

Policies for Common Servicer Issues

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No Equipment at the pickup location

- The designated pickup location will display on the paperwork and display in the Home Solutions Mobile App. The servicer is expected to arrive at the pickup location on the day of the appointment or on the date provided by the client.
- The servicer will need to bring the paperwork or Mobile App into the pickup location to assist with product confirmation.
- Servicers must confirm any unavailable or damaged items with a manager or supervisor at pickup location prior to reporting any issues to Resolution Care.
- If there is missing or damaged equipment and the client is unable to locate a replacement, the servicer will update the Equipment Pickup step in the Home Solutions Mobile App to accurately reflect which items were unavailable.
 - o When updating orders in the Mobile App, servicers should mark each product *individually* as pickup or unavailable.
 - o Servicers not using the app will need to call or chat Home Solutions to report pickup issues.
 - o When contacting Home Solutions, the servicer needs to confirm the pickup location address and the name of the pickup location manager or supervisor that confirmed the item is unavailable.

Failure to do so will result in any Appearance Fees being denied. The information should be notated in Mobile App, if not chatting/calling in.

- Servicers should call the customer and make them aware. Afterwards, Home Solutions will work the order and update the client.
 - If the servicer does not feel able to call the customer, the servicer will need to chat/call Home Solutions in real-time to have Resolution Care call the customer.
- For Lowe's or Sam's Club, the servicer should call/chat Home Solutions if they wait 30 minutes or more at the pickup location.

Missed Appointment/Running Late

- Servicers are expected to call the customer roughly 30 minutes prior to arrival and provide an ETA.
 - That ETA should be logged in PreCall step in the Mobile App.
- As soon as the servicer knows they will be late or unable to make the appointment, the servicer **needs to call the customer immediately**.
 - Servicers should notate any updated ETA's in the Mobile App and call/chat Home Solutions in the event the customer needs to be rescheduled.
- **If unable to call the customer; call/chat Home Solutions.** Home Solutions will reach out to the customer to reset expectations and reschedule if necessary.
 - The Home Solutions agent will always open a Missed Appointment escalation, regardless of the reason. This allows Home Solutions to track missed appointments.

Parts Sales

- For most clients, Servicers can sell parts and associated labor directly to customers when onsite.
- All sales must be noted in the "Additional Charges" section of the *Completion Form*.
- All sales must be reported from onsite using the Mobile App or by calling/chatting Home Solutions.
- If the customer objects to the price of the part, Home Solutions has a Suggested Parts Price List that Resolution Care will use to determine if the servicer's price is in line with our expectations. If the price is too high and the servicer will not budge on the cost, Home Solutions will refer the servicer to the Market Manager.
- **Lowe's** – Call Home Solutions from onsite. No direct sales to the customer are permitted. Lowe's will handle all payment.
 - Includes water heater orders.
 - If we can verify that direct payment was taken from a Lowe's customer, Home Solutions will immediately refund the customer and back bill the servicer.
- **Bosch** – Call Home Solutions from onsite – services must be approved by the client.

Service Sales/Missing Services

For most clients, Home Solutions may sell services to the customer while onsite. Additionally, if the customer purchased a service and that service did not import on the order, we have processes for correcting the work order.

!! For all services for which Home Solutions has a client SKU, the sale must be processed through Resolution Care !!

The servicer will:

- Call Home Solutions **before** performing any work outside the scope of work
- Home Solutions will follow the client sales or missing SKUs process.
- If it is necessary to charge the customer directly, Home Solutions will process a credit card payment over the phone
- If the client process allows it and/or if the customer pays for the service, Resolution Care will update the SKUs on the order.
- All sales/additional work should be documented in the Additional Charges section of the paperwork, even if Home Solutions took payment or if no payment as taken. This protects the servicer from liability should the customer object to the work or charge later.

Note: If the servicer calls after the work is performed and neither the client nor the customer agrees to pay for the work, Resolution Care cannot add those SKUs to the order or enter a trip fee for the additional work. The servicer may appeal to the Market Manager, but some clients prohibit adding SKUs after we have left the customer's home.

Note: There are no parts or service upsells allowed for Lowe's orders. Home Solutions must call all additional work and parts requests into Lowe's for processing. This can result in the order being rescheduled for a later date.

