**Virtual Caretaker Program (VCP) - Standardized Operating Procedure (SOP)**.rev1 3/25/24

What is VCP?

VCP is a program MSI offers to residential and commercial customers (CST) that may desire additional levels of support and assistance with their monitored alarm systems.

Who is eligible for VCP?

Any CST that has an alarm system that can be remotely connected to by an after-hours technician. This means the communication path must be internet or cellular and the panel hardware must allow remote uploading/downloading through MSI’s currently supported software. The CST property must also be located in MSI service areas in NE WI.

What does VCP do for a CST

* Allows MSI to remotely disarm the alarm system for authorities or authorized in the case of an alarm or requested access.
* Allows MSI to service the system in order to keep the product in a good working order if the CST is not able to authorize service
* Allows MSI to grant access to contractors that are needing to be on-site to service other systems, which may or may not have triggered alarms on the alarm system

Why would a customer want to be on the VCP?

* CST’s that live in our service area seasonally and don’t have anyone (family, neighbors, friends) to provide access to their home/business in the case of an alarm
* CST’s that may not be available to answer the response center’s alarm calls and would like MSI to handle dispatches and assist on other alarm related issues
* CST’s that may want a contractor to access their home to service other systems (plumbing, HVAC, electrical)

What does it take to setup a customer on VCP?

* CST’s signs a proposal that includes the lockbox hardware, install labor, and annual subscription cost
* CST’s signs an agreement that details specific responses to alarms, troubles, and service issues on their alarm panel. It also verifies the cost that MSI can authorize on their behalf if other sub-systems require service from a contractor
* MSI goes on-site to install a lockbox, document pictures of specific zones, and confirm remote access to the alarm system
* CST provides a key for MSI to place in the lockbox as well as at MSI headquarters as a spare, in case the original is lost

New VCP customer setup process:

1. Sales provides proposal to customer for installation and subscription costs
2. Sales also provides 2 documents for customer to fill out (online pdf doc) once proposal is signed
   1. Virtual Caretaker Customer Agreement
   2. Customer Preferred Vendor List
   3. Contact Permissions Form
3. Customer signs proposal as well as fills out the customer agreement form and preferred vendor list, signed quote sent back to salesrep and customer agreement/preferred vendor list go to the [virtualcaretaker@martinsystems.com](mailto:virtualcaretaker@martinsystems.com) email group.
4. Sales submits project as normal but specifying to Data Services (DS) that this is a VCP install
5. DS creates a new product and new subscription for in the customer’s account in Q360.
   1. They also issue a randomly generated 4 digit lockbox code in Q360 (customer>products>virtual caretaker>access info)
   2. As well as work with Warehouse to designate a Martin Warehouse Key # in Q360 (customer>products>virtual caretaker>access info)
6. Project is scheduled with installation team as any other project would be
   1. See installation SOP for install specifics

VCP Installation SOP:

1. Scheduling coordinator receives email from sales that customer has signed a VCP proposal.
   1. They should confirm with purchasing on inventory of lockbox hardware and suggest ordering if not in stock.
2. Once project is created and lockbox is in inventory Project Coordinator should reach out to CST to schedule install.
   1. While communicating on schedule, coordinator should also be requesting 2 copies of CST’s door key that will be stored in lockbox on-site as well as lockbox physically located in warehouse of MSI
3. Technician arrives on-site and determines the location of the lockbox with the CST, installs, and programs new 4 digit code (provided in project by DS)
   1. Typical installations may include near an air conditioning disconnect or near the electrical meter base. Somewhere near other mechanicals to allow the lockbox to blend in but still be accessible. Location should not be on the front of the home in plain sight
   2. Installations should be at waste height to allow access without being buried by snow or covered by leaves
   3. Technician documents both the lockbox location (with notes on specifics) along with the door the key works on
4. Technician takes pictures of locations of MSI equipment (environmental zones, life safety zones, burglary keypads, etc…)
5. Technician places 1 key in lockbox and brings another key back to warehouse for storage in MSI warehouse key box (key location # provided in project by DS)
6. After installation Project Coordinator will confirm that the following information is documented in both the project in q360 as well as the onenote folder; [Virtual Caretaker Info](onenote:https://martinsecuritysystemsinc.sharepoint.com/Green%20Bay/Residential/Resi%20Tools/Virtual%20Caretaker%20Info.one#section-id={67FB3817-3A91-4788-98C9-A270913EEE36}&end) ([Web view](https://martinsecuritysystemsinc.sharepoint.com/_layouts/OneNote.aspx?id=%2FGreen%20Bay%2FResidential%2FResi%20Tools&wd=target%28Virtual%20Caretaker%20Info.one%7C67FB3817-3A91-4788-98C9-A270913EEE36%2F%29))
7. Pictures of lockbox location
8. Pictures of door that key will open
9. Pictures of any environmental or life safety devices and their location for reference
10. Any other relevant pictures taken during install
11. Both the customer agreement and preferred vendor list finished docs
12. Lockbox code both in Q360 (customer>products>virtual caretaker>access info) as well as in Boldnet (customer>details>Street 2)
13. MSI is 2nd on the CST’s call list at Boldnet (customer>call lists>location 2)

