805: Pretreat Procedures

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Section: Termite Administration
Subject: Pretreat Procedures
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Policy

Pretreat Procedure

Massey Services, Inc. provides pre-construction soil treatment for the purpose of protecting new buildings from subterranean termite infestation. This practice, known as "Pretreatment," provides a valuable source of termite revenue for our Company.

In order to have effective management of our pretreatment program, it is vital to standardize communications/paperwork, rate card pricing, treatment specifications, and a system of record keeping and follow-up.

Pretreat Classifications

Pretreat jobs fall into three basic classifications Commercial/Industrial Pretreat, Developers/Custom Homebuilders, and Individual Residences. The following will briefly address each category.

1. COMMERCIAL/INDUSTRIAL PRETREATS
    - Large Commercial/Industrial pretreats requiring multiple treatments over thirty days or more, usually have very structured requirements for payment, i.e.: bill as sections or phases are completed or billed on a weekly or semi-monthly basis as treatments take place. They may also

have time constrictions, i.e.: invoices to be paid must be in by the 10th of the month in order to receive payment on the 25th of that month. In this type of pretreatment an accurate graph or blueprint must be a part of the master file. This graph or blueprint must be marked off as the sections are treated. It is important to do this so that production and sales counted will equal that amount billed and paid. To put it more simply, you must not end the month with 90% of the job counted as complete on the Daily Operations Report (DOR) when in reality only 40% or 50% has been treated. Retainage - Very often with this type of pretreat, 10% of the payment will be held in escrow by the General Contractor until either the project is complete or the particular phase of the project is complete. This arrangement must be clearly understood at the time the contract is executed. Procedures and time frame to collect this outstanding balance (retainage) must be spelled out and agreed upon in the contract.

2. DEVELOPER/CUSTOM HOMEBUILDERS
    - This category includes custom home-builders and developers, or builders of numerous single family homes usually in pre-planned communities or developments. Pretreatment normally requires specialized billing and paperwork usually dictated by a master contract covering an entire development or specified sections.
    - For production and sales record-keeping purposes, count sales and completions as the individual units are treated, i.e.: a 100 unit single family subdivision sold for a total contract price of $34,000.00 or $340 per unit, would have sales on these units counted as they are treated. This way sales counted on this job should always equal the amount of completions or production counted. For example, treated 3 units today, the Daily Operations Report (DOR) would reflect $1,020 in completions and $1,020 in termite sales.
    - A development plan or layout should be secured for this type pretreat. As the individual units are completed, they are marked as such on the development plan.

3. INDIVIDUAL RESIDENCES
    - Included in this category are individual residences built for private owners and may also apply to custom home-builders completing only two or three homes per year usually in the $200,000 price range or higher.

Types of Guarantees

There are two types of guarantees offered on custom home-building and subdivision developers. One is the FHA/VA FORM 2052, which is a 5 year guarantee with 1 year retreat/repair and 4 years retreat only. The second is a Massey New Construction Guarantee which offers 1 year retreat/repair. The New Construction Guarantee is a Company form that is issued to the builder in place of the Six-Point Total Protection Guarantee.

The following will explain both types of coverage:

1. FHA/VA FORM 2052
    - FHA/VA Financing on a pretreated structure requires the completion of the FHA/VA Form 2052 to substantiate or show proof the pretreatment was performed. FHA/VA Financing also requires the company performing the pretreatment to provide a guarantee for retreatment and repair protection for 1 year and retreatment only for 4 additional years from the date of treatment.

2. Massey's New Construction Guarantee
    - Where FHA/VA Financing is not involved, Massey Services prefers to sell a one year New Construction Guarantee which provides protection for retreatment and repair. This is the type of guarantee that will be completed and furnished to the builder on any property, except FHA/VA Financing. It is the intent of the Company to convert New Construction Guarantee to our Six-Point Total Protection Guarantee once the property has been sold, thus affording the new owner the option of continuing this protection each year for 4 additional years.

Communications/Paperwork

The following procedures are designed to address each segment of the pretreat program categorically from the time the call is received.

