



# Fannie Mae Agent Job Aid

## Repairs

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## OVERVIEW

This Job Aid contains information about repair tasks you will receive in Equator for a Fannie Mae property, including scoping, obtaining bids, and monitoring repair status.

Equator® is a task based workflow system. It tasks you to provide information to Fannie Mae throughout the REO process.

Task routing is based on the Fannie Mae REO workflow, which may include authority levels, internal business rules, state specific regulations, etc. Tasks may be triggered by various methods:

- Completion of a preceding task
- By date (scheduled tasks)
- Manually triggered (called Ad Hoc tasks)

**Note:** Any field that is required will be prefixed by a red asterisk.

## Minimum System Requirements

- Microsoft Windows XP SP3+
- (Recommended ) Internet Explorer v. 7.0
- Adobe Reader v. 8.0
- Adobe Flash Player v. 9.0
- JavaScript Enabled

## Acceptable Upload Formats

- Adobe .pdf
- Word .doc or .docx
- Excel .xls or .xlsx
- .jpg (under 400 kb)

## SCOPE REPAIRS (AGENT)

### Task Overview

The **Scope Repairs (Agent)** task is assigned to the Agent to create a list of repairs that needs to be performed on the property. The Agent provides the general category of the repair as well as a specific sub-category; the location of the item that needs repair, the type of repair and the quantity. For certain sub-categories, additional description of the repair may be required; also, for certain sub-categories, an image file may be required.

This task is for repair items only. For items not covered by the Form 1093, such as preservation and maintenance, use the Expense Reimbursement process. See the *Equator Agent User Manual* section on Expenses for further detail.

This task can be triggered when:


- The Sales Representative completes an Initial or Review Marketing Plan task with a Repaired strategy. (The Sales Representative may also message the Agent in Equator with further details about bid items to include or inspections required.)
- The Sales Representative completes the **Request Repair Bids** task. (Comments will show in the **Scope Repairs (Agent)** One View.)
- There is an MI (Mortgage Insurance) bid (when the property is marketed As Is).
- The Sales Representative requests a rescope because the scope is not sufficient.
- The Agent triggers manually via ad hoc. (See the “Important” section on page 6 for ad hoc guidelines.)

**Note:** The Repair Scopes tab displays all repair tasking. The repairs tasks are appended with a scope number to help link tasks together.

Use the Repair Scopes tab to see all repair tasks/deliverables, even those not assigned to you (such as the Repair Company/SAM, Fannie Mae, & MI).

You can add multiple repairs items through this task. (Also, once an item has been added to the list, you can delete items from the list prior to submitting the task.) Upon completion of the task, the SAM/Non-SAM matrix triggers which will determine for each repair item whether the repair item should be assigned to a SAM or to you (the Agent).

1. Click Scope Repair (Agent).
  - The Scope Repair (Agent) screen appears.
2. Information from the **Request Repair Bids** and the **Review Scope Repairs** task will be displayed in the one-view section above the task.



Repair Scopes					
Scope 1					
Repair Tasks					
Task Name	Role	Person	Servicer	Open Date	Due/Completed
Scope Repairs (Agent) - Scope 1	Agent	I. AGENT02	Fannie Mae	09/15/2016 8:35 (4)	09/20/2016 8:35 (-5)
Scope 2					
Repair Tasks					
Task Name	Role	Person	Servicer	Open Date	Due/Completed
Scope Repairs (Agent) - Scope 2	Agent	I. AGENT02	Fannie Mae	09/15/2016 10:38 (4)	09/20/2016 10:38 (-5)

3. Using the **Repair Bid Type** drop-down, select one of the following:

- Lender Required
- Marketing Repairs
- Vandalism
- Valuation (bids to validate the total cost of repairs to assist with determining the As Is value)

Scope Repairs (Agent)	
Repair Bid Type *	Select One
Approximate Square Footage	Select One
Repair Item	Lender Required
Category *	Marketing Repairs
	Vandalism
	MI Bids
	Valuation

**Note:** If this task triggers from the **Request Repair Bids** task or an MI bid, this field will be pre-populated.

4. (Optional) Enter the Approximate Square Footage.

**Note:** If there is a completed and approved Complete Appraisal order or a completed and approved Initial BPO order in the workflow, the system will pre-populate this field.

## SCOPE REPAIRS (AGENT) (CONTINUED)

5. Any negative responses to the questions require comments and will turn red.
6. **Scope Performed By** – General comments are required if Agent is selected instead of Scope Writer.
7. Use the following drop-downs to select the following required fields to add a Repair item:
  - Category
  - Sub-Category
  - Service Type

**Quantity** – This field defaults to “1” but is editable. Do not zero out the quantity.

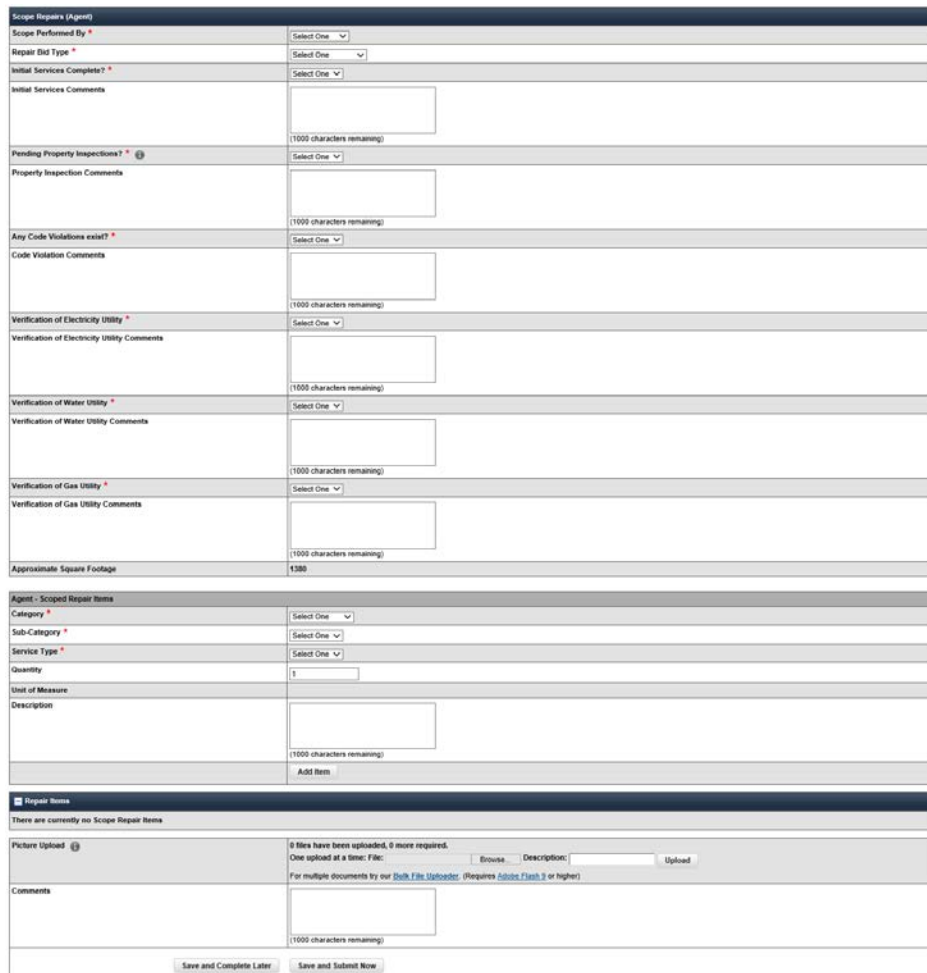
**Description** – This field is required if **Other** is selected from the Category drop-down.

**Note:** Add a detailed description noting location of the repair.

8. Click Add Item.
  - The new item appears in the **Repair Item(s)** section.
9. To add additional repair line items, repeat steps 3-6.
10. To Upload a Photo, click **Browse**, enter a Description, and click **Upload**.
11. Click Save and Submit Now.
  - The **Review Scope Repairs** task triggers to the Sales Representative.

**Note:** At least one repair item must be submitted in order for this task to be completed.

**Note:** To remove Repair Item(s), click the check box on the item(s) that you wish to remove and click Remove Item(s).



## SCOPE REPAIRS (AGENT) (CONTINUED)

Once the Sales Representative selects to proceed with the repair items, you will receive a message in Equator with the SAM(s) assigned to provide bids.

### Scope Repairs Upload Sheet Process:

To use the Fannie Mae Excel spreadsheet (**Scope Repairs Upload Sheet**) to complete the **Scope Repair** task:

- Using the **Scope Performed By** drop-down, select **Scope Writer**.
  - Information from the **Request Repair Bids** and the Review Scope Repairs task will be displayed in the one-view section above the task.
- Using the **Repair Bid Type** drop-down, select one of the following:
  - Lender Required
  - Marketing Repairs
  - Vandalism
  - MI Bids
  - Valuation

**Note:** If this task triggers from the **Request Repair Bids** task or an MI bid, this field will be pre-populated.

- Enter the Approximate Square Footage.

**Note:** If there is a completed and approved Complete Appraisal order or a completed and approved initial BPO order in the workflow, the system will pre-populate this field.

- Scope Upload**  
You must use the Scope Repairs Upload Sheet provided by Fannie Mae to complete the Excel Spreadsheet upload for the Scope Upload. See **Scope Repairs Upload Sheet – Scope Writer** instructions, next page.