Office Staff Reacting to WHIRC notifying of a burglary or life safety alarm for VCP customer (this occurs during normal MSI business hours):

1. DS should confirm that the response center has dispatched the proper authorities and provide their Boldnet password to WH operator.
   1. **If this is a life safety alarm DS and WH should confirm with the dispatching fire department that there is a key box on-site if the fire department needs to enter the home (this is an attempt to avoid them breaking down doors)**
2. DS should then email the VCP email group (VCP@martinsystems.com) to give an update of the situation, including customer name, customer number, system account number, zone with alarm, details on the alarm, and what was already done.
3. Once this email is received by the group one individual in the group (primarily residential service team with secondary being commercial service team) should react with reaching out to the customer via email to digitally notify of the situation. They should also attempt another call with voicemail at any of the primary owner contact numbers to notify.
4. This individual should also follow up with the WH operator to identify what the dispatching authorities concluded and include that information on a follow up email to the customer.
5. If MSI is required to go on-site and service any equipment on the alarm system, the contractor dispatch procedures (listed in this SOP) should be followed prior to servicing

Office Staff Reacting to WHIRC notifying of an environmental alarm for VCP customer (this occurs during normal MSI business hours)

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4. This individual should now review the contact list and if possible, attempt to notify other individuals that may have the ability to assist in this situation. Passwords should be used to verify the individual in Boldnet.
   1. If another contact person is reached, MSI should provide information on the situation. The discussion should lead towards seeing if that contact prefers to do a site survey to identify the possible issue or if MSI should dispatch the appropriate service contractor.
      1. If contact person agrees to go on-site, MSI will need to remotely disarm the alarm system and provide the lockbox code. Individual should be in direct communication with that contact to understand the situation.
         1. If the alarm is true (water issue or furnace issue) individual should follow contractor dispatch procedures (listed in this SOP)
         2. If alarm is false and all is ok, individual should work with contact to locate key back in lock box and have MSI re-arm the alarm system
         3. VCP customer should be again notified via email of what occurred and the resolution.
         4. If MSI is required to go on-site and service any equipment on the alarm system, the contractor dispatch procedures (listed in this SOP) should be followed prior to servicing.
      2. If contact person is not reached or does not agree to go on-site, MSI will need to follow contractor dispatch procedures (listed in this SOP)

After Hours Tech Reacting to WHIRC notifying of a burglary or life safety alarm for VCP customer (this occurs after normal MSI business hours):

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   1. **If this is a life safety alarm Tech and WH should confirm with the dispatching fire department that there is a key box on-site if the fire department needs to enter the home (this is an attempt to avoid them breaking down doors)**
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Contractor Dispatch Procedures - MSI or after hours tech, based on a VCP situation, are in need of dispatching a contractor to a customer’s site:

1. MSI to review the VCP agreement on file to determine several specifics needed to make a decision on dispatching a contractor
   1. Section 1 Line H – Has the customer approved MSI to dispatch sub-contractors? If yes, proceed. If not, do not dispatch (this would be a rare occurrence as all customer’s have selected this option)
   2. Section 3 – What cost has the customer authorized MSI to spend for sub-contractor fees. This will need to be communicated with the contractor and confirmed that anything more needs to be authorized by the owner directly.
   3. Based on the type of alarm that occurred, or situation that we were notified of, MSI should contact the appropriate contractor from the CST’s preferred vendor document.
      1. MSI should let the contractor know the situation and schedule service accordingly
      2. If the issue occurred after hours, the after hours tech should attempt to dispatch the contractor after hours. If this service is not available, the tech should notify the [VCP@martinsystems.com](mailto:VCP@martinsystems.com) group that they attempted to reach the contractor with no luck. That group will takeover attempting to reach the contractor and owner
   4. Once contractor is dispatched, MSI should communicate with that contractor and provide the 4 digit lockbox code, the door the key works with, as well as disarming the alarm system.
   5. MSI will need to ensure that contractor is communicating what issues they experience while on-site and assist in deciding what actions to take to resolve the issues, based on the pre-determined authorized value of service the CST gave MSI to spend.
   6. Once a resolution has been reached, and the problem has been resolved, MSI should request the contractor return the key to the lockbox. MSI will then need to re-arm the alarm system.
   7. Depending on the situation, MSI may need to schedule service of the alarm system. This should be determined by agreement section 1 lines F/G/I to confirm CST has authorized MSI service techs to dispatch billable service.
   8. MSI will need to review agreement section 4 to determine if CST requested MSI to reset lockbox code. If so, DS will need to issue a new code and documents accordingly in Q360 & onenote.
   9. MSI for all these situations should be notifying via email and phone call, to the primary CST to provide updates on what actions are being taken.