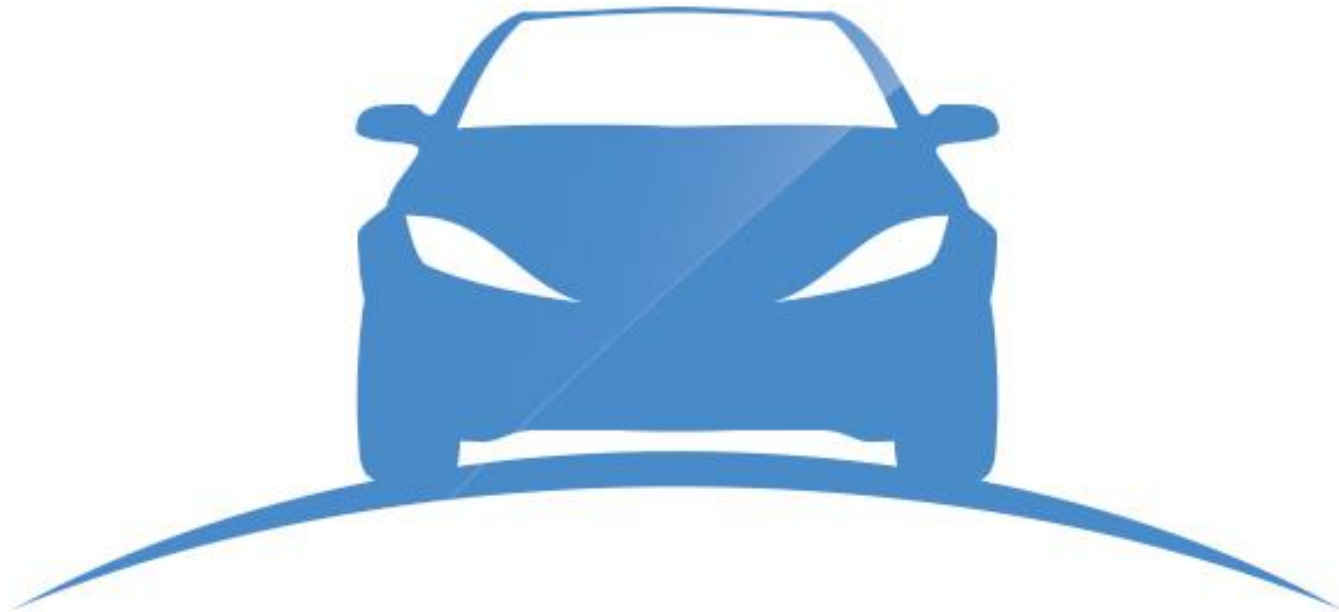


The Bullet Proof File

Presented by

Mark Olson



Your Partner in Collision Repair to
Get it right the first time!



You are going to get shot at.
Can your shop withstand it?
Are your files bullet proof?



Scenario - that will happen at some point

Imagine that you get that dreaded phone call/letter, get served or customer comes in that informing you there is an issue with a vehicle. Even worse, someone has been injured or killed. What you say and do next can have a big impact on your outcome.

- 1- Pull your file before you try an answer anything from memory.
- 2- Take detailed notes of the complaints that they have - and listen and take notes, there will be time for you to talk. If you are served, seek council. **Seeking council is good advice on anything major.**
- 3- Get the issue to a person of power (one that can make the financial decision)
- 3- If you can resolve easily with re-repair - do so. Even if you think you are OK, most calls we get from shops that try to deny small things, causes customers to hire experts that will find things. When this happens, there is a 99% that buying the vehicle is the best option.



Forms - do you have them?