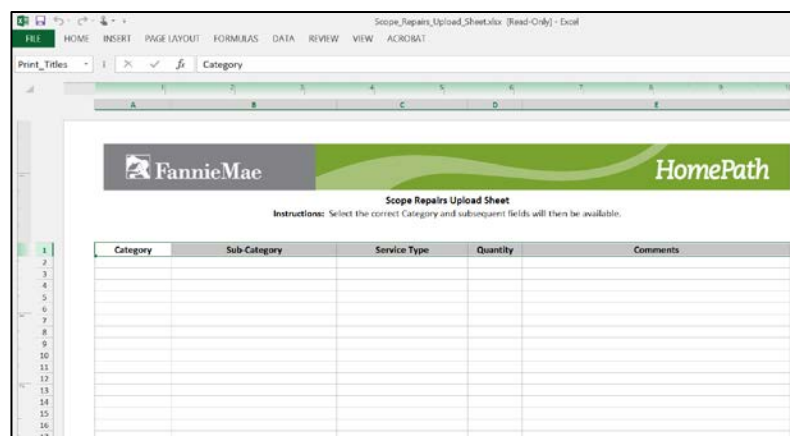
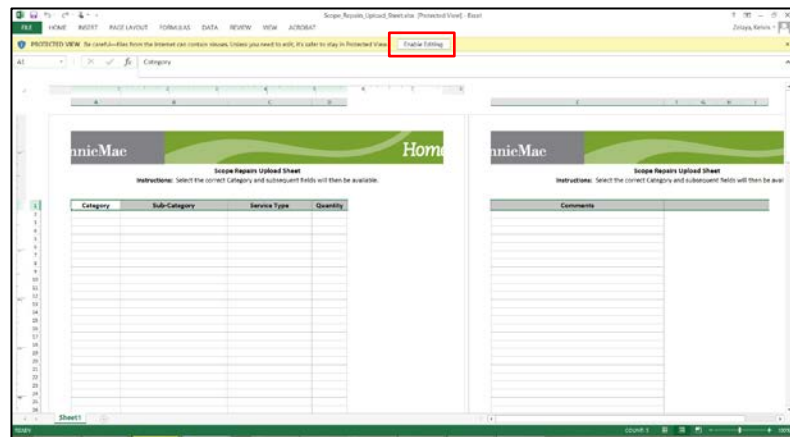
Scope Repairs (Agent)	
Scope Performed By *	Select One Agent Scope Writer
Repair Bid Type *	▼
Approximate Square Footage	938
<b>Agent - Scoped Repair Items</b>	
Category *	Select One ▼
Sub-Category *	Select One ▼
Service Type *	Select One ▼
Quantity	1
Unit of Measure	
Description	<div></div> (1000 characters remaining)
Add Item	

## SCOPE REPAIRS UPLOAD SHEET – SCOPE WRITER

### Tips to Avoid Rejection Errors

Here are a few things you need to know when using the Scope Repairs Upload Sheet (Scope Writer).

- You will need Microsoft Excel or a program that can read .XLSX extensions.
  - The first row under each column title in the spreadsheet is a dropdown menu. (**Category**, **Sub-Category**, and **Service Type**)
  - When you select a **Category**, the **Sub-Category** dropdown menu should only give you selections for the **Category** selected.
  - Service Type** is a dropdown menu. Select the appropriate service type.
  - Quantity** must be a whole number. Enter the number “1”. Do not leave blank.
  - Comments** feed through to the Sales Representative. You can use this section to communicate to the Sales Representative and to provide additional information to help the repair decision.
  - If you start a **Category** and do not finish it, you will receive an error message when you try to upload the spreadsheet. Do not leave any rows incomplete. Either complete it or remove the line item.
- Open the Scope Writer (Scope Repairs Upload Sheet).
    - The spreadsheet opens and may display the **Enable Editing** button. Click this button to edit the spreadsheet.
  - The blank Scope Writer will be ready for editing after you click the **Enable Editing** button.

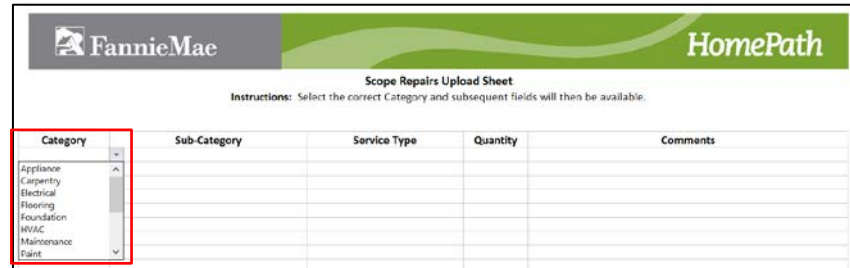




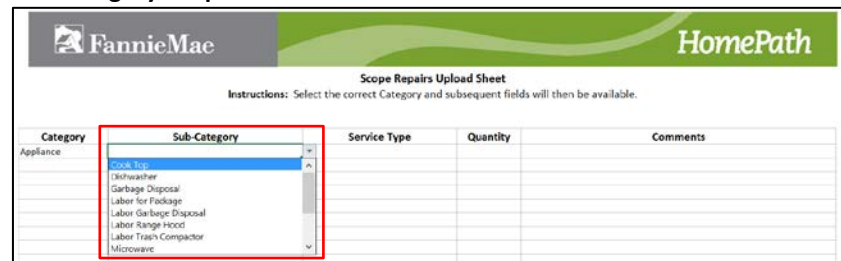
## SCOPE WRITER (CONTINUED)

6. Complete the Scope Writer line item by line item, using each dropdown menu to complete:
  - **Category**
  - **Sub-Category**
  - **Service Type**
7. **Quantity:** Enter the quantity needed.
8. **Comments:** Write any comments needed to help the decision process for the line item. Remember your Sales Representative will be able to see this comment.
9. Continue entering each line item until all repairs are listed.

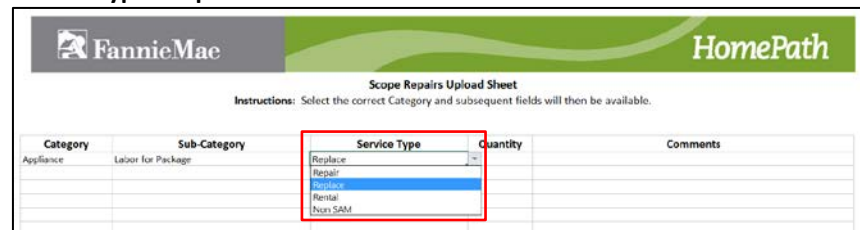
### Category Dropdown Menu:



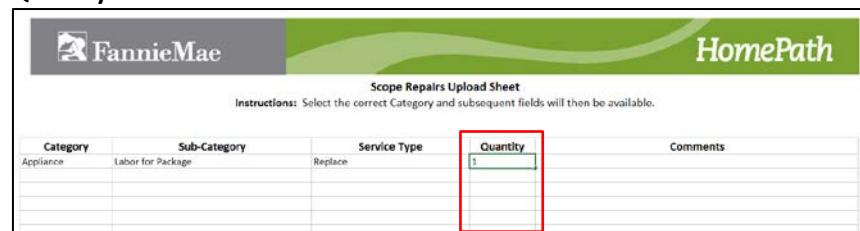
### Sub-Category Dropdown Menu:



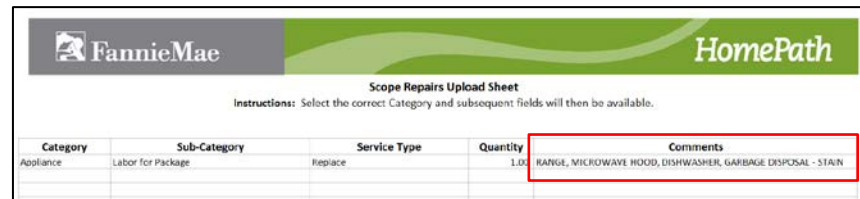
### Service Type Dropdown Menu:



### Quantity:

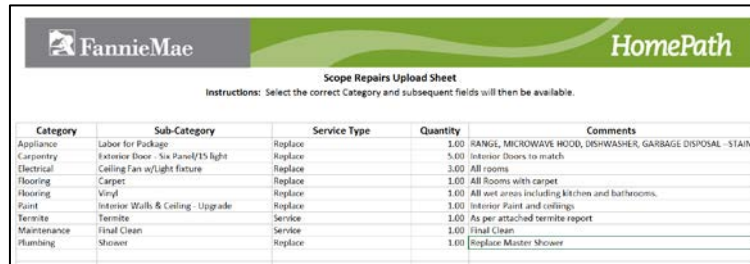


### Comments:



## SCOPE WRITER (CONTINUED)

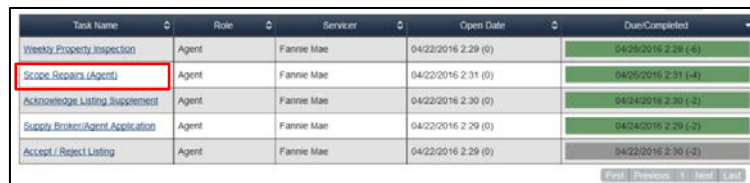
10. Here's an example of what the Scope Writer will look like once completed. Save to a location you will be able to find quickly. It may help to save as "REO-Scope Writer" to quickly locate.



