

**Property Preservation  
Training Manual  
on  
Work Order Processing**

## INDEX

# INTRODUCTION OF PROPERTY PRESERVATION

## What is Foreclosure Property?

A foreclosure property is a piece of real estate that a mortgage lender sells to pay off a defaulted mortgage loan. Every foreclosure culminates in a public auction where the lender sells the property and anybody can purchase the property. Or you can purchase a foreclosure property from a bank after the bank purchases the property at the auction.

## Why Do Sellers Go Into Foreclosure?

- > Laid-off, fired, or quit job
- > Job transfer to another state
- > Excessive debt and mounting bill obligations
- > Maintenance issues they can longer afford

## What is Pre Foreclosure (PFC)?

A pre foreclosure happens when a borrower defaults on their mortgage but before the bank fully forecloses on it and sells it at auction. During this time, the seller can either sell the property or make good on the outstanding balance owed. An investor can typically buy a pre foreclosure at a discount. Generally if the seller misses three consecutive mortgage payments, the bank will issue a notice of default and the pre foreclosure stage will begin. Once the notice of default is issued, the seller will generally have 2-3 months to “reinstate” the loan and stop the foreclosure process.

\*\* Sometimes bank/investor issues work order to inspect property. In that case we can't remove any personal property as the borrower still own the personals. Only lock change is applicable in order to further access.

## **Post-Foreclosure (Bank Owned/REO):**

At the post-foreclosure stage, the lender has already taken control of the property. The home is then in the possession of the lender's REO (Real Estate Owned) department, or in the hands of a new owner or investor who purchased the property at auction.

**\*\*** In this stage bank/investor can start preserving property starting with securing and removing personal property/debris.

## **What is Property Preservation?**

Property preservation is the process to keep foreclosed properties secure, safe and well-maintained inside and outside, be it vacant or occupied. Property preservation businesses work with banks and asset management companies to provide services such as repair, inspection, insurance claim management, and maintenance.

## **Key Responsibility as an Updater:**

As an updater your key responsibility is to check work order instruction first and address verification photo to ensure that field contractor went to right property. Need to check that, contractors provided all necessary photos and documents per work order instruction. If not, you may need to send back the order to the contractor for required photos/documents or explanation for the missing information. After verifying all required information you are now ready to start processing.

You need to place bids that need to repair, place damage report and need to invoice for the items contractor performed in the filed per work order instruction/allowed to/approved for.

**\*\*** You are playing the most CRUCIAL role and please do not limit yourself within a simplified term of PROCESSOR. Because if you fail to place any bid then we will be held liable to repair it at our own cost. And if you fail to place any invoice that contractor performed then we may need to pay contractor from our pocket.

## **Types of Work:**

Followings are the most common type of works occurs in property preservation.

- |            |                    |                 |                  |
|------------|--------------------|-----------------|------------------|
| > Securing | > Lawn Maintenance | > Maid Service  | > Debris Removal |
| > Eviction | > Snow Removal     | > Winterization | > Bid Approval   |

## **Preservation Flow Chart:**

Example of National Client Portal:

## PPW Dashboard:

# PPW-Dashboard

- Finding a work order
- Follow-up vs Processing
- Categories
- Blue tabs/white tabs

The screenshot shows a software interface titled "PPW-Dashboard". At the top, there is a navigation bar with links: "New Work Order", "View Work Order", "Reports", "Search", "Forms & Docs", "Admin", a help icon, and "Discounts". On the far right of the top bar, it says "David Outlaw" and includes "LOGOUT" and other user icons. Below the navigation bar is a toolbar with buttons for "Actions", "Filter", "Advanced Filter", "Zip Lookup", and "Columns". There are dropdown menus for "Show 100 entries" and "Filters: Status: Unread In Field Ready Office Invoiced Follow Up". A search bar is labeled "Search Within:". The main area is a table listing work orders:

	Status	WO #	Ready Office	Date Due	Client	Client Date Due	Customer	Category	Work Type	Address
	READY FOR OFFICE	M10609738	01-03-17	01-05-17	MCS	01-06-17	502	Waiting for Conjunction Order	Lending Condition	1912 ABERDEEN AVENUE
	FOLLOW UP	M10609732		01-10-17	MCS	01-06-17	502		Initial REO Service	1912 ABERDEEN AVENUE
	IN FIELD	23190446		01-13-17	Ulta	01-15-17	PennyMac - REO		Maid Refresh	436 W CALIFORNIA AVE
	READY FOR OFFICE	M10615092	01-09-17	01-08-17	MCS	01-08-17	528	Kim Antle	Initial Secure	316 SOUTH LINDEN
	UNREAD	M10632730		01-13-17	MCS	01-14-17	144	Ready to Assign	Bid Approval	5526 HIGHWAY 174
	UNREAD	M10631420		01-17-17	MCS	01-18-17	528	Ready to Assign	Grass Recut	1289 OLD TORY TRAIL
	IN FIELD	M10620648		01-09-17	MCS	01-10-17	552	Ready to Assign	Snow Removal	6194 RENNINGER RD
	FOLLOW UP	1056465541		01-05-17	Ulta	01-05-17	251		Snow Removal	220 KENT ST
	UNREAD	1056521335		01-29-17	Service Link	01-31-17	518	Ready to Assign	Snow Removal	11W E CHEROKEE TRL
	FOLLOW UP	M10590534		12-31-16	MCS	01-11-17	144		Bid Approval	6229 SUMTER HWY
	READY FOR OFFICE	M10626459	01-10-17	01-11-17	MCS	01-12-17	658		Winterization	1859 TANK ROAD
	UNREAD	23188319		12-16-16	Ulta	12-16-16	Dakota Asset Svcs - Conv. REO		Snow Removal	302 MAIN ST
	UNREAD	1751838		01-14-17	Sand Castle	01-16-17	Caliber Home Loans	Ready to Assign	Snow Removal	5228 Grange Hall Rd
	IN FIELD	1056470664		01-28-17	Service Link	01-31-17	518	Ready to Assign	Snow Removal	1225 OLD MILL LN

# PPW – Finding a Work Order

Screenshot of a software application interface for managing work orders (WOs). The top navigation bar includes links for New Work Order, View Work Order, Reports, Search, Forms & Docs, Admin, Help, and Discounts. The user is logged in as David Outlaw.