New User Registration: Sign Up | Login

RESOURCE CENTER

REGISTER FOR A COURSE

About MVP | Contact Us

- HOME
- EXPLORE OUR PROGRAMS •
- LEAN FOR COLLISION
- BUSINESS COURSES
- CONFERENCES
- MARKET YOUR SHOP
- TOOLS & SERVICES
- ABOUT MVP



**Charley Hutton
Talks MVP**
See what Charley is
saying about
the Value of MVP

EXPLORE OUR PROGRAMS

Lean For Collision

Business Courses

Conferences

Market Your Shop

Tools & Services



Market Your Shop

Proven Approach for Growing Your Business

In this rapidly changing world, new marketing technologies and the popularity of social media are impacting how consumers find and select whom they do business with. These technologies are transforming the way customers access information and form opinions. Today's collision center can no longer rely solely on traditional marketing techniques. Staying competitive will require a re-engineered sales and marketing strategy that takes advantage of the latest strategies, tools, and systems.

Back
a Level

Get More Details
Market Your Shop

Continue Explore
Our Programs



LEAN FOR COLLISION

Welcome

Green Belt Training

White Belt Training

Commercial Truck Green Belt Training

BUSINESS COURSES

Welcome

Administration

Production

Fundamentals of Estimating

Advanced Estimating 2010

CONFERENCES

Welcome

Agenda

Keynote Speakers

Breakout Sessions

Gala Dinner Entertainment

MARKET YOUR SHOP

Welcome

Continuing Education (CE)

Precision Marketing Report

Marketing Courses

TOOLS & SERVICES

Welcome

Layout & Design

Consulting Services

Rapid Improvement Workshops

Resource Center



body shop forms



Sign in

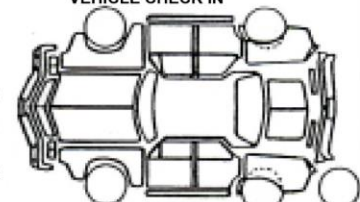
All Images Shopping Maps News More Settings Tools

SafeSearch

- customer information
- printable
- checklist
- intake
- authorization
- vehicle inspection
- template
- quality control
- pre rental
- detail
- insurance

Authorization Form

- Customer is your client not insurance company
- May be part of check in form or stand alone
- Must comply with your state laws
- Are you scanning? - May need release to scan
- May need release to share information with insurance co.
- Check state laws on signature (wet or phone authorization?).
- Is person who drops off car authorized to sign (kids spouse etc.)
- Contact about additional.
- Vary from state to state
- Test drive waiver?
- Vehicle insurance - or garage keepers

00000 US Highway 19 North Clearwater, Florida 33761 Phone (000) 000-0000 Fax (000) 000-0000		State of Florida Registration # MV-00000
CUSTOMER	HAT#	REPEAT REPAIR <input type="checkbox"/> YES <input type="checkbox"/> NO
ADDRESS	MILEAGE IN / OUT	DATE
CITY	STATE	ZIP
HOME PHONE	BUSINESS PHONE	LABOR RATE
E-MAIL ADDRESS		JOB LINE NO.'S
MAKE	MODEL	YEAR
LICENSE	STATE	EXT. COLOR
COLOR CODE	DSO	TRIM CODE
TIME IN	PROMISE TIME	PRE-APPROVED AMOUNT
ADD'L PERSON WHO MAY AUTHORIZE WORK		
NAME	PHONE	
VEHICLE IDENTIFICATION NUMBER		
CUSTOMER CONCERNS		VEHICLE CHECK IN
		DAMAGE
		C-Chips
		S - Scratch
		D - Dent
		M - Missing
		T - Tear
		G - Glass
		Damage
		