**Scope Repairs Upload Sheet**  
Instructions: Select the correct Category and subsequent fields will then be available.

Category	Sub-Category	Service Type	Quantity	Comments
Appliance	Labor for Package	Replace	1.00	RANGE, MICROWAVE HOOD, DISHWASHER, GARBAGE DISPOSAL - STAIN
Carpentry	Exterior Door - Six Panel/15 light	Replace	5.00	Interior Doors to match
Electrical	Ceiling Fan w/light fixture	Replace	3.00	All rooms
Flooring	Carpet	Replace	1.00	All Rooms with carpet
Flooring	Vinyl	Replace	1.00	All wet areas including kitchen and bathrooms.
Paint	Interior Walls & Ceiling - Upgrade	Replace	1.00	Interior Paint and ceilings
Termite	Termite	Service	1.00	As per attached termite report
Maintenance	Final Clean	Service	1.00	Final Clean
Plumbing	Shower	Replace	1.00	Replace Master Shower

11. Find the **Scope Repairs (Agent)** task for your property and open it.



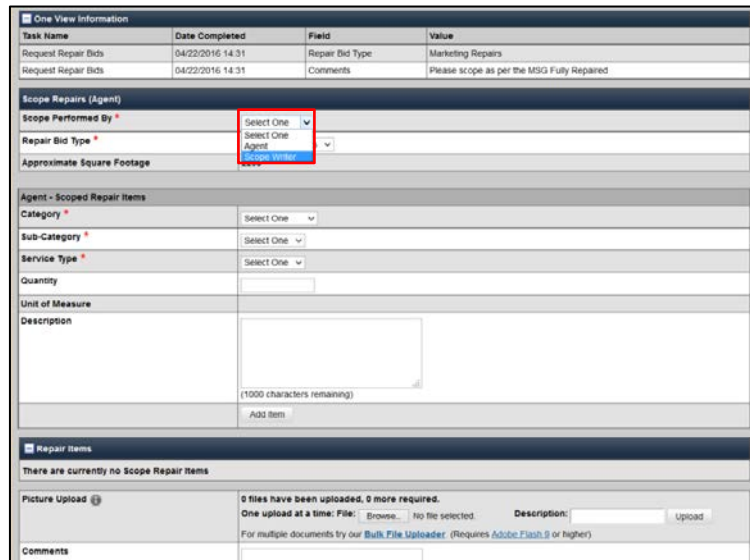
Task Name	Role	Service	Open Date	Due/Completed
Weekly Property Inspection	Agent	Fannie Mae	04/22/2016 2:29 (0)	04/22/2016 2:29 (4)
<b>Scope Repairs (Agent)</b>	Agent	Fannie Mae	04/22/2016 2:31 (0)	04/22/2016 2:31 (4)
Acknowledge Listing Supplement	Agent	Fannie Mae	04/22/2016 2:30 (0)	04/24/2016 2:30 (-2)
Supply Broker/Agent Application	Agent	Fannie Mae	04/22/2016 2:29 (0)	04/24/2016 2:29 (-2)
Accept / Reject Listing	Agent	Fannie Mae	04/22/2016 2:29 (0)	04/22/2016 2:30 (-2)

12. Find the **Scope Performed By** field and select **Scope Writer** from the dropdown menu.

**Note:** If you select **Agent** it will not work.

- A **Scope Upload** section will then display with the following fields:
  - Scope Writer Company Name**
  - Scope Writer Company Email**
  - Scope Writer Company Phone Number**
  - Scope Upload**

Complete this section with your contact information.



**One View Information**

Task Name	Date Completed	Field	Value
Request Repair Bids	04/22/2016 14:31	Repair Bid Type	Marketing Repairs
Request Repair Bids	04/22/2016 14:31	Comments	Please scope as per the MSG Fully Repaired

**Scope Repairs (Agent)**

Scope Performed By: **Select One** (Dropdown menu with "Scope Writer" selected)

Repair Bid Type: **Select One** (Dropdown menu with "Marketing Repairs" selected)

Approximate Square Footage: 2228

**Agent - Scoped Repair Items**

Category: **Select One** (Dropdown menu)

Sub-Category: **Select One** (Dropdown menu)

Service Type: **Select One** (Dropdown menu)

Quantity:

Unit of Measure:

Description:

(1000 characters remaining)

Add Item

**Repair Items**

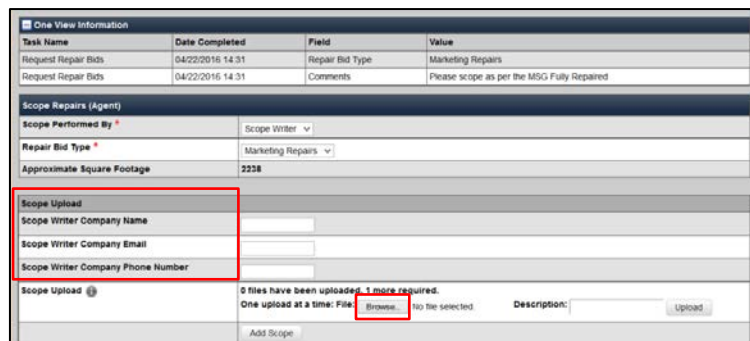
There are currently no Scope Repair Items

Picture Upload: 0 files have been uploaded. 0 more required. One upload at a time: File:  No file selected. Description:  Upload

For multiple documents try our Bulk File Uploader (Requires Adobe Flash 9 or higher)

Comments:

13. Select **Browse** to find the Scope Writer spreadsheet you saved.



**One View Information**

Task Name	Date Completed	Field	Value
Request Repair Bids	04/22/2016 14:31	Repair Bid Type	Marketing Repairs
Request Repair Bids	04/22/2016 14:31	Comments	Please scope as per the MSG Fully Repaired

**Scope Repairs (Agent)**

Scope Performed By: **Scope Writer** (Dropdown menu)

Repair Bid Type: **Marketing Repairs** (Dropdown menu)

Approximate Square Footage: 2228

**Scope Upload**

Scope Writer Company Name:

Scope Writer Company Email:

Scope Writer Company Phone Number:

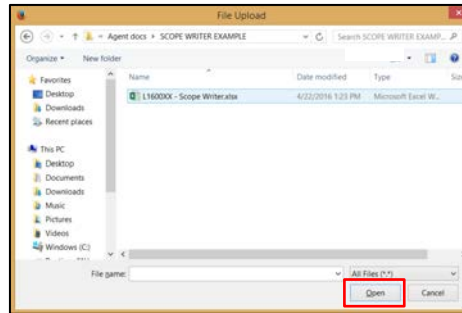
Scope Upload: 0 files have been uploaded. 1 more required. One upload at a time: File:  No file selected. Description:  Upload

Browse

Add Scope

## SCOPE WRITER (CONTINUED)

14. Locate your saved Scope Writer and click **Open**.



15. Label the **Description** and click the **Upload** button.
  - The Scope Writer spreadsheet is now uploaded to Equator.

Scope Upload

Scope Writer Company Name: COMPANY NAME

Scope Writer Company Email: Your\_Email@Ema

Scope Writer Company Phone Number: 626-867-5309

Scope Upload ⓘ: 0 files have been uploaded, 1 more required. One upload at a time: File: Browse... L1600XX - Scope Writer.xlsx Description: Scope Writer Upload

Add Scope

16. Click the **Add Scope** button to start the script.
  - The line items from the Scope Writer will then transfer.
  - Scroll to the bottom of the screen to see the line items.

Scope Upload

Scope Writer Company Name: YOUR COMPANY

Scope Writer Company Email: Your\_Email@Ema

Scope Writer Company Phone Number: 626-867-5309

Scope Upload ⓘ: 1 files have been uploaded, 0 more required. You have uploaded the maximum number of allotted files for this category.

Scope Writer Save

Add Scope

Repair Items

Level	Location	Category	Sub-Category	Service Type	Quantity	Unit Of Measure	Additional Description
		Appliance	Labor for Package	Replace	1.0	Each	RANGE, MICROWAVE HOOD, DISHWASHER --STAINLESS STEEL
		Carpentry	Exterior Door - Six Panel	Replace	5.0	Each	Interior Doors to match
		Electrical	Ceiling Fan w/Light fixture	Replace	3.0	Each	All rooms
		Flooring	Carpet	Replace	1.0	Square Yards	All Rooms with carpet
		Flooring	Vinyl	Replace	1.0	Square Yards	All wet areas including kitchen and bathrooms
		Maintenance	Final Clean	Service	1.0	Each	Final Clean
		Paint	Interior Walls & Ceiling - Upgrade	Replace	1.0	Square Foot	Interior Paint and ceilings
		Plumbing	Shower	Replace	1.0	Each	Replace Master Shower
		Termite	Termite	Service	1.0	Each	As per attached termite report

Download to Excel

Remove Selected Repair Items

Picture Upload ⓘ: 0 files have been uploaded, 0 more required. One upload at a time: File: Browse... No file selected. Description: Upload

For multiple documents try our [Bulk File Uploader](#) (Requires Adobe Flash 9 or higher)

Comments

## SCOPE WRITER (CONTINUED)

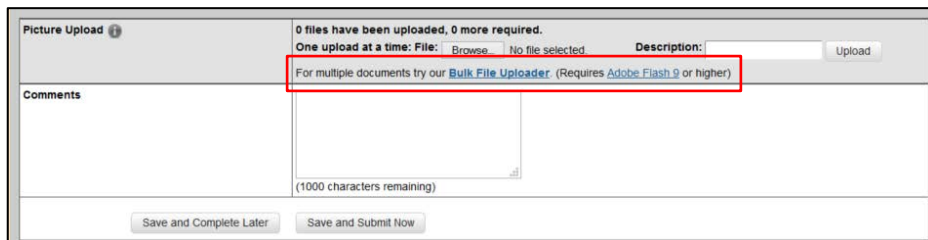
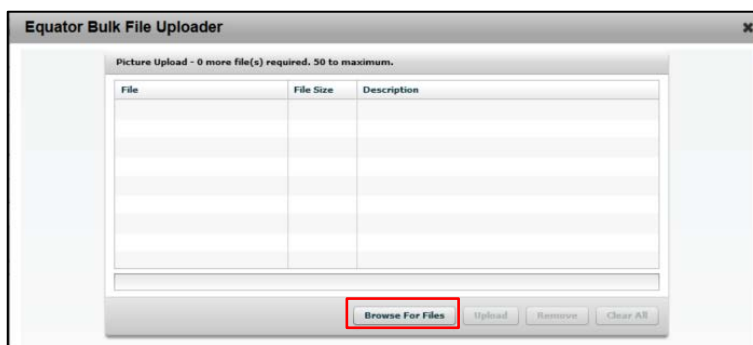
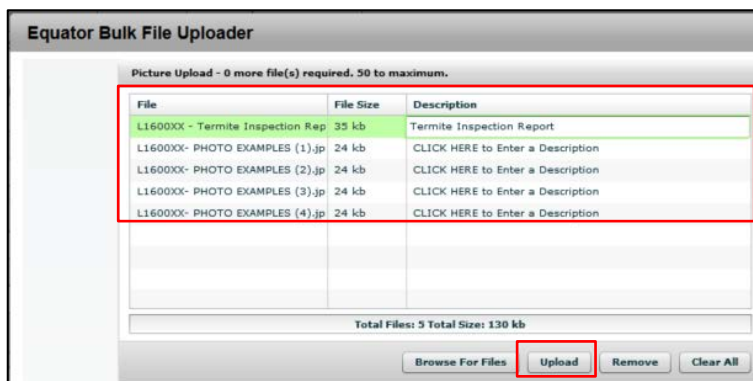
### Bulk File Uploader

