

# SERVICER REQUESTS PRIOR TO APPOINTMENT

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CRST Home Solutions agents will field a variety of inbound phone calls or emails from servicers. Some you will process, and others you will redirect to the appropriate department.

## ***Servicer Calling to Accept an Order***

In this case, the servicer is returning a call from Resolution Care, the TRA, or Field Leadership requesting the servicer pickup the job. We will assist by reviewing the job and updating it per the servicer's response.

- **Accept for scheduled date**
  1. Confirm the scheduled date and time with the servicer
  2. Reassign the job to the service company
  3. Schedule the job to the new service company for the pre-scheduled date and time
  4. Update job status to "Scheduled – (scheduled no comment)"
  5. Advise the servicer you have scheduled and accepted the job for them
  6. Notate the order in DOLI
- **Accept for an alternate date**
  1. Confirm the date and time the servicer is available
  2. Review the order history and determine if it is appropriate to call the customer to reschedule, e.g. two or less days before appointment, no other coverage in area.
  3. If rescheduling the customer:
    - a. Call the customer to confirm the new appointment date
      - i. Customer does not answer – leave a message and send an email to confirm the new appointment date and time.
      - ii. If the customer refuses to reschedule, work the job to find coverage per the appropriate process.
    - b. Reassign the job to the service company
    - c. Schedule the job to the new service company for the alternate date and time
    - d. Update job status to "Scheduled – (scheduled no comment)"
  4. If you are not rescheduling the customer, advise the servicer you will call them if the customer accepts that date and time.
  5. Notate all calls in DOLI (be sure to include whatever dates the servicer states that they are available)
- **Accept with Trip Charge**
  1. Pull up the calculator on your computer and enter requested fee and multiply it by 0.80.
  2. Propose this calculated amount to servicer, saying: "My supervisor is more likely to approve 'calculated amount' than 'originally requested amount'. I can submit 'calculated amount' to my supervisor for approval."
    - a. If the servicer insists on the originally requested amount or counters with a different amount, you may continue to negotiate or accept the servicer's proposed amount based on the situation at the time.
  3. Enter the agreed upon amount in the Trip Charge tool on the DOLI job following the normal procedure.
  4. If the job is scheduled for **two or more days in the future**
    - a. Put the Trip Charge in "**Pending Approval**" status and enter "**FSR**" in the *To be Approved By* field
    - b. Advise the servicer the order will be assigned to them if a supervisor approves the trip charge.
    - c. Update the job status to **Prescheduled -Rejected**
  5. If the job is scheduled for **today or tomorrow**
    - i. Ask a member of management to approve the trip charge
    - ii. If approved:

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1. Enter the Trip Charge in DOLI. Put Trip Charge in “Pending Approval” status and enter the name of the person who approved the fee in the To be Approved By field
2. Reassign and book the order in DOLI for agreed date.
3. If necessary, call the customer and confirm the new scheduled date and time.
  - If the customer doesn’t answer, leave a message and send an email.
6. Notate all calls in DOLI.

## ***Servicer Calling to Decline Job***

A servicer is calling in to inform us that he is unable to perform the job on the scheduled date. We need to update the job to reflect that the servicer is not rolling and act to take care of the customer.

- **Job is scheduled for two or more days in the future**
  - Ask why the servicer is not unable to perform the job
  - Ask the servicer if there is any date(s) they can perform the job
  - Advise the servicer that you will update the job in DOLI
  - Update the job status to “Prescheduled – Rejected”
  - Notate the call in DOLI and include the reason the servicer declined the job
  - This job will go to the Tech Needed Report so that coverage can be found.
- **Job is scheduled for today or tomorrow**
  - Ask why the servicer is not unable to perform the job
  - Ask the servicer if there is any date(s) they can perform the job
    - If the assigned servicer stated he cannot cover the job for ANY date, reassign order to 9668
  - If the job was scheduled for today, open a “Missed Appointment” escalation
  - Advise the servicer you will contact the customer to reschedule
  - Call the customer and offer next available date/alternate date
    - **Customer doesn’t answer:**
      - Update the job status to “**Waiting Customer Action – Called Cust Left Message**”
    - **Customer accepts new date/time:**
      - Reschedule order in DOLI
    - **If the customer refuses to reschedule:**
      - Advise that we will look for alternate coverage and will contact him/her with an update.
      - Change the job status to “**Prescheduled - Rejected.**”
      - Open and work a “Field Management Support” escalation” ownership “Install Support.”
      - Set clear call-back expectations with the customer.
  - Notate the call in DOLI and include the reason the servicer declined the job

## ***Servicer Calling to Request a Trip Charge***

Servicers are able to request trip charges to compensate them for job specific issues that may not be covered by the standard rate, such as extra mileage or a last-minute request to cover a job. When the servicer contacts us with this request, RC agents will work the request as below:

1. Pull up the calculator on your computer and enter requested fee and multiply it by 0.80.
2. Propose this calculated amount to servicer, saying: “My supervisor is more likely to approve ‘calculated amount’ than ‘originally requested amount’. I can submit ‘calculated amount’ to my supervisor for approval.”

