Job Process Guide - BC's

Handwritten notes are shown in red italics.

Building Consultants have two job scenarios at Rimkus.

a. Building Consultant is the BTK on their own matter *(Billing Time Keeper)*

b. Building Consultant is the Co-Consultant on a PE matter to provide a repair cost estimate based on the PE's inspection

Scenario A: Building Consultant is assigned as the BTK for the matter.

1. Review the Matter Short Entry in 3E.

   a. Review the narrative and the scope of work and write down any questions or clarification you would want to ask the client.

   b. Run a Google Map to determine the Travel Time & Mileage (cost).

   c. Prepare a budget estimate (use your template) based on the information in your email notification/matter sheet (download matter sheet from 3E) *Excel File – find in email.*

2. **CALL 1** - Call the Ordering Client (Ordering v Paying client can be different). *Always talk to ordering client.*

   a. Take notes during the phone call.

      i. Write down any additional data or updates for matter – send to Admin to update in 3E *cross sell/upsell*

   b. During the call, discuss the job narrative (what, where, when, etc.).

   c. Confirm Scope of Work (what does the client want us to determine?).

   d. Offer additional Rimkus services if appropriate (PE's are available, Mitigation Consultants, Contents Valuations, 3D Laser Scan, Thermal Imaging, Matterport, DocuSketch, know all that we can offer based on the conversation and scope).

   e. Provide the client with a budget estimate.

      i. Include Job setup/planning, RT Travel Time & Mileage, Inspection, Analysis, TR of analysis, Verbal report, Preparation of Report, and TR of Report.

      ii. Add'l items to charge for: (review $ in Cosine) Outside Vendors, Equipment, Corelogic, Eagleview. Strike Reports Etc.

      iii. NOTE: This is our preliminary budget. Notify the client immediately upon arrival at the site if something needs to change or be added to the budget. Leave a message if necessary.

      iv. NOTE: Rimkus bills the client a 15% markup when paying vendor invoices that are billed to a job.

   f. Once the budget estimate is provided/discussed/approved with the client, Enter the budget amount under Matter Budget in 3E. Send a follow up email to the client for an email confirmation of the approved budget; place in the matter folder *Matter Short Entry in 3E.*

g. NOTE: If at any point during the job process you feel you will go over the budget estimate, you will need to get approval from the client to raise the amount (Add additional Budget in 3E).

h. If you get the client's voicemail – *VERY LIKELY* -- Leave a voice message providing your contact information and the claim number. Ask for a call back. NOTE: We need approval of the budget before proceeding with the matter.

i. **CONCLUSION OF CALL 1 – Update 3E - FOUR ENTRIES**

   i. Enter matter budget - Matter Short Entry

   ii. Enter TR *Tech Reviewer (Ryan Anderson)* - Matter Short Entry (I will be TR to begin with)

   iii. Enter (Phase/task) Planning/Confirmed Scope of Work w/ Client – Time *Entry* **(CRITICAL EVENT #1)**

   iv. Enter (Phase/task) Planning/Budget transmitted to client – Time *Entry* (typically a zero-hour entry)

3. Call the insured to schedule an inspection NOTE: You may need to call a cntr or PA

   a. During the call, confirm address, special inspection requirements, if a cntr is involved, etc

   b. Notify the client if there are any delays in scheduling the inspection (insured is not responding or wants to wait, cntr delay, weather delays, etc).

   c. **CONCLUSION OF INSURED CONTACT CALL – Update 3E - ONE ENTRY**

      i. Enter (Phase/task) Planning/Physical Inspection Scheduled - Time *Entry* **(CRITICAL EVENT #2)**

      ii. Update OUTLOOK CALENDAR – develop a system and use it

4. Conduct the site inspection.

   a. Be punctual, be open minded. You are there to determine the facts and truths

   b. Create field notes for each file (Rimkus Graph Paper) record the name and designation of all present parties, owners, cntr, PA, adjuster, etc.