Next you will need to use Bulk File Uploader to upload any attachments:

- Any file other than JPG format
- Inspection reports in PDF format
- Picture addendums in PDF Format
- Pictures

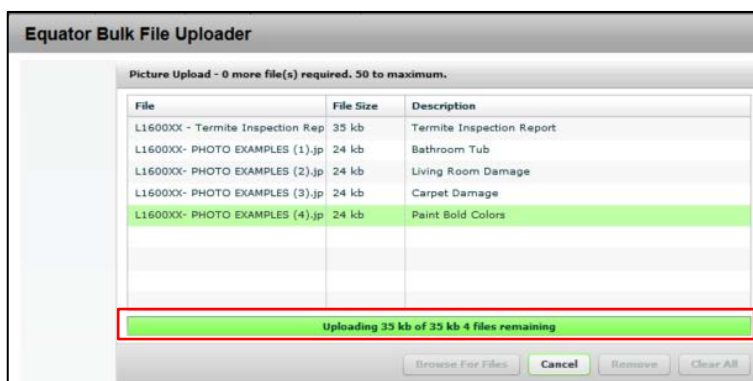
**Note:** Adobe Flash software is required to use the Bulk File Uploader, so update Adobe Flash as needed.

1. Click the **Bulk File Uploader** link.
  - The Picture Upload window will open.
2. Select **Browse For Files** to find the files you will need to upload.
3. Select the files and use a descriptive label for each attachment.
4. Click the **Upload** button.
  - The file upload will begin and the Picture Upload window will close when completed.

File	File Size	Description
L1600XX - Termite Inspection Rep	35 kb	Termite Inspection Report
L1600XX- PHOTO EXAMPLES (1).jp	24 kb	CLICK HERE to Enter a Description
L1600XX- PHOTO EXAMPLES (2).jp	24 kb	CLICK HERE to Enter a Description
L1600XX- PHOTO EXAMPLES (3).jp	24 kb	CLICK HERE to Enter a Description
L1600XX- PHOTO EXAMPLES (4).jp	24 kb	CLICK HERE to Enter a Description

Total Files: 5 Total Size: 130 kb



File	File Size	Description
L1600XX - Termite Inspection Rep	35 kb	Termite Inspection Report
L1600XX- PHOTO EXAMPLES (1).jp	24 kb	Bathroom Tub
L1600XX- PHOTO EXAMPLES (2).jp	24 kb	Living Room Damage
L1600XX- PHOTO EXAMPLES (3).jp	24 kb	Carpet Damage
L1600XX- PHOTO EXAMPLES (4).jp	24 kb	Paint Bold Colors

Uploading 35 kb of 35 kb 4 files remaining

## SCOPE WRITER (CONTINUED)

5. Scroll down to see the uploaded files.
  - You can change the description of each file if you prefer.
  - You may also add a note in the **Comments** section; however these notes do not feed through to the Sales Representative.
6. Click the **Save and Submit Now** button.
  - The task is now completed.

<input type="checkbox"/>	Level	Location	Category	Sub-Category	Service Type	Quantity	Unit Of Measure	Additional Description
<input type="checkbox"/>			Appliance	Labor for Package	Replace	1.0	Each	RANGE, MICROWAVE HOOD, DISHWASHER, GARBAGE DISPOSAL --STAINLESS STEEL
<input type="checkbox"/>			Carpentry	Exterior Door - Six Panel/15 Light	Replace	5.0	Each	Interior Doors to match
<input type="checkbox"/>			Electrical	Ceiling Fan w/Light fixture	Replace	3.0	Each	All rooms
<input type="checkbox"/>			Flooring	Carpet	Replace	1.0	Square Yards	All Rooms with carpet
<input type="checkbox"/>			Flooring	Vinyl	Replace	1.0	Square Yards	All wet areas including kitchen and bathrooms.
<input type="checkbox"/>			Maintenance	Final Clean	Service	1.0	Each	Final Clean
<input type="checkbox"/>			Paint	Interior Walls & Ceiling - Upgrade	Replace	1.0	Square Foot	Interior Paint and ceilings
<input type="checkbox"/>			Plumbing	Shower	Replace	1.0	Each	Replace Master Shower
<input type="checkbox"/>			Termite	Termite	Service	1.0	Each	As per attached termite report

[Download to Excel](#)

Remove Selected Repair Items

**Picture Upload** ⓘ

5 files have been uploaded, 0 more required.

One upload at a time: File:  No file selected. Description:  Upload

For multiple documents try our [Bulk File Uploader](#) (Requires Adobe Flash 9 or higher)

Save

Save

Save

Save

Save

Comments

(1000 characters remaining)

### Important:

- **Ad Hoc Guidelines**
- If you trigger the **Scope Repairs** task via ad hoc incorrectly or you think the task has been triggered in error, message the Sales Representative to have it shut down.
- DO NOT ad hoc the **Scope Repairs** task to be pro-active on requesting marketing repairs on pre-listed properties. Equator will trigger repair tasking once the Sales Representative determines the marketing strategy.
- ONLY ad hoc the **Scope Repairs** task to identify:
- Work that is necessary for property preservation repairs prior to listing (e.g., plumbing or electrical work to restore utility service) \$500 or over, OR
- Additional repairs of \$500 or over required after marketing has started or completed.
- You should scope all repairs within one task: avoid submitting multiple **Scope Repairs** tasks.
- The **Scope Repairs** task may trigger on an As Is property if an MI Bid is needed. You should complete the task, referring to the REO Sales Guide for guidance on MI bids as needed.
- If the Sales Representative requests a rescope, all prior items will be included in the **Scope Repairs** task.
- If appliances are scoped, the labor line items will automatically be added to the scope. Continue to ONLY scope appliance labor if in a SAM area.

## DISTRIBUTE REPAIR BIDS (FOR NON-SAM)

### Task Overview

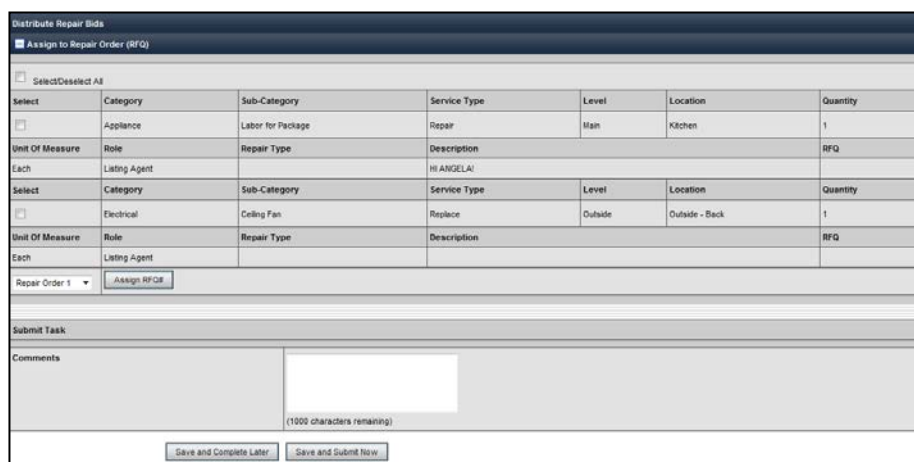
The **Distribute Repair Bids** task allows the Agent to view the list of all repair items that could not be assigned to a SAM contractor, and then separates the line items into groups (RFQ, or Request for Quote) – the aim of which is to group together those items which can be performed by a single contractor. Once the Agent has grouped the line items together and completes this task, one **Provide Repair Bid** task triggers per grouping to the Agent.

The **Distribute Repair Bids** task triggers upon completion of the SAM/Non-SAM Assignment matrix with the outcome that there are no SAMs available for the repair items. **Note: MI bids and Appliance Orders** will follow the Non-SAM path in Equator. (SAM's can be used for MI bidding but no tasking will trigger to the SAM's.)

1. Click Distribute Repair Bids.
  - The Distribute Repair Bids screen appears.
2. Using the **Select** checkbox, check the Repair item you wish to select.
3. Using the drop-down, select the **Repair Order #** you wish to group the selected Repair items.
4. Click Assign **RFQ#**.
  - The selected Repair items will be assigned to the Repair Order # that was selected.
5. Click Save and Submit Now.
  - A Provide Repair Bid task triggers to the Agent for each RFQ group.

### Notes:

- If you have an open **Distribute Repair Bid** task that is no longer needed, contact the Sales Representative who will escalate to the Sales Manager to have it shut down.
- Separate Whirlpool appliance items from other non-SAM items by assigning a different RFQ.





## PROVIDE REPAIR BID (FOR NON-SAM)

### Task Overview

The Agent can view the set of repair items that has been assigned to be completed. You will be required to complete the header information. You will enter the Quantity and the Bid Price Per Unit in the Repair Items table. You also have the ability to add one or more suggested repair items to the bid as Contractor Addendum Repair Items.

The **Provide Repair Bid** task triggers when either the **Distribute Repair Bids** task or the **Assign Repair Bid** task is completed as Agent.

Use this task to:

- Upload repair bids received from the contractor(s).
- Enter Quantity and Bid Price information for each repair item.
- Provide estimated days to complete for each bid.
- Provide Contractor information.