1. ADMINISTRATIVE RESPONSIBILITY
    - After the call is received and the Pretreat Work Order is completed, the following paperwork must be prepared by the Administrative office and passed on to the Service Manager.
        1. Service agreement/renewal (WDO Agreement Form) completed from Pretreat Work Order
        2. Plat map, if available (with location highlighted).

3. Subdivision location map. Provide location instructions or directions.
4. A blank WDO graph for recording an accurate floor plan.
5. WDO sticker
6. Schedule in Termite Daily Work Schedule (as required).

- The above items should be completed and given to the Service Manager by 5:00 p.m. the day the request is received.

2. SERVICE MANAGEMENT ASSIGNMENT RESPONSIBILITY
   - The Service Manager will assign the pretreat specialist the following items for the proper completion of the job.
     - All items listed under Administrative Responsibility (a through e).
     - Sufficient unopened termiticide to properly complete the pretreat as determined from the Pretreat Work Order.
     - Assign pretreats to assure completion by "schedule" deadline.
     - Prelist work assignment on termite technicians daily report and see that trucks are prepared for service the night before scheduled treatments.

3. PRETREAT SPECIALIST RESPONSIBILITY
   1. Obtain and have in possession the paperwork described in all items under Administrative Responsibility (a through e) before proceeding to the job site.
   2. After performing the actual pretreatment (see treatment specifications) attach a completed WDO sticker to the "permit" board or the largest plumbing stack.
   3. Enter location of WDO sticker on Service Agreement in appropriate block.
   4. Fill in required information on Pretreatment Completion Certificate (lower half of the Pretreat Work Order).
      1. type termiticide used
      2. concentration %
      3. total square footage (as measured)
      4. total gallons applied
   5. Obtain signature of the on-site supervisor, (or appropriate alternate) and date.

6. Pretreat Specialist signs and dates the Pretreatment Completion Certificate in appropriate blanks.
7. Draw an accurate to scale diagram of the structure on the graph paper provided. **This graph must reflect the actual structure treated in order to answer future questions regarding the Company's liability and/or responsibility for retreatment and possible termite damage on structure additions, alterations, etc.**

SPECIAL NOTE:

An accurate graph is critical to the long-term liability of the Company.

Pretreat 90-Day Follow-up

1. ADMINISTRATIVE RESPONSIBILITY
    - All pretreatments require a follow-up approximately 90 days after the original treatment. This follow up is required to treat the exterior perimeter of the foundation after final grade work and landscaping is complete.
    - At the beginning of each month, the responsible administrative person will pull all pretreatment files on jobs completed 90 days prior for follow up assignment. To assure that all customer files are accounted for, the files should be verified against the corresponding month's termite backlog report.
        - For example, jobs completed in January will be pulled and assigned for 90 day follow-up on May 1.
            - The following paperwork is required for the 90 day follow-up treatment. These items are assembled by the administrative office and given to the Service Manager for assignment daily by 5:00 p.m.
                - Copy of original Pretreat Work Order with copy of original service order attached (pull from hard copy red file). Indicate in the special instructions section of the original service order "Final Application Follow-up".
                - Plot Map.
                - Development location/directions.

        - Copy of floor plan/graph. To be updated by a pretreat specialist - adding porches, patios, etc. not on the original graph.
        - WDO treatment sticker.
        - Schedule in Termite Daily Work Schedule,

2. SERVICE MANAGEMENT RESPONSIBILITY
    - The Service Manager will assign the pretreat specialist the following items for the proper completion of the job:
        - All items listed under Administrative Responsibility (a through e).
        - Sufficient unopened termiticide to properly complete the pretreat as determined from the pretreat work order.
        - Assign all follow-ups due for treatment to assure completion on schedule and to make most productive use of time.
        - Prelist or assign on termite technicians daily report and see that trucks are prepared for service the night before scheduled treatments.

3. PRETREAT SPECIALIST RESPONSIBILITY
    - Perform final pretreatment termiticide application to the proper areas - exterior trenching/rodding of outside foundation walls, etc.
    - Indicate 90 day follow-up final treatment and date (day/month/year) in special instructions section of Pretreat Work Order Copy
    - Complete a WDO Sticker and place inside the structure if at all possible, i.e. water heater, attic access, kitchen cabinet.
    - Enter location of WDO sticker on Service Agreement copy.

