1004: General Contractors

1000: Insurance & Claims · https://milo.masseyservices.com/docs/1004-general-contractors/

Section: Insurance & Claims
Subject: General Contractors
Approved by: Tony Massey
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Policy Owner: VP, Director of Quality Assurance

Policy

In order for Massey Services to protect our customer’s and our company’s interest and to ensure our customers’ satisfaction, the following policy statement with regards to General Contractors shall apply:

Any individual, partnership, company or corporation, vender or subcontractor doing work for Massey Services must meet all legal requirements with regard to business licensing and permitting as well as carrying adequate insurance to indemnify Massey Services.

This requirement applies to:

- All work performed on the property of a customer for whom we may be performing repairs, as in a termite damage or lawn claim.
- All work performed at a customer’s property on behalf of Massey Services as part of a sale such as landscape renovation, pest exclusion, or wildlife trapping.
- All work performed on property owned or leased by Massey Services.

All vendors must be approved by the Director of Purchasing prior to any work being performed. The Massey representative requesting to contract with a vendor must submit their vendors’ company information for approval to the Director of Purchasing. This information must include a copy of the following:

- Completed IRS form W-9
- Current and appropriate license(s)
- Current and appropriate Insurance certificates (see below)
- Permitting Requirements Affidavit (See Exhibit A) signed and notarized, prior to any work being performed.

Insurance Requirements

- General Liability: Minimum $1,000,000 Limit with Massey Services named as additional insured.
- Workers' Compensation: Required Minimum of $500,000/$500,000/$500,000 (Bodily Injury by accident/disease (policy limit)/by disease (each employee)
- Auto: A copy of the Declarations Page ($500,000 Required Minimum) with Massey Services named as additional insured.

Termite Damage Claims Contractors

Any contractor approved to perform work on behalf of Massey Services for repairs on Termite Damage Claims must also be interviewed and approved by the Claims Department to insure that they understand and are willing to comply with our repair standards and procedures for billing and payment.

Structural Fumigation Contractors/Heat Remediators

All vendors performing sub-contract structural fumigation or heat remediation on behalf of Massey Services must also be approved by the Vice President, Director of Quality Assurance and/or the Termite Technical & Training Director

Managing sub-contractors to complete a sale

The use of sub-contractors to complete work requires additional steps to ensure proper communication with our customers, quality workmanship in keeping with our commitment to customer service and satisfaction, and prevention of problems that can lead to dissatisfaction with Massey Services.

Sales Inspector Duties and Responsibilities

1. Upon the sale of services requiring sub-contracted work, provide the Customer with a timeline of the steps to be taken to provide service. The customer will be updated within 48 hours as we work on selecting and securing the right sub-contractor for the work.
2. At the time of sale, contact the Service Center from the customer's home to start the process to secure a firm date for the work to be done.
3. As soon as a firm start date for the work is secured, call the customer to relay the information and confirm the start date and time.
4. Record the start date and time on the DSAR to be present at the beginning of the work at the customer's home.
5. Be on-site at the beginning of the work to:
    1. ensure that the customer's expectations and the sub-contractor's scope of work match to what was sold;
    2. confirm when the expected work is going to be completed (which is to be added to the DSAR for the appropriate date);
6. Return to the Customer's home just prior to the completion of the work and review the work with the sub-contractor to ensure the proper workmanship has been provided.
7. Meet with the customer to confirm the customer's satisfaction with the work completed and document it using Massey's Completion Certificate (MS-022) or
8. Renovation Completion Certificate (MS-056), which will be required prior to any sub-contractor invoices being paid for the services rendered. The completed certificate and related paperwork is to be submitted to the Service Center for appropriate processing.

General Manager Duties and Responsibilities

1. Upon approval of a sale requiring sub-contracted work, call one of the approved vendors and secure an estimated start date.
2. No later than the next morning's check-in from the time of the sale, review all paperwork and ensure all measurements, etc. are correct and, if necessary, update the sub-contractor.
3. Submit a hand-written Purchase Request to your assigned Purchasing Agent with required approvals based on Limits of Authority detailing the scope of services to be provided and the

estimated cost. Attach a copy of the Sales Agreement and Graph.