**Note: MI bids and Appliance Orders** will follow the Non-SAM path in Equator. (SAM's can be used for MI bidding but no tasking will trigger to the SAM's.)

Use this task to upload the Appliance Order Form and enter the dollar amounts from that form into corresponding fields. See page 10 for further guidance.

1. Click Provide Repair Bid.
  - The **Provide Repair Bid** screen appears.
2. Enter the Contractor 1 Name.
3. Enter the Contractor 1 Office Phone.
4. (Optional) If applicable, select the **Unable to Provide 2<sup>nd</sup> Bid** by clicking the checkbox.
 

**Note:** This field will only display if the Repair Items Subtotal – Bid 1 is greater than \$1000.
5. Upload **Bid1** by clicking **Browse**, entering a Description, and then clicking **Upload**.

Provide Repair Bid	
Fannie Mae REO No	QTP0038
Fannie Mae Loan No.	9676500038
Property Address	QTP BPO Pending38 STREET_ADDRESS_2, Los Angeles, CA, 23415
County	ACCOMACK
Repair Bid Type	Lender Required
Approximate Square Footage	33.00
Contractor 1 Name *	<input type="text"/>
Contractor 1 Office Phone *	<input type="text"/>
Contractor 1 Cell Phone	<input type="text"/>
Unable to Provide 2nd Bid	<input type="checkbox"/>
Contractor 2 Name	<input type="text"/>
Contractor 2 Office Phone	<input type="text"/>
Contractor 2 Cell Phone	<input type="text"/>
Agent Name	MARIE CHUNG, NRBA+REOMAC
Agent Phone	5627411000
Lock Box Combination	<input type="text"/>
Bid1 Upload *	<p>0 files have been uploaded, 1 more required.</p> <p>One upload at a time: File: <input type="text"/> Description: <input type="text"/> <input type="button" value="Upload"/></p> <p>For multiple documents try our <a href="#">Bulk File Uploader</a>. (Requires Adobe Flash 9 or higher)</p>
Bid2 Upload	<p>0 files have been uploaded, 1 more required.</p> <p>One upload at a time: File: <input type="text"/> Description: <input type="text"/> <input type="button" value="Upload"/></p> <p>For multiple documents try our <a href="#">Bulk File Uploader</a>. (Requires Adobe Flash 9 or higher)</p>

## PROVIDE REPAIR BID (FOR NON-SAM) (CONTINUED)

### Repair Items section

6. If there are bids from two contractors, use the radio button to select one of the contractors.
7. (Optional) Modify the **Quantity** and/or **Bid 1 Price/Unit** and **Bid2 Price/Unit** (if applicable).
8. Click **Save Changes** if any modifications were made.

Repair Items					
Mike Doughia - 2143334566 ● Dave Barber - 2142221111					
Save	Category	Sub-Category	Service Type	Level	Location
<input type="button" value="Save Changes"/>	Septic	Septic System	Repair	Inside	Entire Inside - Excluding Basement
Suggested Price/Unit	Quantity	Unit of Measure	Role	Description	
0	5	Each	Listing Agent		
Bid 1 Price/Unit	Bid 1 Line Item Total	Bid 2 Price/Unit	Bid 2 Line Item Total		
1000.00	\$5000.00	1000.00	\$5000.00		
Photos			Contractor Description		
Repair Items Subtotal – Bid 1			Repair Items Subtotal – Bid 2		
\$5000.00			\$5000.00		
<a href="#">Download to Excel</a>					
Contractor Addendum Repair Items					
<input type="button" value="Add Addendum Repair Item(s)"/>					

### Contractor Addendum Repair Items

To add suggest repair item:

9. Click Add Addendum Repair Item(s).
  10. Use the following drop-downs to select the following required fields to add  
Repair Item(s):
    - Category
    - Sub-Category
    - Service Type
    - Description – This field is required if Other is selected.
- Note:** Add a detailed description noting location of the repair.
11. Click Add Addendum Item.
- The new item appears to the Contractor Addendum Repair Items section.
12. To Upload a Photo, click **Browse**, enter a Description, and click **Upload**.

### Bid Totals section

13. Enter the Bid 1 Contractor Estimated Days to Complete.
14. Click Save and Submit Now.

Bid Totals	
Bid 1 Grand Total	\$5100.00
Bid 1 FNM Calculated Days to Complete	9
Bid 1 Contractor Estimated Days to Complete *	<input type="text"/>
Bid 2 Grand Total	\$5100.00
Bid 2 FNM Calculated Days to Complete	9
Bid 2 Contractor Estimated Days to Complete	<input type="text"/>
Comments	<div><input type="text"/></div> (1000 characters remaining)
<input type="button" value="Save and Complete Later"/> <input type="button" value="Save and Submit Now"/>	



## PROVIDE REPAIR BID (FOR NON-SAM) (CONTINUED)

### Process for Whirlpool Appliances:

The Whirlpool process is to be managed as a Non-SAM process by the Agent.

- In the **Contractor Name** field, enter “Whirlpool”.
- In the **Contractor 1 Office Phone** field, enter in any number. This field does not affect anything in the process.
- Check the box next to **Unable to Provide 2nd Bid** when providing the Whirlpool appliance bid.
- You will only be able to add appliances in the contractor addendum section if all other items in that task are appliances. Use the **Distribute Repair Bids** task to itemize the non-appliance items.

Provide Repair Bid	
Fannie Mae REO No	QTP0038
Fannie Mae Loan No.	9676500038
Property Address	QTP BPO Pending38 STREET_ADDRESS_2, Los Angeles, CA, 23415
County	ACCOMACK
Repair Bid Type	Lender Required
Approximate Square Footage	33.00
Contractor 1 Name *	Whirlpool
Contractor 1 Office Phone *	555-555-5555
Contractor 1 Cell Phone	
Unable to Provide 2nd Bid	<input checked="" type="checkbox"/>
Contractor 2 Name	

Upon completion of this task:

- The **Review Repair Mod (Agent)** task triggers to the Agent.
- If Unable to Provide 2<sup>nd</sup> Bid checkbox is ticked, a system message is sent to the Repairs Specialist.

### Notes:

- SAM contractors, when used in a Non-SAM area, will be considered Non-SAM: the 1093 will be issued to the Agent. You will need to provide two bids if over \$1000.
- If you have an open **Provide Repair Bid** task that is no longer needed, contact the Sales Representative who will escalate to the Sales Manager to have it shut down.

## REVIEW REPAIR MOD (AGENT) (FOR SAM AND NON-SAM)

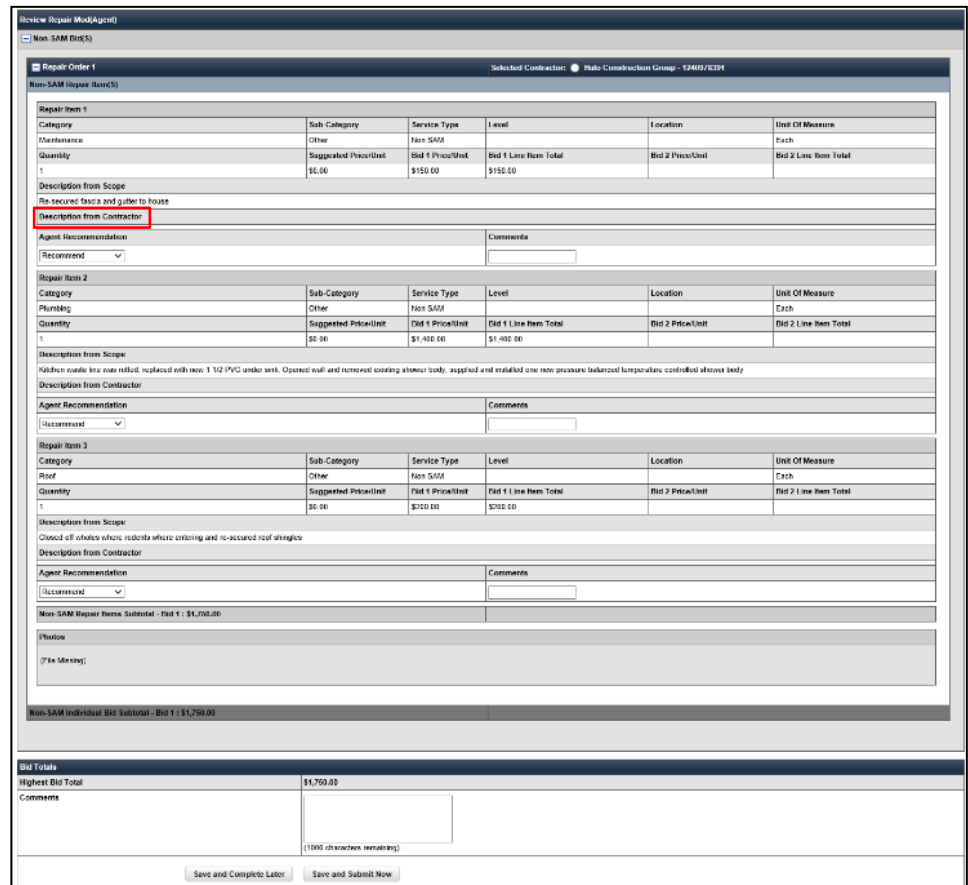
### Task Overview

In this task, the Agent reviews all the repair bids on the property in order to make recommendations about which repairs should be performed. The task displays both SAM bids (from the **Accept/Reject Repair List** deliverable) and Non-SAM bids (from the **Provide Repair Bids** task). You are required to mark each repair item as **Recommend** or **Do Not Recommend**. In addition, for any Non-Sam bids where pricing was obtained from two separate contractors, you are required to recommend one of the contractors. Upon completion of this task, the Bid Modification Approval Matrix is applied.

