

### SERVICEBENCH JOB PROCESS SUMMARY

Below are the steps to update your service reports and submit a Claim to be paid for the Jobs assigned to your company.

Please note that ServiceBench provides your company visibility into what is covered on the customer's contract in the **ENTITLEMENT** section of a job. As a result you are empowered to determine if the work will be covered by Cross Country, discuss non-covered expenses with the customer on site, and complete average repairs.

- For large repairs or those that can result in a replacement, review item "C" below for instructions on **Claim Estimate Required** requests.

Finally, just as before, there is an expectation from all ServicePartners to provide the most cost effective repair for all covered and non covered charges in order to continue attracting volume based on our partnership agreement.

- A. **GENERAL INFORMATION** : Always check the General Information section to ensure you are working on the correct Service Job ID.

- B. **PRODUCTS**: Verify/Update Model ID, Serial Number, and Unit Location

- C. **SERVICE INSTRUCTIONS** (Optional):

- Confirm service scheduled date/time, special instructions and verify **Claim Estimate Required** setting.

If your company would like to have the claim reviewed by CCHS Authorizers, selecting Claim Estimate Required to "YES" is recommended. Set this when there are questions on whether CCHS may approve a replacement instead of repairs, possible pre-existing conditions, major repairs, or the customer is considering a claim credit.

- D. **SERVICE INFORMATION**: Update the following:

- **Service Provider Reference Number**: If your company has its own internal claim number system (optional).
- **Sub-status**: should be set to **Job Complete** when repairs have been finished.
- **Service Explanation**: Details about diagnosis and actions taken to resolve issue.
  - Example: What you found was wrong, what you did to fix it, that you tested it, and if you collected the deductible.
- **Service Date**: When service was performed

- E. **PARTS**: Add details of parts used to repair system/unit/appliance, including price. If you are requesting CCHS to source the part, select **Cross Country Home Services** under **Part Source** and select **Order Requested** as the Parts Status **and this will**

send the information to our Purchasing team to source and supply the part. If you have supplied the Part, choose **Installed** as the Part Status.

- In the **Product Row Number** field, select the Model number from the dropdown.
- Enter the Part Number in the **Part Ordered** field, the **Quantity** and a **Description** of the part.
- Select the **Service Failure Code**, **Parts Diagnostic Code** and **Part Item Code** from the dropdowns in each of these fields.
- **Comments:** Additional description or special instructions on part being replaced
- **Unit Price:** Enter the price if you are supplying the part, leave blank if you are requesting CCHS supply the part.
- **Status:** Select the most appropriate option. Two of the most common are: **Installed** or **Order Requested**
- **Reminder:** Be sure to click Save at the bottom of the screen after adding parts or making updates to a Job.

ONCE all the work is done, you will invoice as follows:

F. **CREATE CLAIMS:** To submit your invoice go to the **PRODUCTS** section of the job and click on **CREATE CLAIM**.

- NOTE: All information entered in the Service Job will update to the Claim when this button is pressed. Be sure that all Customer, Product, Parts and Service Information has been updated on the Job before creating the Claim.
- Once in the Claim, you will complete the following 2 sections:

#### G. SERVICE DETAILS

- **Date Repaired:** Populated from the Service Date field in the Job.
- **Date Repair Started:** Enter the date of the first repair attempt.
- **Labor Hours:** *In order to continue attracting future volume, only input the time you actually worked on the repair (hands on equipment). Example: 0.5 for 1/2 hour, 0.75 for 45 minutes, etc. Labor hours should be entered in ¼ hour increments.*
- **Explanation of Service Performed:** Details transfer from the Service Explanation field in the Service Job. If not, return to Service Job and enter details there as well as in this field.

#### H. AMOUNTS

- Enter Amounts in the section at the bottom:
  - i. **Labor:** This is the full Labor Amount on the Job. This amount must equal the Labor Hours input above multiplied by your Hourly Labor Rate.
  - ii. **Diagnostic Fee:** Enter your company's Diagnostic Fee (Service Call Fee).

- iii. **Tax:** Enter total Tax on the Job (if applicable).
- iv. **Total Service Provider Parts:** This will populate automatically for all Parts supplied by the Provider.

- I. **ADD ADDITIONAL CHARGES:** This section is generally reserved for “Non-Covered” expenses.
  - To complete, select the “most appropriate” option from the drop down box, enter the amount and click on **ADD ADDITIONAL CHARGES** to add to the form.
    - i. Repeat step for other additional charges.
  - **NOTE:** When adding **ADDITIONAL CHARGES** you must enter a comment on the **COMMENT** section above PARTS for the system to accept said charges

- J. **SUBMIT:** Once you’ve entered all the corresponding amounts for the repair/replacement in question, you will then select **SUBMIT** at the bottom of the page.

- K. The system will display an APPROVED column where it will list the approved amounts.
  - Please review **SERVICE PROVIDER PAYABLE** to confirm the amount approved/payable by CCHS and **CUSTOMER LIABILITY** for the non-covered expenses.

ITEM	REQUESTED AMOUNT	ENTITLED	APPROVED
LABOR		Yes	
DIAGNOSTIC FEE	0.00	Yes	0.00
TAX	0.00	No	0.00
TRAVEL	0.00	No	0.00
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TOTAL SERVICE PROVIDER PARTS	0.00		0.00
TOTAL PARTS PORTAL SOURCED PARTS	0.00		0.00
DEDUCTIBLE	0.00		0.00
OVER CONTRACT LIMIT	0.00		0.00
PREMIUM UPGRADE	0.00		0.00
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CCHS LIABILITY	0.00		0.00
CUSTOMER LIABILITY	0.00		0.00
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SERVICE PROVIDER PAYABLE	0.00		0.00
CUSTOMER CREDIT PAYABLE	0.00		0.00
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CUSTOMER TOTAL			

- L. In the event there are any discrepancies with the approved amounts you can escalate the claim to our Support Service team by selecting **ESCALATE** at the bottom of the claim and one of the Authorizers will reach out to you shortly. If the Claim is in **Approved** status, you only have 48 hours to make corrections to the Claim; You can submit an Escalation but it is recommended to call Authorizations to update.

- **NOTE:** Under normal volume conditions the expected turnaournd is 24-48 hours, but the team is currently working through a backlog due to additional Service Partners submissions.