



DEVELOPMENT PROGRAM

1200

STORE MANAGER

Developer Guide

STORE MANAGER DEVELOPER GUIDE

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REVIEWING INCIDENT REPORTS-1202

Welcome

Welcome to the Reviewing Vehicle Incident Reports Module. In this module you will learn about how to review an incident after a Vehicle Incident Report is submitted to determine if the car wash is responsible for causing the damage or not.

Notes and Questions

As you go through the module, please follow along and take notes as you go. Taking notes will help you remember any key points or questions that you would like to discuss. Once you have completed each section and completed your quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved in order to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of reviewing vehicle incident reports is to gather and evaluate all evidence surrounding the claim and make a determination of responsibility. The efficient gathering of information allows us to make quicker decisions regarding responsibility for damage. This allows us to communicate with customers and update them on the status of their claim in a short amount of time. Whether we are responsible for causing the damage or not, customers will appreciate our thorough review and quick response.

What

The following are the items you will need when reviewing vehicle incident reports:

1. Camera Footage of the Incident

In order to determine if the vehicle damage occurred at the car wash, we will need to review the footage of the customer's visit on the day of the reported incident.

2. Camera Computer

The camera computer is used to access the camera footage as well as the company intranet and Vehicle Incident Portal.

3. Office Computer

The office computer will be used to access the Intranet.

4. Vehicle Incident Portal

The portal is used throughout the vehicle incident review process to save and access information as well as complete the incident report process.

5. Company Intranet

The company intranet is used to access the Vehicle Incident Portal.

6. Completed Vehicle Incident Report

The completed VIR will provide information and photos that are needed to review the incident.

7. Release of Claims Form

A release of claims form must be filled out and signed by the customer before we can pay for repairs on the customers vehicle in the event that we are responsible for causing the damage.

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Educate

Anytime we receive a VIR, we will need to review the incident in order to determine if the car wash is responsible for causing the damage, or not. Throughout the incident review process communication is key, and prompt evaluation of customer claims not only makes the reviewing process easier, but also makes for a better customer experience regardless of the outcome. All customer claims should be evaluated by location management within one to three business days after the claim is reported to ensure a prompt response. During the review process, you will need to gather all of the evidence from the incident, review the evidence and determine responsibility for the damage. Once you complete your review of the incident and made a decision, you will need to communicate with the customer regarding the decision.

Evidence Gathering

Before we can begin reviewing the evidence, we must first gather the evidence. Evidence includes all facts, information and media that could prove or disprove something. Gathering evidence is critical to the decision-making process when a customer makes a damage claim. During the evidence gathering process, you will need to collect photos of the damage, video footage of the customer's entire visit on the date of claim and any employee testimony that may be available.

Photos of Damage

The photos of the damage from the complete VIR will help us determine exactly where on the vehicle the damage is located and what the damage looks like. This will allow us to locate the damage on the vehicle when reviewing video footage. The photos of damage will need to be saved to the Google Drive folder for the claim using the Evidence Link.

Video Footage

Video footage helps to identify if damage was present before entering the car wash tunnel. Video footage should be saved immediately after the incident report is completed and photos are taken. Video is often the most important form of evidence used during the review process.

The cameras needed to save footage from is based on where the damage is located. Using the VIR and photos of damage, you will be able to determine which camera angles we need to save footage from. Oftentimes vehicle damage can be seen from one angle and not another. For this reason, it is important that we always save any video footage that could be useful during the review process. After saving the footage, ensure that the date and time can be clearly seen in the video. Then, you will need to add the footage to the Google Drive folder for the claim using the Evidence Link.

Employee Testimony

Any employees that were involved in, or witnessed, the incident should be interviewed as soon as possible after the incident while it is still fresh in their memory. Any significant information or observations, such as an employee that remembers seeing the damage already present on the vehicle during the loading process, should be recorded in the notes section of the Claim Notes which can be accessed using the Vehicle Incident Portal. Additionally, if the customer made a statement to any employee acknowledging preexisting damage or driver error, it should be documented.

Reviewing the Incident

Once you have gathered all of the evidence, it is time to review the incident. Look at the pictures to determine exactly where to look for the damage. It may be helpful to use items such as, door handles, body panels, trim pieces, antennas, mirrors, etc. on the vehicle as reference points. This will allow you to quickly and easily locate the damage on the camera footage. When reviewing an incident, it is important to remember that car wash equipment malfunctions are rarely the cause of vehicle damage. Most often damage is the result of a vehicle having pre-existing damage, excessively old or worn parts, or aftermarket modifications. It is also common for customers to cause the damage by way of driver error before, during or after the wash process.

Common Causes of Damage

The most common causes of vehicle damage are preexisting, unforeseen, or internal vehicle conditions and defects, previous body work, parts blown off by blowers, antennas and mirrors, hood ornaments, non-factory items and vehicle modifications, older vehicles and driver error. Let's review each of the causes of damage and some common examples.

Preexisting, unforeseen, or internal vehicle conditions and defects

One of the most common causes of damage are body panels that show clear signs of previous impact or other damage. Most plastic body panels are held on using weak plastic clips that can easily become damaged from minor impacts. If the clips attaching these body panels have been damaged or broken, the body panel can be easily dislodged by the car wash tunnel equipment. In these instances, it is the preexisting damage to the vehicle that causes the car wash to cause further damage. Essentially, if the damage did not already exist, the car wash would not have damaged the vehicle in any way.

In cases where vehicle damage is preexisting, or further damage is caused due to preexisting damage, we cannot accept responsibility. These damages occur because of vehicle condition or defects, not car wash malfunction.

Previous Body Work

We cannot accept responsibility for damage caused by any previous body work on the vehicle such as pinstriping, graphics, painted plastic, repaints, previous body work, etc.

A common example of previous body work would be plastic trim pieces, such as grills or emblems that are normally unfinished plastic, have been painted to match the vehicle or to "black out" the trim. These plastic pieces are not intended to be painted and are often made from flexible, glossy plastic compounds that make it very difficult for paint to bond to these pieces. This often leads to flaking, cracking, or peeling which can occur, or be worsened, when going through the car wash. Whether the customer believes the car wash caused the initial damage or caused further damage, we cannot accept responsibility for damage to these parts.

Parts Blown Off by the Blowers

We cannot accept responsibility for damaged or lost parts, such as roof rails, mirror glass or covers, fuel doors, lights, etc., that are blown off by the blowers.

A common example of this is when a trim piece is blown off by the blowers due to previous damage causing the trim piece to not sit flush as intended from the factory. In this scenario, the blowers did not malfunction in any way and performed exactly as intended. The previous damage to the trim piece caused it to not sit flush with the body panels and allowed air to get underneath and blow it off.

Antennas & Mirrors

Because damage to items such as standard or oversized side mirrors and power, cellular or satellite antennas is often caused by preexisting damage or improper operation by the driver, we cannot accept responsibility for damage to these parts.

A common example of this would be a motorized, power antenna that is not retracted before entering the car wash. Power antennas are not designed to go through an automated car wash while in the up position. The driver of the vehicle is solely responsible for lowering the antenna by powering off the radio because they are operating their own vehicle.

Hood Ornaments & Emblems

Hood ornaments, emblems, parts or logos attached with tape, adhesive, press fit, snap on, etc. are not items we can accept responsibility for in the event they are damaged. Tapes and adhesives get brittle and their bonding strength weakens as they age while press fit and snap on badges, ornaments, trim pieces, etc. can become warped or brittle as they age due to exposure to heat and other environmental factors.

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A common example is when a team logo emblem is affixed to the side or rear of the vehicle and it comes off in the car wash causing paint damage. In this scenario, the emblem was attached to the vehicle with adhesive and the adhesive had weakened which caused the emblem to become loose. So, when the vehicle went through the car wash the emblem fell off.

Non-factory Items and Modifications

Our car washes are designed and tested to wash factory specification production vehicles. For this reason, we cannot accept responsibility for these parts, or for damage caused because of these parts or modifications. Some examples of non-standard or non-factory equipment are custom tires, rims, metal stems larger than one and a half inches, caps or other wheel accessories. Additionally, spare tire covers, wipers, running boards, bug shields, visors and deflectors, spoilers, hitches, license plates and frames, luggage racks, bike racks, custom lights, exposed wires, raised or lowered vehicles, etc. Any modifications or parts that put the vehicle outside of factory specifications can result in improper operation of the car wash equipment. Lowered vehicles can be damaged due to lack of ground clearance which places them too close in contact with the equipment. Parts such as tow hitches, bike racks, luggage racks, light bars, etc. that protrude from the vehicle can get caught on brushes and cause damage to the part and/or damage to the vehicle. Aftermarket, non-factory, or custom tires, rims, metal stems larger than one and a half inches, caps or other wheel accessories may extend too far from the vehicle and cause issues with the tire brush and/or the tire shine applicators.

Older Vehicles

We cannot accept responsibility for damage to vehicles over seven years of age or 100,000 miles. Environmental factors, previous damage, disrepair, and owner maintenance habits affect the life expectancy of a vehicle and the parts used to build them.

Driver Error

Many times, a customer will make an error while going through the car wash that causes damage to their own vehicle, and possibly other customer vehicles. Errors such as turning the wheel, braking or putting the vehicle in gear during the wash process can put vehicles in a position to be damaged. When these errors occur, we cannot accept responsibility for the damage.

Determining Responsibility

After you have completed your review of the incident, you will need to determine responsibility for the incident. By using all of the information that you have at your disposal from the initial vehicle incident report to your review of the video footage, you will be able to make an accurate assessment of which party is responsible. When you are making your determination, you will also need to consider whether or not the specific damage falls into any of the categories listed on the disclaimer board. Every WhiteWater site has a disclaimer of liability posted on the entrance of the car wash tunnel to make customers aware of what we will not accept liability for, and inform them that they are entering the car wash entirely at their own risk. These disclaimers provide legal protection for the company while also making customer expectations more realistic. You will need to determine if the damage in question falls within the disclaimer of liability, and although this does not completely disqualify the claim, it can be used as a guideline. Once you have decided to accept or deny responsibility for the damage, you will need to contact the customer and inform them of the decision and any next steps.

Denying a Claim

If the determination is that the car wash is not responsible for causing the damage, we will need to communicate with the customer to explain why we are unable to accept responsibility. Be sure to inform the customer that you have reviewed the photos, video and any other information to reach your determination. We want the customer to understand that we have performed a thorough review of the incident, and not feel like we just denied their claim arbitrarily.

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Angry Customers

If the customer disagrees with the decision you will need to offer for the customer to review any footage we collected of the incident. You can also explain how the equipment functions and why it is safe for vehicles. Regardless, emotions can run high in these situations and customers may become angry or disagree with the company's decision. These frustrations often times are taken out on the employee. In these cases, if you feel unsafe or the customer is acting disrespectful, do not be afraid to walk away or tell the customer that another management member will reach out to them.

If at any time they outright refuse to accept your determination, direct them towards the Contact Us page on the website.