- Click Review Repair Mod (Agent).
  - The Review Repair Mod screen appears.
  - Information from the Transfer Utilities and the Scope Repairs (Agent) task, including original descriptions, will be displayed in the One View Information section above the task.
  - This task will contain a SAM Bid(S) and/or Non-SAM Bid(S) section if applicable. All SAM items will contain a Description from the Contractor.
- If bids were obtained from two separate contractors, use the **Selected Contractor** radio button to recommend the Contractor for the **Non-SAM Bids** section.
- Using the Agent Recommendation drop-down, select Recommend or Do Not Recommend.
- The Description field will be named with the field's owner.
- Click Save and Submit Now.
 

Upon completion of the task, depending on the repair amount:

  - The **Review Repair Bids** task triggers to the Repair Specialist (if additional review is needed).  
OR
  - The **Approve Repairs** task triggers to the Sales Representative.



The screenshot displays the 'Review Repair Mod (Agent)' interface. It shows three repair items, each with a table of details and a description field. The first item is 'Repair Item 1' (Category: Maintenance, Sub-Category: Other, Service Type: Non-SAM, Level: 1, Location: , Unit Of Measure: Each). The second item is 'Repair Item 2' (Category: Plumbing, Sub-Category: Other, Service Type: Non-SAM, Level: 1, Location: , Unit Of Measure: Each). The third item is 'Repair Item 3' (Category: Roof, Sub-Category: Other, Service Type: Non-SAM, Level: 1, Location: , Unit Of Measure: Each). Each item has a 'Description from Contractor' field and an 'Agent Recommendation' dropdown menu. The 'Description from Contractor' field for the first item is highlighted with a red box. At the bottom, there is a 'Bid Totals' section showing the 'Highest Bid Total' as \$1,750.00 and a 'Comments' field.

Repair Item	Category	Sub-Category	Service Type	Level	Location	Unit Of Measure
Repair Item 1	Maintenance	Other	Non-SAM	1		Each
Repair Item 2	Plumbing	Other	Non-SAM	1		Each
Repair Item 3	Roof	Other	Non-SAM	1		Each

## BEGIN REPAIRS (AGENT) (FOR SAM AND NON-SAM)

### Task Overview

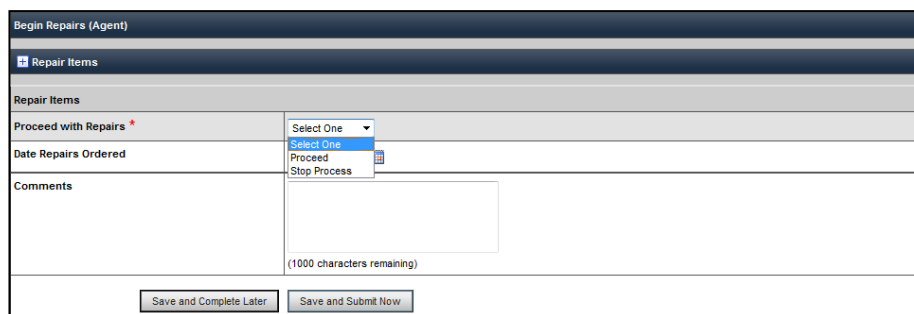
The **Begin Repairs (Agent)** task shows what repairs have been approved and allows you to indicate whether the repairs should proceed or not. If you indicate that the repairs are to proceed, then tasks are triggered for both the SAMs and you to start the work. If you indicate that the repairs are not to proceed, then the **Approve Repairs** task is triggered and the 1093s that were just created at the triggering of the **Begin Repairs (Agent)** task are set to cancelled/inactive. Rejected items display within this task as well. The rejected items section defaults to being collapsed. If ALL items within the scope were rejected by the Sales Rep, an Equator message will be sent to you and any applicable SAMs.

**Important Note:** You see this information before the SAM contractor does. At this point in the process you will coordinate the repairs. For example, if there are both paint and flooring repairs, you will ensure painting occurs prior to flooring, and so on, by coordinating the contractors.

Use this task to:

- Indicate if the repairs should proceed.

- Click **Begin Repairs (Agent)**.
  - The **Begin Repairs (Agent)** screen appears.
  - Information regarding all the PO/1093 forms will be displayed in the One View Information section above the task.



- Using the **Proceed with Repairs** drop-down, select one of the following:
  - Proceed
  - Stop Process

**Note:** Comments are required if “Stop Process” is selected.
- Enter **Date Repairs Ordered** if at least one line item in the Repair Items table is Non-Sam. This cannot be a future date and cannot be a date prior to the open date of the **Begin Repairs (Agent)** task.
- Enter **Comments** if **Stop Process** is selected.
- Click **Save and Submit Now**.

Upon completion of the task:

- If **Proceed**, triggers one or both of the following tasks:
  - Repairs Complete (Agent)** task to the Agent.
  - Acknowledge Approved Repairs** deliverable to the Repair Company (SAM contractor).
  - Appliance Delivery Confirmation** task triggers to the Agent if appliances are present.
- If **Stop Process**, the **Approve Repairs** task triggers to the Sales Representative. (1093s will be canceled.)

## PROVIDE REPAIR UPDATE (FOR NON-SAM)

### Task Overview

The **Provide Repair Update** is triggered to the Agent to provide a weekly update for each Non-SAM repair order.

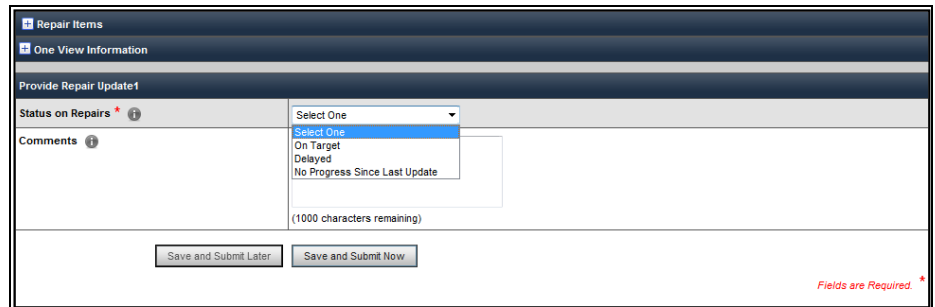
This task is scheduled to generate for each **Repairs Complete (Agent)** task every Monday and will continue until the repair order is closed when all the following conditions are true:

- The **Begin Repairs (Agent)** task is completed.
- The **Repairs Complete (Agent)** order is open.

Use this task to:

- Provide a weekly update for Non-SAM orders
- Indicate the:
  - Update date
  - Estimated completion date
  - Repair status

1. Click Provide Repair Update (Agent).
  - The Provide Repair Update screen appears.
  - The **Repairs Items** section will display information from the **Repairs Complete (Agent)** task.
  - Information from the **Repairs Complete (Agent)** task will be displayed in the One View Information section above the task.



2. Using the **Status on Repair** drop-down, select one of the following:
  - On Target
  - Delayed
  - No Progress Since Last Update
3. Enter Comments.
4. Click Save and Submit Now.
  - No tasks or deliverables trigger.

### Notes:

- In addition to completing this task, if there are concerns over the status of repairs (SAM or Non-SAM), you should message the Sales Representative with further details. (The SAM contractor receives a weekly update deliverable for their repair items, which is not viewable to you.)
- You will receive a task for each Non-SAM 1093.
- Any comments you add stay within the task. If you have issues or concerns, you must message the Sales Representative.

## APPLIANCE DELIVERY CONFIRMATION

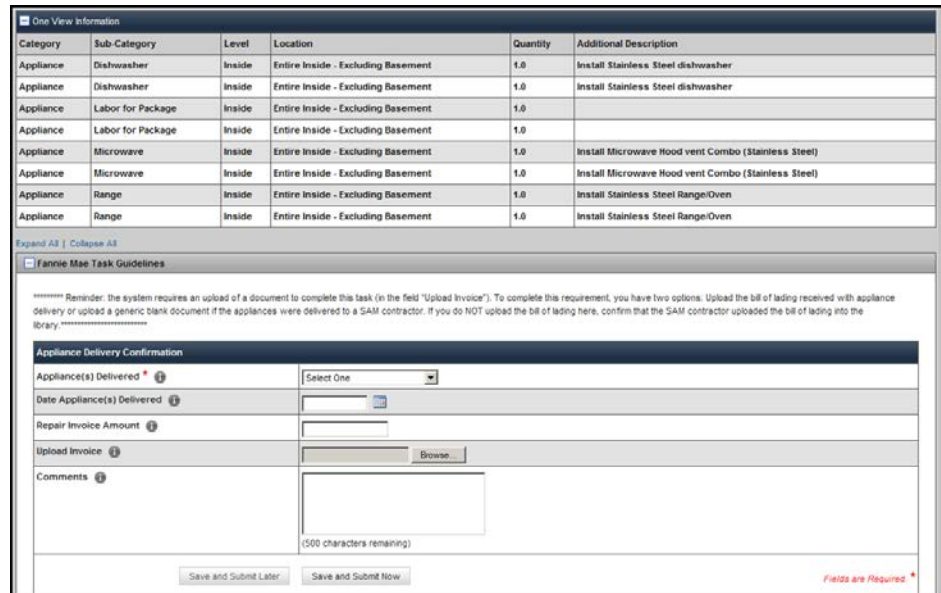
### Task Overview

The **Appliance Delivery Confirmation** task allows the Agent to record the date that appliances were delivered in good condition by Whirlpool. This task will serve as the trigger to create the separate 1093 Requested Disbursement to auto-pay Whirlpool. This task triggers when the outcome of the Appliance Repair Item Check decision matrix is that at least one appliance repair items is present in the **Begin Repairs (Agent)** task.

