



VIDEO DIAGNOSIS Policies & Procedures

This document gives you the “DOs and DON'Ts” of conducting a video diagnosis using Stroom®, along with our

Safety Policy. Together, this information helps you provide a safe, valuable, and positive experience for your customers.

DO

- **Screen your customers before scheduling a video diagnosis appointment.**

Ask the following questions to determine if this is appropriate for your customer's situation before scheduling.

- Do they have a smart phone with high-speed data plan or WiFi access near the item?
- Will they have access to and full visibility of the item during the scheduled time?
- Is there a service issue, item and/or a safety condition that disqualifies a video appointment?

See our **Customer Guide** for scripting and other tools to screen your customers.

- **Treat “Video” and “On-site” appointments the same.**

Manage and talk about a video appointment with the same importance, value and expectations as on-site visits- internally as well as with customers. As with on-site visits, discussion and interaction between the skilled technician and the customer while reviewing the system are critical to your success— and give your customer the best experience.

- **Prepare your customer for the video appointment.**

Use our scripts and email templates to help your customers understand:

- what will happen during the appointment
- what information you'll be collecting
- what physical and technical requirements should prepare for

The customer may have hesitations at first. Do your best to reassure them that it's an easy and safe way to help complete their repair faster.

- **Update dispatch status when video diagnosis appointment is scheduled.**

Once the appointment has been scheduled for an AHS dispatch, update the dispatch status to “Appointment Set” in the AHS Contractor Portal. You can only consider this a video diagnosis appointment if the appointment will be with a skilled technician who can diagnose the failed system.

- **Always include the AHS Dispatch ID** in the Stream

Reference number field when initiating the video call for an AHS customer. **This is required** to identify the dispatch and measure the benefits. Use your own internal tracking number for all non-Frontdoor jobs.

The screenshot shows a 'Create an Invitation' form with the following elements:

- Name***: A text input field containing 'Customer Name'. A small asterisk indicates this field is required.
- Reference**: A text input field containing 'Dispatch ID'. A large red star is overlaid on this field.
- Mobile Phone Number***: A text input field with a dropdown menu for the country code (set to '+1') and a text input for the number (set to '608 658 1041'). A small asterisk indicates this field is required.
- Below the Reference field, there are two buttons: 'Send SMS' and 'Copy & Paste Link'.
- At the bottom of the form, there are two buttons: 'Cancel' and 'Invite'.

- **Focus on the Customer**

How the technician engages with the customer during the video call will impact their diagnosis success rate – as well as the overall customer experience. Since the technician will complete the diagnosis through the customer (likely limited in technical skills), the technician’s ability to safely and respectfully direct the customer is **critical**.

- Speak clearly and provide one instruction to the customer at a time.
- Adhere to our

- **Safety** Policy.
 - Ask the customer if they are comfortable with a task (or if they have done the task before) when the task exceeds the normal activity with the system or appliance (e.g., moving a refrigerator away from a wall).
 - Show patience and empathy to the customer. Watch for signs if the customer is becoming frustrated, has physical difficulty or is uncomfortable with an activity. Err on the side of caution and stop or limit a diagnosis if you have any doubts about the customer's safety.
 - Educate the customer – explain why you are asking the customer to do something. In addition to increasing their comfort level, better understanding their systems will empower them.
- **Bill Frontdoor for Customer DIY (No Truck Roll)**
Frontdoor will compensate DIY repairs completed by a **technician** during a virtual appointment as we currently do for “on-site” visits. And likewise, we will collect the Trade Service Call Fees in recognition of the value delivered by the technician.

DON'T

- **DO NOT record any payment information using Stream.**

If a payment transaction is required (e.g., following sales quote for a non-home warranty customer or non-covered costs for home warranty members), end the Stream session before processing the transaction to ensure credit card or other sensitive info is not captured on video or audio.

- **DO NOT inform the customer of non-covered charges or full denial during the video call.**

If you identify non-covered charges or situations that will result in a full denial, DO NOT inform the customer until a Frontdoor authorization agent has been consulted. Make sure the Stream session documents the conditions and explain to the customer what parts, repairs and/or other adjustments are needed to complete the repair. The authorization agent will contact the customer to discuss next steps first, then they will contact you to discuss the outcome.

- **DO NOT forget to follow up if an issue was resolved during the video call**

Customers expressed frustration and questioned the value of their trade service fee when they heard *“That should do it. Call me if you have any more problems.”* at the end of the call.

If they need to wait a period of time to make sure the repair is successful (e.g., thaw freezer for 48 hours to resolve a leak), or if the technician is not confident that the problem will be repaired, contractors must follow these procedures before invoicing a DIY.

1. Schedule a follow-up call (for a time after the waiting period) for a technician or other service representative to confirm the resolution with the customer. The call should be scheduled during time allocated to video appointments to support the customer via Stream if needed.
2. Update the dispatch to “Job Complete” status only after resolution has been confirmed. If the customer did not respond to the follow up call at the scheduled time, the dispatch can be updated to “Job Complete.”
3. Invoice Frontdoor as if an in-home visit occurred.

Safety Policy

Like any in-person service request, health and safety are paramount considerations while using Strem technology. As an independent home-repair professional, it is critical that you safeguard the health and safety of everyone present in and around the home whenever you virtually troubleshoot a customer's service request.

1. General

- a. Use common sense and carefully consider whether the video appointment could create or increase any risk of harm to people or property
- b. Ask the customer if they are comfortable with performing any requested actions with their mobile device. If uncomfortable, do not request the customer perform the action
- c. If particular expertise, knowledge or skill is required, don't ask the customer to do it
- d. Always use your independent, professional judgment when conducting a video appointment
- e. Don't assume a customer is capable of safely performing tasks you are able to safely perform (e.g., stand on a ladder or chair)
- f. When in doubt, always err on the side of caution
- g. Nothing involving tools
- h. Nothing involving electrical components
- i. Do not ask customers to take anything apart

2. Appliances

- a. Nothing physical unless the customer is capable (e.g., pull out refrigerator, dryer)
- b. Do not ask a customer to take anything apart
- c. Do not ask a customer to diagnose anything (just asking for visual access)
- d. Nothing involving water lines or something that could cause secondary damage
- e. Nothing involving gas leaks

3. HVAC

- a. Don't ask customers to diagnose anything (visual access only)
- b. Nothing involving water or gas lines or anything that might cause secondary damage
- c. Nothing involving gas leaks
- d. Nothing on the roof
- e. Nothing in the attic (unless accessible safely and without a ladder)
- f. Nothing in the crawl space

4. Plumbing

- a. Do not ask a customer to re-light a pilot
- b. Do not ask a customer to attempt to reset a toilet
- c. Do not ask a customer to attempt to unclog a toilet if already attempted plunging
- d. Do not advise customer to put hands into garbage disposal to unclog it
- e. Do not advise any repair tied to electricity (especially if in wet area)
- f. Do not advise turning off valve that appears to be rusted or corroded

5. Pool/Spa

- a. Do not advise any repair tied to electricity
- b. Do not advise turning off valves that appear to be rusted or corroded

6. Electrical

- a. Electrical risks must be carefully considered, and remote assessment of electrical issues should be very limited
- b. Don't advise removing something (covers, plates, etc.) or using a tool due to shock or fire hazard
- c. May be helpful to reset a GFCI or breaker, but do not ask customer to check the power to confirm if there is an issue to "why" the breaker was tripped

7. Garage Door Opener

- a. Do not ask a customer to remove the door opener cover
- b. Do not ask a customer to get on a ladder, stool, etc.