Accepting responsibility

We can only accept responsibility for damage caused by the malfunction of equipment or employee error. If the car wash equipment functions as it is designed to, no damage will be done to a vehicle. However, in the event that car wash is responsible for causing the damage, we want to take care of the customer as soon as possible. You will need to communicate with the customer about ordering replacement parts or the process for using a repair shop.

Paying for Replacement Parts & Repairs

In the event that we are accepting responsibility and paying for replacement parts, you will need to source the parts from auto parts stores, car dealerships, websites or other available sources. We are looking for the lowest cost option so you will need to search multiple sources for the parts.

In the event that we are accepting responsibility and paying for repairs, the customer must collect two to three estimates from repair shops and WhiteWater will pay for the lowest quote. If the customer has a preferred repair shop, and the estimate is less than ten percent more than the lowest estimate, we will accept the estimate from the repair shop they prefer.

Any parts or repairs should be paid for using the Divvy card whenever possible. Invoices totaling less than \$500 should be paid for with the Store Divvy card. However, any invoices totaling over \$500 must be paid for with the Area Directors Divvy card. All Divvy charges related to damage claims should be categorized as a casualty loss and charged to the store at which it occurred. Additionally, the claim ID, VIR and receipt should be entered into the notes section of the transaction.

Rental Cars

If the damages we are covering will put the customer out of a car for greater than one day we will cover the cost of a rental vehicle of similar type to the customer's vehicle. All car rentals must be approved by a Vice President or Regional Director.

WhiteWater does not have the ability to rent a car for customers while repairs are being completed so, customers will have to rent the vehicle themselves. They may then submit a receipt to be reimbursed for the rental amount during the date of repair. and only the date of repair will be covered.

Release of Claims

Anytime we are accepting responsibility for damage, a release of claims form must be filled out and signed by the customer before we can pay for repairs on the customers vehicle. For parts or repairs over \$500, the Area Director will have to sign the Release of Claim form. Once the form is completed by the store and AD, the release of claims form needs be completed on site with the customer.

This is the form we must complete before paying for replacement parts or repairs to the customers vehicle. It is a contract between WhiteWater Express Car Wash and the customer to pay for the agreed upon settlement in exchange for a release of this claim. It does not say that they cannot file another claim against us; it is saying they cannot file an additional claim for the same event. When this is signed, we are contractually obligated to pay.

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Reviewing Vehicle Incident Reports Quiz

1. Which of the following is NOT a common cause of damage? (Select all that apply)
 - a. Previous body work
 - b. Scratches caused by the wraps**
 - c. Hood ornaments
 - d. Driver error
 - e. Paint discolored by triple polish**
2. Parts or repairs over \$500 are paid for using _____.
 - a. The store Divvy card
 - b. The AD Divvy card**
 - c. A check from the accounting department
 - d. We do not pay for claims over \$500
3. Parts or repairs under \$500 should be paid for using the store Divvy card.
 - a. True**
 - b. False
4. How many quotes does a customer need to get for repairs?
 - a. 1
 - b. 2-3**
 - c. 4
 - d. It depends on the amount of damage
5. If we are covering the cost of a rental car, it should be paid for using the store Divvy card.
 - a. True
 - b. False**
6. We cannot accept responsibility for damage to vehicles over _____ years of age or _____ miles.
 - a. Five, 75,000
 - b. Seven, 100,000**
 - c. Ten, 100,000
 - d. None of the above
7. Communication is key throughout the review process.
 - a. True**
 - b. False
8. What is the purpose of reviewing vehicle incident reports?
 - a. To find a reason to deny the claim
 - b. To determine why the car wash caused damage to a vehicle
 - c. To gather all of the evidence surrounding the claim and send the information to your Area Director
 - d. To gather and evaluate all evidence surrounding the claim and make a determination of responsibility**

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9. A release of claims form must be filled out and signed by the customer before we can pay for repairs on the customers vehicle.
 - a. **True**
 - b. **False**
10. Which of the following is a common cause of damage? (Select all that apply)
 - a. **Previous body work**
 - b. Scratches caused by the wraps
 - c. **Preexisting damage to the vehicle**
 - d. **Driver error**
 - e. Paint damage cause by car wash chemicals
 - f. Factory installed parts

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Reviewing Vehicle Incident Reports Demonstration

During the Demonstration, it is important that you do not stop to answer a team member's questions or provide additional information. The goal is for the team member to see the process performed as close to a real-life scenario as possible. This uninterrupted performance will help connect the steps or information learned. We will answer all questions and address any issues after the Demonstration.

Once the team member has passed the quiz, ask if they have any questions and provide the answers. Once all questions have been answered, it is time to demonstrate the process of reviewing an incident using video footage from a recent incident and identifying the damage on screen.

Once you have completed the demonstration, ask if the team member has any questions and review the process you have just completed. Then, proceed to the Perform & Coach step.

Reviewing Vehicle Incident Reports Perform & Coach

During Perform & Coach, it is important that you do not stop to answer any team member's questions, and you shouldn't stop the team member to provide additional information. The goal is for the team members to complete the process. Coaching will be provided upon completion.

Using video footage from a recent incident, have the team member review the footage and identify the damage on screen. After the team member completes the process and identifies the damage, provide coaching and answer questions. Repeat the process of roleplay and coaching until the team member has completed the process correctly multiple times.

Once the team member has demonstrated that they can successfully review incidents, they will need to go through the process at the next opportunity. A manager will need to shadow the team member during their initial attempts to ensure proper completion. Once the team member demonstrates the ability to perform the procedure correctly, they are ready for development sign-off. Upon sign-off, the team member can begin completing the incident review portion of the incident review process anytime the need arises.

PAY STATION CASH DEPOSIT (DRB) PART 1-1211

Welcome

Welcome to part two of the Pay Station Cash Deposit Development Module. In this module, you will learn about the pay station cash deposit and the steps for completing the deposit.

Notes and Questions

As you go through the module, please follow along and take notes as you go. Taking notes will help you remember any key points or questions that you would like to discuss. Once you have completed each section and completed your quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved in order to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the pay station cash deposit is to remove all of the money that has been collected in the pay stations each week. By performing weekly deposits, we are able to limit the amount of money that is on-site, which helps to increase the safety and security of the location and its team.

Additionally, performing this procedure ensures that we do not miss any steps in the process and that all of our reporting is accurate.

What

The following are the items you will need to complete the Pay Station Cash Deposit successfully:

1. General Manager or Store Manager

The General Manager or the Store Manager must participate in the cash deposit process anytime we are adding or removing money from the XPT's.

2. One Additional Team Member

A Team Leader, Shift Leader or another manager must accompany the manager performing the task anytime we are adding or removing money from the XPT's.

3. Safe

The safe is located in the office and is used to hold the change order and/or the deposit.

4. Consignment Log

The consignment log is used to record the deposits and verify that they were received by the Loomis driver. The consignment log is kept on site in the deposit box.

5. Deposit Box

Located in the server room, the deposit box houses the necessary items for completing the deposit process.

6. Deposit Slip

The deposit slip is used to record the deposit amount. The deposit slip has a white and a yellow copy. The white copy is placed in the deposit bag and the yellow copy is used when submitting the deposit forms on the Intranet.

7. Deposit Bag

The deposit bag is a clear plastic bag that can be sealed when the time comes. This is also what you will give to the Loomis driver when they arrive to collect the deposit.

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8. Change Order

The change order is the money that is delivered by Loomis and used to replenish the XPT. The change order will come in bands of \$1 and \$5 bills. Each band will contain 100 bills of the particular denomination.

- a. One band of \$1 bills is equal to \$100
- b. One band of \$5 bills is equal to \$500

9. Change Order Receipt

The change order receipt is brought to the location by the Loomis driver. This receipt will need to be signed by the person who accepts the change order.

10. XPT

You will need the XPT's to add and remove money and retrieve the Vault Access Slip

11. XPT Keys & Wrench

You will need the keys to each XPT as well as the wrench used to unlock the XPT door.

12. Traffic Cone

The traffic cone is used when we are removing and adding money to the XPT's to close the line while we complete the process.

13. Bill Acceptor

The bill acceptor collects all of the money inserted into the XPT.

14. Bill Dispenser

The bill dispensers return change to cash paying customers. Each XPT contains two bill dispensers. One for \$1 bills and one for \$5 bills.

15. Reject Tray

The reject tray collects any bills that cannot go through the dispenser due to damage, wear or other issues. When a damaged bill is detected, the dispenser will push the bill to the reject tray before dispensing any more money.

16. XPT Cash Audit Report

This form is generated through Site Manager and is needed to reconcile the deposit.

17. Vault Access Slips

These slips are receipts that are generated by the XPT. You will need these slips to complete the XPT cash audit.

18. Office Computer

The office computer will be used to access the Intranet to submit deposit reports.

19. Company Intranet

The company intranet is used to access the forms that need to be submitted.

20. DRB Site Manager

You will need to access Site Manager to complete the deposit process.

21. Printer/Scanner

The printer/scanner is used to copy and scan the information needed to submit the deposit reports on the Intranet.

22. Loomis Issue Log

Anytime an issue arises with the Loomis portion of the deposit, you will need to document the issue in the Loomis issue log. This log can be found, and completed, on the company Intranet.

Educate

The XPT Cash Deposit is critical in ensuring that our deposits make it to the bank and that the XPT's are always able to accept and dispense money. Without proper removal and addition of money to the

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XPT's, the potential exists for our customers to not be served effectively. This could come from the acceptor being too full to accept money, or the dispensers being empty and unable to deliver change to the customer. When this occurs, we have to take time out to solve the problem. This impedes the customers quick trip to the car wash, and turns it into a longer visit than they expected. It also requires us to spend time resolving the matter, and this takes time away from other critical tasks.

Safety and Security

The XPT cash deposit procedure **MUST** be performed with a Site Manager or General Manager and one other team member. The second team member can be a Team Leader, Shift Leader or another manager. This is done in an effort to ensure your safety and the security of the money being handled. Additionally, to ensure everyone's safety, money may only be removed from, or added to, the XPT's between **7:30am and 4:30pm**. You must also complete the process for both XPT's at the same time. If you don't feel you can efficiently complete both XPT's at the same time, you will need to plan another time to add or remove money.

In order to further ensure safety, and prevent any internal issues, we must keep our safes locked at all times. This is done without exception. The safe should only be opened to add or remove deposit bags and when adding change orders received from Loomis. It is also critical that the safe is visible on the cameras so that there is video evidence of any possible incidents.

Theft

While we have multiple safety measures in place, those measures cannot completely eliminate the possibility of theft. In this instance, we are talking about theft by someone outside our organization. In simple terms, there is a possibility, albeit small, that you could find yourself in the middle of a robbery attempt.

You, our most valuable asset, cannot be replaced. If you do find yourself in a robbery situation, it is safest to meet their demands without resistance. We have cameras located around the site, and pointed at the safe, so if any incident occurs, the cameras will capture video footage that can be used as evidence when further action is taken against the perpetrator.

Team Member Responsibilities

Robbery

As a team member, it is your responsibility to ensure the safety of yourself, your teammates and our guests. In the event of a robbery or break-in, you will need to take the following steps.