   c. Interview all necessary parties, take notes of what is stated

   d. Explain to the insured why you are here and what you will be doing/not doing

   e. Create your routine but be flexible

   f. Scan and save field notes to the matter folder (title it "Field Notes") *see below for where to save this

   g. **CALL 2 – VERBAL OBSERVATIONS TO CLIENT** - When inspection is completed and you are alone, call the client while at the site to provide them with your observations only (NO CONCLUSIONS).

      i. Verify with the client if there is anything else they need you to inspect while at the job site.

      ii. Offer additional Rimkus services, add'l inspections if appropriate

      iii. If needed, leave the client a voicemail.

   h. **FOLLOWING THE SITE INSPECTION – Update 3E - THREE ENTRIES**

i. Enter (Phase/task) Inspection/Travel – Time *Entry*

ii. Enter (Phase/task) Inspection/Physical Inspection Completed – Time *Entry* **(CRITICAL EVENT #3)**

iii. Enter (Phase/task) Inspection/Observations given (0 hr. Entry typically) – Time *Entry*

4 check boxes
- Pics upload
- 3E
- Expenses
- Verbal Rpt.

5. Prepare the Cost of Repair Estimate/Cost Analysis and the appropriate Cover Letter

a. Review your field notes, photos, (UPLOAD ALL TO MATTER FOLDER) Use the preloaded **PHOTOS** folder. Add any documents (Field Notes) pertaining to the job to the preloaded **GENERATED FOLDER** (you may create subfolder(s) within these preloaded folders if necessary).

b. When the estimate/analysis are complete, upload to the matter folder as follows:

i. Go to the matter folder and open the preloaded **GENERATED FOLDER**

ii. Create a subfolder called: **Rimkus Cost Estimate/Analysis**

iii. Within this subfolder drop all documentation, cost data, and a **PDF version** of the estimate/analysis *– Tech Review*

iv. Create a subfolder within the **Rimkus Cost Estimate/Analysis** subfolder called: **ESX – Internal Use Only**

c. Complete the appropriate Cover Letter

i. Download the letter report template from 3E to prepare all Cover Letters – Matter Short Entry

ii. Prepare the cover letter using our standard Cover Letter templates (Available on the Team Hub)

iii. Go to the matter folder and open the preloaded **GENERATED FOLDER**

iv. Within the subfolder called **Rimkus Cost Estimate/Analysis,** upload the Cover Letter

v. The proper naming conventions for the estimate/analysis and Cover Letters are:

100xxxxxx - Cost of Repair Estimate (PDF file)
100xxxxxx – Cost Analysis (PDF file)
EST100xxxxxx.doc (Word file)

d. Submitting for Technical Review

i. File maintenance, clean everything up and organize the matter folder as needed/appropriate

ii. Make sure all documentation, cost data backup, ESX file are in the matter folder as required and organized earlier

iii. Place the estimate/analysis and Cover Letter in the **Rimkus Cost Estimate/Analysis** subfolder in the correct format and with the correct names; All

items you utilized to create the estimate/analysis should be in a subfolder called **Cost Data Backup;** the items within this folder should be clearly and logically named

iv. **NOTE**: When you submit for a TR, it should be your intention that these documents are perfect and ready for publishing; **PROOFREAD THEM FIRST**

e. **Update 3E – TWO ENTRIES**

i. Enter (Phase/task) Misc/Note – Time *Entry* (Completed Estimate)

ii. Enter (Phase/task) Report/Report submitted – Time *Entry* (Prepared Cover Letter) **(CRITICAL EVENT #5)**

iii. Use the **Route To**: option, select your TR and hit POST *– Don't forget to include TR – RUSH – or SOON DATE in subject email.*

iv. Follow up with an email to TR reviewer that the estimate/analysis and Cover Letter* are ready for their **TECHNICAL REVIEW**

f. Technical Review Completed

i. TR will review the estimate/analysis PDF and the EST Cover Letter and leave comments; they will respond back to your email when the TR is completed

ii. Review comments by TR (accept or reject)

iii. Pick up any additional comments left by your TR

iv. Call TR with any questions, **DO NOT EMAIL BACK AND FORTH**

v. IF TR DOES NOT AGREE OR QUESTIONS YOUR ESTIMATE – CALL TR TO DISCUSS, come to terms, otherwise escalate

vi. IF TR IS IN AGREEMENT WITH YOUR Estimate and Cover letter, you may proceed to the **Verbal Report #6**

vii. Once all updates are completed on the estimate/analysis and Cover Letter **DELETE** all TR mark ups from the matter folder; confirm Recycle bin is empty

g. **Update 3E - ONE ENTRY** → *Short entry* → *Letter Reports* → *Cover Letter*

i. Enter (Phase/task) Misc/Note – Time Capture (Finalized estimate and Cover Letter)

