

# New Servicer Vetting

## What is Vetting?

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Our Territory Field Recruiters are responsible for searching out and making initial contact with prospective provider to fill the needs of our network. Our Recruiters will work with the providers to determine if the company is a good fit for our network. Once the Recruiter has determined the provider is a good prospect, they will circle in the Market Manager for that area for a vetting call, where the Market Manager can go over more details of the provider's qualifications.

## Vetting Process

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1. Recruiters will schedule a vetting call with the provider and make the Market Manager aware of the appointment date and time.
2. Recruiters and Market Managers will use the Vetting Sheet to document the servicers' qualifications. The Recruiter will complete the "Company Info" tab of the Vetting Sheet down to the "Recruiter Comments" and send that to the Market Manager prior to the scheduled vetting call.
3. On the vetting call, the Market Manager will complete the
4. On the vetting call, the Market Manager will complete the "All Skillsets" section of the "Company Info" tab and the appropriate service-type tabs on the Vetting Sheet.
  - a. It is important to go through all the applicable questions on the Vetting Sheet. These questions are designed to ensure the prospective provider can meet the requirements and standards of CRST Home Solutions.
  - b. Clearly enter the provider's answers on the Vetting Sheet.
  - c. Enter a summary of your discussion for each service-type in the "notes/recommendations/reasoning" sections.
5. After having discussed the providers qualifications, the Market Manager will consider the provider's responses and record their decisions about the provider into the "Vetting Call Results" section of the Vetting Sheet.
  - a. Many fields in this section are drop down options.
  - b. Approved or Not Approved - Indicate whether we should go further with recruiting this provider
  - c. Approved Client Level # - Choose the client for each skill set level for which the provider is a good fit.
  - d. Level - Which position for the client is the provider best suited? Primary, Secondary, Tertiary, Other?
6. Email the completed Vetting Sheet back to the Recruiter. Additionally, keep a copy of the Vetting Sheet to refer back to during the recruitment process.

## Compliance Process

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Once the Market Manager approves the provider during the vetting process, the next step is to go through CRST Home Solutions' compliance requirements and collect that documentation from servicer. The servicer will need to supply the following items before their DOLI accounts can be created and they can be assigned work.

- **Master Agreement for Professional Services** – Return without any alterations or addendums. Servicer must accurately complete the fields on page one and page 6.
- **Vehicle Type** – Provider must have a vehicle appropriate for the service type. For a team that will perform deliveries, the provider must have either a box truck, cargo van, or an enclosed trailer large enough for products to fit all the way inside without any parts hanging out while in an appropriate transport position, e.g. TV's must be transported upright to avoid cracking. The service company must have constant access to the vehicle being used. It is not acceptable to rent a delivery vehicle. For any questions about acceptable vehicles, speak with your Regional Manager.
- **Crew Size** – The service company must be able to provide adequate crew to safely handle product without asking the customer for assistance. For most appliances or TV's, the service company will be expected to provide at least two servicers. One-man teams will need special approval from the Regional Manager, as this will limit the types of jobs the company can cover.
- **Proof of Liability Insurance** – Provide a Certificate of Insurance that shows the service company carries at least \$1,000,000 that lists "Installs, LLC" as both the Additional Insured and Certificate Holder.
- **Auto Insurance** – Provide proof of insurance for at least \$1,000,000 in auto coverage. (The standard is \$1,000,000, but actually accept coverage of \$300,000 or more without additional approval).
- **Head Shots** – Provide one headshot for each person who will be performing Home Solutions' work. The headshot needs to be a clear, full-color image, on a plain colored background, and show the servicer from the shoulders up.
- **Vehicle Photos** – Provide clear, color photos of all vehicles used on Home Solutions job. For each vehicle we need one photo each of the front, back, left side, and right side of the vehicle. The license plate needs to be readable.

### Additional Requirements

- **Drug Tests** – Service companies must have every servicer who will perform Home Solutions jobs take a 5-panel Drug Screening when they join our network. This screening must be renewed every year. Will be sent to the FSS team.
- **Background Checks** – Service companies must submit the *Background Check Consent Form*, their Social Security Card, and Driver's License for each servicer who will perform Home Solutions. Our FSS department will run the checks when the servicer joins the network and re-run them each year to ensure the servicer remains in compliance.

The above items should be sent into [fieldrelations@crst.com](mailto:fieldrelations@crst.com). Field Relations will review the documents and inform the servicer and Market Manager if there any necessary edits to meet Home Solutions' requirements. Once all information has been provided, a DOLI account will be created for the service company by our Compliance team- this is the Service Company Admin account. The Compliance will also create the first servicer account in DOLI – this account is the individual account necessary for DOLI to assign jobs to the company.

The Servicer account will not be activated until the Market Manager informs Compliance that the servicer has cleared both the background check and drug screening. Once the service company has completed the Compliance process and is active in DOLI, the TRA will reach out to the servicer to perform the initial DOLI training and orientation.

The service company will need to repeat the process of submitting the background check and drug screening for each person who will perform Home Solutions jobs. These servicers will also need to have individual servicer accounts created in DOLI.