- Click Appliance Delivery Confirmation.
  - The Appliance Delivery Confirmation screen appears.
  - Information from the **Begin Repairs (Agent)** task will display in the One View Information section above the task.
- Using the **Appliance(s) Delivered** drop-down, select one of the following:
  - Yes – Appliance(s) Delivered
  - No
  - Cancel Appliances

**Note:** Select **Cancel Appliances** if repairs have been stopped.

- Enter the **Date Appliance(s) Delivered**  
**Note:** If there is a discrepancy between the amount approved and the actual cost of the appliance, select **Cancel Appliances**. (You will then need to ad hoc the **Scope Repairs** task.) Upload the **Invoice** by clicking **Browse**. If you select Cancel, a pop-up message will appear confirming that this action will cancel the appliance 1093.
- Click **Save and Submit Now**.



Category	Sub-Category	Level	Location	Quantity	Additional Description
Appliance	Dishwasher	Inside	Entire Inside - Excluding Basement	1.0	Install Stainless Steel dishwasher
Appliance	Dishwasher	Inside	Entire Inside - Excluding Basement	1.0	Install Stainless Steel dishwasher
Appliance	Labor for Package	Inside	Entire Inside - Excluding Basement	1.0	
Appliance	Labor for Package	Inside	Entire Inside - Excluding Basement	1.0	
Appliance	Microwave	Inside	Entire Inside - Excluding Basement	1.0	Install Microwave Hood vent Combo (Stainless Steel)
Appliance	Microwave	Inside	Entire Inside - Excluding Basement	1.0	Install Microwave Hood vent Combo (Stainless Steel)
Appliance	Range	Inside	Entire Inside - Excluding Basement	1.0	Install Stainless Steel Range/Oven
Appliance	Range	Inside	Entire Inside - Excluding Basement	1.0	Install Stainless Steel Range/Oven

**Appliance Delivery Confirmation**

Appliance(s) Delivered \* ⓘ Select One

Date Appliance(s) Delivered ⓘ

Repair Invoice Amount ⓘ

Upload Invoice ⓘ Browse

Comments ⓘ   
(500 characters remaining)

Save and Submit Later Save and Submit Now Fields are Required \*



Upon completion of the task and the Appliance(s) Delivered selection is:

- Yes, 5 days after completion of this task a 1093 Requested Disbursement for Whirlpool is created.
- No, this task is re-opened for the Agent.
- Cancel, the 1093 and the appliance portion of repairs process are stopped.

**Notes:**

- You must upload the bill of lading received with the appliance delivery. If you do not have a copy of the bill of lading required for this task, message the SAM to obtain.
- Until the appliances are delivered, let the task age until the due date and then continue to complete the task with "No - appliances not delivered." The task remains open so you can complete it at any time.
- If the PO/1093 was generated prior to Equator conversion, you will NOT receive this task: appliances should be confirmed via the **Repairs Complete (Agent)** task discussed on page 16.
- Ensure that the Repair Invoice Amount is still correct. If the amount is NOT correct and needs to be decreased, message the Repair Specialist to correct. If the amount needs to be increased, you must STOP the process by selecting Cancel and proceed with re-scoping the item(s).

## REVIEW COMPLETED REPAIRS (FOR SAM)

### Task Overview

The Review Completed Repairs task allows the Agent to review repairs completed by a SAM. This task should be completed within 2 days.

This task triggers when one of the following occurs:

- The **Repairs Complete (SAM)** deliverable is completed.
- The **Repairs Incomplete (SAM)** deliverable is completed.

Use this task to indicate:

- Review repairs completed by a SAM.
- Repair Completion Date.

- Click Review Completed Repairs.
  - The Review Completed Repairs screen appears, with any applicable photos uploaded by the SAM.
  - This task contains the following sections:

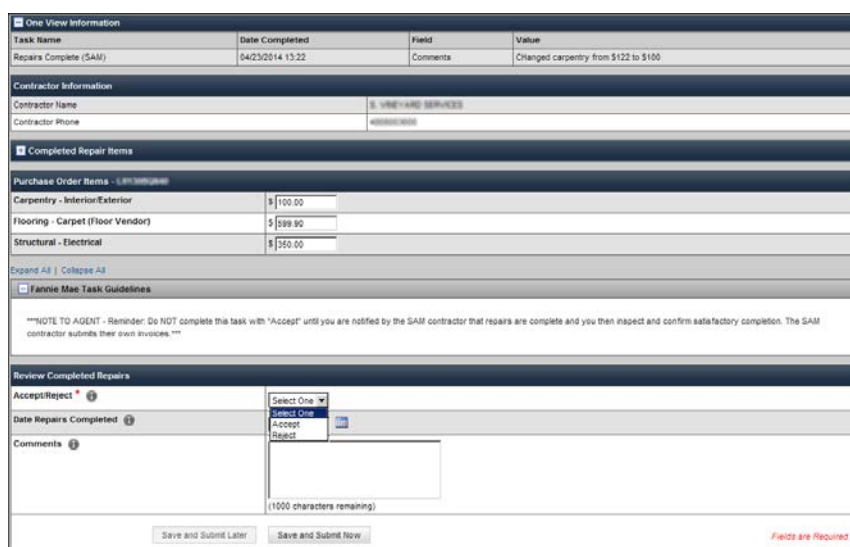
#### Contractor Information

#### Completed Repair Items

#### Purchase Order Items

(Original approved amounts by line item and new dollar amounts entered by the SAM)

#### Review Completed Repairs



- Using the drop-down, select **Accept** or **Reject**.
  - If you are rejecting because of subpar repair work, note in comments specifically what is incomplete for the SAM.
  - If you see the SAM is invoicing for work we have decided not to proceed with, select “Reject” and add a comment directing the SAM to modify the PO to remove the item(s) not completed.
- Enter Date Repairs Completed if Accept is selected.
- Enter **Comments** if **Reject** is selected.
- Click Save and Submit Now. Upon completion of the task and the Accept/Reject selection is:
  - Accept, the **Invoice and Complete Repairs** deliverable triggers to the SAM contractor.
  - Reject, the **Repairs Incomplete** deliverable triggers to the SAM contractor.

### Notes:

- You will receive a task for each SAM 1093.
- You should NOT select “Accept” until all repairs are complete AND the correct dollar amounts are reflected on each item.
- Once the SAM contractor completes a **Repairs Incomplete** deliverable, the **Review Completed Repairs** task will re-trigger to you.
- If the SAM has added photos, you will be able to see them.

## REPAIRS COMPLETE (AGENT) (FOR NON-SAM)

### Task Overview

The **Repairs Complete (Agent)** task is used by the Agent to confirm that the Non-SAM repair work has been completed.

This task is triggered when the **Begin Repairs (Agent)** task is completed. This task is opened in the paused state and scheduled to un-pause if either of the following conditions are met:

- Five (5) days prior to the Estimated Completion Date.
- The **Repairs Completed Early (Agent)** task is completed as Yes.

Use this task to:

- Indicate the invoice amount.
- Confirm the completion of repair work.
- Upload the invoice.

1. Click Repairs Complete (Agent).
  - The Repairs Complete (Agent) screen appears.
  - This task will contain the following sections:
    - **Completed Repair Items** – this section will display the corresponding repair items from the **Begin Repairs (Agent)** task.
    - **Purchase Order Items** - this section will display the corresponding line item from the active 1093 form as well as each approved amount.
2. Enter the amount of work actually completed in the Actual Amount field (which is a required field). This amount cannot be greater than that in the Approved Amount field; however, you may enter a lesser amount or zero
3. Upload the **Invoice** by clicking **Browse**, entering a **Description**, and then clicking **Upload**.
4. Enter the **Date Repairs Completed** (cannot be future date).
5. Using the **Property Repair Inspection Count**, select the appropriate number.
6. Enter **Comments** if the Purchase Order line item was modified.
7. Click Save and Submit Now.

Repairs Complete (Agent)					
Completed Repair Items					
Repair Item	Category	Sub-Category	Service Type	Level	Location
Appliance	Labor	Range Hood	Non SAM		
Quantity	Unit of Measure	Bid Price/Unit	Line Item total		
1.0	Each	100.00	100.00		
Description	Order Number				
	DR1504X241				
Grand Total					100.00
Download					
Purchase Order Items - DR1504X241					
Items	Approved Amount	Actual Amount *			
Appliances - Labor	100.00				

### Notes:

- You will receive a task for each Non-SAM 1093.
- You should NOT complete this task until all repairs are complete. (See **Request Repair Delay (Agent)** task for guidance on delaying repairs.)
- If the PO/1093 was generated prior to Equator conversion, you will use the **Repairs Complete (Agent)** task to confirm appliance delivery.



## REQUEST REPAIR DELAY (AGENT) (FOR NON-SAM)

### Task Overview

The **Request Repair Delay (Agent)** task allows the Agent to request a delay in the completion date for the repairs being performed by a Non-SAM contractor.

This task is manually triggered by the Agent via Ad Hoc as long as there is an open or paused **Repairs Complete (Agent)** task.

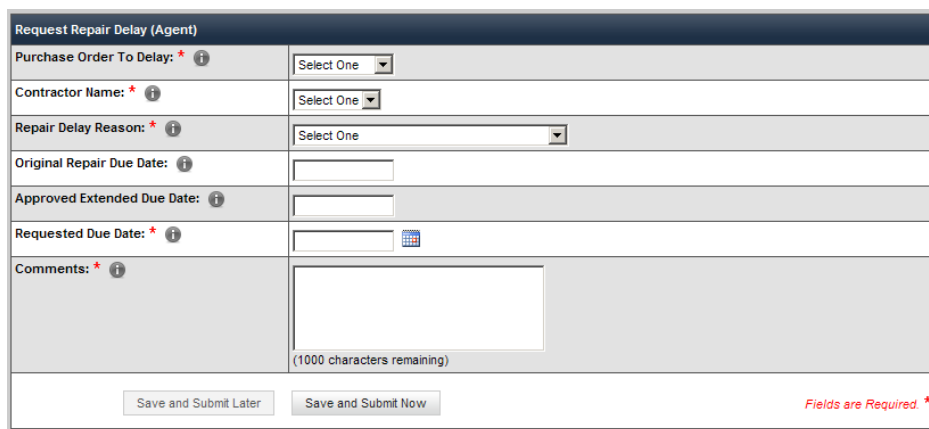
1. Click Request Repair Delay (Agent).
  - The Request Repair Delay (Agent) screen appears.