		KEYLESS CODE _____
		RADIO STATION _____
		FUEL _____
		E 1/4 1/2 3/4 F
		TERMS: STRICTLY CASH UNLESS PRIOR ARRANGEMENTS MADE
		"I hereby authorize the repair work hereinafter set forth to be done along with the necessary material and agree that you are not responsible for loss or damage to vehicle or articles left in vehicle in case of fire, theft, or any other cause beyond your control or for any delays caused by unavailability of parts or delays in parts shipments by the supplier or transporter. I hereby grant you and/or your employees permission to operate the vehicle herein described on streets, highways or elsewhere for the purpose of testing and/or inspection. An express mechanic's lien is hereby acknowledged on below vehicle to secure the amount of repairs thereto." In the event sums are due and owing to the seller/dealer are not paid and this matter is forwarded to our attorney for collection, customer agrees to pay cost of collection including attorney fees.
		X
		PLEASE READ CAREFULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SIGN: I UNDERSTAND THAT UNDER STATE LAW, I AM ENTITLED TO A WRITTEN ESTIMATE, IF MY FINAL BILL WILL EXCEED \$100.00.
		I REQUEST A WRITTEN ESTIMATE.
		I DO NOT REQUEST A WRITTEN ESTIMATE AS LONG AS THE REPAIR COSTS DO NOT EXCEED \$_____ THE SHOP MAY NOT EXCEED THIS AMOUNT WITHOUT MY WRITTEN OR ORAL APPROVAL.
		I DO NOT REQUEST A WRITTEN ESTIMATE.
		Signed: _____ Date: _____
		NOTE: You will be notified upon completion of any diagnostic work necessary to estimate the cost of repair, or if the actual charges exceed the written estimate including any additional charges, by \$10 or 10% whichever is greater, not to exceed \$50. If you are so notified, you may orally or in writing authorize, modify or cancel the order for repair.
		CANCELLATION OF REPAIRS: In the event the customer cancels the repair work, the vehicle shall be reassembled in a condition reasonably similar as when received unless the customer waives reassembly or the reassembled vehicle would be unsafe. The repair shop may charge for the cost of teardown, the cost of parts and labor to replace items destroyed by teardown and the cost to reassemble the vehicle.
		LIMITED WARRANTY: The only warranties applying to the part(s) installed in accordance with this estimate and/or repair order are those that may be offered by the manufacturer. The seller hereby expressly disclaims all warranties, either express or implied, including any implied warranty of merchantability or fitness for a particular purpose, and neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of products or service sold under the terms of this estimate and/or repair order. Parts and labor are guaranteed for 12 months or 12,000 miles, whichever comes first. Seller does not guarantee that the work performed in accordance with this estimate and/or repair order with correct any problem specified on the description of the complaint.
STORAGE CHARGES: No storage charges shall accrue or be due and payable for a period of 3 working days from the date you are notified that the work on your vehicle has been completed. After that date, the daily charge for storage of your vehicle will be \$15.00.		Miscellaneous Shop Supplies and Hazardous Waste Disposal Charges: *This charge represents costs and profits to the motor vehicle repair facility for miscellaneous shop supplies or waste disposal. [s. 559.904(4)]. The state of Florida requires a \$1.00 fee to be collected for each new tire sold in the state [s. 403.718], and a \$1.50 fee to be collected for each new or remanufactured battery sold in the state [s. 403.7185].

Scanning Authorization Form Sample

Pre and Post-Repair Diagnostic Scan Work Authorization Form

This diagnostic work authorization form grants [repair shop] permission to perform a pre and post-repair diagnostic scan on your vehicle as part of the repair process. By accepting this procedure, you acknowledge the terms and conditions listed below. If you choose to decline this procedure, you acknowledge the repair shop will not be held liable for problems with the vehicle that cannot be detected without proper diagnostic scans.

Definition:

Pre-Repair diagnostic scan - this is a complete health check of your vehicle and provides the repair shop (and insurance company, if applicable) a complete report on the number of computer modules on board, as well as any diagnostic trouble codes (DTC's) that could indicate pre-accident and/or accident related damage. This essential step eliminates unnecessary delays waiting for parts and/or additional insurance authorizations, and identifies issues with the vehicle that could be missed without a pre-repair diagnostic scan.