The main search/filter panel contains the following fields:

- Assigned, Unread, Ready Office, Closed
- Unassigned, In Field, Invoiced, Follow Up
- Address, City / State, Zip Code
- Contractor, Admin, Work Type
- Client, Customer, Category
- WO #, PPW #, Loan #, Invoice #

Below the search panel is a toolbar with buttons for Run, Cancel, and Reset to Default, along with Save, Load, and Pin options.

The main area displays a grid of work order records:

READY FOR OFFICE	WO #	BID REQUEST	ASSIGNMENT	WORK TYPE	CREATED	MODIFIED	LAST ACTIVITY	CUSTOMER	FILED	ATTACHMENTS
READY FOR OFFICE	1057035107	Bid Request	jeremy paul	Service Link	02-20-17	101	02-19-17	02-18-17	251	1
READY FOR OFFICE	2000382	Bid Request	Marlon Robinson	M&M Mortgage Services	02-21-17	88	02-19-17	02-18-17	335BR CALIBER HOME LC	1
READY FOR OFFICE	M10721035	Snow Removal	Glenn Warner	S.MCS	02-20-17	12	02-19-17	02-19-17	159	2
READY FOR OFFICE	2934805	Re-Secure	Marlon Robinson	Carrington	02-20-17	48	02-18-17	02-19-17	Bank of America - PF (88)	1

A sidebar on the right shows a list of customers with their names, counts, and icons.

# PPW - When to Follow-up vs Processing

**Fill in highlighted areas:**

General Info Job Notes (3/12) PCR Form Bid / Completion Info Photos / Documents (281/0) Invoice Send

Ready for Office WO#: M10722647 Address: 36854 90TH AVE STANLEY, WI Client: MCS Due: 02-19-2017

Background Checkin Provider Aspen Grove Solutions ▾

Lock Code 44535 Lock Location   
Key Code 44535 Gate Code

Broker Name  Broker Company   
Broker Phone  Broker Email

Received Date 02-17-2017 Start Date   
Due Date 02-19-2017 Client Date Due 02-20-2017  
Complete Date Cancel Date

Missing Info  Needs Reviewed ASAP

Comments Current keycode(s), location(s) and/or lockbox code are: 44535.  
Last Grass Cut Date: 10/16/2016 Last Winterization Date: 1/6/2015  
It is mandatory for the ICC status of this property to be reported  
as well as a description of the ICC issues if it is not in ICC

**Empty highlighted areas:**

Item Description	Qty	Price	Total	Flat Fee
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add Line"/>		Sub Total	\$0.00	<input type="button" value="-"/>
		Client Discount	25.00 %	<input type="button" value=""/>
		Client Total	\$0.00	<input type="button" value=""/>

Invoice complete

Sent to Client Complete Date Client Invoice #

Internal Invoice Notes

# PPW – Categories

Where:

The screenshot shows the PPW software interface with the following details:

**Top Navigation Bar:** New Work Order, View Work Order, Reports, Search, Forms & Docs, Admin, Help, Discounts.

**Sub-Menu:** General Info, Job Notes (3/12), PCR Form, Bid / Completion Info, Photos / Documents (281/0), Invoice, Send Results.

**Tool Buttons:** Print, Map, Edit, Duplicate, Delete.

**Status Bar:** Ready for Office WO#: M10722647 Address: 36854 90TH AVE STANLEY, WI Client: MCS Due: 02-19-2017

**Work Order Info:**

WO #	M10722647
Work Type	Hazard Bids
Address	36854 90TH AVE STANLEY, WI 54768
Client Company	MCS Import ID :4529
Contractor	Lehrke, Lucas (ABC# WI547031030)
Rush	No
Background Checkin Provider	Aspen Grove Solutions
Broker Info	

**PPW #:** 34309

**Loan Info:** \*\*\*\*\*2189 FHA (11)  
**Mortgager:** DEBRA STUDLER  
**Investor Type:** Not Provided

**Customer:** 543  
**Assigned Admin:** Jeremy Paul  
**BATF:** No  
**Lot Size:** 210394 Lawn: 43560

**Lock Code:** 44535  
**Key Code:** 44535

**Ready for Office:**  02-18-2017 2:06 PM by Lucas Lehrke  
**Estimated Complete Date:**   
**Category:**   
**Office Locked:**   
**Freeze Property:**

**Mobile Check In:**

Date	User	ID
Feb 18, 17 11:32 AM	L. Lehrke	WI547031030 (AGS)

**Check In Sync:**

# The NOTE Method of Processing

# **NOTE (4 STEPS)**

- **N** – Notes (Job Note)
- **O** – Open the WO
- **T** – Together, look at photos and fill out the PCR
- **E** – Enter the information into the client's site

**N (Notes):** First, we need to read all of the Job Notes for a WO. From the job notes we can get a lot of information about the property and work order. By reading job notes we can determine if we can process this order or if there are any problems. This ensures we have all necessary information needed to process the work order.

Screenshot of a software interface showing Job Notes for Work Order #1054445842.

The top navigation bar includes: Home, New Work Order, View Work Order, Reports, Search, Forms & Docs, Admin, Help, and Discounts. On the right are links for Processing Team, Logout, and other system icons.

Sub-navigation tabs include: General Info, Job Notes (5/0) (highlighted), PCR Form, Bid / Completion Info, Photos / Documents (452/3), and Invoice.

Buttons for New Note and New Note (pop-out window) are visible.

A status message at the top indicates the work order is Closed: WO#: 1054445842 Address: 153 MAIN ST PENNSBURG, PA Client: LPS Due: 07-19-2016 Complete: 07-19-2016.

## Job Notes

### Work Order Notes

Frederick Williams to Gary Buskirk (Message 1)

Hi Gary,

This work order is rush and needs to be completed tomorrow. Let us know if you need any additional fee for the work order.

Regards  
Frederick

Gary Buskirk to Frederick Williams (Message 2)

Client Company Login, Contractor

Frederick Williams (Message 3)

Jul 18, 2016 4:39 PM

\*\*\*Processor: pay out contractor an additional \$10 as rush fee.

Gary Buskirk to Frederick Williams (Message 4)

Client Company Login, Contractor

Frederick Williams (Message 5)

Jul 19, 2016 7:14 AM

\*\*\*Property seems to be occupied. Locked from the inside. Gary is calling the cops. Utility seems to be on at the property.

