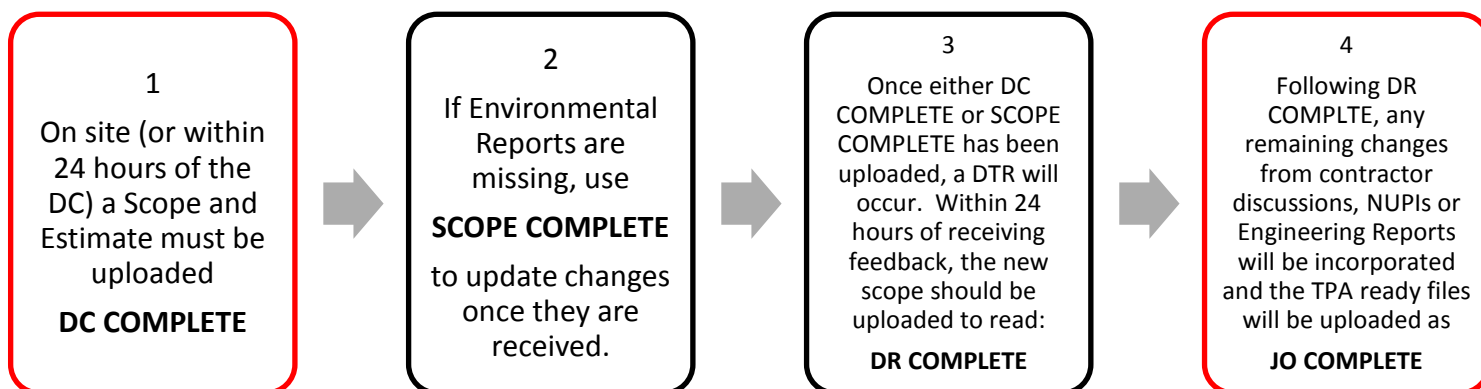


Version control

To maintain the integrity to the Design Consultation process, a scope and version control system has been implemented. Along each step of the delivery process, a unique Scope and Estimate file will be generated.

Procedures and sequence for file naming are outlined below. Up to four (4) versions of a file may exist. However, depending on the status of the Tier II Environmental reports, or the QC results, some jobs may consist of only two of the four steps outlined below. Review the outline below to determine how many steps your DC files will be required to complete.

Scope / Estimate Version Control 10 April 2014				
	Scope/Estimate PDF Version Name	Process Event	Version Description	Timeline
1	DC COMPLETE	Design Consultation – on site and immediate time after	Used following a completed Design Consultation - Status must be 'DC Complete'; and LDS must 'check out' to push EDI and PDF files to CMS. - This is when a JOC will first be notified of a NUPI	Immediately following the completion of a DC. Recommended upload from DC site. (maximum 24 hours if technical problems are experienced)
2	SCOPE COMPLETE	Draft Detailed Scope Complete -necessary if Tier II Environmental reports are missing prior to the DC being conducted	Used when a new version of the Scope/Estimate is created as a result of incorporating lead and/or asbestos and/or engineer review. - Do not upload new EDI and PDF versions until ALL relevant and outstanding items have been incorporated and Draft Detailed Scope is COMPLETE and ready for QC	Up to <u>5-10 days</u> from the DC date <u>Not always necessary, if Environmental reports are available at the time of the DC, proceed directly to step 3.</u>
3	DR COMPLETE	Design Review - following DTRQC process	Used if corrections are made during QC (otherwise, if no deficiencies are detected, no new version is uploaded and 'Scope Complete' with a DC status of DR complete indicates most recent version in CMS?)	DR COMPLETE needs to be uploaded within <u>24 hours</u> after DTR is completed
4	JO COMPLETE	Job Order Development - this is the version for TPA signings	Used if any further changes are made to Scope post-DR Complete (e.g. NUPIs or discussion with JOCs)	After a DR COMPLETE status is uploaded, an LDS has <u>48 hours</u> to allow for a Homeowner Review and to resolve any and all items with the JOC for a TPA.
Versions highlighted in RED are mandatory for each and every job.				