Post-Repair diagnostic scan - this step ensures that all systems on your vehicle are in proper working order prior to delivery. It is important to note that the majority of DTC's do not result in a malfunction indicator lamp (dashboard light). Failure to perform a post-repair scan by trained professionals with factory scan tools significantly increases the risk that your vehicle may be returned with malfunctioning, or inoperable, safety and convenience systems. A post-repair diagnostic scan is the single best way to ensure that your vehicle is returned to pre-incident condition.

Data privacy:

In the process of performing a diagnostic scan, [repair shop] will collect important historical vehicle data, including in some cases, the date, time and mileage of when a DTC was created. This information is helpful in understanding if a problem is accident related or pre-existing. It is possible this information will be shared with your insurance company. Your acceptance of this procedure grants [repair shop] permission to share this information with others, including your insurance company. No personally identifiable information is collected during the pre or post-repair scan.

Disclaimers:

□ Diagnosing vehicles has limitations. In some cases, modified vehicles may give false DTC's. [repair shop] and its employees cannot be responsible for omission or errors caused by the information provided, or not provided, by the customer. □ All work performed by [repair shop] will be in accordance with Original Equipment Manufacturer (OEM) specifications and defaults. This includes, but is not limited to, any repairs, calibrations, integrations, programming and set points as indicated by the OEM by way of their designated sources of such information. [repair shop] is not responsible for any damage that results from, or to, aftermarket parts, or modifications from OEM factory specifications. □ Variations between vehicles, according to the make model and trim level, may limit the information captured during a pre or post-repair diagnostic scan. □ Depending on the condition of the vehicle, and the extent of the damage, and other factors outside the control of [repair center], a factory scan tool may not see every system on the vehicle being scanned. □ [repair shop] is not responsible for any changes made to the vehicle after the vehicle leaves the shop.

While [repair shop] recommends a pre and post-repair scan on every vehicle, it is especially important to perform these functions on newer, highly optioned, heavily damaged vehicles. Failure to do so significantly increases the risk to the vehicle owner and occupants.


< Signature Page to Follow >

Yes _____ (initial) I accept having a pre and post-repair diagnostic scan performed on my vehicle, even if my insurance coverage does not pay for these procedures. In some instances, insurance coverage may not be determined until after the diagnostic scans are performed.

No _____ (initial) I decline having a pre and post-repair diagnostic scan on my vehicle, though they were recommended by [repair shop] and the need for them was explained to me. I understand [repair shop] will not be held liable for any hidden damage that could not be detected during the repair process as a result of not having performed a pre-repair scan. I also understand certain systems may not function correctly, or at all, following the repair, and it would be impossible to detect issues with those systems without a post-repair diagnostic scan. I release [repair shop] from all liability for any pre-accident issues, hidden damage or post repair malfunctions that would have been discovered, had I consented to having pre and post-repair diagnostic scans performed.



Vehicle Check in Form (Intake)



Your Company Name
123 Company Lane New York, NY 12345
Tel. (123)456-7890
Fax. (123)456-7890

Date _____
 Truck No. _____
 Trip No. _____

Section A (Must be completed by the customer or releasee of the vehicle)
 Customer hereby requests the broker to make arrangement for the transport of the following described vehicle from Origin to Destination with carrier selected by Broker and subject to the terms and conditions on back of this form.

ORIGIN

 Consignor: _____
 Address: _____
 City, State, Zip: _____
 Tel. (Home): _____
 Tel. (Work): _____
 Cell: _____



DESTINATION



 Consignor: _____
 Address: _____
 City, State, Zip: _____
 Tel. (Home): _____
 Tel. (Work): _____
 Cell: _____

Section B Bill _____ C.O.D. _____
Check, cash or check or money order only

Car SUV Van

Year: _____ Make: _____ Model: _____ Color: _____ VIN: _____

B - BENT
 BB - BUFFER BURNED
 BR - BROKEN
 C - CUT
 CR - CRACKED
 D - DENTED
 F - FADED
 FF - FOREIGN FLUID
 G - GOUGED
 L - LOOSE
 M - MISSING
 P - PITTED
 PC - PUNCTURE CHIP
 R - RUBBED
 RU - RUST
 S - SCRATCHED
 SL - SOLED
 ST - STAINED
 T - TORN

During transport, vehicles and vehicle equipment may cease to properly through no fault of the transporter, the transporter will be responsible for damage directly caused by the driver, the transporter WILL NOT be responsible for damage NOT caused by Driver, is NOT responsible for any luggage left in the car.