Gary Buskirk to Frederick Williams (Message 6)

Client Company Login, Contractor

Frederick Williams (Message 7)

Jul 19, 2016 9:39 AM

We had to call the police to this property, we believed there was someone in the house. We were there a few weeks ago and relocated personal debris from the exterior to the interior of the property. This visit the locks were changed and locked from the inside. The police were called they arrived and kicked in the front door so we had to hasp and padlock front door. The back door has to much debris in front of it to get to.

Gary Buskirk to Frederick Williams (Message 8)

Jul 19, 2016 9:45 AM

There is no hot water at property only broiler. There is no sump pump there, nor a place to place one. Electric was on

**O (Open the WO):** After reading the job notes, we need to read the work order instructions carefully. We need to write down the instructions and all allowable items that can be performed in this WO like grass cut, lock, lock box etc.

Screenshot of a Work Order Management System interface:

Header: New Work Order, View Work Order, Reports, Search, Forms & Docs, Admin, ?, Discounts

Sub-Header: General Info, Job Notes (5/0), PCR Form, Bid / Completion Info, Photos / Documents (452/3), Invoice

Action Buttons: Print, Map, Edit, Duplicate, Delete

Job Details: Closed WO#: 1054445842 Address: 153 MAIN ST PENNSBURG, PA Client: LPS Due: 07-19-2016 Complete: 07-19-2016

General Info:

PCR / PHOTOS / BIDS / DAMAGES REQUIRED WITH EVERY ORDER EXCEPT GRASS ORDERS	0 0.00 0.00	PCR/PHOTOS/BIDS/DAMAGES IN FULL ARE REQUIRED WITH EVERY ORDER SUBMITTED. SOME CLIENTS REQUIRE THIS FOR GRASS ORDERS - PLEASE READ YOUR ORDER CAREFULLY IF IT IS A GRASS RECUT ORDER.	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
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Job Notes (5/0):

DO NOT FORGET THAT ALL DAMAGES, DEBRIS, AND PERSONAL PROPERTY BID MUST BE JUSTIFIED BY PHOTOS.

\*\*ALWAYS CALL FROM SITE WITH ANY EMERGENT ISSUES OR BATF REQUESTS TO ENSURE YOU DISCUSS PRICING AND SCOPE OF WORK. PLACING A BID AND LEAVING THE PROPERTY COULD CREATE LIABILITY AND NO CHARGE ORDERS.\*\*

Photos / Documents (452/3):

PROPERTY CONDITION PHOTOS INCLUDE ADDRESS, FRONT, BACK, AND BOTH SIDES OF ALL BUILDINGS ON THE PROPERTY. PHOTOS SHOWING ROOF CONDITION. PHOTOS SHOWING ALL FOUR WALLS, THE CEILING, AND THE FLOORS OF ALL ROOMS IN THE HOME INCLUDING THE ATTIC, BASEMENT, OR CRAWLSPACE.

DO NOT FORGET THAT ALL DAMAGES, DEBRIS, AND PERSONAL PROPERTY BID MUST BE JUSTIFIED BY PHOTOS.

\*\*ALWAYS CALL FROM SITE WITH ANY EMERGENT ISSUES OR BATF REQUESTS TO ENSURE YOU DISCUSS PRICING AND SCOPE OF WORK. PLACING A BID AND LEAVING THE PROPERTY COULD CREATE LIABILITY AND NO CHARGE ORDERS.\*\*

Invoice:

Invoice - Viewed	P. Team	07-19-16 1:26 PM
Viewed	P. Team	07-19-16 1:33 PM
Viewed	P. Team	07-19-16 1:57 PM
Invoice - Viewed	P. Team	07-19-16 4:13 PM
Viewed	P. Team	07-19-16 4:19 PM
Viewed	P. Team	07-20-16 4:20 AM
Viewed	S. Team	07-20-16 4:20 AM
Invoice - Viewed	S. Team	07-20-16 4:20 AM
Viewed	S. Team	07-20-16 4:20 AM

Allowable Services (highlighted in yellow box):

- Grass Cut
- Lock Change
- Winterization

Bid Approval Options (highlighted in yellow box):

- Trim Tree
- Trim Shrubs

**T (Together, look at photos and fill out the PCR):** At this stage we need to, first, download all photos and scan them to see that we have all photos required to process or not (ie: grass cut photos if a grass cut was to be completed). Then we need to categorize the photos while filling out the PCR with bids and damages. We have to make sure to arrange all information in the PCR form correctly to prevent us from having to go through the photos again.

File New folder Search New folder

size ▾ Include in library Share with ▾ Slide show New folder

favorites Desktop Downloads Dropbox Recent Places

libraries Documents Music Pictures Videos Computer

network

Bids Debris Removal Grass Cut Mold

Property Condition Trim Shrub Winterization

Order Update form

Virtual Name: \_\_\_\_\_ Client's Name: \_\_\_\_\_ NC: \_\_\_\_\_ Date: \_\_\_\_\_

W/D: \_\_\_\_\_ Address: \_\_\_\_\_  Address is verified with photo

Loan Type: \_\_\_\_\_ Client Number: \_\_\_\_\_ Key Code: \_\_\_\_\_  No Duplicate Photos  Photos are Geocoded

Due Date: \_\_\_\_\_ RFO Date: \_\_\_\_\_ Photo Date: \_\_\_\_\_ Late Penalty: \_\_\_\_\_ %  Aspen Check In Completed

Read client's instruction. W/D Instruction:

FOR Property Condition (Write down damages from photos, PCR, Job note etc.)  Photo check box (✓/✗)

<input type="checkbox"/>	Broken window	<input type="checkbox"/>	Graffiti/defective Paint	<input type="checkbox"/>	Boiler	<input type="checkbox"/>
<input type="checkbox"/>	Fire damage	<input type="checkbox"/>	Hazard	<input type="checkbox"/>	A/C unit/Window A/C	<input type="checkbox"/>
<input type="checkbox"/>	Flood damage	<input type="checkbox"/>	Mold	<input type="checkbox"/>	Sump pump	<input type="checkbox"/>
<input type="checkbox"/>	Structure damage	<input type="checkbox"/>	Missing appliance	<input type="checkbox"/>	Pool in ground/above	<input type="checkbox"/>
<input type="checkbox"/>	Plumbing damage	<input type="checkbox"/>	Refrigerator	<input type="checkbox"/>	FHA Checklist	<input type="checkbox"/>
<input type="checkbox"/>	Roof damage	<input type="checkbox"/>	Stove	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Freeze damage	<input type="checkbox"/>	Dishwasher	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Dry wall damage	<input type="checkbox"/>	Microwave oven	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Water damage	<input type="checkbox"/>	Washing machine/Washer	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Exposed wire	<input type="checkbox"/>	Dryer	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Vandalism	<input type="checkbox"/>	Hot water tank	<input type="checkbox"/>		<input type="checkbox"/>

Follow Up to Contractor:  
(Give the contractor the date and time you need information by. Uncheck 'Incomplete' and remove completion date.)