The process is outlined graphically above. Steps 1 and 4, highlighted in red will be required for each and every DC job.

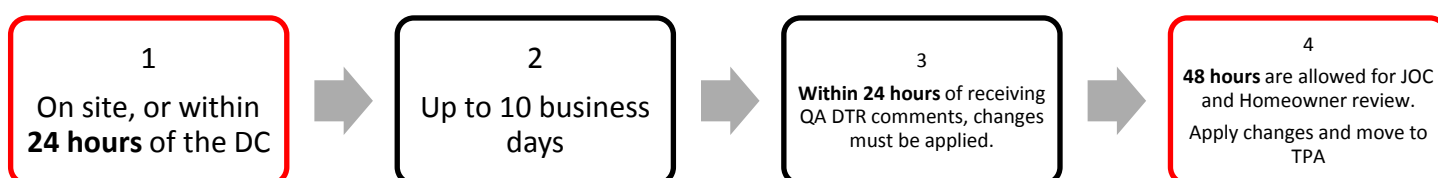


Figure 1 – Screenshot of a completed Scope.

Each Version of the Scope/Estimate will be documented using the Xactimate 'Claim Number' field.

Step	Screenshots of the process	Status
0		
	Where to locate the field for updating versions? The 'Claim Number' field is located in the 'Claim Info' tab of Xactimate. Within that tab, be sure that the 'Coverage/Loss' menu is selected.	

1

Version 1: Design Consultation

Type 'DC COMPLETE' in the claim number field.

Loss Information

Claim Number:	DC COMPLETE	Adj. File Number:	
Policy Number:	APP-000000		
Type of Loss:	IURRICANE	Hurricane	Roof Damage: <NONE>
Cause of Loss:	<Unspecified>		
Cat Code:			
Policy Dates:	/ / to / /	Policy Type	Apply Deductible
Initial Coverage:	/ /	☒ Homeowner	☒ Across all Coverage
Form Numbers:		☐ Commercial	☐ Coverage Specific
			\$0.00

2

Version 2: Scope Complete

Type 'SCOPE COMPLETE' in the claim number field.

Loss Information

Claim Number:	SCOPE COMPLETE	Adj. File Number:	
Policy Number:	APP-000000		
Type of Loss:	IURRICANE	Hurricane	Roof Damage: <NONE>
Cause of Loss:	<Unspecified>		
Cat Code:			
Policy Dates:	/ / to / /	Policy Type	Apply Deductible
Initial Coverage:	/ /	☒ Homeowner	☒ Across all Coverage
Form Numbers:		☐ Commercial	☐ Coverage Specific
			\$0.00

3

Version 3: DR Complete

Type 'DR COMPLETE' in the claim number field.

Loss Information

Claim Number:	DR COMPLETE	Adj. File Number:	
Policy Number:	APP-000000		
Type of Loss:	IURRICANE	Hurricane	Roof Damage: <NONE>
Cause of Loss:	<Unspecified>		
Cat Code:			
Policy Dates:	/ / to / /	Policy Type	Apply Deductible
Initial Coverage:	/ /	☒ Homeowner	☒ Across all Coverage
Form Numbers:		☐ Commercial	☐ Coverage Specific
			\$0.00

4

Version 1: JO Complete

Type 'JO COMPLETE' in the claim number field.

Loss Information

Claim Number:	JO COMPLETE	Adj. File Number:	
Policy Number:	APP-000000		
Type of Loss:	IURRICANE	Hurricane	Roof Damage: <NONE>
Cause of Loss:	<Unspecified>		
Cat Code:			
Policy Dates:	/ / to / /	Policy Type	Apply Deductible
Initial Coverage:	/ /	☒ Homeowner	☒ Across all Coverage
Form Numbers:		☐ Commercial	☐ Coverage Specific
			\$0.00

The last action in each step will always be to upload the file to the portal.

Whatever file is on the portal will be considered the most accurate phase of work that has been completed on that particular scope.