I agree with the Driver's assessment of the condition of this vehicle _____ Initial
 I agree with the terms and conditions on the back of this page _____ Initial

Driver cannot make proper inspection:
 Night Time Pick-up _____ Initial
 Snow _____ Initial
 Not DOT _____ Initial

CUSTOMER'S SIGNATURE UPON DELIVERY

 The Customer/Consignor hereby acknowledges and represents that he or she has received this Vehicle in the same conditions as it had previously been delivered to transporters except as noted above, and hereby releases the Broker and Transporter from any claims for damage to the Vehicle. Will not honor claims made after driver's Signature.









Customer's Signature (Releasee) _____ Date _____

Customer's Signature _____ Date _____

VEHICLE CHECK IN REPORT

Name _____		Date _____	Written By _____	
Address _____		City _____	State, Zip _____	Received _____ AM _____ PM
Business Phone _____		Home Phone _____		Promised By _____ AM _____ PM
Email _____		Cell Phone _____		Ins. Co. _____
Fuel _____ F _____ 3/4 _____ 1/2 _____ 1/4	Year _____	Make _____	Model _____	Ins. Phone _____
Odometer In _____		Odometer Out _____	VIN _____	Claim No. _____
				Adjuster _____

EXTERIOR CONDITION

O=Operational	D=Damaged	<input checked="" type="checkbox"/> =No Visible Damage	N/A=Not Applicable
R=Repairs Needed	M=Item(s) Missing		

INTERIOR CONDITION				EQUIPMENT				
	LF	LR	RF	RR				
Door Panels	_____	_____	_____	_____	Radio Code	_____	Running Boards	_____
Seats	_____	_____	_____	_____	Radio / Antenna	_____	Mud Guards	_____
Console	_____	_____	_____	_____	Phone / Antenna	_____	Wipers	_____
Dash Board	_____	_____	_____	_____	C. B. / Antenna	_____	Spare Tire	_____
Headliner	_____	_____	_____	_____	Horn	_____	Wheel Covers	_____
Carpet	_____	_____	_____	_____	Sun Roof	_____	Wheel Lock	_____
Floormats (# of _____)	_____	_____	_____	_____	Power Windows	_____	Jack	_____
Radio	_____	_____	_____	_____	Power Locks	_____	Pinstripe/Paint	_____
Mirrors	_____	_____	_____	_____	Climate Control	_____	Windshield	_____
Interior Lights	_____	_____	_____	_____	Exterior Lights	_____	GPS	_____
					Cell Phone	_____	DVD Player	_____
					Alarm System	_____	Alarm Code	_____


PAINT CONDITION	
Excess Scratches	_____
Color Match Off	_____
Fade	_____
Checking	_____
Overspray	_____
Hail Damage	_____
Acid Rain	_____

Notes: _____

We have recorded any damage on your vehicle that is unrelated to the authorized repairs. By having yourself and our representative review these areas together, we can both be assured of the best possible service. We have indicated each area of damage or blemish along with other miscellaneous items, please feel free to assist us while we fill out this form.

Inspected By _____ Date _____

Customer Signature _____ Date _____

Item # 605 White: Customer Copy Canary: Repair Order File MADE IN U.S.A. 