Completion & Invoice:

#	Job #	Client	MM	Invoice Item	QTY	Price	Rate
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d
20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/> c/d c/d c/d

# **Securing**

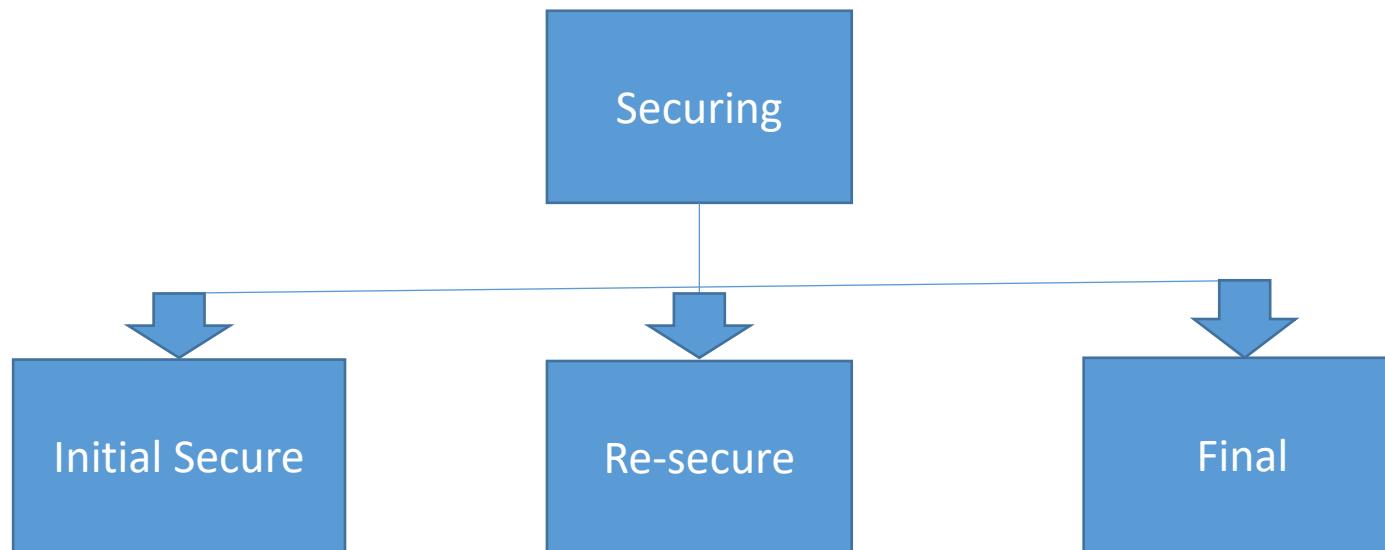
# What Is Securing ?

Securing a property means protecting a properties from any kind of unauthorized entries. It is not limited to human entry in property or lock change. It is process and consequent work to protect a property from any kind damages by human, animal, air, water, etc.



# SECURING

Types of Securing : During Processing we find 3 types of Securing -



# SECURING

## Initial Securing:

Protecting properties begins with the initial securing order. The goal is to protect a properties from any kind of unauthorized entries which is not limited to human entry in property or lock change but also from any kind damages by human, animal, air, water, etc. Securing order typically consist of following task; . If the property is a pre-sale property, the lock on a secondary door (when possible) will be changed so that future preservation work can be completed. When the property is post-sale, all locks are changed and all broken windows and doors boarded. Generally, when securing a property all locks, including deadbolts, will be changed and keyed to a client-specific code. All outbuildings and sheds will be padlocked.

> Lock Change              > Installing Padlock              > Installing Pad Lock              > Boarding              > Placing Repair Bids

> Completing Pre-Approved Work per Investor Guideline

## ❖ Lock Change:

Once an inspection has been completed and vacancy has been determined, contractor will dismantle existing lock and install a new lock (Knob lock/Dead Bolt/Lock Set) in accordance with investor or insurer guidelines on secondary door. Any door except front door and sliding door are secondary door. If there is no secondary door, in that case contractor can change lock on front door.



# SECURING

## Initial Securing:

- Pool areas will be secured and the fences surrounding the pool will be padlocked. A lockbox will be installed with working keys inside to facilitate access for contractors, inspectors and real estate agents. Openings such as broken windows and doors or unsecured crawlspaces that pose a security risk to the property may be boarded consistent with FHA standards.

**Initial securing work order is critical as this is the 1<sup>st</sup> visit and we have to update all the damages carefully, if we fail to address any issues our CLIENT will be liable for that so will we.**



### Security Door:

If door (typically front door) is missing then contractor need to install a security door to secure access. If any other entrance door is missing then contractor need to board them. Security door consist of plywood, hinge, padlock and bracing metal. As it is pre-approved in order to secure access, contractor can install security door and boarding other exposed doors and invoice accordingly.

**But we must need to provide bid to**

- 1. Remove security door or any other boarding**
- 2. Remove debris**
- 3. Replace new door**
- 4. Install knob lock/lock set**



### Securing other Access:

If garage door is damaged, out building shed or fence gate is insecure then contractor need to install bracing metal/hinge and padlock.



### Slider Lock:

If slider lock is damaged then contractor need to replace slider lock.



#### Antique Door/Door Lock:

It is restricted to change lock on any antique door or dismantle any antique lock as they have antique value. We must need to report to national client if there any antique door or lock and claim trip charge instead replacing lock. We can replace only if instruction is to change antique lock or on antique door. Otherwise we can place bid to have lock smith to dismantle without breaking it and replace with regular lock.

#### Digital Mechanical Lock:

For some national clients, digital mechanical lock need to install instead knob lock/dead bolt or lock set.



#### Lock Box:

After changing locks per work order instruction, contractor need to install lock box on front door or secondary door and need put all keys in the lock box for further access.