6. **CALL 3** - Verbal Report to client

a. Call client to deliver the verbal report of your estimated repair costs or analysis deltas NOTE: prep for this call, you need to have a conversation and explain our estimate/analysis

b. Confirm with the client that they want the COST ESTIMATE/ANALYSIS. IF THEY DO NOT WANT A WRITTEN ESTIMATE/ANALYSIS – **proceed to Proforma # 9**

c. If they want the written ESTIMATE/ANALYSIS, give a timeline – DO NOT OVER-PROMISE WHAT YOU CANNOT DELIVER *Possible 48/72 hrs.*

d. Rimkus' goal is to deliver Estimates/Analysis and Cover Letters within two weeks of an inspection

e. **Update 3E - ONE ENTRY**

i. Enter (Phase/task) Report/Verbal report to client – Time Capture **(CRITICAL EVENT #4)**

ii. Move to **Submitting to CPC #7, then continue with #8 and #9**

Scenario B: *(circled)* Building Consultant is assigned to a matter inspected by a Rimkus PE and asked to produce a Repair Estimate/Cost Analysis based on the PE's inspection.

a. Review the scope and narrative in 3E and the Report of Findings prepared by the PE.

b. Provide a budget estimate via email to the PE for their submittal to the client.

c. Once budget approval is received, do TWO things

   i. Update 3E: Enter yourself as a **Co-Consultant, enter your TR*** and enter your **Budget** in the matter – Matter Short Entry

   ii. Reach out to the PE to discuss the scope of the estimate/analysis and review the ROF and photos together to determine the scope of the repair estimate; review the conceptual repair protocol in the ROF; address any concerns or details. You may need to help detail the scope for the PE, don't be afraid to do this, it takes a TEAM sometimes.

d. **Update 3E – ONE ENTRY**

   i. Enter (Phase/task) Inspection/Meeting – Time Capture

e. Complete the repair estimate/analysis

   i. Go to the matter folder and open the preloaded **GENERATED FOLDER**

   ii. Create a subfolder called: **Rimkus Cost Estimate/Analysis**

   iii. Within this subfolder drop all documentation, cost data, and a PDF version of the estimate/analysis

   iv. Create a subfolder within the **Rimkus Cost Estimate/Analysis** subfolder called: **ESX – Internal Use Only**

f. **Update 3E – TWO ENTRIES**

   i. Enter (Phase/task) Data/Prepare Cost Estimate – Time Capture

   ii. Enter (Phase/task) Analysis/Tech review – Time Capture

g. * Scope Review with PE

   i. Notify the PE via email that the estimate/analysis is ready for their **SCOPE REVIEW**; offer to meet with them on TEAMS to review the estimate/analysis. **NOTE**: If you are reviewing an Xactimate estimate, be prepared to OPEN LINE ITEM INFORMATION details for any/all line items to allow the PE to see that their complete scope is covered in your estimate.

   ii. Answer all questions and make any updates needed

   iii. Confirm if the PE will be adding our estimate to their ROF or if we will be issuing a separate Cover Letter

h. **Update 3E – ONE ENTRY**

   i. Enter (Phase/task) Inspection/Meeting – Time Capture

i. Prepare for Technical Review

   i. File maintenance, clean everything up and organize the matter folder as needed/appropriate

ii. Update the estimate/analysis per PE Scope Review and create updated PDF files, DELETE THE OLD FILES and anything with PE review comments from the matter folder. CHECK RECYCLE FOLDER TO CONFIRM

iii. The proper naming conventions for the estimate/analysis and Cover Letters are:

