

### LIST OF ITEMS NEEDING ATTENTION OF PROPERTY MANAGERS 8/1/15

- FOLLOW THE INSTRUCTIONS ON THE HANDOUTS FOR REPORTING CLAIMS
- GET AS MUCH INFORMATION FROM THE CALLER AND TRIAGE THE SITUATION TO DETERMINE IF THERE IS A POTENTIAL CLAIM. SPEAK TO EACH UNIT OWNER AND FIND OUT IF THEY NEED WATER MITIGATION.
- DURING BUSINESS HOURS, TELL THE UNIT OWNER THAT BOB CASPAR WILL GET BACK TO THEM IMMEDIATELY, AND CALL BOB WITH THE FACTS. BOB WILL CALL THEM BACK, OFFER TO SEND A MITIGATION COMPANY OUT TO DRY THE UNIT (IF WATER) AND ASSIST THEM. DO NOT SEND THEM TO BOB IN A PHONE CALL AS HE NEEDS THE FACTS BEFORE HE TALKS TO THEM
- AFTER BUSINESS HOURS, OFFER TO SEND OUT ONE OF OUR PREFERRED VENDORS RIGHT THEN TO DRY THE UNIT (IF WATER) AND TELL THEM BOB WILL CALL THEM THE NEXT BUSINESS DAY TO GET THINGS GOING. DO NOT GIVE THE UNIT OWNER NUMBERS AND TELL THEM TO CALL, BECAUSE THEY MAY NOT DO IT. IMPRESS UPON THEM THE IMPORTANCE OF AN IMMEDIATE RESPONSE. OUR PREFERRED VENDORS ARE ON THE "h" DRIVE UNDER INSURANCE CLAIMS FORMS AND HAVE BEEN HANDED OUT TO THE PROPERTY MANAGERS.
- COMPLETE THE INSURANCE CLAIMS CHECK LIST IMMEDIATELY AND GET IT TO BOB WITH AS MUCH INFORMATION AS POSSIBLE INCLUDING THE POLICY DEDUCTIBLE FOR THE TYPE OF LOSS INVOLVED AND IF THERE IS A SPECIAL WATER DEDUCTIBLE. PLEASE TYPE THESE FORMS AND SEND THEM ELECTRONICALLY AS AN EXCEL FILE AS THEY WILL BE SENT TO THE CARRIER AS OUR FIRST REPORT OF LOSS. PLEASE BE THOROUGH AND INCLUDE COMPLETE ADDRESSES, DATES, AND ANY OTHER INFORMATION.
- DO NOT REPORT CLAIMS TO OUR AGENTS OR CARRIERS. THEY SHOULD NOT BE THE ONE DECIDING IF IT IS A CLAIM OR NOT. THIS SHOULD ONLY BE DONE BY BOB.
- TELL THE UNIT OWNER TO MAKE SURE THEY REPORT IT TO THEIR INSURANCE CARRIER AND GET THAT INFORMATION FOR THE CLAIMS CHECK LIST.
- WE SHOULD ALWAYS BE THINKING ABOUT HELPING THEM WITH MITIGATION AND POSSIBLE RECONSTRUCTION EVEN IF IT IS NOT GOING TO BE A CLAIM. IF YOU OFFER A PREFERRED VENDOR TO THEM LET BOB KNOW SO HE CAN FOLLOW UP.
- WHEN MONIES COME IN FROM INSURANCE COMPANIES ON CLAIMS THE PROPERTY MANAGER NEEDS TO GIVE BOB THE CHECK AND ALL DOCUMENTATION ATTACHED SO HE CAN PUT THE CHECK REQUEST PROCESS IN MOTION.
- WHEN ACCOUNTING GETS A CHECK REQUEST FROM BOB THEY NEED TO GET IT PROCESSED ASAP AND NOT LET IT SIT. THE MONEY MAY BE NEEDED TO GET WORK STARTED AND DELAYS IN PROCESSING CAN CAUSE DELAYS IN GETTING THE REPAIRS COMPLETED.
- BOB IS ALWAYS AVAILABLE TO DISCUSS A POTENTIAL CLAIM OR ASSIST THE PROPERTY MANAGER WHEN A QUESTION ARISES. JUST CALL HIM ON HIS CELL ONLY – 770-363-2070