Custom Labor or Additional Plumbing Work

If the customer's site needs custom labor (e.g., correct product opening size, etc.) or additional plumbing work in order to complete the installation (e.g., for dishwashers) and the servicer has the appropriate skills, tools, and licensure to do the work to code, they can offer to perform the necessary work for the customer for an additional charge. **Before** beginning any custom labor or additional plumbing, servicers **must**:

- Provide the customer the full amount they will charge them for parts and labor.
- Get the customer's agreement to pay for the additional work.
- Document the details of the required work in the "Additional Charges" section of the paperwork and have the customer sign off on the form.
- Report the sale to Home Solutions from onsite via Mobile App notations, chat, or call.

Best Buy Make It Right

For Best Buy orders when SKU corrections or additional services/parts are necessary, the customer may refuse to pay additional money, often due to wrong expectations set at sale. When this happens, Home Solutions (agents and market managers) must call Geek Squad DoD prior to adding any services or parts as Client Billable.

- All requests for additional services must be **called/chatted in from onsite before the additional services are performed.**
 - We cannot call DoD to have the order adjusted prior to the servicer being onsite or after they leaves the customer's home.
- **Home Solutions *must* attempt to charge the customer for the services or parts prior to calling DoD for approval of a client billable service.**
- The servicer needs to remain onsite while Home Solutions speaks with DoD.
 - DoD will reach out to the customer during our call to confirm any information.
 - DoD may also ask to speak to the servicer, at which time Resolution Care (RC) will conference the servicer in with DoD.
 - DoD will provide the RC agent with a Breeze Case ID, which must be recorded in DOLI. Only SKUs and client billable trip charges approved by DoD and accompanied by a Breeze Case ID may be added to any Best Buy order in DOLI.
 - The "Trip Charge Info" tool in DOLI will calculate a "Billable Amount." Home Solutions must request the *billable amount* displayed from the DoD agent when seeking approval for Client Billable Trip Charges.
- Servicers must submit **one photo showing the additional work performed for each SKU or Client Billable Trip Charge** added to the order.
 - *Return Forms are acceptable for AI Uninstall or Product Return SKUs.*
- Servicers must submit a **completed and signed "Completion Form / Onsite Checklist"**
- **Servicers should not reach out to DoD directly, but should chat or call Home Solutions instead.**

Pre-approval by BBY Field Leadership:

Under the Best Buy Make It Right process, it is possible to address mis-sold orders prior to going onsite by having a member of Best Buy field leadership "pre-approve" the additional charges prior to going onsite. However, we will need written approval from the Best Buy Field Leader in the form of an email before we can add a SKU to DOLI as approved by Best Buy Field Leadership.

1. CRST Home Solutions Market Manger reaches out to Best Buy Field Leader for SKU approval.
2. The Field Leader needs to send an email to the CRST Home Solutions Market Manager stating the SKU or Trip Charge was approved.
3. CRST Home Solutions Market Manager takes a screenshot of the approval email and uploads that image to the DOLI job as an "Installation Picture."
4. CRST Home Solutions Market Manger adds the SKU to the order as "Client Pays" Use the Breeze Case ID 000000003, and notate the SKU addition to explain why the SKU is needed and why the customer was not charged.

If a servicer calls Resolution Care to request an order be correct prior to the day of the appointment, the RC agent should ask for a detailed description of what needs to be corrected. The RC agent should then email the Market Manager from DOLI requesting the necessary changes. The Market Manager will review and reach out to the Best Buy Field Leader.

This process can be used to help assure our servicers that the orders will be corrected, and they will be paid for the work they perform.

All existing Make It Right policies remain the same, e.g., notations, need a photo of the completed work, etc.

Best Buy Non-Paid Redo Campaign

Best Buy may create return visits to the customer's home to incomplete or substandard installation issues. Best Buy may also create return visits for customer service issues. These orders will import into DOLI with only Troubleshoot SKUs and will all have the campaign "Non-Paid Redo." If a servicer request that the troubleshoot be updated to a paid sku, follow the process below:

- o Ask for a detailed subscription of the work the servicer needs to perform.
- o Is the Campaign "Non-Pay Redo AI" or "Non-Pay Redo CE" ?
 - No - Follow the Standard process
- o Click on Edit Order and locate the Account #. Search DOLI for the Account # to see if the customer has another installation order in DOLI.
- o Yes - Another order under Account #
 - Needed work is within the SOW - Add 1 Service Call SKU to the order as Installs inc Pays. Do not remove the Troubleshoot SKU(s) from the order.
 - Needed work is outside the SOW
 - Advise that the necessary work is not part of the customer's original order and that the customer should be referred back to Best Buy.
 - If the servicer already performed the work, refer them to their Market Manager.
- o No - There is no installation order in DOLI
 - Confirm which original installation SKU we are performing as the redo
 - If the work is not related to the original installation, advise that the necessary work is not part of the customer's original order and that the customer should be referred back to Best Buy.
 - Add the installation SKU as client pays to the Troubleshoot order in DOLI. Do not remove the Troubleshoot SKU(s) from the order.
 - Use DoD as Approver Title
 - Use Breeze Case ID 000000004
 - Fill in all required sub-reasons
 - Clearly notate what work the servicer performed while onsite

Best Buy Basic Audio Setup Add-on

- There is a contract agreement that we will perform these services as a certain rate. We understand that occasionally Best Buy orders will import with just this one add-on SKU. Servicers may ask for additional pay, we normally do not run on just add-on SKUs. If this happens, **you may add a \$20 trip charge for “Job does not pay enough.”** You may not ask Best Buy field leadership nor DoD to approve additional job pay for this SKU.

Lowe’s Misc.

- Servicers are required to call or chat RC about non-complete issues from onsite. RC will call IST and request a Trip Charge /Revisit SKUs. Lowe’s servicers are eligible for a standard Appearance Fee for non-complete issues.
- Neither Home Solutions nor the servicer can sell anything for any amount directly to the customer. The servicer must call or chat from onsite before performing the work. RC or the MM can call IST and request a WO for the additional work. This will be entered via the Lowe’s Custom Work Calculator in Trip Charge Info.
- **Unscheduled – Waiting Ship Notification:** Do not schedule these orders. We are waiting on the product to be available for pickup.
- **Prescheduled – Assigned:** The servicer must upload a permit for these orders. Do not schedule unless the permit is uploaded. Once Back Office sees the permit, they will update to **Unscheduled – Assigned** status and the customer will be contacted to schedule.
- **SKU 3002 – Special Installation:** This is a place holder SKU for custom work or mileage requested on Premeasure/Detail. Back Office will add a Client Billable Trip Charge for the originally requested amount. There is no need to call IST.
- **Revisit SKU:** This SKU is used for two purposes:
 - o When the servicer has a non-complete, RC will call IST and request s Trip Charge SKU. Back Office will add that to DOLI as a Revisit SKU when the WO comes over.
 - o When additional work or return visits are sent to Home Solutions, DOLI will create a Revisit SKU. Back Office will add any necessary Trip Charges and/or SKUs as they review the WOs in the Lowe’s IMS system.

Uninstall SKUs – All Clients

- **HT –**
 - o TV mounting services include the removal of the existing TV. **Servicers are only eligible for additional job pay if we need to move or replace the existing TV mount** (this includes moving the existing mount to another location).
- **AI –**
 - o Appliance installation SKUs include the removal of the existing appliance. The only time we will ask for additional SKUs, such as when the Best Buy sends us an order with a Product Return SKU and not matching installation SKU. In that case, we may ask for a matching Uninstall and Product Return SKU form the client.
 - o Best Buy will reimburse the servicer when there is an onsite equipment issue and the servicer needs reinstall in the existing appliance. This SKU requires the servicer to request the payment

when he calls/chats from onsite and we must seek DoD approval. This must be clearly notated in the Make It Right tool, such as “reinstalled old dishwasher.”

Missing, Wrong, Damaged, Defective Equipment Onsite

- Servicers must call/chat ALL damaged or defective equipment into the Home Solutions call center.
 - o *This step is required. Many clients require that Home Solutions update them immediately if there is an onsite equipment issue.*
 - o *Servicers should not leave the customer's location without seeking direction from Resolution Care. There may be additional actions necessary to ensure the customer's product issue is resolved.*
- Missing or wrong equipment can be reported through the Home Solutions Mobile App
- If the servicer is able to complete only part of the services on the order, the servicer must call/chat Home Solutions to have the SKUs updated.
- Uninstalled equipment should be returned to the client's pickup location within 24 business hours.