#### Re-securing:

If the locks of a secured property are broken or damaged by any accident or unwanted occurrence, then securing again property is called re-secure.

Note: Contractor need to use same key coded locks in lock set. Most common key coded locks are 35241, 44535, 67767 for knob/dead bolt and A389 for padlock.

# SECURING

## Final Securing:

- **General instruction from client:**
- Vendors must check the locks to determine what key code was previously used at this property. If the previous key code could not be determined, vendors must use the last digit of the loan number to determine which key code to use.
- Vendors must use the last digit of the loan number to determine which key code to use.
- **Loans ending in 0, 1, 2 = 67767**
- **Loans ending in 3, 4, 5, 6 = 35241**
- **Loans ending in 7, 8, 9 = 44535**
- **Rekey all doors unless they were previously rekeyed.** Change both Knob lock and deadbolt per the 2010-18 HUD allowable. Key the deadbolt and knob lock to the same key code.
- If antique door hardware exists, do not remove hardware and instead secure with a padlock and hasp. If the garage door is broken, unsecure, will not open manually, bid to repair and replace.
- Detached or attached garage doors and outbuildings shall be secured with a padlock and hasp only if no other locking mechanism exists.
- If unable to gain access - obtain the name of the HOA, COA, or neighborhood that the property is located in. provide HOA/COA name, contact number, and fax number. If property is located in a subdivision, include the name and cross street on the completion.
- Provide before/after photo documentation including wide angle shots the door.

**Door information is important for LOCK CHANG and LOCKBOX. Never select front door. Select front door if client wants to change lock in front door or there are no secondary doors exist.**

# Lock Change

- Lock Change means Install new Locks (Lockbox/Padlock/Knob lock/Deadbolt) to the Secondary door. If there is no Secondary door or the Secondary door is Sliding glass door then it is allowable to change the locks in Front door.



Powered by DIYTrade.com

# Lock Change

- **LOCK BOX**

Confirm lockbox has been installed to door that was previously rekeyed; take photos of the lockbox and keys inside. If lockbox has not been installed, install a lockbox to code ARL/OCN/Last four digit of loan number/Client specified number (depends on client instruction) for the allowable, provide two keys that are coded to the rekey code for the allowable and take the required photo documentation.

- **PADLOCK**

Vendor uses Padlock to secure fence gate, garage door, outbuilding, crawl space and damaged door. Most of the time A389 key code used for padlock.

- **SLIDER LOCK**

Vendor uses Slider lock to secure sliding glass door.

- **Photos**

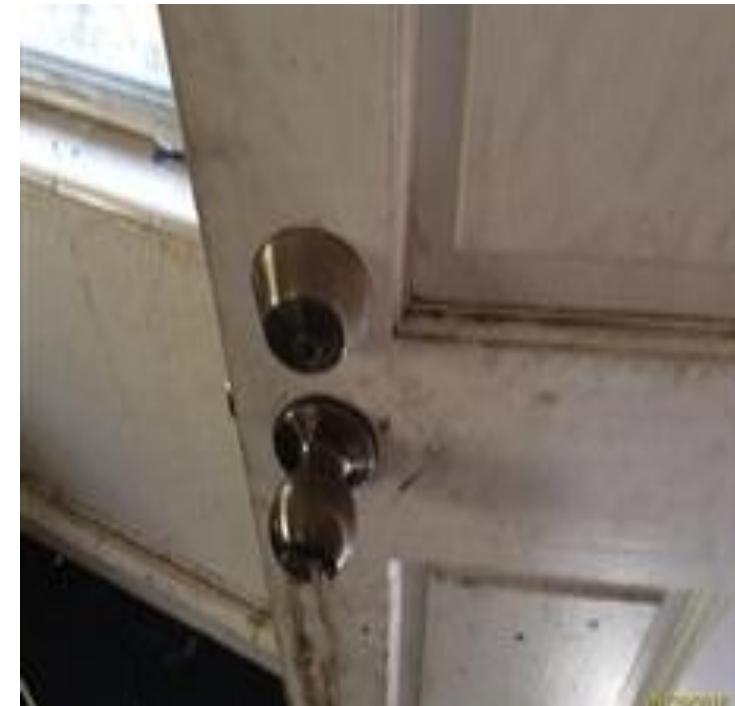
- "Before" photo showing old lock in place.
- "During" photo showing old lock removed. And installing new one.
- "After" photo showing new lock installed with key in the lock.

A cover plate must be installed over all openings. It is never acceptable to put a sticker over the hole that is left there. A photo of the deadbolt cover is required.