1. Remain calm.
2. Follow the robbers' directions without argument, using slow, deliberate movements.
3. Inform the robber if any employees are entering the area.
4. Be observant of the person, and take notice of any distinguishing features, clothing, tattoos, speech impediments or sayings and the details of any weapon used.
5. When the robber leaves the property, close the lanes and immediately call 911.
 - Do not touch or disturb anything that the assailant may have been in contact with.
6. Contact your Area Director and General Manager.
7. Write a detailed account of what happened and what you saw.
 - Include any additional comments from other team members.
8. Follow police instructions.

Break-In

In addition to robbery, the possibility also exists for our stores to be broken into. When this occurs, it is important to remain calm and perform the following steps:

1. All employees must retreat to a safe distance with good visibility and call 911 immediately.
2. If there are any unfamiliar vehicles near the location take note of the description from a safe distance.

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3. Notify Area Director.
4. When the police arrive, they will clear the building and make sure it is safe to enter.
5. Follow police instructions.
6. Take pictures of any/all damage.
7. Go over with area director what needs to be accomplished before opening.

Management Responsibilities

As a manager, it is your responsibility to ensure the safety of our employees and guests during and after a robbery. Anytime you are informed about a robbery or break-in, you will need to take the following steps:

Robbery

- Drive to the location as soon as you are able.
- Ensure that staff and guests are safe.
- Notify Regional Director, Loss Prevention and Human Resources.
- Get an accurate assessment of the amount lost.
- Save all relevant video footage.
- Send relevant footage and all statements to Loss Prevention.
- Follow police instruction.
- Work with accounting on getting a deposit for the store if necessary.

Break-In

- Drive to the location as soon as you are able.
- Ensure the staff are safe.
- Notify Regional Director, Loss Prevention and Human Resources.
- Follow police instruction.
- Get an accurate assessment of the amount lost.
- Clean any debris after police have cleared to do so.
- Work with Regional Director on what needs to be completed prior to opening.
- Work with accounting on getting a deposit for the store if necessary.
- Save all relevant video footage.
- Send relevant footage to Loss Prevention.

Deposit Schedule

Depending on the location, you may have one or two deposit days each week. For information regarding your location's deposit day, or days, refer to the management team at your store.

Regardless of deposit day, or days, the XPT cash deposit must be completed before the end of the business day two days after the deposit is given to Loomis.

Process Overview

The XPT cash deposit breaks down into nine sections and 61 total steps. Each step is just as important as the next, and it is important that all steps are completed properly, and in the correct order. Remember, this process **MUST** be performed with a Store Manager or General Manager and one other team member. The second team member can be a Team Leader, Shift Leader or another manager. Additionally, to ensure everyone's safety, money may only be removed from, or added to, the XPT's between **7:30am and 4:30pm**. You must also complete the process for both XPT's at the same time.

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Pay Station Cash Deposit (DRB) Part 1 Quiz

Once the team member has completed the module, they will need to complete the quiz. To pass the quiz, the team member must score a 100%. If the team member does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you will need to review the quiz and answers with them before they attempt the quiz again.

1. Between what hours can the XPT cash deposit procedure be performed?
 - a. **7:30am—4:30pm**
 - b. 7:30am—6:00pm
 - c. 9:00am—6:00pm
 - d. 7:00am—8:00pm
2. Which of the following are needed to complete the XPT cash deposit procedure? (Check all that apply)
 - a. **XPT Keys & Wrench**
 - b. **Vault Access Slip**
 - c. Flashlight
 - d. Handcuff and chain for the deposit box
 - e. **Change Order**
3. One band of \$1 bills equals _____ and one band of \$5 bills equals _____.
 - a. \$100; \$100
 - b. \$100; \$250
 - c. **\$100; \$500**
 - d. \$200, \$500
4. The XPT cash deposit procedure can be performed anytime during operating hours.
 - a. True
 - b. **False**
5. The total amount of the change order will vary by location.
 - a. **True**
 - b. False

STORE MANAGER DEVELOPER GUIDE

Pay Station Cash Deposit (DRB) Part 1 Demonstration

During the Demonstration, it is important that you do not stop to answer an employee's questions or provide additional information. The goal is for the employee to see the process performed as close to a real-life scenario as possible. This uninterrupted performance will help connect the steps or information learned. We will answer all questions and address any issues after the Demonstration.

Once the employee has passed the quiz, ask the employee if they have any questions and provide the answers. Then, review all the tools and resources listed in the WHAT portion of the module. Be sure to go to where each item is located. Next, review the robbery and break-in procedures with the team members, then ask if they have any questions.

Once complete and all team members' questions have been answered, give the team members their copy of the **Pay Station Cash Deposit (DRB) Part 1 Handout** to review and study. Then, proceed to the Perform & Coach step.

Pay Station Cash Deposit (DRB) Part 1 Perform & Coach

During Perform & Coach, it is important that you do not stop to answer any team member's questions, and you shouldn't stop the team member to provide additional information. The goal is for the team members to complete the process. Coaching will be provided upon completion.

Have the team member explain the steps of the robbery and break-in procedures and show you where all the tools and resources are listed in the WHAT portion of the module, where each item is located, and where replenishments are stored. Provide coaching on any items they are having trouble explaining or finding.

Repeat the Perform & Coach process until the team member has complete knowledge and understanding of all the information covered in this module.

Pay Station Cash Deposit (DRB) Part 1 Handout

The following is an overview of the information reviewed in the module:

The XPT Cash Deposit is critical in ensuring that our deposits make it to the bank and that the XPT's are always able to accept and dispense money. Without proper removal and addition of money to the XPT's, the potential exists for our customers to not be served effectively. This could come from the acceptor being too full to accept money, or the dispensers being empty and unable to deliver change to the customer. When this occurs, we have to take time out to solve the problem. This impedes the customers quick trip to the car wash, and turns it into a longer visit than they expected. It also requires us to spend time resolving the matter, and this takes time away from other critical tasks.

Safety and Security

The XPT cash deposit procedure **MUST** be performed with a Site Manager or General Manager and one other team member. The second team member can be a Team Leader, Shift Leader or another manager. This is done in an effort to ensure your safety and the security of the money being handled. Additionally, to ensure everyone's safety, money may only be removed from, or added to, the XPT's between **7:30am and 4:30pm**. You must also complete the process for both XPT's at the same time. If you don't feel you can efficiently complete both XPT's at the same time, you will need to plan another time to add or remove money.

In order to further ensure safety, and prevent any internal issues, we must keep our safes locked at all times. This is done without exception. The safe should only be opened to add or remove deposit bags and when adding change orders received from Loomis. It is also critical that the safe is visible on the cameras so that there is video evidence of any possible incidents.

Theft

While we have multiple safety measures in place, those measures cannot completely eliminate the possibility of theft. In this instance, we are talking about theft by someone outside our organization. In simple terms, there is a possibility, albeit small, that you could find yourself in the middle of a robbery attempt.

You, our most valuable asset, cannot be replaced. If you do find yourself in a robbery situation, it is safest to meet their demands without resistance. We have cameras located around the site, and pointed at the safe, so if any incident occurs, the cameras will capture video footage that can be used as evidence when further action is taken against the perpetrator.

Team Member Responsibilities

Robbery

As a team member, it is your responsibility to ensure the safety of yourself, your teammates and our guests. In the event of a robbery or break-in, you will need to take the following steps.

9. Remain calm.
10. Follow the robbers' directions without argument, using slow, deliberate movements.
11. Inform the robber if any employees are entering the area.
12. Be observant of the person, and take notice of any distinguishing features, clothing, tattoos, speech impediments or sayings and the details of any weapon used.
13. When the robber leaves the property, close the lanes and immediately call 911.
 - Do not touch or disturb anything that the assailant may have been in contact with.
14. Contact your Area Director and General Manager.
15. Write a detailed account of what happened and what you saw.
 - Include any additional comments from other team members.
16. Follow police instructions.

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Break-In

In addition to robbery, the possibility also exists for our stores to be broken into. When this occurs, it is important to remain calm and perform the following steps:

8. All employees must retreat to a safe distance with good visibility and call 911 immediately.
9. If there are any unfamiliar vehicles near the location take note of the description from a safe distance.
10. Notify Area Director.
11. When the police arrive, they will clear the building and make sure it is safe to enter.
12. Follow police instructions.
13. Take pictures of any/all damage.
14. Go over with area director what needs to be accomplished before opening.

Management Responsibilities

As a manager, it is your responsibility to ensure the safety of our employees and guests during and after a robbery. Anytime you are informed about a robbery or break-in, you will need to take the following steps:

Robbery

- Drive to the location as soon as you are able.
- Ensure that staff and guests are safe.
- Notify Regional Director, Loss Prevention and Human Resources.
- Get an accurate assessment of the amount lost.
- Save all relevant video footage.
- Send relevant footage and all statements to Loss Prevention.
- Follow police instruction.
- Work with accounting on getting a deposit for the store if necessary.

Break-In

- Drive to the location as soon as you are able.
- Ensure the staff are safe.
- Notify Regional Director, Loss Prevention and Human Resources.
- Follow police instruction.
- Get an accurate assessment of the amount lost.
- Clean any debris after police have cleared to do so.
- Work with Regional Director on what needs to be completed prior to opening.
- Work with accounting on getting a deposit for the store if necessary.
- Save all relevant video footage.
- Send relevant footage to Loss Prevention.

Deposit Schedule

Depending on the location, you may have one or two deposit days each week. For information regarding your location's deposit day, or days, refer to the management team at your store.

Regardless of deposit day, or days, the XPT cash deposit must be completed before the end of the business day two days after the deposit is given to Loomis.

PAY STATION CASH DEPOSIT (DRB) PART 2-1212

Welcome

Welcome to part two of the Pay Station Cash Deposit Development Module. In this module, you will learn about the pay station cash deposit and the steps for completing the deposit.

Notes and Questions

As you go through the module, please follow along and take notes as you go. Taking notes will help you remember any key points or questions that you would like to discuss. Once you have completed each section and completed your quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved in order to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the pay station cash deposit is to remove all of the money that has been collected in the pay stations each week. By performing weekly deposits, we are able to limit the amount of money that is on-site, which helps to increase the safety and security of the location and its team.

Additionally, performing this procedure ensures that we do not miss any steps in the process and that all of our reporting is accurate.

Educate

Let's review the steps for completing the XPT cash deposit process in detail.

Steps 1-4

The first thing you will need to do is go to the server room and retrieve the deposit box. Then, you will need to get the change order out of the safe. Place the change order in the deposit box and head outside to the XPT's. Once you are at the XPT, you will need to place a traffic cone in front of the lane you are working in. This is done to ensure that customers do not wait for, or attempt to use, the XPT that you are working at.

1. Remove the deposit box from the server room.
2. Remove the change order from the safe and place it in the deposit box.
3. Take the deposit box to the XPT's.
4. Cone off the XPT lane. One at a time.