Best Buy:

- Home Solutions will need to reach out to the Geek Squad DoD for guidance while the servicer is onsite and get a case # from the DoD agent. Even if the servicer is using the Mobile App, he needs to call or chat from onsite. Resolution Care will update the order to reflect the work performed after reaching out to DoD.
- The servicer must submit a photo of the affected product or site location that shows the reason it cannot be installed.
- Resolution Care agents will need to request permission from DoD to add the reinstallation SKU when we are reinstalling the old appliances due to onsite issues.
- **Servicers should not reach out to DoD directly but should chat or call Resolution Care instead.**

Site Not Ready/No Fit

- If the customer needs additional work before we can complete the service or the product doesn't fit, the servicer needs to report the issue to Home Solutions from onsite
- The customer can decide to have the work done by another company and then have Home Solutions back out to complete the installation, or the servicer can leave the equipment onsite and the customer can have another party install the equipment (Delivery Only).
 - o If we leave the equipment onsite or complete any of the services on the order, the servicer should have the customer sign off in the Complete step of the Mobile App or Section 8 on the *Completion Form*
- Uninstalled equipment, especially anything that needs exchanged, should be returned to the client's pickup location the same day.

Best Buy

- If the unit is being returned to the pickup location (no fit, wrong model, customer will re-select), follow the Wrong/Damaged/Defective process. The servicer should chat/call Home Solutions from onsite, as we will need to call DoD for a Breeze Case ID.
- For all site not ready situations, the servicer must submit a photo of the affected product or site location that shows the reason it cannot be installed.

Job Closeouts

All forms that print in DOLI must be complete and submitted to Home Solutions for the order to be paid. Forms should be completed/submitted in the Mobile App or via the Form Upload button in DOLI.

Standard Forms are in the Mobile App

- **Onsite Checklist/Completion Form** – *Required for all clients*
 - o Must have all applicable sections completed and all applicable customer signatures.
 - o Signatures must be recognizable as signatures, e.g. have letters in them, and not just be squiggly line.
 - o If any services on the order, including delivery, were completed, get the final customer signature on the form or in the “Complete” step of the Mobile App.
- Product Information for Pickup Form
- Recycling Form
- Return Form
- **Post-Installation Photo** – *Required for all clients*
- Lowe’s Dishwasher Checklist

Non-Standard Forms Not in the App include, but are not limited to:

- In-Home Consultation/Pre-measure Form
- Best Buy Unit Return Form
- Bosch Certificate of Destruction
- Electrolux Certificate of Destruction
- Lowe’s Water Heater forms – must be handled via <http://ime.myhomeprojectcenter.com/documents>

Non-standard forms will need to be printed separately if using the app and uploaded with Take Photo or with Form Upload in DOLI.

Only jobs with the scope of work 100% complete should be closed out as “Complete – Completed per SOW” or “No Issues.” Equipment that is not installed and working correctly is considered an incomplete installation, including those that are damaged, defective, no fit, etc. Any parts of the order that cannot be completed need to be reported to Home Solutions from onsite. Resolution Care will update the order per the client process to reflect which work was completed and which work needs a return visit. Failure to correctly report onsite issues leads to delayed resolution for the customer. Some clients will not process an exchange or reschedule without an onsite report and/or a returned product.

Escalations & Compensation

Resolution Care agents handle customer service escalations, other than those assigned to Field Leadership. Agents will talk to the customer, review the order notes, and if necessary, speak with the servicer. Home Solutions will work with the customer to find a resolution. All actions are documented in DOLI. Many times, Resolution Care will offer the customer compensation. Accounting will reach out to Market Managers via the Deductions Report, who will approve whether we are back billing that compensation to the servicer.

Damage Claims

- Home Solutions' Damage Claims department will handle any Damage Claims, Theft, or Personal Injury escalations.
- The Damage Claims rep will investigate the claim, including asking for estimates to correct the damage, photos of the damage, setting up a troubleshoot to have a servicer return to review the damages, and documentation of any loss or repairs performed by a third party.
- All information regarding the claim will be forwarded to the Market Manager for a decision regarding liability.
- Market Managers will work with the servicer to see if they want to pay the customer directly or submit to insurance. If the servicer refuses responsibility or unresponsive, Market Manager's will work with the Regional Manager to resolve the claim, including submitting to insurance, without the servicer's input.
- When we come to a resolution, Damage Claims will have the customer sign and return a release.