
FIRST RESPONDER

Review the claim and images before visiting the site to be better equipped. Document consistently with the output reports in mind, and easily complete the Preliminary Report while on-site.

Step 1: Review and Site Arrival

1. Open the claim, review photos, notes, and agreements (*located in Exterior*).
2. Document the Exterior:
 - a. Using the Exterior, tap **Photos** to take a landscape photo.
 - b. Add a photo note of pre-existing conditions if applicable.
 - c. Add a photo or text note for site instructions.
 - d. From **Documents** open the **Work Authorization** document to review and get signed.

Step 2: Document the Loss for Each Room

1. Document the affected areas with overview photos.
 - a. **Open or Add the room/area.**
 - b. Click **Photos** and take 6–10 overview photos left to right.
2. Add a photo note to document a specific subject matter.
 - a. Click **Notes** once or twice till the popup appears and select **Photo note**.
 - b. Take photos of the Cause of Loss (COL), tap **Done**, **add a title "COL" and enter findings in "Description"**.
 - c. Repeat step 2 for Resulting in Damage to Structure, Resulting Damage to Contents.
3. Add a Sketch of the room for moisture measurements.
 - a. Select **Sketch** and tap **Create New Sketch**.
 - b. **Tap out the basic room shape** and tap **Save**.
4. Add moisture points and measurements.
 - a. Select **Moisture** at the top of the sketch.
 - b. **Tap on the sketch** to add a moisture point.* See Step 3 about setting up Dry Standards
 - c. Add or select a material to measure.
 - d. Enter the meter type when prompted.
 - e. Add an initial reading for that point.
5. Update the dry standard values for each material.
 - a. Go to **Drying** and select a material and update the reading to unaffected measurement.
6. Add a Sketch of the room for estimating.
 - a. Tap **Create Sketch** from background photo* (or use tool),
 - b. Take a photo of your hand-drawn sketch and tap **Save** repeatedly until it closes.

Step 3: Set-Up Initial Moisture Readings and Dry Standards

1. Setup affected area readings:
 - a. Go to **Drying** function via side menu.
 - b. Go to **Psychrometrics**, add exterior and unaffected area readings.
 - c. **Create a chamber** and add initial readings.

Step 4: Create Output Documents and Exhibits | Go to the Documents Section

1. Create the Encircle PDF Photo Report.
 - a. Go to **Documents**. Tap **Generate Report**, then **PDF Report**. Next, select **Encircle PDF** and then tap **Everything**.
 - b. Add a title.
 - c. Add a **Cover photo** by attaching a photo and tap **Save**.
2. Create the Drying Report.
 - a. Go to **Documents**. Tap **Generate Report** then select **PDF Report**. Tap **Encircle PDF** and then tap **Nothing Selected**.
 - b. Tap **Edit Report Contents** and select the sketches used for moisture. Tap **Save**.
3. Create a Resulting Damage to Contents from photo notes.
 - a. Tap **Generate Report** then **Encircle PDF**. Choose **Nothing Selected**
 - b. Enter a title such as "Resulting Damage to Contents."
 - c. Select all notes tagged as Resulting Damage to Contents.
 - d. Tap **Save**.
4. Create a Resulting Damage to Structure from photo notes.
 - a. Tap **Generate Report** then **Encircle PDF**. Choose **Nothing Selected**.
 - b. Enter a title such as "Resulting Damage to Structure"
 - c. Select all notes tagged as Resulting Damage to Structure.
 - d. Tap **Save**.
5. Create the Scoping Document.
 - a. Go to **Documents**. Tap **Generate Report**, then **PDF Report**. Choose **Scoping Document** (Mitigation/Contents).
 - b. Enter Information as needed and select line items.
 - c. Tap **Save**.

Step 5: Create or Update the Preliminary Report

1. Create/Open a Preliminary Report and attach the various exhibits.
 - a. Go to **Documents**. Tap **Generate Report** and then select **PDF Report**. Tap **Preliminary Report**.
 - b. Enter all relevant information and attach photos to various sections as needed.
 - c. Tap **Attachments** and select the various exhibits to attach to the appendix of the report:
 - i. Encircle Photo report
 - ii. Resulting Damage to Structure Report
 - iii. Resulting Damage to Contents Report
 - iv. Drying Report
 - v. Signed Work Authorization Agreement
 - vi. Scope of Work
 - d. **Add the cover page photo** and tap **Save**.