Steps 5-7

Once you have coned off the lane, it is time to open the XPT. To start, get the XPT wrench and the appropriate set of keys for the XPT. Using the green key, unlock the top lock of the XPT. An alarm screen will appear and you will need to scan the barcode on your name badge in order to proceed with the process. Once you have scanned your badge, and the alarm screen goes away, you can continue to unlock the XPT. To do so, remove the bottom lock using the green key. Then, using the XPT wrench, unscrew the internal locks for both the top and bottom.

5. Remove the top lock from the XPT.
6. Scan the barcode on your name badge when prompted.
7. Remove the bottom lock and use the XPT wrench to unlock the door.

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Steps 8-12

Once you have accessed the inside of the XPT, it is time to begin the steps for removing the money. Depending on your location, there may be one door to access both the dispensers and acceptor, or there will be two separate doors for accessing each one. Refer to your location's management team to determine how your XPT is configured.

To start, unlock the access door to the bill acceptor. Then, remove the acceptor by pressing down on the yellow button on the front of the cassette. Once the cassette is removed, take the cash out. Then hand the money to your partner so that they can rubber band the cash, and place it in the deposit bag. While your partner is banding the money, re-insert the acceptor. Then, if your XPT has two doors, close the door. If your XPT has one door, you will need to proceed to steps 13-19 before closing the door.

8. Unlock the bill acceptor access.
9. Remove the acceptor and remove the money.
10. Give the money to your partner to rubber band and put into the deposit bag.
11. Re-insert the acceptor.
12. Close and lock the acceptor access.

Steps 13-19

Now that you have completed the process with the bill acceptor, it is time to complete the process for the bill dispensers. To start, unlock the dispenser access door. Then remove the reject tray and collect any money that is in the tray. Then remove the dispensers one at a time. To remove the dispensers, press the green button on the front of the cassette and pull the dispenser out. Next, open the dispenser and remove the money. To open the dispensers, use the small key on the XPT key ring to unlock the cassette and open it from the top.

After you have removed the money from the dispenser, hand the money to your partner for them to rubber band and place in the deposit bag. Upon completion, take the money from the change order and insert the bills, either \$1 or \$5 bills, into the appropriate dispenser. Then, close the dispenser, ensuring that you hear it click which signals the dispenser is closed and locked. Finally, re-insert the dispenser into the appropriate slot and repeat the process for the other dispenser. After both dispensers have been completed, you will close and lock the dispenser access door.

13. Unlock the bill dispenser access.
14. Remove any bills from the reject tray.
15. Remove the dispensers, one at a time, and remove the money.
16. Hand the money to your partner to be rubber banded and placed in the deposit bag.
17. Take the change order from your partner and place it in the dispensers.
18. Re-insert the bill dispensers.
19. Close and lock the dispenser access.

Steps 20-25

Now that you have removed and added the money to the acceptor and dispensers, you are ready to close and lock the XPT. Close the door and use the XPT wrench to tighten the top and bottom internal locks, then insert the locks. To insert the locks, insert the green key into the lock and turn the key so that the catch is level with the rest of the lock. Insert the lock into the proper slot and twist the key until the lock is secure and remove the key. Once you have inserted the locks, the screen will prompt you to tell the XPT what you did in regards to money addition and removal.

On the screen, select, "I removed ALL the money from the bill and coin acceptors." Then, select, "I removed ALL the money from the bill and coin dispensers." Finally, select, "I put the following amount of money into the bill dispensers." Input the amount that was added to the acceptor in the box that appears on the screen. Once you have completed your selections, select Post. The XPT will then

STORE MANAGER DEVELOPER GUIDE

print the Vault Access Slip receipt. Take the receipt and place it in the deposit box. You will use this receipt later in the process.

After you have collected the receipt, remove the cones from the XPT lane and move on to the next XPT. Then repeat the previous steps, steps 5-23, for the remaining XPT. If your location only has one XPT, you can proceed directly to step 26 and return to the office.

20. Close the XPT, use the wrench to secure the door.

21. Insert the top and bottom lock.

22. When prompted on the XPT screen:

- Select, "I removed ALL the money from the bill and coin acceptors."
- Select, "I removed ALL the money from the bill and coin dispensers."
- Select, "I put the following amount of money into the bill dispensers." Then enter the amount added to the XPT.
- Select Post then collect the receipt that is printed.

23. Remove the cone from the lane and move to the next XPT.

24. Repeat steps 5-23 for the remaining XPT.

25. Take the deposit box and go back to the office.

Steps 26-31

Upon returning to the office, you will be ready to perform the XPT cash audit and compare the cash audit report to the XPT vault access slips to ensure that the numbers are accurate.

On the XPT vault access slip, locate where it shows "Acceptor Deposits" and "Dispenser Deposits." Then, confirm that the numbers on the vault access slip, is greater than zero and that the amount matches the XPT Cash Audit line item "Money Removed from Acceptors." Then, locate the "Added to Dispensers" line on the Vault Access Slip and confirm it is equal to the amount that was added to the XPT, and the amount matches XPT Cash Audit "Money added to Dispensers" line item. If any of the amounts on the vault access slips do NOT match the amount on the XPT Cash Audit, the cash audit will need to be edited.

26. Go to Site Manager.

27. Login with your credentials.

28. Go to Site Manager → Select Reports → Sales Activity → XPT Cash Audit.

29. Set the date to the deposit date then click Generate.

30. Using the Vault Access Slips, total the amounts removed from the acceptors and dispensers.

31. Check that the Vault Access Slips from the XPTs match the XPT Cash Audit.

- Confirm that Vault Access Slip "Acceptor Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Acceptors" amount.
- Confirm that Vault Access Slip "Dispenser Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Dispensers" amount.
- Confirm that Vault Access Slip "Added to Dispensers" amount matches XPT Cash Audit "Money added to Dispensers" amount.
- Repeat for each XPT.

Steps 32-36

Once you have confirmed the amounts of the XPT cash audit and the vault access slips match, you are ready to complete the deposit slip. Before you begin filling out the deposit slip, ensure that the location listed on the top of the slip matches the location where you are performing the XPT cash deposit. If the deposit slip does not match, try to locate a deposit book with the correct information. If you are still unable to locate a deposit book with the correct location, notify your Area Director. Once you have the correct deposit book, go to the first deposit slip in the book and input the date at the top

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of the slip. The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match. Then, input the amounts that you removed from each XPT. Be sure to only include XPT deposit amounts on the deposit slip. Then, total the amount at the bottom of the slip. If there are any additional deposits, they will require additional, separate deposit slips.

32. Prepare the deposit slip.

33. Ensure that the location listed on the top of the deposit slip matches your location.

- If the location on the deposit slip does not match, see if there is another deposit book that has the correct location.
 - If there are no deposit slips with the correct location listed, contact your General Manager or Area Director.

34. Input the date on the top of the deposit slip.

- The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match.

35. Input the deposit amount removed from each XPT.

- Do NOT record any other deposits on the XPT deposit slip.

36. Record the total amount removed at the bottom of the deposit slip.

Steps 37-44

Now, you are ready to complete the deposit bag and Loomis consignment log for the deposit. The first thing you will need to do is prepare the deposit bag. On the deposit bag input the To, From, Date and Deposit Amount in the appropriate places. You will also need to input the Account Number which can be found on the deposit slip you just completed. Next, remove the bag tag from the top of the deposit bag.

Once you have prepared the bag, fill out the Loomis consignment log by inputting the date, deposit amount and deposit bag number in the appropriate areas of the log. Lastly, place the white copy of the deposit slip into the deposit bag and seal the bag. Then, place the deposit bag, and its contents, in the safe and lock the safe door.

37. Prepare the deposit bag.

38. On the deposit bag input the To, From, Date, Deposit Amount and Account Number in the appropriate places.

- The account number can be found on the deposit slip.

39. Record the total deposit amount on the deposit bag.

40. Remove the bag tag from the deposit bag.

41. Input the date, deposit amount and deposit bag number on the Consignment Log.

42. Place the white copy of the deposit slip in the unsealed deposit bag.

43. Seal the deposit bag and place it in the safe.

44. Close and lock the safe.

Steps 45-53

Now that the deposit is securely in the safe, you will need to complete the Weekly XPT Deposit form on the Intranet. To complete this, login to the Intranet, click on the Finance tab and go to the WhiteWater XPT Weekly link. Then complete page 1-12 of the form with the necessary information. Once you get to page 13 of the form, you will need to scan the deposit submission packet which includes the XPT receipts, deposit bag tag and yellow deposit slip, the Loomis Change Order Receipt and any other documents requested. Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit. Next, complete the rest of the form and then click Submit. Finally, once you have submitted the form, return the deposit box back to the server room.

45. Go to the office computer and login to the WhiteWater Intranet.
46. Go to the Finance tab and select XPT Weekly.
47. Fill in the required information on Page 1-11.
48. If there were any issues, be sure to record them on Page 12.
49. Attach the XPT receipts, deposit bag tag and yellow deposit slip to the Loomis Change Order Receipt. Then, scan and add the file to the deposit submission
50. Scan and add any additional documentation if necessary.
 - Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit
51. Input the deposit bag number.
52. Click Submit.
53. Put the deposit box back in the server room.

Steps 54-61

The next steps in the process are to be performed when the Loomis driver arrives at your location. When the Loomis driver arrives, you will first need to take the change order from the driver. Then, verify the change order has the correct amount of money within, and sign the tablet from the Loomis driver to confirm receipt. Refer to location management to determine the amount of the change order. Give the deposit to the Loomis driver and have them sign the consignment log. The consignment log **MUST** be signed by the Loomis driver anytime you give them a deposit. Once you retrieve the consignment log back from the driver, you will have completed the XPT cash deposit process.

54. Retrieve the change order from the driver.
55. Verify the amount for the change order.
56. Sign the tablet from the Loomis driver to confirm receipt.
57. Place the change order in the safe.
58. Remove the deposit from the safe.
59. Close and lock the safe.
60. Give the deposit bag to the Loomis driver.
61. Give the Consignment log to the Loomis driver so they can verify the information and sign the form.

Troubleshooting

From time to time, issues may arise while performing the XPT cash deposit. Remember, anytime there is an issue it is critical that we communicate with the accounting department and any other parties necessary as soon as possible. Depending on the issue, it may also be necessary to submit a Loomis issue log through the intranet.

The following are the common issues and their resolutions:

XPT did not print a receipt

1. Go to Site Manager
2. Login with your credentials
3. Select Reports → Sales Activity → XPT Cash Audit
4. Set the date to the deposit date then click Generate
5. Total the amounts removed from the acceptors and dispensers
 - Look for the lines that say, "Money removed from acceptors/dispensers"
6. Fill in the total on the deposit slip, deposit bag and Consignment log
7. When this occurs, you will need to include the XPT Audit in lieu of the Vault Access Slips

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The XPT is not accessible

Wait until access is restored, then perform the procedure. If you cannot submit the deposit before the cutoff day, notify the accounting department by sending a message to accounting@whitewatercw.com

Loomis arrives without the change order

1. Complete the Loomis Issue Log
2. Notify the accounting department by sending a message to accounting@whitewatercw.com

Amount of "money added" is entered on the XPT incorrectly

1. Contact accounting by sending a message to accounting@whitewatercw.com
2. Call your Area Director to have them complete the correction process.