4. If the vendor is not an approved vendor the Purchase Request will be denied until the Vendor is approved by Purchasing. A list of approved Subcontractors is available on the G: drive under G: Shared: Risk: Subcontractors.
5. When the Purchase Requisition is approved, Purchasing will assign a Purchase Order (P.O.) number and email a copy of the P.O. to the Service Center.
6. GM will send the subcontractor a copy of the P.O. and confirm a start date.
7. Once a confirmed start date is secured, forward the information to the Sales Inspector in order to contact the customer.
8. As part of check-in and once the start date is known, ensure that the start date is pre-listed on the DSAR for the appropriate Sales Inspector. In addition, ensure the expected completion date/time is pre-listed.
9. If the scope of the job changes, or if the price exceeds the estimate on the P.O., complete a revised Purchase Request detailing the additional charges, get approvals from the appropriate person based on Limits of Authority, and send the approved Purchase Request to your assigned Purchasing Agent. The invoice will not be paid if the cost exceeds the approved P.O.
10. In the check-in following the expected completion date of the work, ensure that the completion certificate is signed by the customer. The certificate is then given to the OM to process payment once the other required paperwork is received.

Administrative Duties and Responsibilities

1. When a sale is called into the Service Center which requires sub-contract work, the GM is to be immediately notified to generate a Purchase Request and contact the selected sub-contractor and to schedule a firm date for the work to be started when the approved P.O. is received.
2. Schedule the Sales Inspector to be on-site at the beginning of the work to be completed which should be recorded in the appointment log.
3. Upon completion of the work, the Inspector is to provide a signed completion certificate. The completion certificate is evidence of the completed work and authorizes the O.M. to post the service as complete within the CRM.
4. Upon submission by the sub-contractor of an invoice, process the appropriate payment with all required paperwork, including the AP Voucher, Purchase Order, Invoice, Sales Agreement, Graph,

and Subcontractor Analysis worksheet.

Managing Sub-Contractors to Complete a Claim

General Manager Duties and Responsibilities

1. Upon awareness of a customer claim, enter the claim details into the Claims Editor.
2. Contact one of the approved vendors and secure an estimate and enter the estimated amount into the claims editor.
3. Complete the Claims Authorization Purchase Request from within Claims Editor and submit to Risk Management. If the cost of the claim exceeds the General Manager's limits of authority, they should notify their Regional Manager of the claim.
4. If the vendor is not an approved vendor the Purchase Request will be denied until the Vendor is approved by Purchasing. A list of approved Subcontractors is available on the G: drive under G: Shared: Risk: Subcontractors.
5. When the Claims Authorization Purchase Requisition is approved, Purchasing will assign a Purchase Order (P.O.) number and email a copy of the P.O. to the Service Center.
6. GM will send the subcontractor a copy of the P.O. and confirm a start date.
7. Once a confirmed start date is secured, contact the customer to inform them when the repairs are to be made.
8. The General Manager will update their schedule to meet the sub-contractor at the beginning of the work to ensure the scope of work is followed.
9. If the scope of the job changes, complete a revised Claims Authorization Purchase Requisition detailing the additional charges and send to Risk Management. The invoice will not be paid if the cost exceeds the approved P.O.
10. Upon completion of the repairs, meet with the customer and ensure they are satisfied with the completed work and get the completion certificate and claims release signed by the customer. The certificate is then given to the OM to process payment once the vendor submits their final invoice for the work completed.

Administrative Duties and Responsibilities

1. Upon completion of the work, the General Manager is to provide a signed completion certificate and/or claims release.
2. Upon submission by the sub-contractor of a final invoice, process the appropriate payment with all required paperwork, including the AP Voucher, Purchase Order, Invoice, Completion Certificate, and/or Claims Release.

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