Administration & Billing Procedure

Handle new contract as any other sale.

The Data Entry Specialist will enter the new Pretreat Service Agreement in the computer system the same as a Post Construction Agreement, under

Warranty Master Maintenance Screen. If the treatment location is outside your Service Center territory, use the following # in field 17 to code the appropriate service center for transfer at a later date:

0	**Tampa**	**4**	**Cocoa**	**7**	**Daytona**
1	**North Orlando**	**5**	**Ocala**	**8**	**Port Orange**
2	**Leesburg**	**6**	**Orange Park**	**9**	**Port St. Lucie**
3	**South Orlando**				

- Use F-4 for response received mode. Response Receive the account.
- Go to file maintenance select option (Service Location Master).
- ENTER A ZERO in accounts receivable statement code line 18 on service screen to assure that customer does not receive bill. (All billing performed by Service Center.)

TO BE FILLED OUT BY THE CUSTOMER SERVICE SUPERVISOR AT TIME OF COMPLETION OF FIRST SERVICE:

- FHA/VA Form 2052 and Termite Guarantee Comparison Disclosure Statement. OR
- The New Construction Guarantee and the Termite Guarantee Acknowledgment.

The above forms will be filled out upon the completion of the first portion of any soil pretreatment. These forms will be placed in the file with the Wood Destroying Organism Agreement and the Wood Destroying Organism Graph to become a part of the permanent file. Write the date and method of delivery of the forms to the contractor on the file copy beneath the Authorized Agent/General Manager Signature (i.e. Mailed 8/22/90, and hand delivered by sales inspector, Ron Eger)

The Customer Service Supervisor will prepare the hard copy of the customer's file. When a pretreatment job is sold, a file folder is created in the same manner as a post-construction treatment. Instead of using a manila file folder to create the file, a red folder is filed in the pretreat files alphabetically in the month the job was completed. The completed file folder should contain the following:

1. Customer copy of service order
2. Customer copy of the Pretreat Work Order/Completion Certificate

3. Customers copy of graph
4. Original Guarantee
5. Copy of Issued 2052 or New Construction, Guarantee Subterranean Termite Protection
6. Two copies of Termite Guarantee Comparison Disclosure Statement or Termite Guarantee Acknowledgment.
7. A Six Point Total Protection Subterranean Termite Guarantee (blank original)

Place file in completed-not paid section of termite files.

- All billing is to be performed manually by the Service Center with follow up until the account is paid in full. During final month-end close these accounts will be transferred to the proper Service Center automatically.
- During month-end close, complete the following:
  - Print a "pretreats completed" log (onq) from computer of all pretreats completed and paid with a zero balance by type:

4-0	**Tampa**	**4-4**	**Cocoa**	**4-7**	**Daytona**
4-1	**North Orlando**	**4-5**	**Ocala**	**4-8**	**Port Orange**
4-2	**Leesburg**	**4-6**	**Orange Park**	**4-9**	**Port St. Lucie**
4-3	**South Orlando**				

1. Print computer screen, fold and place in file folder.
2. Pull all file folders with a zero balance from the completed-not paid section of termite files, and sort by Service Center.
3. Mail, hand deliver or have picked up, by the receiving Service Center all folders and logs.

Administrative Procedure

Transfer of Account/Receiving Service Center

1. Upon receipt of "pretreats completed" log and folders, the following steps must be completed:
   - Place all folders A/Z in a separate file drawer marked "pretreat completed"

- Homeowners name obtained, if available
- Homeowners billing address
- Property treated (street) address
- Home and business phone number, if available
- Any other necessary information
    1. Work with the transferring Service Center Manager to obtain this information. This information must be obtained as soon as available to assure a timely follow up by our Sales Inspectors.

2. Upon completion of above (A-F), an account record change must be prepared with all corrected information. This information is entered into the computer, tab changed on folder, and Guarantee typed. The account record change with a copy of the Guarantee then must be placed in original file folder.
    - The Customer Service Supervisor verifies that the customer file folder contains the following forms in the Service Center file folder (red).