Did not tell XPT money was removed

1. Contact accounting by sending a message to accounting@whitewatercw.com
2. Call your Area Director to have them complete the correction process.

Multiple change orders

1. Accept extra change order and confirm the amount
2. Place the extra change order in the safe
3. Complete the Loomis Issue Log
4. Notify the accounting department by sending a message to accounting@whitewatercw.com

Loomis no show

1. Complete the Loomis Issue Log
2. Notify the accounting department by sending a message to accounting@whitewatercw.com

Procedure

Now that you have an understanding of the XPT cash deposit, let's go through the procedure for completing the XPT Cash Deposit. Remember, the XPT Cash Deposit **MUST** be performed with two people to ensure your safety and the security of the money being handled.

The following are the steps for completing the XPT Cash Deposit:

1. Remove the deposit box from the server room.
2. Remove the change order from the safe and place it in the deposit box.
3. Take the deposit box to the XPT's.
4. Cone off the XPT lane. One at a time.
5. Remove the top lock from the XPT.
6. Scan the barcode on your name badge when prompted.
7. Remove the bottom lock and use the XPT wrench to unlock the door.
8. Unlock the bill acceptor access.
9. Remove the acceptor and remove the money.
10. Give the money to your partner to rubber band and put into the deposit bag.
11. Re-insert the acceptor.
12. Close and lock the acceptor access.
13. Unlock the bill dispenser access.
14. Remove any bills from the reject tray.
15. Remove the dispensers, one at a time, and remove the money.
16. Hand the money to your partner to be rubber banded and placed in the deposit bag.
17. Take the change order from your partner and place it in the dispensers.
18. Re-insert the bill dispensers.

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19. Close and lock the dispenser access.
20. Close the XPT, use the wrench to secure the door.
21. Insert the top and bottom lock.
22. When prompted on the XPT screen:
 - Select, "I removed ALL the money from the bill and coin acceptors."
 - Select, "I removed ALL the money from the bill and coin dispensers."
 - Select, "I put the following amount of money into the bill dispensers." Then enter the amount added to the XPT.
 - Select Post then collect the receipt that is printed.
23. Remove the cone from the lane and move to the next XPT.
24. Repeat steps 5-23 for the remaining XPT.
25. Take the deposit box and go back to the office.
26. Go to Site Manager.
27. Login with your credentials.
28. Go to Site Manager → Select Reports → Sales Activity → XPT Cash Audit.
29. Set the date to the deposit date then click Generate.
30. Using the Vault Access Slips, total the amounts removed from the acceptors and dispensers.
31. Check that the Vault Access Slips from the XPTs match the XPT Cash Audit.
 - Confirm that Vault Access Slip "Acceptor Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Acceptors" amount.
 - Confirm that Vault Access Slip "Dispenser Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Dispensers" amount.
 - Confirm that Vault Access Slip "Added to Dispensers" amount matches XPT Cash Audit "Money added to Dispensers" amount.
 - Repeat for each XPT.
32. Prepare the deposit slip.
33. Ensure that the location listed on the top of the deposit slip matches your location.
 - If the location on the deposit slip does not match, see if there is another deposit book that has the correct location.
 - If there are no deposit slips with the correct location listed, contact your General Manager or Area Director.
34. Input the date on the top of the deposit slip.
 - The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match.
35. Input the deposit amount removed from each XPT.
 - Do NOT record any other deposits on the XPT deposit slip.
36. Record the total amount removed at the bottom of the deposit slip.
37. Prepare the deposit bag.
38. On the deposit bag input the To, From, Date, Deposit Amount and Account Number in the appropriate places.
 - The account number can be found on the deposit slip.
39. Record the total deposit amount on the deposit bag.
40. Remove the bag tag from the deposit bag.
41. Input the date, deposit amount and deposit bag number on the Consignment Log.

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42. Place the white copy of the deposit slip in the unsealed deposit bag.
43. Seal the deposit bag and place it in the safe.
44. Close and lock the safe.
45. Go to the office computer and login to the WhiteWater Intranet.
46. Go to the Finance tab and select XPT Weekly.
47. Fill in the required information on Page 1-11.
48. If there were any issues, be sure to record them on Page 12.
49. Attach the XPT receipts, deposit bag tag and yellow deposit slip to the Loomis Change Order Receipt. Then, scan and add the file to the deposit submission
50. Scan and add any additional documentation if necessary.
 - Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit
51. Input the deposit bag number.
52. Click Submit.
53. Put the deposit box back in the server room.
54. Retrieve the change order from the driver.
55. Verify the amount for the change order.
56. Sign the tablet from the Loomis driver to confirm receipt.
57. Place the change order in the safe.
58. Remove the deposit from the safe.
59. Close and lock the safe.
60. Give the deposit bag to the Loomis driver.
61. Give the Consignment log to the Loomis driver so they can verify the information and sign the form.

Pay Station Cash Deposit (DRB) Part 2 Quiz

Once the team member has completed the module, they will need to complete the quiz. To pass the quiz, the team member must score a 100%. If the team member does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you will need to review the quiz and answers with them before they attempt the quiz again.

1. What should be done if Loomis brings an extra change order? (Check all that apply)
 - a. Contact your Area Director
 - b. Accept extra change order, confirm amount**
 - c. Place the extra change order in the safe**
 - d. Tell Loomis to take back the change order
2. When should you upload the XPT Audit with the deposit submission packet?
 - a. Always
 - b. If the total amount is over \$5,000
 - c. Only if the amounts on the access slip and audit don't match**
 - d. Only if the amounts on the access slip and audit match
 - e. Never
3. Which of the following are needed to complete the XPT cash deposit procedure? (Check all that apply)
 - a. XPT Keys & Wrench**
 - b. Vault Access Slip**
 - c. Flashlight
 - d. Handcuff and chain for the deposit box
 - e. Change Order**
4. If Loomis arrives without a change order, what should you do?
 - a. Complete the Loomis Issue Log
 - b. Complete the Loomis Issue Log and notify Accounting**
 - c. Complete the Loomis Issue Log and notify your Area Director
 - d. Complete the Loomis Issue Log and notify your Area Director and accounting
5. When should you unseal the deposit bag?
 - a. If there is a discrepancy on the XPT Audit
 - b. When Loomis arrives
 - c. When you verify the amount of cash in the deposit
 - d. Never**
6. What date should be used on the deposit slip?
 - a. The date it is filled out
 - b. The following Loomis pickup day
 - c. The date on the XPT vault access slips**
 - d. None of the above
7. If the XPT is not accessible, you should skip the XPT cash deposit for that week.
 - a. True
 - b. False**
8. The location listed on the deposit slip does not have to match with the location you are at, any deposit slip will work.
 - a. True
 - b. False**

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9. The total amount of the deposit is the sum of the total money removed from all XPT's.
 - a. **True**
 - b. **False**
10. If the amount removed from an XPT is over \$2,500, you will need a separate deposit bag for the remaining XPT.
 - a. **True**
 - b. **False**

Pay Station Cash Deposit (DRB) Part 2 Demonstration

During the Demonstration, it is important that you do not stop to answer an employee's questions or provide additional information. The goal is for the employee to see the process performed as close to a real-life scenario as possible. This uninterrupted performance will help connect the steps or information learned. We will answer all questions and address any issues after the Demonstration.

The Demonstration for this module is covered in the online module.

Once the team member has passed the quiz, ask the team member if they have any questions and provide the answers. Once all team member questions have been answered, give the team member their copy of **Pay Station Cash Deposit (DRB) Part 2 Handouts 1 & 2** to review and study. Then, proceed to the Perform & Coach step.

Pay Station Cash Deposit (DRB) Part 2 Perform & Coach

During Perform & Coach, it is important that you do not stop to answer any team member's questions, and you shouldn't stop the team member to provide additional information. The goal is for the team members to complete the process. Coaching will be provided upon completion.

Have the team member perform the steps of the pay station cash deposit process in role-play and real-life deposits over the next few weeks. The goal is for the team member to be knowledgeable and capable enough to complete the process unassisted. Once the team member has completed the process, provide coaching and answer any questions.

Once the team member demonstrates the ability to perform the procedure correctly, they are ready for development sign-off. Upon sign-off, the team member can complete the process anytime needed.

Money should not be added or removed from the pay station when completing a demonstration or during the perform & coach step.

You **MUST** indicate that you “Did not add or remove any money.” after closing the pay station.

Pay Station Cash Deposit (DRB) Part 2 Handout 1

The following are the steps for completing the XPT Cash Deposit:

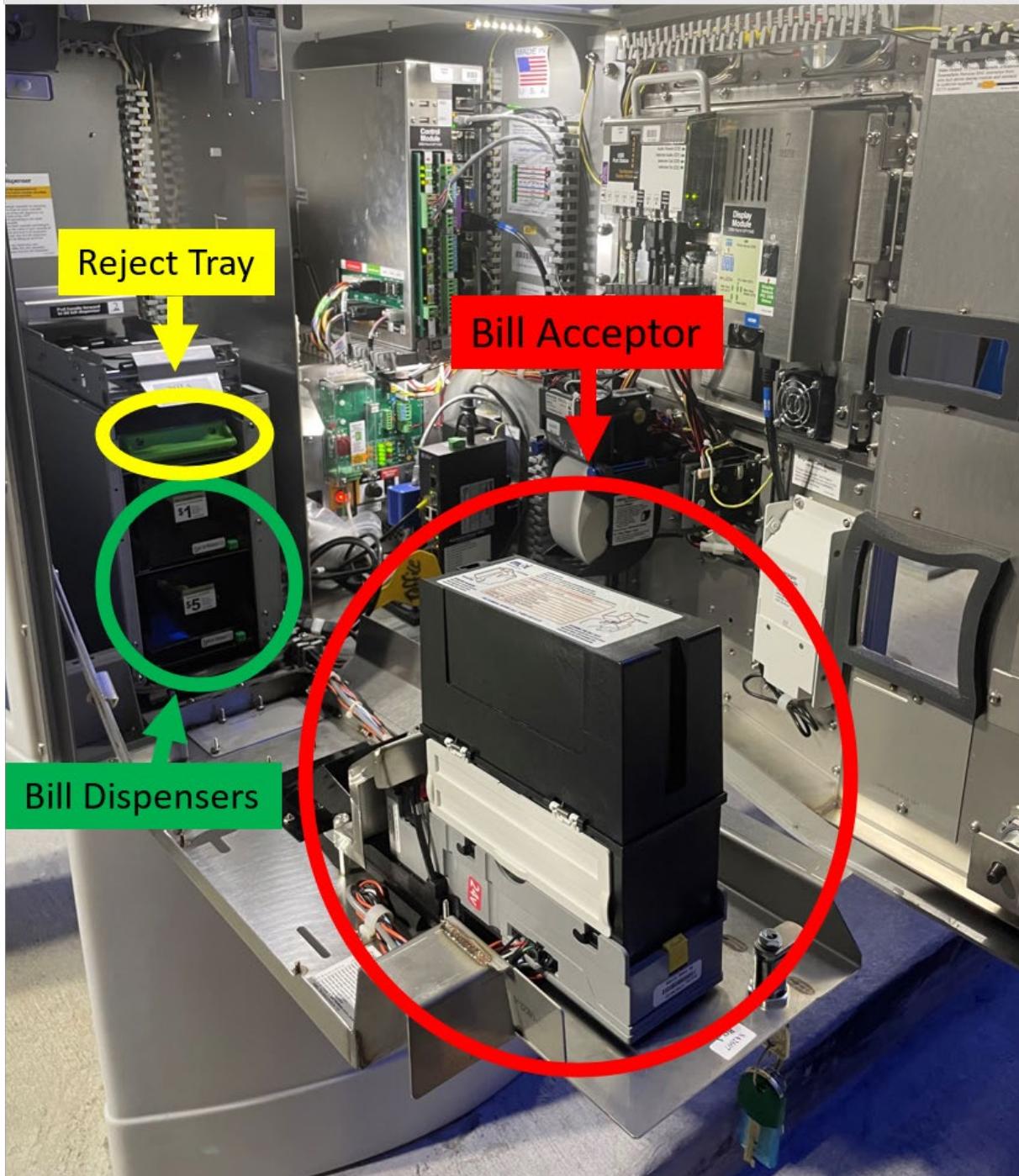
1. Remove the deposit box from the server room.
2. Remove the change order from the safe and place it in the deposit box.
3. Take the deposit box to the XPT's.
4. Cone off the XPT lane. One at a time.
5. Remove the top lock from the XPT.
6. Scan the barcode on your name badge when prompted.
7. Remove the bottom lock and use the XPT wrench to unlock the door.
8. Unlock the bill acceptor access.
9. Remove the acceptor and remove the money.
10. Give the money to your partner to rubber band and put into the deposit bag.
11. Re-insert the acceptor.
12. Close and lock the acceptor access.
13. Unlock the bill dispenser access.
14. Remove any bills from the reject tray.
15. Remove the dispensers, one at a time, and remove the money.
16. Hand the money to your partner to be rubber banded and placed in the deposit bag.
17. Take the change order from your partner and place it in the dispensers.
18. Re-insert the bill dispensers.
19. Close and lock the dispenser access.
20. Close the XPT, use the wrench to secure the door.
21. Insert the top and bottom lock.
22. When prompted on the XPT screen:
 - Select, "I removed ALL the money from the bill and coin acceptors."
 - Select, "I removed ALL the money from the bill and coin dispensers."
 - Select, "I put the following amount of money into the bill dispensers." Then enter the amount added to the XPT.
 - Select Post then collect the receipt that is printed.
23. Remove the cone from the lane and move to the next XPT.
24. Repeat steps 5-23 for the remaining XPT.
25. Take the deposit box and go back to the office.
26. Go to Site Manager.
27. Login with your credentials.
28. Go to Site Manager → Select Reports → Sales Activity → XPT Cash Audit.
29. Set the date to the deposit date then click Generate.
30. Using the Vault Access Slips, total the amounts removed from the acceptors and dispensers.
31. Check that the Vault Access Slips from the XPTs match the XPT Cash Audit.
 - Confirm that Vault Access Slip "Acceptor Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Acceptors" amount.
 - Confirm that Vault Access Slip "Dispenser Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Dispensers" amount.
 - Confirm that Vault Access Slip "Added to Dispensers" amount matches XPT Cash Audit "Money added to Dispensers" amount.
 - Repeat for each XPT.

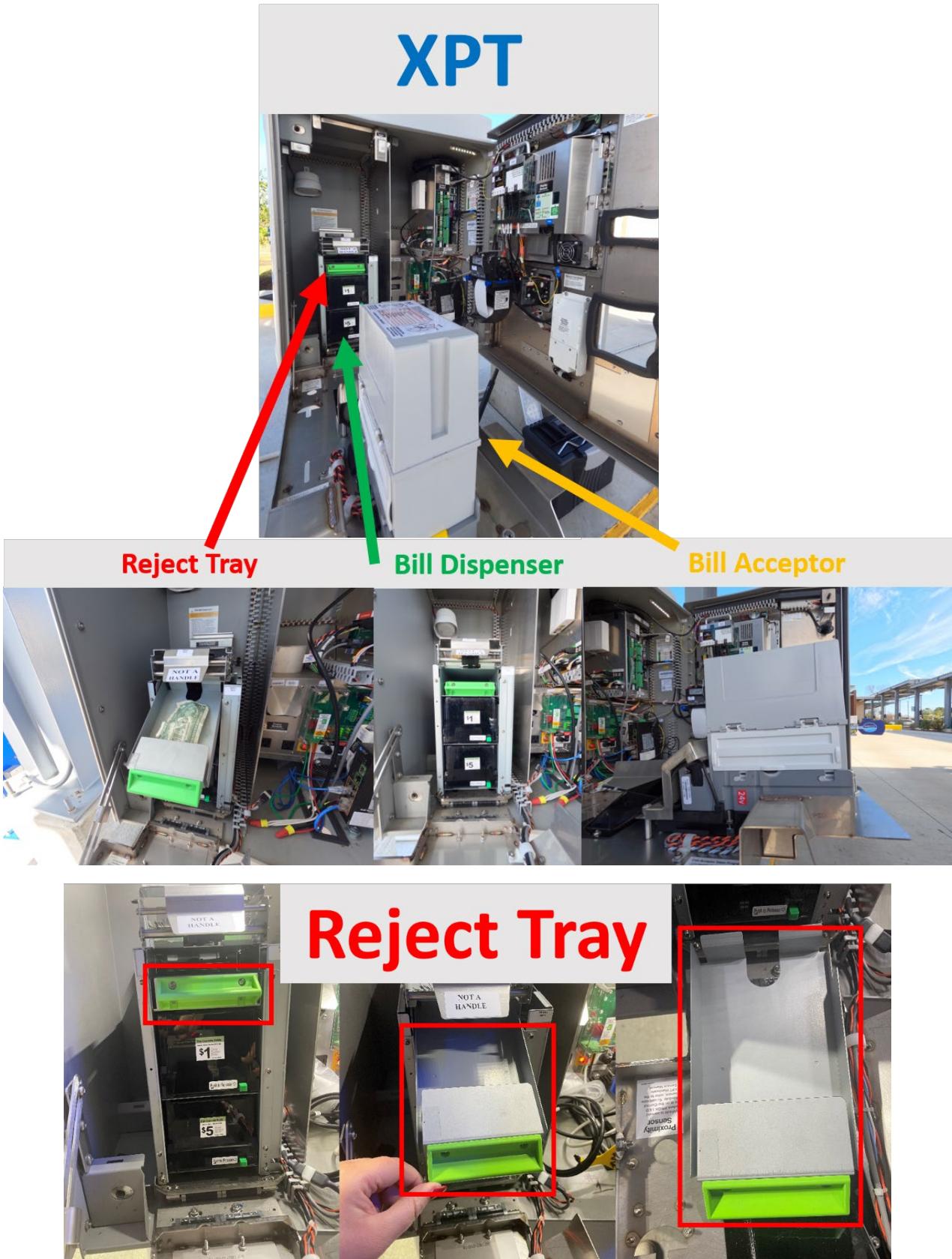
STORE MANAGER DEVELOPER GUIDE

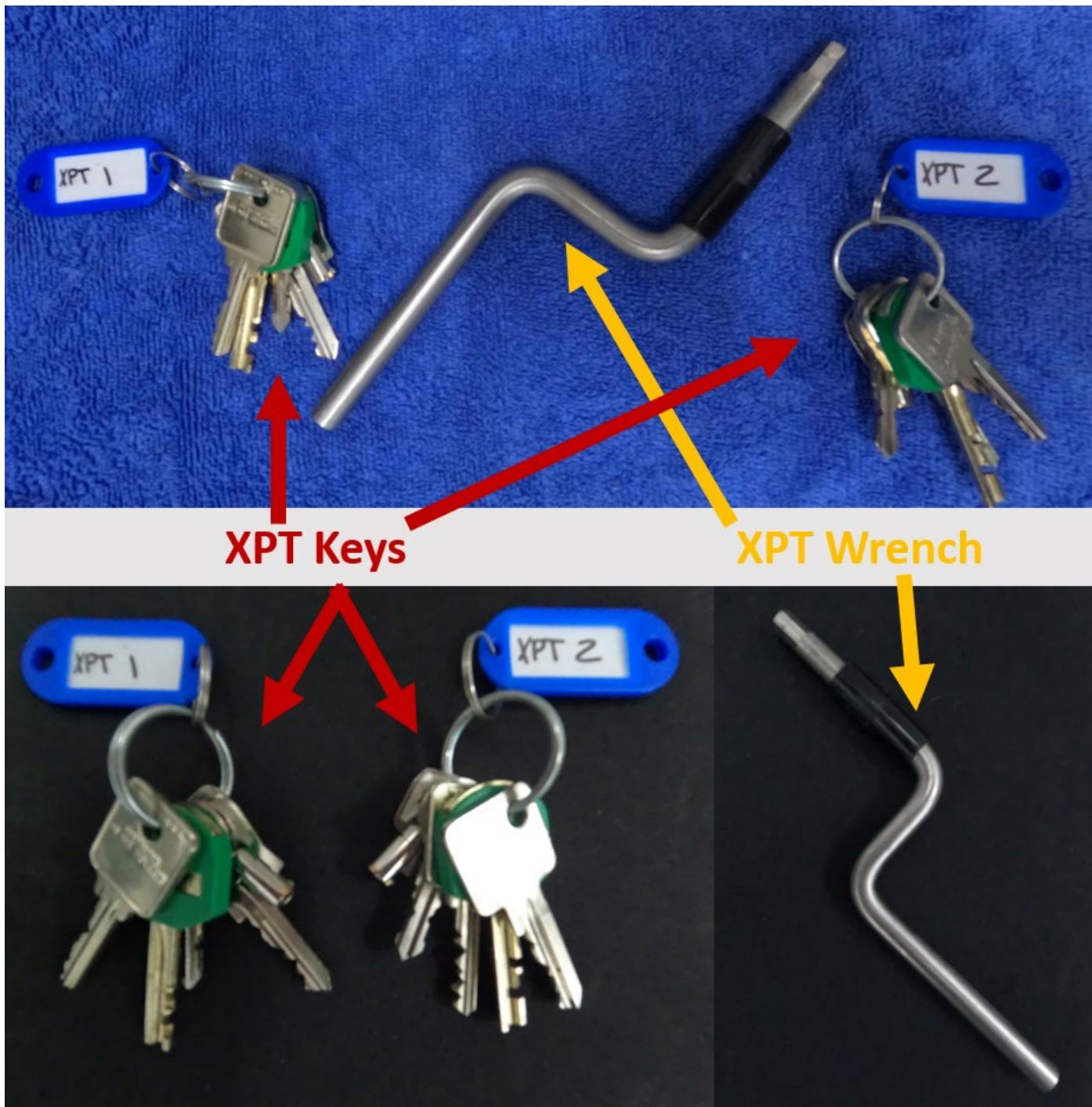
32. Prepare the deposit slip.
33. Ensure that the location listed on the top of the deposit slip matches your location.
 - If the location on the deposit slip does not match, see if there is another deposit book that has the correct location.
 - If there are no deposit slips with the correct location listed, contact your General Manager or Area Director.
34. Input the date on the top of the deposit slip.
 - The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match.
35. Input the deposit amount removed from each XPT.
 - Do NOT record any other deposits on the XPT deposit slip.
36. Record the total amount removed at the bottom of the deposit slip.
37. Prepare the deposit bag.
38. On the deposit bag input the To, From, Date, Deposit Amount and Account Number in the appropriate places.
 - The account number can be found on the deposit slip.
39. Record the total deposit amount on the deposit bag.
40. Remove the bag tag from the deposit bag.
41. Input the date, deposit amount and deposit bag number on the Consignment Log.
42. Place the white copy of the deposit slip in the unsealed deposit bag.
43. Seal the deposit bag and place it in the safe.
44. Close and lock the safe.
45. Go to the office computer and login to the WhiteWater Intranet.
46. Go to the Finance tab and select XPT Weekly.
47. Fill in the required information on Page 1-11.
48. If there were any issues, be sure to record them on Page 12.
49. Attach the XPT receipts, deposit bag tag and yellow deposit slip to the Loomis Change Order Receipt. Then, scan and add the file to the deposit submission
50. Scan and add any additional documentation if necessary.
 - Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit
51. Input the deposit bag number.
52. Click Submit.
53. Put the deposit box back in the server room.
54. Retrieve the change order from the driver.
55. Verify the amount for the change order.
56. Sign the tablet from the Loomis driver to confirm receipt.
57. Place the change order in the safe.
58. Remove the deposit from the safe.
59. Close and lock the safe.
60. Give the deposit bag to the Loomis driver.
61. Give the Consignment log to the Loomis driver so they can verify the information and sign the form.