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- a. If the servicer insists on the originally requested amount or counters with a different amount, you may continue to negotiate or accept the servicer's proposed amount based on the situation at the time.
  3. Enter the agreed upon amount in the Trip Charge tool on the DOLI job following the normal procedure.
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- **If the job is scheduled for two or more days in the future**
    1. Put Trip Charge in "Pending Approval" status and enter "FSR" in the To be Approved By field
    2. Notify the servicer that if the supervisor approves the trip charge, the order will be assigned to them in DOLI.
    3. Update the job status to "Prescheduled – Rejected"
  - **If the job is scheduled for today or tomorrow**
    1. Ask a management to approve the trip charge
    2. If approved, ensure the job is assigned and booked to the servicer for the current scheduled date.
    3. Advise the servicer that the fee has been approved and confirm the scheduled date and time.
    4. Enter the Trip Charge in DOLI. Put Trip Charge in "Pending Approval" status and enter the name of the person who approved the fee in the To be Approved By field
  - Notate all calls in DOLI.

## ***Servicer Calling to Update SKUs on Order Prior to Appointment***

Our servicers will review their work orders before rolling on those jobs. If there is an issue or if the customer brings something up during the servicer's pre-call, the servicer may call to have the order corrected.

### **Standard Missing SKU Process**

- Review SOW to confirm needed servicers are not included in the purchased services
- Confirm with the caller which SKU is missing from the order and use the Master Client SKU List to find the SKU if needed.
- Advise the caller that you will have to call the store to verify that it is missing from the order.
- Ask to put the caller on hold while you call the store, DoD, or IST.
- Call the store and speak with a store agent regarding the missing SKU.
- Is the SKU missing from the order?
  - Yes:
    - Inform the caller that the store approved the addition of the missing SKU.
    - Add the SKU to the order as "**Client Pays.**"
    - Confirm the servicer can perform the services as scheduled
  - No
    - Follow the client specific upsell process
    - Advise customer/servicer if the order is not being performed as scheduled
- Notate all calls in DOLI.

**The below clients use a client specific Missing SKU process. Refer to the WF for these processes:**

- **Lowe's**
- **Porch**

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## **BBY Make It Right**

It is a Best Buy requirement that the servicer be onsite in order for CRST to add additional services to the customer's order.

- If the servicer requests RC add services prior to the servicer rolling on the job, we should advise the servicer to call us back from onsite.
- If the servicer is unable to roll on the job with the services sent to us by Best Buy, Resolution Care will refer the servicer to their Market Manager for further assistance.
- If there is a question about what is supposed to be on the order:
  - Call the customer and ask about the expected services.
  - If the order is incorrect, the customer will be referred to Best Buy to correct the order. In these cases, we will not roll on the job until the customer and client have resolved the issue.
  - We will update the order to "Waiting Client Action – Problem with Order" status until the issue is resolved.

## ***Update Pickup Location***

There are times where our service may be assigned to an order, but the pickup location is very out of the way for the servicer. If the servicer requests that we change the pickup location, it is necessary to arraign this change with the client.

1. Confirm the pick-up location on the order with the servicer by clicking the blue client link in DOLI and verbally reviewing the location's address with the servicer.
2. Call the client to ask if the pick-up location can be changed to the requested location.
3. If the location can be changed,
  - a. Confirm when the product would be available at the new location.
  - b. Note the new pick-up location in the Additional Instructions, and if possible, update the pickup location in the client info screen.
4. If the location cannot be changed, ask if the servicer is still able to complete the job.
  - a. **No:** We will need to put the order into "Prescheduled - rejected" status and start the servicer needed process.
  - b. **Yes:** Leave the order scheduled as is.
5. Notate DOLI accordingly

**Note:** We cannot change the pickup location for Sam's Club orders.

## ***Servicer calling about joining the CRST Home Solutions network***

If the servicer has not put in an application, advise the servicer to go to our website to put in an application and a recruiter will call them back.

If the servicer has already been speaking with our recruitment team, transfer the call to the recruiter who contacted the company/covers the company's territory. Recruiter handles this call and follow up with any necessary duties.