# Lock Change

## Sequence of Lock Change

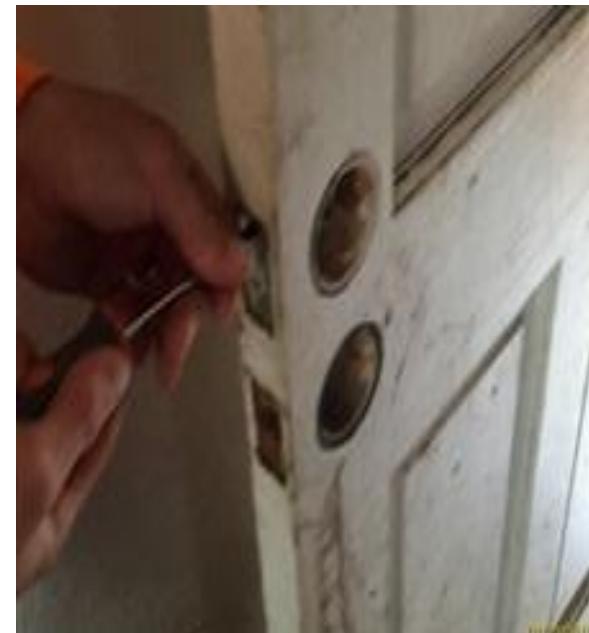
- Before



# Lock Change

## Sequence of Lock Change

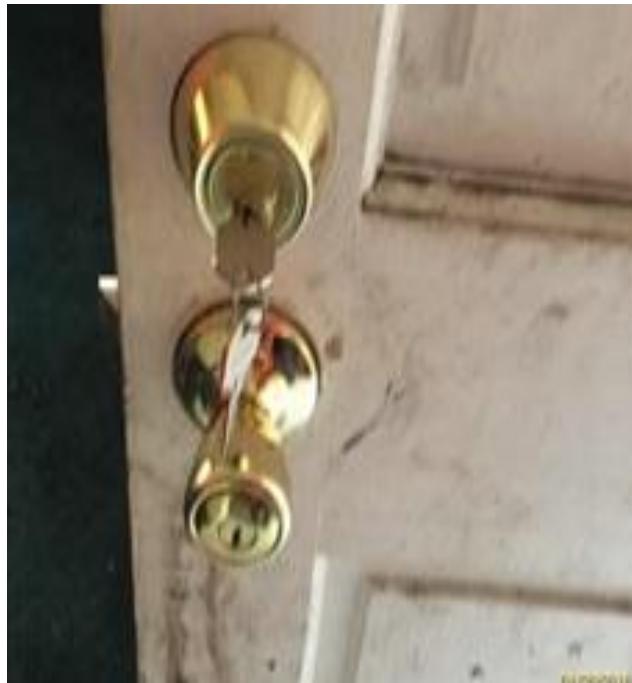
- During



# Lock Change

## Sequence of Lock Change

- After



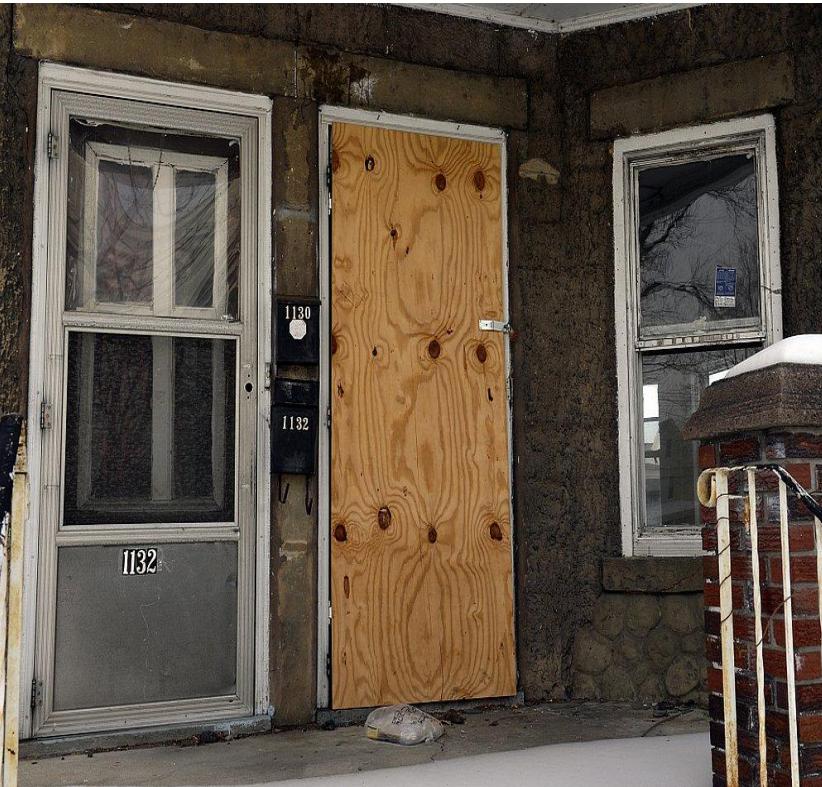
# Bid scope for Lock change

LOCK CHANGES		
<b>Lockbox</b>	EA	Install (1) ( Code: ) Lock box on the (location) door with Keys
<b>Knob lock Only</b>	EA	Change the knob lock on the (Location) Door to (Key code) - (Reason)
<b>Deadbolt Only</b>	EA	Change the Deadbolt on the (Location) Door to (Key code) - (Reason)
<b>Lockset (knob lock and Deadbolt)</b>	EA	Change the Lockset on the (Location) Door to (Key code) - (Reason)
<b>Padlock</b>	EA	Install ( ) A389 Padlock/Hasp on the (Location) to Secure - (Reason)
<b>Slider Locks</b>	EA	Install (1) Slider lock set on the Sliding Glass door to properly secure - Lock on top and Bottom of Door
<b>Window Locks</b>	EA	Replace ( ) Window locks on (Location) window so it can properly Secure - (Reason)
<b>Locksmith Required for Access</b>	M/C	Have a Locksmith Disable and Change locks on 1 door for access to home - (Reason)

# **Boarding**

# What is Boarding

- Boarding up is the process of installing boards on the windows and doors of a property to protect it from storm damage or to prevent unauthorized access by squatters, looters or vandals.



# Boarding Materials

- **Compulsory Materials for Boarding are-**

➤ Plywood



- **½" for Window**
- **½" for Other Opening**
- **5/8" for Door**
- **¾" for Sliding Glass Door**

- **2"X4" Studs**



- **Carriage bolt**



# Forbidden Boarding Materials

- **NO SCREWS AND NO OSB!!**



# Boarding Measurement

- Boarding measurements are always counted by UI (United Inch)  
Pricing for boarding is calculated by the following formula

**Price in \$ = UIxD**

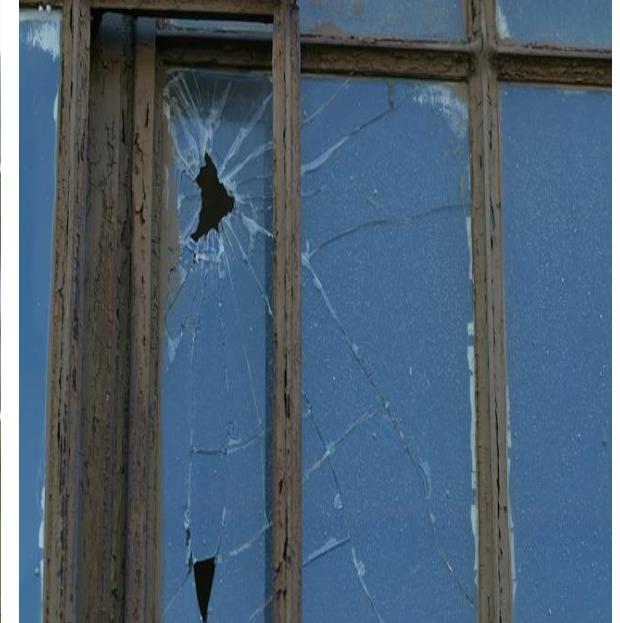
Where, United Inches, UI = Length in Inch + Width in inch.

D= Fractional amount for thickness.