100xxxxxx - Cost of Repair Estimate (PDF file)
100xxxxxx – Cost Analysis (PDF file)
EST100xxxxxx.doc (Word file)

iv. Make sure all documentation, cost data backup, updated ESX file are in the matter folder as required and organized earlier

v. Prepare the Cover Letter; if applicable

vi. Place the estimate/analysis and Cover Letter in the **Rimkus Cost Estimate/Analysis** subfolder in the correct format and with the correct names; All items you utilized to create the estimate/analysis should be in a subfolder called **Cost Data Backup;** the items within this folder should be clearly and logically named

vii. **NOTE**: When you submit for a TR, it should be your intention that these documents are perfect and ready for publishing; **PROOFREAD THEM FIRST**

j. **Update 3E – TWO ENTRIES**

i. Enter (Phase/task) Misc/Note – Time Capture (Reconcile Estimate)

ii. Enter (Phase/task) Report/Report submitted – Time Capture (Prepared Cover Letter)

iii. Use the **Route To**: option, select your TR and hit POST

iv. Follow up with an email to TR reviewer with a CC to the PE that the estimate/analysis and Cover Letter* are ready for their **TECHNICAL REVIEW**

v. TR will review the estimate/analysis PDF and the EST cover letter and leave comments; they will respond back to your email when the TR is completed

vi. Review comments by TR (accept or reject)

vii. Pick up any additional comments left by your TR

viii. Call TR with any questions, **DO NOT EMAIL BACK AND FORTH**

ix. Once all updates are completed on the estimate/analysis and Cover Letter DELETE all TR mark ups from the matter folder; confirm Recycle bin is empty

k. **Update 3E - ONE ENTRY**

i. Enter (Phase/task) Misc/Note – Time Capture (Finalized estimate)

l. Contact the PE and let them know that the estimate/analysis and Cover Letter are back from Technical Review and ready to CPC.

NOTE: Ask the PE if they would like to reach out to their client with the estimate totals/analysis deltas prior to us going to CPC for publishing

*** If they want to call the client, wait until you hear back with further direction*

*** If they do not want to reach out, move on to #7*

7. Submit estimate/analysis and Cover Letter to Central Processing Center (CPC)

a. On SHAREPOINT click the CPC link

b. Enter data for matter into CPC popup, hit save

c. **Update 3E - ONE ENTRY**

   i. Enter (Phase/task) Report/ report submitted to Central Processing – Time Capture (typically a zero-hour entry)

d. CPC will review the COVER LETTER ONLY and place it back on the server for your review. You will receive notice of this by email

e. Review the notes/changes from CPC - accept or reject changes made to the Cover Letter. Re-save to server and REPLY ALL to CPC to prepare the PDF version for signature

f. CPC will send a reply email when the Final PDF with estimate/analysis attached, is ready and on server. THIS IS YOUR FINAL LOOK BEFORE PUBLISHING

g. Sign the PDF – reply all to CPC "Cover letter is signed"

h. CPC will issue the document to client and copy you and appropriate ADMIN

i. ADMIN will send reminder email to complete your Proforma

8. Proforma – 3E Workflow Inbox (Billing Dashboard)

a. Review that all of your time and expenses are included in the proforma.

b. Make sure all TR time is on the proforma

c. Often missed items are soft costs like CoreLogic, Eagleview, etc…

d. Include needed information under Internal Comments (i.e. missing expenses that was previously turned in, missing tech review time, no photos charged, etc)

e. There are a minimum of **FIVE SECTIONS** to review on the Proforma:

   - Top light grey box
   - TimeKeeper Summary
   - Proforma Detail Cost
   - Proforma Detail Fees
   - Proforma Notes

f. Approve/Submit the proforma.

   i. Our goal is to send the client an invoice immediately after the Cover Letter is issued.

9. Close Matter – Enter (Phase/task) Miscellaneous/Request Matter Closed – 3E Time Capture

a. Enter: Please close, matter complete (no client deliverable requested at this time)

b. Enter: Please invoice and leave open (Interim invoicing)

c. (Typically a Zero hr. entry)

Responsible Time Keeper = Admin for the job. That's who closes the job.

KEEP THIS AT YOUR DESK UNTIL IT IS MEMORIZED