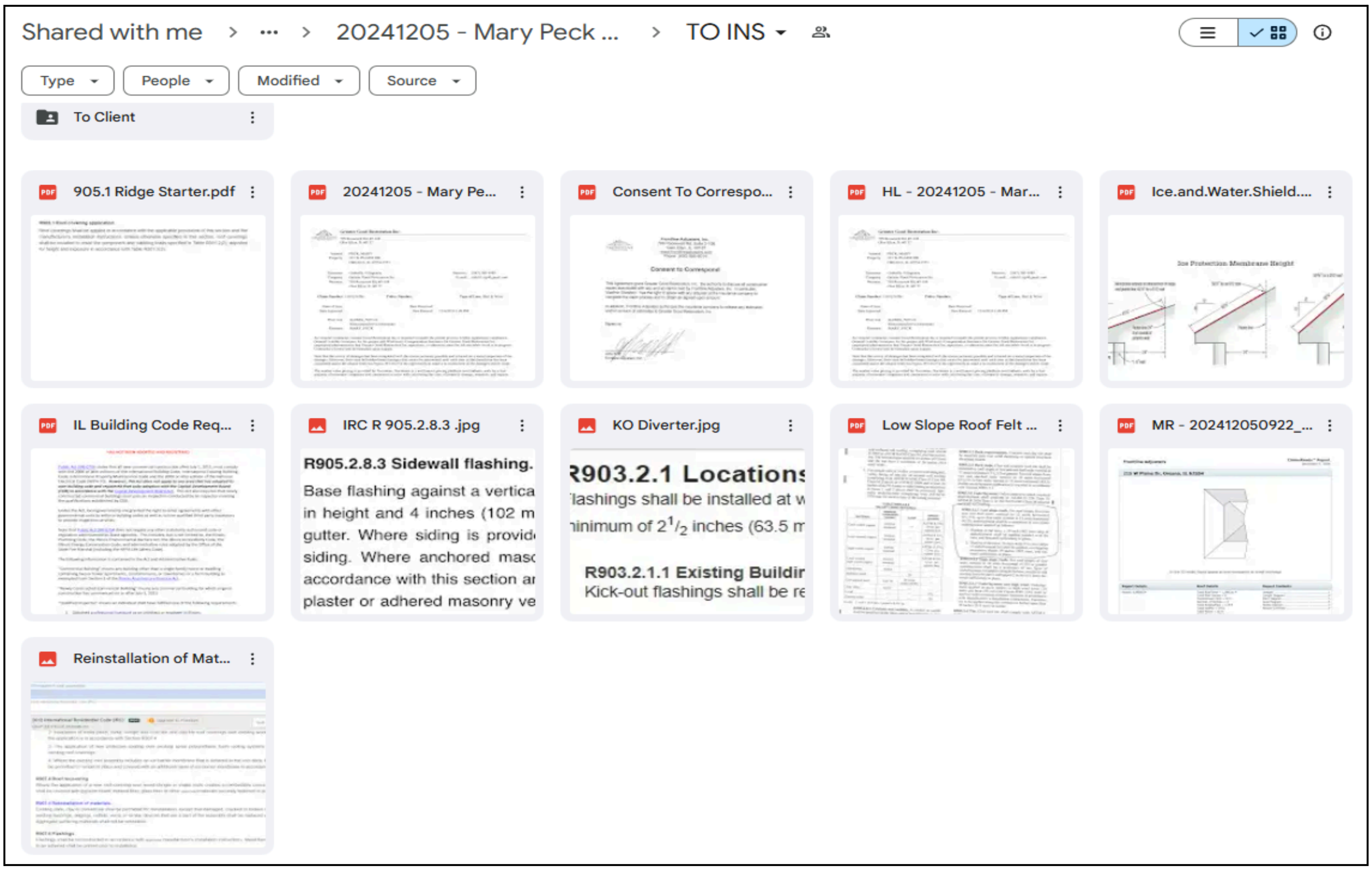
FIVE OF SIX PIPE JACKS (CIRCLED) - THREE FURANCE VENTS (ARROWS)

1-Overview Date Taken: 1/27/2025

Gable cornice strip. Copper flashing on this area.

STEP 3: As for the rest of the documents on the **package,** make sure all the needed documents are there:

1. Code document for the city.
2. All other code documents for coded items. (Counter check it from the estimate*)
3. CTC (Consent to Correspond)
4. The MR is for the correct home address.
5. Clean copy
6. Supplement estimate



STEP 4: If you wish to add line items with photos in the supplement, you can create a CRM note and task the estimator due on the next business day. Edit photos as needed (e.g., add arrows or crop) before attaching them to the CRM note.

If the Deal Owner has a **"Rush"** task, they should call the Estimator to ask if he has capacity for a same-day task. If yes, they should create a task with a same-day deadline, and the Estimator will complete it accordingly.

STEP 5: Change the stage to **"Ready for INS"** once you are sure that the estimate contains all necessary photos, code documents, and line items.

Checklist for REVX

Cover Page of Estimate:

- [x] ~~Client logo, name, address, and opening statement are correct.~~
- [x] ~~Homeowner's name & address are correct.~~
- [x] ~~Deal Owner info (as the Estimator) is correct, and email address (don't use info10 for liberty mutual/safeco).~~
- [x] ~~Claim #, Type of Loss, and Price List are correct.~~

Estimate Items/Photos:

- [x] ~~All SOL items are included & correct.~~
- [x] ~~All RF requests for items/quantities (if any) are included.~~
- [x] ~~Notes are present & accurate for all supplemental items.~~
- [x] ~~Photos are present and make sense, based on the items.~~
- [x] ~~Quantities make sense, based on the MR and actual property damage.~~
- [x] ~~Damaged items seen in the RF's photos are included in the estimate (unless the RF isn't repairing it).~~

Package:

- [x] ~~CTC.~~
- [x] ~~MR (unless including the full MR will hurt your estimate).~~
- [x] ~~Code docs (as needed).~~
- [x] ~~Manufacturer docs (as needed).~~
- [ ] Invoices/receipts (as needed).