Pay Station Cash Deposit (DRB) Part 2 Handout 2

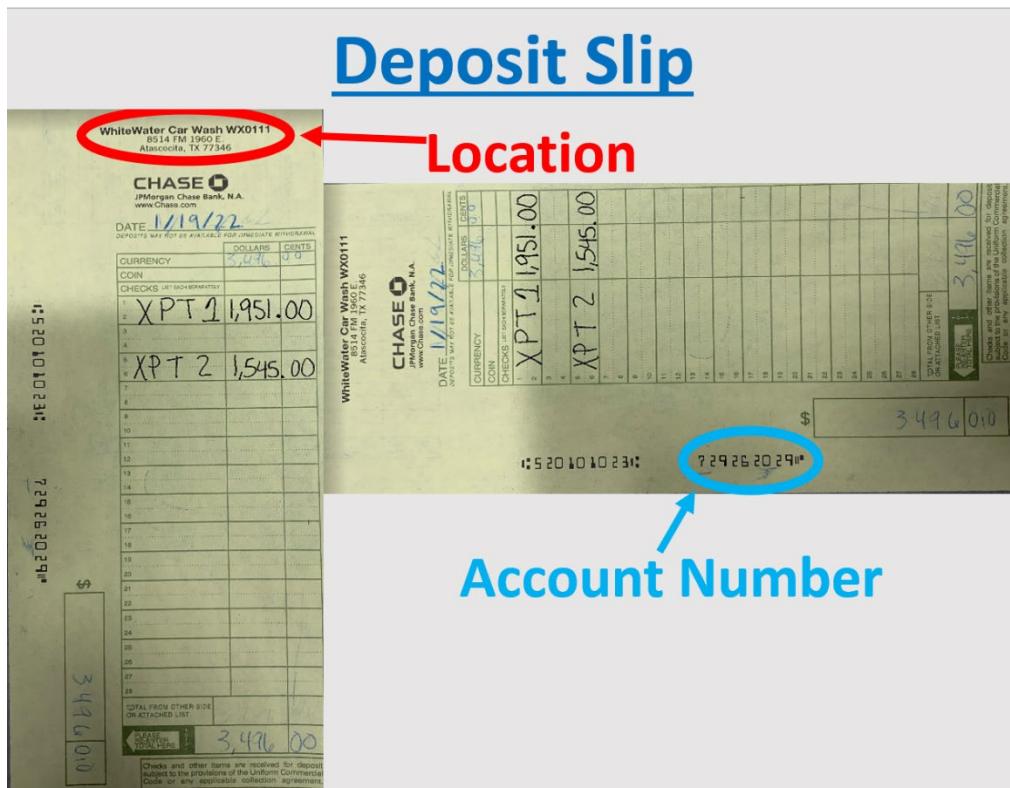
XPT Inside











Vault Access Slip

<p>Vault Access Deposits WhiteWater Car Wash-Atascocita Empl # 3096 @ XPT2 01/19/2022, 02:30 PM</p> <p>Money Removed</p> <table border="1"> <tbody> <tr> <td>Acceptor Bills</td> <td>-\$177.00</td> </tr> <tr> <td>Acceptor Coins</td> <td>\$0.00</td> </tr> <tr> <td>Acceptor Deposits</td> <td>-\$177.00</td> </tr> <tr> <td>Dispenser Bills</td> <td>-\$1,368.00</td> </tr> <tr> <td>Dispenser Coins</td> <td>\$0.00</td> </tr> <tr> <td>Dispenser Deposits</td> <td>-\$1,368.00</td> </tr> <tr> <td>Total Removed</td> <td>-\$1,545.00</td> </tr> </tbody> </table> <p>Money Added</p> <table border="1"> <tbody> <tr> <td>Bills Added</td> <td>\$1,400.00</td> </tr> <tr> <td>Coins Added</td> <td>\$0.00</td> </tr> <tr> <td>Added to Dispensers</td> <td>\$1,400.00</td> </tr> <tr> <td>Net Deposits</td> <td>-\$145.00</td> </tr> </tbody> </table>	Acceptor Bills	-\$177.00	Acceptor Coins	\$0.00	Acceptor Deposits	-\$177.00	Dispenser Bills	-\$1,368.00	Dispenser Coins	\$0.00	Dispenser Deposits	-\$1,368.00	Total Removed	-\$1,545.00	Bills Added	\$1,400.00	Coins Added	\$0.00	Added to Dispensers	\$1,400.00	Net Deposits	-\$145.00	<p>Vault Access Deposits WhiteWater Car Wash-Atascocita Empl # 3096 @ XPT1 01/19/2022, 02:27 PM</p> <p>Money Removed</p> <table border="1"> <tbody> <tr> <td>Acceptor Bills</td> <td>-\$688.00</td> </tr> <tr> <td>Acceptor Coins</td> <td>\$0.00</td> </tr> <tr> <td>Acceptor Deposits</td> <td>-\$688.00</td> </tr> <tr> <td>Dispenser Bills</td> <td>-\$1,263.00</td> </tr> <tr> <td>Dispenser Coins</td> <td>\$0.00</td> </tr> <tr> <td>Dispenser Deposits</td> <td>-\$1,263.00</td> </tr> <tr> <td>Total Removed</td> <td>-\$1,951.00</td> </tr> </tbody> </table> <p>Money Added</p> <table border="1"> <tbody> <tr> <td>Bills Added</td> <td>\$1,400.00</td> </tr> <tr> <td>Coins Added</td> <td>\$0.00</td> </tr> <tr> <td>Added to Dispensers</td> <td>\$1,400.00</td> </tr> <tr> <td>Net Deposits</td> <td>-\$551.00</td> </tr> </tbody> </table>	Acceptor Bills	-\$688.00	Acceptor Coins	\$0.00	Acceptor Deposits	-\$688.00	Dispenser Bills	-\$1,263.00	Dispenser Coins	\$0.00	Dispenser Deposits	-\$1,263.00	Total Removed	-\$1,951.00	Bills Added	\$1,400.00	Coins Added	\$0.00	Added to Dispensers	\$1,400.00	Net Deposits	-\$551.00
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Net Deposits	-\$551.00																																												

Deposit Slip

WhiteWater Car Wash WX0111
8514 FM 1960 E.
Atascocita, TX 77346

CHASE
JPMorgan Chase Bank, N.A.
www.Chase.com

DATE DEPOSITS	1/19/22	DATE WITHDRAWAL
CURRENCY	3,496.00	
COIN		
CHECKS	XPT 1 1,951.00	
5	XPT 2 1,545.00	
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		
26		
27		
28		
TOTAL FROM OTHER SIDE OR ATTACHED LIST		
PLEASE REENTER TOTAL HERE		
3,496.00		
Checks and <input checked="" type="checkbox"/> subject to the provisions of the Uniform Commercial Code or any applicable collection agreement.		

Vault Access Slips

Vault Access Deposits WhiteWater Car Wash-Atascocita Empl # 3896 @ XPT1 01/19/2022 02:27 PM	
Money Removed	
Acceptor Bills -\$688.00 Acceptor Coins \$0.00	
Acceptor Deposits -\$688.00	
Dispenser Bills -\$1,263.00 Dispenser Coins \$0.00	
Dispenser Deposits -\$1,263.00	
Total Removed -\$1,951.00	
Money Added	
Bills Added \$1,400.00 Coins Added \$0.00	
Added to Dispensers \$1,400.00	
Net Deposits -\$551.00	
Vault Access Deposits WhiteWater Car Wash-Atascocita Empl # 3896 @ XPT2 01/19/2022 02:30 PM	
Money Removed	
Acceptor Bills -\$177.00 Acceptor Coins \$0.00	
Acceptor Deposits -\$177.00	
Dispenser Bills -\$1,368.00 Dispenser Coins \$0.00	
Dispenser Deposits -\$1,368.00	
Total Removed -\$1,545.00	
Money Added	
Bills Added \$1,400.00 Coins Added \$0.00	
Added to Dispensers \$1,400.00	
Net Deposits -\$145.00	

XPT Cash Audit Report

XPT Cash Audit Report					
WhiteWater Car Wash- 111 - Atascocita		Wed 01/19/2022 12:00:00am Wed 01/19/2022 11:59:59pm			
Date	Activity	XPT1	XPT2	DXPT1	Totals
1/19/22	Cash paid in to Acceptors	20.00			20.00
	Money removed from Acceptors	-688.00	-177.00		-865.00
	Over/Short detected in Acceptors	0.00	0.00		0.00
	Money added to Dispensers	1,400.00	1,400.00		2,800.00
	Change returned by Dispensers		-12.00		-12.00
	Money removed from Dispensers	-1,263.00	-1,368.00		-2,631.00
	Over/Short detected in Dispensers	0.00	0.00		0.00
Summary for 1/19/22 thru 1/19/22					
	Beginning balance in Acceptors	688.00	157.00	0.00	845.00
	Beginning balance in Dispensers	1,263.00	1,380.00	0.00	2,643.00
	Cash paid in to Acceptors	0.00	20.00	0.00	20.00
	Money removed from Acceptors	-688.00	-177.00	0.00	-865.00
	Over/Short detected in Acceptors	0.00	0.00	0.00	0.00
	Money added to Dispensers	1,400.00	1,400.00	0.00	2,800.00
	Change returned by Dispensers	0.00	-12.00	0.00	-12.00
	Money removed from Dispensers	-1,263.00	-1,368.00	0.00	-2,631.00
	Over/Short detected in Dispensers	0.00	0.00	0.00	0.00
	Ending balance in Acceptors	0.00	0.00	0.00	0.00
	Ending balance in Dispensers	1,400.00	1,400.00	0.00	2,800.00
	XPT Cash Sales to Account For	0.00	8.00	0.00	8.00
	XPT Money Accounted For	0.00	-8.00	0.00	-8.00
	Net XPT Money Over/Short	0.00	0.00	0.00	0.00