**\*\*Pricing allowable varies from client to client\*\***

# Boarding Sequence of Boarding Work

- Before



# Boarding Sequence of Boarding Work

- During



# Boarding Sequence of Boarding Work

- After



# Bid Opportunity on Securing

- Replace door if missing.
- Garage door and outbuilding door.
- Sliding door/ Re-glazing
- Screening (pool/patio/window)

# Bid Opportunity on Securing

- Replace door if missing.
- ❖ If any door is missing that time we have to board up that door as primary security and after that we must have to provide a bid to replace a new door.
- ❖ Doors replacement bids will also include a Knob lock installation to make that newly installed door secured.

# Bid Opportunity on Securing

- Garage door and outbuilding door.
- ❖ If garage door or outbuilding door found broken/damaged/missing, we will need to board that up and after that we will have to provide a bid to replace that doors with a security door if they are beyond repair.
- ❖ If new door install in shed or outbuilding, padlock bi have to be added to keep that new door secured.

# Bid Opportunity on Securing

- **Sliding door/ Re-glazing**
  - ❖ If the sliding glass door found broken, we will need to board that for primary securing and after that we will bid for re-glazing the sliding door. Based on situation we may need to provide a bid to install slider locks.
  - ❖ If sliding door is missing with its panel, bids will be added with panel as well.

# Bid Opportunity on Securing

- **Screening (pool/patio/window)**
  - ❖ If the pool screening works as an entry way to the interior of the property that time we have to board the damaged screen area for security purpose. After that will provide a bid to replace new screening in the damaged area.

# Bid scope

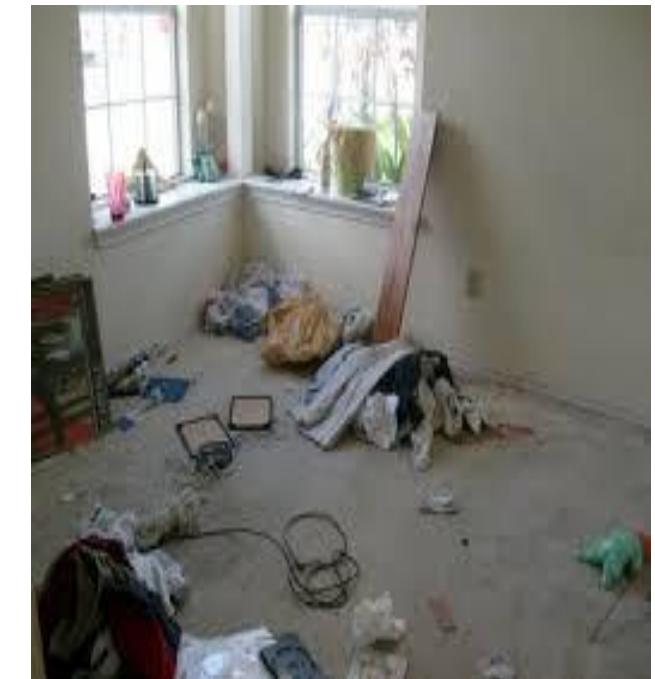
<i><b>Securing (Boarding / Lock Changes)</b></i>		
<b>Boarding Windows</b>	EA	Bolt Board ( ) _x_ Broken (location - first floor,basement,etc) window with 1/2 Plywood to Secure - Vandalism
<b>Boarding Doors</b>	EA	Bolt Board ( ) 36x80 Door on the (Location) with 1/2 inch Plywood to secure - (Reason)
<b>Board Security Door</b>	EA	
<b>Economy Grade Wooden Security Door</b>	EA	Install ( ) 36x80 Wooden Security door using 1/2 inch Plywood with 2 Steel Hinges on the (Location) Door and Secure with (1) A389 Padlock to Secure - (Reason)
<b>Board Single Garage Door 9x9</b>	EA	Bolt Board ( ) 9x9 Garage Overhead door with 1/2 inch Plywood to Secure - (Reason)
<b>Board Double Garage Door 9x18</b>	EA	Bolt Board ( ) 9x18 Garage Overhead door with 1/2 inch Plywood to Secure - (Reason)
<b>De-Boarding window</b>	EA	De-boar ( )36"x48" Window to reglaze- Including disposal
<b>De-Boarding Single door</b>	EA	De-boar ( ) 36"x80" single door to replace door- Including disposal
<b>De-Boarding double door</b>	EA	De-boar ( ) 80"x80" double door to replace door- Including disposal