2. Using the **Purchase Order To Delay** drop-down, select the purchase order.


3. Using the drop-down, select the **Contractor**.


4. Using the **Repair Delay Reason** drop-down, select one of the following:


- Waiting on Custom Materials
- Waiting on Approval on Change Order
- Weather Not Conducive to Approved
- Repairs
- Delay in Delivery of Appliances
- Delay in Installation of Flooring
- Job on Hold by Agent





**Request Repair Delay (Agent)**



Purchase Order To Delay: \*  Select One


Contractor Name: \*  Select One

Repair Delay Reason: \*  Select One

Original Repair Due Date: 

Approved Extended Due Date: 

Requested Due Date: \*   

Comments: \*    
(1000 characters remaining)

Fields are Required. \*

5. Enter the **Requested Due Date**. This date must be after the **Current Repair Due Date**.

6. Enter Comments.

7. Click Save and Submit Now.
  - The **Review Repair Delay** task triggers to the Repair Specialist.

## CHANGE ORDER REQUEST (AGENT) (FOR NON-SAM)

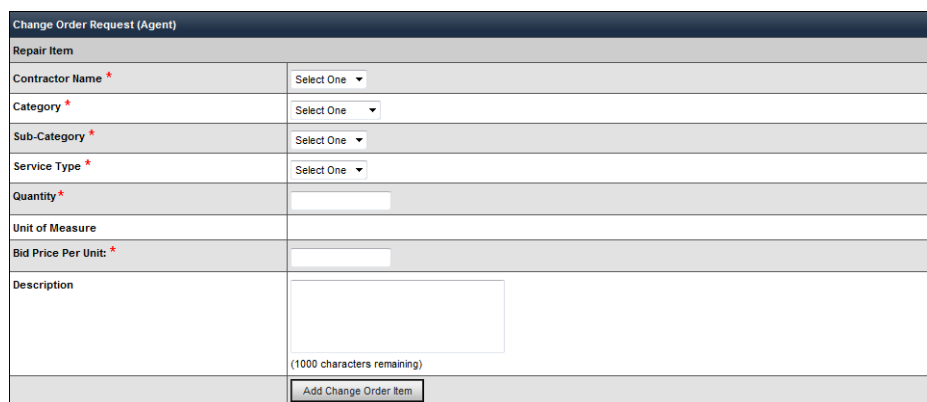
### Task Overview

The **Change Order Request (Agent)** task allows the Agent to request additional repair items. You will enter individual line items, along with a reason for the repairs. You can also request additional days to complete the repair.

This task is triggered manually by the Agent via Ad Hoc as long as there is an open or paused **Repairs Complete (Agent)** task.

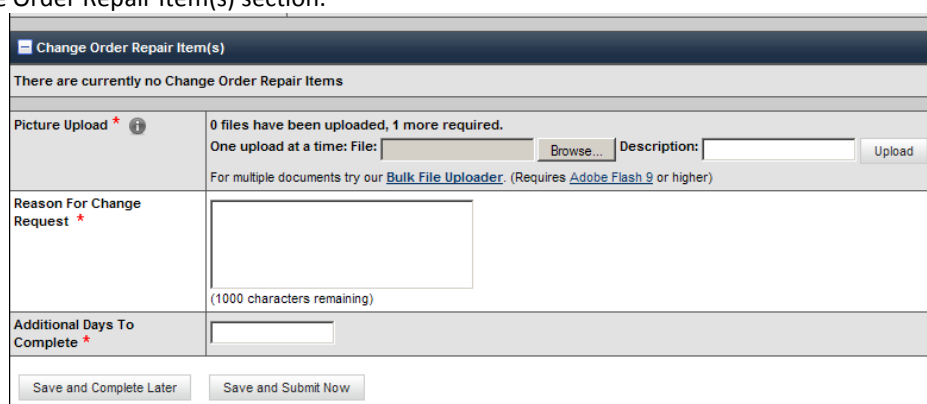
**Important Note:** You should NOT ad hoc this task for SAM contractors. SAM contractors have their own deliverables for change order requests.

- Click Change Order Request (Agent).
  - The Change Order Request (Agent) screen appears.
- Using the **Contractor Name** drop-down, select the contractor.
- Using the following drop-down, select the following required fields to add a Change Order Item:
  - Category
  - Sub-Category
  - Service Type
  - Quantity
  - Bid Price Per Unit
  - Description – This field is required if Other is selected



**Note:** Add a detailed description noting location of the repair.

- Click Add Change Order Item.
  - The new item appears in the Change Order Repair Item(s) section.
- To Upload a Photo, click **Browse**, enter a **Description**, and click **Upload**.
- Enter the Reason for Change Request.
- Enter the **Additional Days to Complete**. This field must be greater than zero.
- Click Save and Submit Now.
  - The **Review Change Order Request** task triggers to the Repair Specialist.



**Note:**

- If you need to remove an item, message the Repair Specialist and cc the Sales Representative to modify the purchase order.
- A message will be sent to the SAM or Agent (whoever originated the request) when Sales rejects a change order.

## REPAIRS COMPLETED EARLY (AGENT) (FOR NON-SAM)

### Task Overview

The **Repairs Completed Early (Agent)** task is used by the Agent to un-pause the **Repairs Complete (Agent)** task.

This task is manually triggered by the Agent via Ad Hoc as long as a **Repairs Complete (Agent)** task is open or paused in the workflow.

Use this task to indicate:

- Repairs were completed early.
- Contractor that completed the repairs.

1. Click Repairs Completed Early (Agent).
  - The Repairs Completed Early (Agent) screen appears.

2. In the **Purchase Order** section, select a purchase order. (You must make a selection even if only one is listed.)

3. Using the **Repairs Completed Early** drop-down, select **Yes** or **No**.

4. Using the **Contractor that Completed Early** drop-down, select the contractor.

5. Enter Comments.

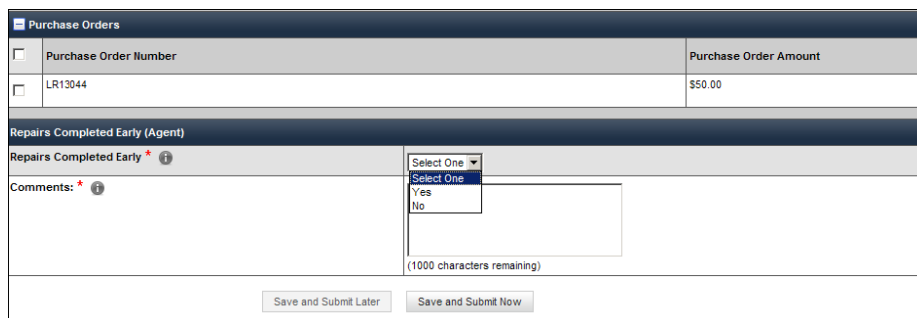
6. Click Save and Submit Now.

Upon completion of this task:

- If Yes Is selected and the **Repairs Complete (Agent)** task is open and in the paused state, the system shall un-pause the **Repairs Complete (Agent)** task. If task is not open or in paused state, no tasks or deliverables trigger.
- If No is selected, no tasks or deliverables trigger.

### Notes:

- Do NOT ad hoc this task for SAM contractors. SAM contractors will complete their own repairs completed early deliverable, and then you will review the repairs in the **Review Completed Repairs** task.
- If Sales decides to stop the repair process, you will be messaged in Equator. You will then need to ad hoc this task for each Non-SAM 1093. You will change the amount in this task to reflect the amount of work actually completed. (See following section for further detail.)



Purchase Orders	
Purchase Order Number	Purchase Order Amount
LR13044	\$50.00

**Repairs Completed Early (Agent)**

Repairs Completed Early \* ? Select One

Comments: \* ? Select One  
 Yes  
 No  
 (1000 characters remaining)

Save and Submit Later Save and Submit Now

## STOPPING THE REPAIR PROCESS

If repairs need to be stopped (e.g., for an MI acquisition, elimination, etc.), a message will be sent to the Agent and all associated SAM contractors.

Upon receiving the message, use the following procedure:

1. If previously approved Non-SAM repairs have not begun or are partially completed, ad hoc and complete the **Repairs Completed Early (Agent)** task for each Non-SAM 1093 and select “Yes”.
2. The **Repairs Complete (Agent)** task will trigger to you for each Non-SAM 1093. Complete this task, noting that the repair process was stopped. Enter the amount for work done thus far. If no work has been done, enter “0” in the Purchase Order line item.

Repairs Complete (Agent)	
<b>Completed Repair Items</b>	
Purchase Order Items - DR13040C41	
Paint - Exterior Trim Only *	<input type="text" value="0"/>
Paint - Interior Walls & Ceiling - Standard *	<input type="text" value="441.00"/>
<b>Invoice and Complete Repairs</b>	
Invoice Amount	\$441.00
Invoice Attachment *	0 files have been uploaded, 1 more required. One upload at a time: File: <input type="text"/> <input type="button" value="Browse..."/> Description: <input type="text"/> <input type="button" value="Upload"/> <small>For multiple documents try our <a href="#">Bulk File Uploader</a>. (Requires Adobe Flash 9 or higher)</small>
Contractor Name	John Doe
Contractor Phone	9722722455
Date Repairs Completed *	<input type="text"/> <input type="button" value="Calendar"/>
Property Repair Inspection Count *	Select One ▼
Comments	<input type="text"/> <small>(1000 characters remaining)</small>
<input type="button" value="Save and Complete Later"/> <input type="button" value="Save and Submit Now"/>	

**Important Note:** You should NOT ad hoc **Repairs Completed Early (Agent)** for SAM contractors. SAM contractors have their own deliverables for this.