3. Customer copy of service order
    - Customer copy of the Pretreat Work Order/Completion Certificate
    - Customers copy of graph
    - Original Guarantee
    - Copy of Issued 2052 or New Construction, Guarantee Subterranean Termite Protection
    - Two copies of Termite Guarantee Comparison Disclosure Statement or Termite Guarantee Acknowledgment

4. The Customer Service Supervisor will then record the customer's name and information in the completed Pretreat Lead Log Binder. The log must reflect the person assigned to deliver the customer guarantee. The file is then given to the General Manager.

Management and Sales Follow Up Procedures

1. General Manager's Responsibility
    - Assign customer file for scheduling appointment.
    - Enter appointment date and time in Lead Log.

- Assure that customer guarantee is delivered.
- Assure that treatment is explained.
- Assure that Form 2052 Guarantee or New Construction Guarantee is explained.
- Assure that Massey Six Point Total Protection Subterranean Guarantee is explained.
- Assure that customer signs Guarantee Comparison Disclosure or Guarantee Acknowledgement verifying that E &F (above) were performed.
- Assure that Premium Pest Prevention Service was proposed and review a copy of the proposal.
- Assure that GreenUp Lawn Service was proposed and review a copy of the proposal.
- Assure that proposal information/date-amount proposed/sold and call back dates are entered in Lead Log.
- Assure that Guarantee Comparison Disclosure or Guarantee Acknowledgement is delivered to the Customer Service Supervisor to be placed in the
- Service Center file (red).
- File folder is then placed in Service Center termite active files, proper month, A-Z.

2. Sales Inspector Responsibility
   - After the property is sold and the name of the new owner is obtained, the Sales Inspector will be given the responsibility to make an appointment with the new homeowner for the purpose of delivering their guarantee, explaining it's contents and submitting proposals for PPP Services and Lawn Care Services at Preferred Customer Discounts.

1. FHA/VA Form 2052
   - When a property is covered under the FHA/VA Form 2052, the Sales Inspector will deliver a copy of this guarantee to the new homeowner, along with a completed copy of the Termite Guarantee Comparison Disclosure. This Comparison Disclosure Statement outlines the difference between the limited protection of the 2052 and the upgrade option to Massey's Six Point Total Protection Program. This Comparison Disclosure Statement must be reviewed in detail, fully executed and signed by the customer and the Sales Inspector at the time of delivery. A copy of this executed Disclosure Statement must be returned to the office for processing and inclusion in the customer's file.

2. MASSEY'S NEW CONSTRUCTION GUARANTEE
    - When a property is covered under a One Year New Construction Guarantee, the Sales Inspector will deliver a fully executed copy of Massey's Six-Point Total Protection Guarantee made out in the name of the new owner, along with a completed copy of the Termite Guarantee Acknowledgement. This Acknowledgement outlines the coverage and benefits of our Six-Point Total Protection program and the options available to the customer to renew for at least 4 additional years. This acknowledgement must be reviewed in detail, fully executed and signed by the customer and the Sales Inspector at the time of delivery. The information that will go on the Six-Point Total Protection Guarantee will come from the original service order and will reflect the original completion date, service order number, etc. A copy of this executed Acknowledgement must be returned to the office for processing and inclusion in the customer's file.

Rate Card Pricing

Based on the architect specifications, type construction, location of job and specified finished spray rate, the charge for preconstruction soil treatment will be determined by the prevailing rate card, as issued by the Corporate Office.

For large developers, contractors, and/or homebuilders, the Massey General Manager may request permission to price below the approved rate. However, under no circumstances will pretreat work be priced under rate card without Corporate Operations Department Approval for One Year Guarantee Protection and/or FHA Form 2052/VA Form 26-8375, (Five Year Guarantee).

Special Note:

Due to the high costs of termiticides and the resulting low profits, sales commissions will not be paid on any pretreat sold for less than the approved rate card price.

Treatment Specifications

All termiticides must be applied at the labeled finished spray rates and dilution rates, i.e.: Dursban T.C. label states 2 gallons Dursban T.C. Concentrate per 98 gallons water to equal a 1% finished spray solution.