# Debris



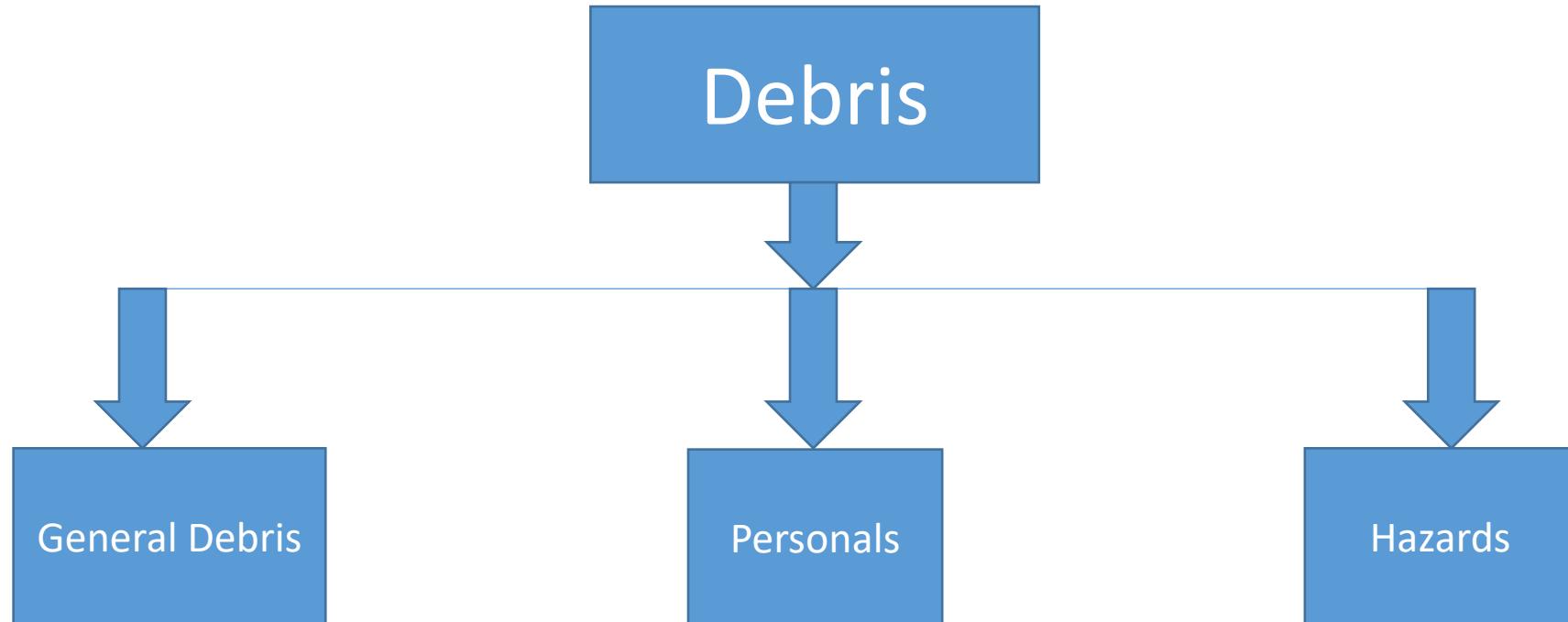
# Debris

- Debris are the scattered remains of something broken or destroyed. Actually it depends on Investor's decision. Whatever the things if Investor want to dump that is Debris.



# Debris Category

- We can categorize Debris into 3 types –



# General Debris

- We can divided into 2 category –
  - ❖ **Interior Debris** : Located within the Main Building/Garages/Attics/Basements/Sheds/Crawl Spaces
  - ❖ **Exterior Debris** : Located outside of the Main Building (Yard/Porch/Deck)



# Debris Sequence of Debris Removal

- Before



# Debris Sequence of Debris Removal

- Debris



# Debris Sequence of Debris Removal

- After



# Debris Personal property

- **Personal property** is generally considered the property that is movable. Whatever the thing if Investor wants to store it then we considered the property as Personals.



# Debris-Hazard

**Hazard** is a situation that poses a level of threat to Life, Health or Environment. Most hazards are dormant or potential, with a theoretical risk of harm. **We divided Hazards into four category – Environmental Hazards :** Materials that can cause environmental hazards as **Dead Animal** remaining in the open space of the property.



# Debris-Hazard

- **Health Hazards :** Materials that can cause environmental hazards as **Raw Foods** remaining in the open space of the property.



- **Trip Hazards :** Materials that can cause environmental hazards as **Brick/Exposed Wire** remaining in the ground of the property.



# Debris-Hazard

- **Safety Hazards :** Materials that can cause human risk by touching unintentionally as **Exposed or loose wire/Hole in a deck/Missing Handrail in stairs/Missing Railing in porch/Insecure pool.**



# Debris

## Sequence of Hazard removal

- Before



# Debris

## Sequence of Hazard removal

- During



# Debris Sequence of Hazard removal

- After



# Bid scope for debris removal

- Bid to remove interior debris.
- Bid to remove exterior debris.
- Bid to remove interior hazard.
- Bid to remove exterior hazard.
- Bid to remove/move interior or exterior personal.
- Store personal.
- Maid service bid after debris removal being done.

# Code Violations

# What is Code violation

- Municipalities have rules and regulations that must be followed by all properties. Should a property not be in accordance with these regulations, a code violation can be issued. These are often for overgrown/tall grass, unsecured pool, excessive debris, infestation, etc.

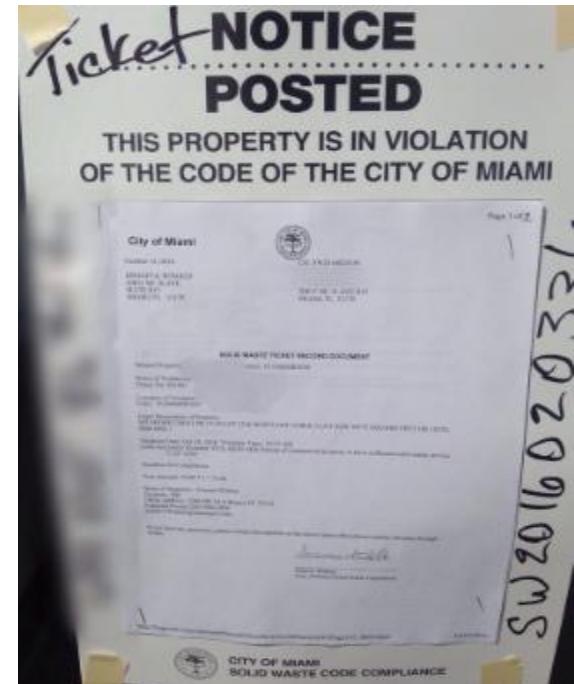
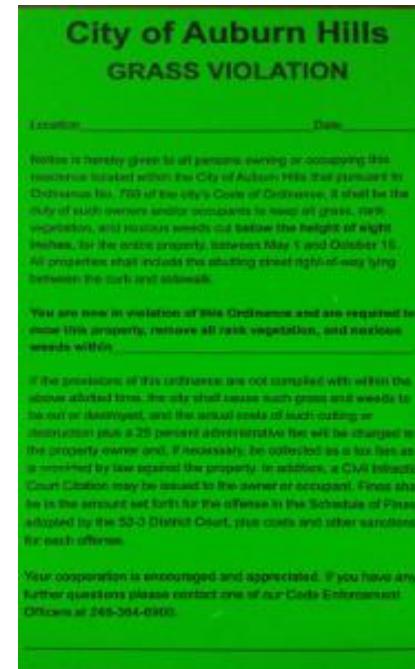
# Violations

- Common Violations:

1. Exterior debris
2. Health or trip hazards
3. Overgrown grass
4. Overgrown shrubs/trees
5. No “means of egress” (refers to the ability to exit the structure, in the event of an emergency, such as a fire)

- Can be issued by:

1. County/City
2. HOA



# Mandatory things we will search in primary visit.

- Missing appliances
- Mold
- Roof condition
- Sump pump (present or not, good/bad condition)
- Lawn condition and shrubs/vines/trees condition
- Structural condition
- Fascia, soffit, gutter, downspout
- Paint and graffiti
- Debris, hazard.
- Plumbing.
- Fence condition.