Adjuster/Customer/Inspector Sign in

- 1- All adjusters/customers/inspectors need to sign in with a form that is a legal release of liability for injury, video recording, photographic recording and audio recording.
- 2- Name, company, representing, vehicle, time in, time out.
- 3- All must comply with Personal Protection Equipment (Respirators, dust masks, eye protection, skin and hearing)



Running Log of notes

- 1- All conversations with customer
- 2- All conversation with adjusters
- 3- All conversations with parts vendors etc.

Can be done in a log fashion with management system for can be done in a simple word format then saved to electronic file.

Each entry must include date and time, and preferably the person making the entry.



Internal notes

- All communications should be electronic or in writing.
- All supplemental requests from tech to office
- All responses to tech on supplement (approved / not approved) supplement form is fine.
- Parts arrival and backorder notes
- Anything written needs to be in the file



Photos

Minimum Stages

1. Intake photo entire car and interior
2. Photos of vehicle damage
3. After teardown and supplemental damage
4. Measuring system on vehicle
5. Measurements Initial and after each pull (of screen)
6. Hook ups
7. Test welds and destructive testing with RO number
8. Section and cut locations
9. Welding done and ready for paint - before primer
10. In paint before primer
11. In paint with primer masked before refinish
12. Initial spray out panel and all tints that were sprayed out with RO number
13. Painted before unmasked
14. Back in body
15. Final vehicle complete ready for delivery (entire vehicle)



Tools and documentation aids



104 Roof Welds Missing



Arrows Mark Welded Roof Points
On Original Honda Fit



Arrows Mark Glued Roof Separation
On Accident Vehicle

OEM Information

- Must be actual OEM information, not from supplier or general
- Can be Mitchell, Alldata, C1 - and OEM is best for repair
- Must be pulled at time of estimate and estimate written with information
- Must include all operations not just cut areas (resets, checks etc...)
- Signed off and reviewed as appropriate (Manager / Production manager / Etc.)
- Photograph put in file or scanned with signatures after job completion
- Must be followed and verified



Product Documentation

- Anything specified by the OEM should be documented (photograph)
- Urethanes for windshields have expiration dates
- Adhesives have expiration dates
- Put a copy of paint mixing label in file (scan or photograph)



EXPIRATION DATE
July 7, 2018



Quality Control Forms /Systems

- 1- Do not make too complicated (keep it simple)
- 2- Can be Stage check
- 3- Can be peer review
- 4- We recommend doing by stage or grouping
- 5- Many variations to the process, have to customize for your shop.

**Biggest issue is not using system as designed,
and the form is pencil whipped**



Handwriting Check

Repair Documentation

QUALITY CONTROL CHECKLIST SUMMARY		Checklist Completed:	52 / 52
BODY / STRUCTURAL / MECHANICAL		Checklist Completed:	13 / 13
PAINT / REFINISH		Checklist Completed:	13 / 13
BUILDUP/REASSEMBLY		Checklist Completed:	11 / 11
DETAIL/FINAL INSPECTION		Checklist Completed:	15 / 15
All Workorder Lines Completed	Test Paint	July 18, 2017 10:57:48	
No Visible Dirt Nibs or Tape Lines	Test Paint	July 18, 2017 10:57:48	
Interior Lamps Operational	Test Paint	July 18, 2017 10:57:48	
Vents Free of Dust & Glass	Test Paint	July 18, 2017 10:57:48	
Seatbelts Operational	Test Paint	July 18, 2017 10:57:48	

Review Details Include


- ✓ Technician Documentation
- ✓ Additional Documents Uploaded
- ✓ Quality Control Checklist
- ✓ Ability to Review & Approve
- ✓ Ability to Reject or Reassign
- ✓ Technician Fingerprint
- ✓ Activity Timestamp
- ✓ Category Summary
- ✓ Repair Procedure Summaries
- ✓ Line Item Photos/Notes
- ✓ Line Item Reassignment



