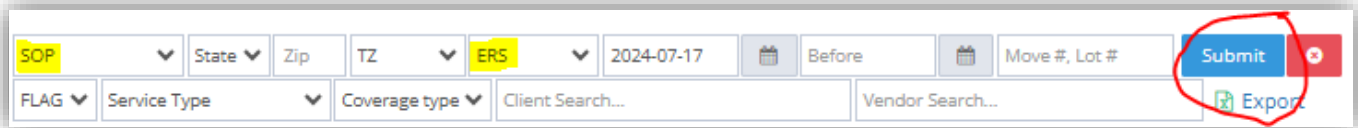


## “ERS Tracker” Confirmations

ERS “Tracker” is the term used to track service confirmations – Scheduled, on scene, picked up, delivered/completed.

All confirmations are to be made with the customer, PUL and delivery location rather than the vendor whenever possible. Confirmations should only take place with a vendor when the customer, PUL or delivery location are unable to confirm. If a vendor provides an update, follow up with the customer to confirm as well.

**Status > SOP, Move Type > ERS, Submit**

A screenshot of the ERS Tracker web application interface. The top navigation bar includes a 'Submit' button highlighted with a red circle. Below the navigation bar, there are several filter dropdowns: 'SOP' (set to SOP), 'State', 'Zip', 'TZ', 'ERS' (set to ERS), '2024-07-17', 'Before', 'Move #, Lot #', 'FLAG', 'Service Type', 'Coverage type', 'Client Search...', and 'Vendor Search...'. An 'Export' button is also visible on the right side of the filter bar.

Confirmations should be attempted in the following order:

On-scene:

1. Customer
2. PUL if at a business – if customer unable to confirm
3. Vendor – if customer or PUL unable to confirm

Pick up:

1. Customer
2. PUL if at a business – if customer unable to confirm
3. Vendor – if customer or PUL unable to confirm

Delivery:

1. Customer
2. Delivery location if a business – if customer unable to confirm
3. Vendor – if customer or delivery loc unable to confirm

**Keep move noted:**

- Who you spoke to
- Current update
- Next follow up needed and when.

## SOP Status

**Scheduled** – Dispatched, ETA column shows the projected ETA at dispatch (will not adjust to any ETA changes so must track updates in move notes)

**On scene** – Confirmed vendor on scene with the on-scene time logged under the confirm tab.

**Picked up** – Unit is tow or service in progress (non-tows) with time logged under the confirm tab. If the service type is a non-tow, use the on-scene time here.

\*Once a delivery/completion time is logged, the move will drop off from SOP status.

\*\*All details/updates outside of standard confirmation times must be noted in the move notes.

Trip confirmations log the following move statuses: On scene, picked up and delivered (completed)

- Select the pencil icon at right of applicable confirmation
- Select Confirmation Type
  - TP call to pick up location – customer confirmed
  - TP call to vendor – vendor confirmed
  - Vendor confirmed – Auto status when vendor confirmed through the vendor portal
- Enter “Spoke To” – name of who you spoke to
- Enter time (or as close to) of the status
  - Select date on the calendar
  - Select the hour under AM / PM
  - Select the time (rounded every 5 min)
- Select Submit

\*\*\*When working the “tracker”, it is imperative that you read the notes to familiarize yourself with the last update. Additionally, it is equally imperative that you note the most recent update on follow ups.