

Customer Service = Resolution



Safeguard
Properties

Determining Occupancy

Please note-this presentation is only intended to be used as a basic educational tool and is by no means all encompassing. Each property should be treated on a case by case basis and vendors will be held responsible for any errors made.



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This presentation will go through the proper processes you need to perform to ensure that, when securing a property, you have fulfilled all client expectations.

The most important process on securing a property is to verify the occupancy status.





- Review the work order. Ensure you fully understand all the client parameters that are covered in the work order.
- No work should ever be completed on a property that is found occupied unless stated in the work order.

- Ensure you are at the correct property.
 - Verify the street name
 - Confirm the house number (take a photo to prove you were at the correct property)
 - Review your work order to confirm the prior identified information
 - Once you've confirmed you are at the correct property, check to see if there are any postings on the front door



- Observe the property From the street.
 - Are people present?
 - Are there pets present? (may be abandoned)
 - Is the grass and yard maintained?
 - Does the property appear to be maintained?
 - Does the property appear secure?
 - Are there vehicles in the driveway?
 - Is there a relator sign present?
- These are all just preliminary observations you need to check first to ensure your safety at the property. Any of these items could identify the property as occupied.

- Walk the property.
 - Look for old newspapers/phone books.
 - Note any postings/code violations.
 - Look for any previously securing signs/ stickers.
 - Verify the electric and gas meters for connection status.
 - Check to see if water meter is turning, open a hose spigot.
 - Look through windows for signs of occupancy and personals.
 - Check for debris in the yard.



- Identify if any neighbors are out to help confirm the status of the property.
 - Do not give out any information to the neighbors about the client
 - Only state that you are attempting to confirm if the property is occupied or not.
 - Neighbors can give great insight on the property status but you should always be the judge and make the final decision.
- DO NOT open up mailboxes or sort through mail.



- If you have determined the property to be vacant, proceed with the work order per the specific client guidelines.
- If you have determined the property to be occupied please provide all required documentation.
- Once again, No work should ever be completed on a property that is found occupied unless stated in the work order.

- Required photos
 - Front of property
 - House number
 - Address block
 - Street sign
 - Street view
 - Utility meters
 - Relator sign if present
 - Any photos that justify that the property is vacant or occupied including but not limited to yard condition, debris, postings, and newspapers.



- If the property has multiple units, complete the following:
 - Read the work order for multiple addresses.
 - This will mostly be on duplexes.
 - Complete a visual exterior inspection of each of the units to verify the status for each.
 - This includes all meters, exterior of mailbox and parking spaces.

- If the property has one or more units that are vacant proceed to secure the vacant units unless there is a common entry for all units.
 - We must never secure a property in a manner that deny the occupied units entry.
 - Ensure on the update all units are identified of the occupancy status.
 - Report all conditions for each unit and the property as a whole.

- You have identified all of the signs from your walk around and determined that the property is vacant. After drilling out the lock you open the door and it's occupied.
 - What to do next
 - Secure the door and walk away (DO NO WORK)
 - Update the order on what happened at the property and the evidence that led you to securing the property and what showed you it was occupied after securing the rear door.
 - If it is a Bank of America property leave the apology letter.
 - **MOST IMPORTANT** is to tell Safeguard immediately for any incorrect securing, wrong property, mistake, etc.

Secure Authorization Call Center

- A call into SACC is required on all Bank of America properties.
- 1-888-406-8940
- The purpose is to ensure that the correct property is being secured and that it is vacant.
- Even if you are given a denial code proceed with the following:
 - Secure gates on fenced in pool areas.
 - Complete lawn maintenance per the work order.