REVIEW- R.O. # 64532

Click summary to expand detail

SUPPORTING DOCUMENTATION SUMMARY Techs: 3 Photos Uploaded: 6 Documents Uploaded:

Photos and Supporting Documentation:

VIN Photo:  Supporting Documents: 

Pre-Repair Photos:  Post-Repair Photos: 

Was a diagnostic pre-scan performed? Tech: Haywood Answer: YES Diagnostic information Was a diagnostic post scan performed? Tech: Jablome Answer: YES

MECHANICAL CATEGORY SUMMARY Repair Procedure Used: OEM: 10/10 None Available: 00/10 None Applicable: 00/10

BODY CATEGORY SUMMARY Repair Procedure Used: OEM: 10/10 None Available: 00/10 None Applicable: 00/10

QUALITY CONTROL CHECKLIST SUMMARY Checklists Completed: 9 / 15

BODY CATEGORY SUMMARY		Category Photos:	Repair Procedure Used:	OEM: Other:	2	None Available: Not Applicable:	0
Line Description		Category Notes:					
Hood Panel	Remove/Replace	OEM	No	Estimate			Test Body Reassign
R Fender Panel	Remove/Replace	OEM	No	Supplement 2			Test Body Reassign

VECO Experts 10 Step Repair Process

- 1- Vehicle Scanning
- 2- Procedure at time of estimate
- 3- Structural procedures
- 4- Procedures followed
- 5- Proper welds
- 6- Proper corrosion protection
- 7- Proper use of QC sheet
- 8- Proper refinish
- 9- Proper use of intake SOP
- 10- Proper vehicle protection



Discounts and Documentation

No matter how you fixed the car, it must be documented that way. If you use a price matching program, the final repair order that the customer receives and you have in your final file must say it is OEM. If there are customary charges that you charge customers, and choose to not charge it for what ever reason, simply put in a zero or n/c or something indicating you did it and did not charge for it. This goes for ALL not included items such as test drives, seat belt and safety checks, vehicle washing etc.



Estimates and repair orders

- All lines on estimate reflect repair done to car
- Lines may be information only
- Lines may be listed and zero charge or listed as no charge
- If it is not listed then it did not happen (test drives, re torque, seat belt inspection, other required diagnostics).

The only difference between two repairs is what you choose to do for free - there is only one way to repair a vehicle.

Rex Dunn



The Ultimate Goal

Imagine that something did go wrong with the repair and they called in someone like me, Mike Anderson, Kristen Felder or Larry Montanez. The first thing we would ask for is your file. AND, your file is all we should need to know everything that took place on that vehicle. Your file is your best defense in any legal situation. If your file is not complete, or has been pencil whipped, you will likely lose in a legal battle. This could cost you a lot of money, your business, your assets, and at a minimum your mental health.



Data Storage

- Do not use estimating systems as your only source to keep files.
- Must have separate storage for data that is yours and yours alone not a 3rd party
- If you change management systems or estimating systems, you may not have access to your data.
- If you sell your shop, most sales are asset sales, and you are responsible for all repairs done in the past. If you do not have access to file, the car will be the only evidence.
- Some companies provide storage as part of the benefits of the program (Assured Performance Network).



3rd Party Agreements and Your Garage Keepers Insurance

- Every time you sign a 3rd party agreement, have your insurance company review the contract you are signing. You may be signing a contract that your insurance company will not cover. Also a good idea to run any contract by your attorney.
- Since you are attending this presentation - you can have your insurance needs looked at by an industry professional that understands the unique needs of the collision repair industry shops. David Willet of Intrepid Insurance.



Basic File Elements to Have Documented.

- All communications internal and external
- All repairs documented following OEM- photos and documents
- Quality control forms, intake, pre-delivery & authorizations fully signed
- All blanks on forms filled out or N/A on them
- A check list of all file items to do a final quality check of file before closing file for storage.
- All photos taken of all stages.



Thank You!



Mark Olson 206-227-7574

“Get it right the first time”