To comply with Florida State Law, all termiticide concentrate must be mixed from an unopened container on the job site.

For complete treatment specifications, refer to "**Treatment Specifications**" instructions that are indicated on the product label.

SPECIAL NOTE: "ALWAYS FOLLOW THE LABEL"

Instructions For Completion of Related Forms

Pretreat Work Order/Completion Certification

Top portion to be completed by the Administrative Office and given to the Service Manager.

Completion Certification to be filled in by the Pretreat Specialist at the site upon completion of actual pretreatment. It is imperative that the Pretreat Specialist obtain the signature of the on-site supervisor (or alternate) and date the form.

Wood Destroying Organism Agreement

1. Secure the name of the property owner if available and place on the line as shown.
2. Every effort should be made to secure the exact street address for the file. Try to avoid Lot Numbers and Plot Numbers.
3. This section of the agreement should show the billing name and address for the initial treatment. In this case the construction company is paying for the pretreatment.

Treatment/Guarantee Section

1. Since this is a pretreat, check the block marked "Pretreatment of".
2. Check the box marked Subterranean Termites.
3. Check "Total Protection/Subterranean Termite Control".

Annual Renewal Section

1. All Massey pretreats will carry a one-year total protection guarantee with an option to renew for four (4) additional years. Renewal fees will be priced at 4¢ per square feet with a minimum of $95.00 per unit. Total square feet will include slab areas.

Special Instructions Section

1. On the Special Instructions line write: "Pretreatment".

Pricing Section

It is necessary to determine the need for the Massey New Construction Guarantee or the FHA/VA Form 2052 at the time of sale. The 2052 is used only for a FHA/VA insured loan.

FHA/VA Form 2052 Instructions

1. Date of Treatment: Actual date to match date on WDO Agreement.
2. Name of Builder: Self-explanatory.
3. Chemical Used: Common trade name, i.e. Dursban TC
4. By: Signature of Builder/Builder's Agent
5. Concentration: Per label mixing instructions (i.e. 1%)
6. Date: Of builder's/ agent's signature
7. Title: of Builder/agent
8. Application method: Soil Spray
9. Soil Treatment Applicator: Massey Services, Inc.
10. License Number: Service Center C.O. License
11. Date: Date of General Manager's signature
12. By: Service Center General Manager
13. Title: Service Center General Manager
14. An invoice will be attached to the completion certificate or FHA 2052 form when mailed.

Termite Guarantee Comparison Disclosure Statement (FHA/VA Form 2052)

This form accompanies the FHA/VA Form 2052. The Sales Inspector is to review this Disclosure Statement in Detail with the customer, have the customer check one of the boxes, sign and date the form. The Sales Inspector also signs and dates the form and returns a copy to the office for processing and inclusion in the customer's file.

Six Point Total Protection Guarantee Subterranean Termite Control

When a property is covered under a Massey New Construction Guarantee, the Sales Inspector will deliver a fully executed copy of the Six Point Total Protection Guarantee to the new homeowner, along with a completed copy of the Termite Guarantee Acknowledgement.

Massey's New Construction Guarantee

To be completed by the Customer Service Supervisor at time of completion of first service:

1. Name of Builder
2. Location of Property (physical address)
3. Mailing address, (builder's office address)
4. Legal Description, City, State, Zip
5. Pretreatment date (in first paragraph). This must be completed with the date of treatment.
6. Date signed, Location signed, in presence of (service technician's printed name), By (Service technician's signature);

Write the date and method of delivery of the forms to the contractor on the file copy beneath the Authorized Agent/General Manager Signature.

TERMITE GUARANTEE ACKNOWLEDGEMENT (Conventional)

This form accompanies the New Construction Guarantee. The top portion is to be completed by the Customer Service Supervisor at time of completion of first service.

The Sales Inspector must review the Acknowledgement in detail with the customer, have the customer check each of the four boxes acknowledging their understanding and receipt of the noted items, sign and date the form. The Sales Inspector also signs and dates the form and returns a copy to the office for processing and inclusion in the customer's file.

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