XPT Cash Audit Report

Vault Access Slip

Date	Activity	XPT1
1/19/22	Cash paid in to Acceptors	
	Money removed from Acceptors	-688.00
	Over/Short detected in Acceptors	0.00
	Money added to Dispensers	1,400.00
	Change returned by Dispensers	
	Money removed from Dispensers	-1,263.00
	Over/Short detected in Dispensers	0.00
Summary for 1/19/22 thru 1/19/22		
	Beginning balance in Acceptors	688.00
	Beginning balance in Dispensers	1,263.00
	Cash paid in to Acceptors	0.00
	Money removed from Acceptors	-688.00
	Over/Short detected in Acceptors	0.00
	Money added to Dispensers	1,400.00
	Change returned by Dispensers	0.00
	Money removed from Dispensers	-1,263.00
	Over/Short detected in Dispensers	0.00
	Ending balance in Acceptors	0.00
	Ending balance in Dispensers	1,400.00
	XPT Cash Sales to Account For	0.00
	XPT Money Accounted For	0.00
	Net XPT Money Over/Short	0.00

Vault Access Deposits
WhiteWater Car Wash-Atascocita
Empl # 3096 @ XPT1
01/19/2022, 02:27 PM

Money Removed

Acceptor Bills -\$688.00
Acceptor Coins \$0.00

Acceptor Deposits -\$688.00

Dispenser Bills -\$1,263.00
Dispenser Coins \$0.00

Dispenser Deposits -\$1,263.00

Total Removed -\$1,951.00

Money Added

Bills Added \$1,400.00
Coins Added \$0.00

Added to Dispensers \$1,400.00

Net Deposits -\$551.00

Loomis Consignment Log

CUSTOMER CONSIGNMENT LOG

01

Received by: LOOMIS

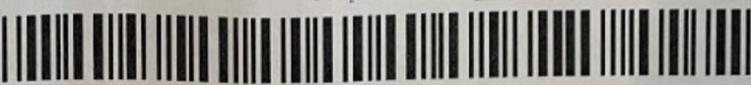
From _____ consignor, the following packages to be delivered to the respective consignees herein stated, it is agreed that these packages are to be distinctly and securely sealed by the consignor and that LOOMIS shall in no event be liable for any shortage by the consignor claimed in any such package delivered to it not so distinctly and securely sealed; also that in the case of the loss of any package LOOMIS shall not be liable for more than the value as herein stated of such package; and in no event for any amount in excess of the liability assumed in the service contract.

LINE	DATE	NO. OF SEALED PACKAGES	DENOMINATION	SEALED PACKAGES SHIPPED TO CONSIGNEE	SAO NUMBER	RELEASED BY	SIGNATURE OF CUSTODIAN	ROUTE #	TIME	DATE
01	1/26	3052			DF487809		JM	101055	1-26	
02	1/26	1300.00			DF48778038		SM	111		
03	2/2	3310			DF48778037		JM	109410	2-2	
04	2/9	49.00			DF48778035		Jim L	1094152	2-9	
05	2/9	3134.00			DF48778034			111		
06	2/16									
07										
08										
09										
10										
11										
12										
13										
14										
15										

CCLOP

Loomis Change Order Receipt

Customer Number: 9330340442	Order Number : 6169962739
Customer Name: WHITE WATER EXPRESS WX111	Delivery Date: 01/18/2022 Tuesday
Address: 8514 FM 1960 E	Ship Date: 01/14/2022
ATASCOCITA TX 77346	Ext. Ref. No. : 898421
	CHASE COMM
	Courier: LOOMIS HOUSTON A Rte: 1
	Prepared By: <i>[Signature]</i>



6169962739

Currency	Denom	\$Amount
800 FIT Bill	\$1	800.00
400 FIT Bill	\$5	2,000.00
FIT Bill	Total	2,800.00

Total Currency:	2,800.00	Total Boxes:	0.00
Total Coin:	0.00	Total Rolls:	0.00
Total Exchange:	2,800.00		

Sample Deposit Submission

ARMED CARRIER'S RECEIPT



B0284-0044032366

Packing Slip: **Delivery Date:** Tuesday 10/15/19
Location: **WHITE WATER EXPRESS WX101** **Carrier:** Brinks
0000000101
Address: **WHITE WATER EXPRESS WX101** **Inventory:** JP Morgan Chase
0000000101
14614 FM 2920 **Run ID:** Houston
TOMBALL, TX, 77377 **Smart Code:**
Confirmation #: 43506972
Reference #: 1517644036
Bag 1 of 1 **Amount:** \$2,800.00

Currency:	Recycled	Total Currency
1	\$800	\$800
5	\$2,000	\$2,000
Total	\$2,800	\$2,800

YELLOW DEPOSIT SLIP

DEPOSIT RECORD, COPY		32-6
WHITE WATER CAR WASH WX101 TOMB		
14614 FM 2920 TOMBALL, TX 77377		
 JPMorgan Chase Bank, N.A. www.Chase.com		
DATE 1/30/07		100
AMOUNTS MAY NOT ADD EXACTLY DUE TO ROUNDING IN DOLLARS, CENTS		
CURRENCY		
CASH		
CHECKS OR BANK INSTRUMENTS		
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		
26		
27		
28		
TOTAL AMOUNT CHECKED		4176.00
AMOUNT RECEIVED		4176.00

CLEAR DEPOSIT BAG STRIP

DF11497337



XPT 1 AND XPT 2 RECEIPTS

Vault Access Deposits		
Vitewater Express Car Wash		
Emp1 # 1025 @ XPT1		
10/16/2019, 02:15 PM		
Money Removed		
ceptor Bills	\$492.00	
ceptor Coins	\$0.00	
ceptor Deposits	\$492.00	
spender Bills	\$1,397.00	
spender Coins	\$0.00	
Censor Deposits	\$1,397.00	
at Removed	\$1,789.00	
Money Added		
1s Added	\$1,400.00	
ns Added	\$0.00	
ed to Dispenser	\$1,400.00	
Deposits	\$389.00	
Vault Access Deposits		
Vitewater Express Car Wash		
Emp1 # 1025 @ XPT2		
10/16/2019, 02:15 PM		
Money Removed		
ceptor Bills	\$1,261.00	
ceptor Coins	\$0.00	
ceptor Deposits	\$1,261.00	
spender Bills	\$1,126.00	
spender Coins	\$0.00	
Censor Deposits	\$1,126.00	
at Removed	\$2,387.00	
Money Added		
1s Added	\$1,400.00	
ns Added	\$0.00	
ed to Dispenser	\$1,400.00	
Deposits	\$997.00	

Loomis Issue Log

Loomis/Deposit Issue Log

mhord@whitewatercw.com [Switch account](#)

 Saving disabled

Your email will be recorded when you submit this form

* Required

Type of Issue

Select the Type of Issue *

- Loomis No Show
- Loomis Arrived without Change Order
- Loomis Did Not Take Deposit
- Loomis Arrived with multiple XPT Change Orders

XPT Deposit Troubleshooting

<p><u>XPT did not print a receipt</u></p> <ol style="list-style-type: none"> 1. Go to Site Manager 2. Login with your credentials 3. Select Reports → Sales Activity → XPT Cash Audit 4. Set the date to the deposit date then click Generate 5. Total the amounts removed from the acceptors and dispensers <ul style="list-style-type: none"> • Look for the lines that say, "Money removed from acceptors/dispensers" 6. Fill in the total on the deposit slip, deposit bag and Consignment log 7. When this occurs, you will need to include the XPT Audit in lieu of the Vault Access Slips <p><u>The XPT is not accessible</u></p> <p>Wait until access is restored, then perform the procedure. If you cannot submit the deposit before the cutoff day, notify the accounting department by sending a message to accounting@whitewatercw.com</p>	<p><u>Amount of "money added" is entered on the XPT incorrectly</u></p> <ol style="list-style-type: none"> 1. Contact accounting by sending a message to accounting@whitewatercw.com 2. Call your Area Director to have them complete the correction process. <p><u>Did not tell XPT money was removed</u></p> <ol style="list-style-type: none"> 1. Contact accounting by sending a message to accounting@whitewatercw.com 2. Call your Area Director to have them complete the correction process. <p><u>Multiple change orders</u></p> <ol style="list-style-type: none"> 1. Accept extra change order and confirm the amount 2. Place the extra change order in the safe 3. Complete the Loomis Issue Log 4. Notify the accounting department by sending a message to accounting@whitewatercw.com <p><u>Loomis arrives without the change order</u></p> <ol style="list-style-type: none"> 1. Complete the Loomis Issue Log 2. Notify the accounting department by sending a message to accounting@whitewatercw.com <p><u>Loomis no show</u></p> <ol style="list-style-type: none"> 1. Complete the Loomis Issue Log 2. Notify the accounting department by sending a message to accounting@whitewatercw.com
--	--

DEPUTY MANAGEMENT-1008

Welcome

Welcome to the Deputy Management Development Module. In this module you will learn about the location management role in the Deputy app.

Notes and Questions

As you go through the module, please follow along and take notes as you go. Taking notes will help you remember any key points or questions that you would like to discuss. Once you have completed each section and completed your quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved in order to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the Deputy Management Development Module is to learn how to utilize the location management functions of Deputy to the best of your ability. In this program you will learn all about utilizing the Deputy app and how work with your team on fulfilling all scheduling needs.

What

The following are the items you will need to perform the scheduling tasks and utilize Deputy:

1. Cell Phone or Computer

You will need a cell phone or computer in order to access Deputy.

2. Deputy App

You will need the Deputy app in order to access Deputy from your phone.

Educate

You already know how to utilize the Deputy app to view your schedule and make changes to your availability. Now, we are going to learn about how to create, edit and manage schedules on Deputy. Utilizing Deputy allows us to have clear communication regarding work schedules, when people are available to work and when they may need some time off. It also allows management to make changes and updates to the schedule that can be instantly seen by the entire store team. Team members will also be notified through the app and/or email when any schedule changes occur.

Access Levels

Your ability to view and edit people in Deputy is controlled by your access level, and is limited to only the team members, or stores, you manage. If you feel your access level is incorrect, or are unable to view the details of those who you manage, consult your location's Area Director for further information. Let's review the two access levels utilized at the stores, Employee and Location Manager:

Employee Access

Employee access is used for the Team Leader and Shift Supervisor positions. Having employee access means you are able to view the schedule, clock in and out for shifts that you are scheduled to work, view any available shifts that need to be filled. This access level also allows the team member to indicate days or times that they are unavailable to work. Users are able to update their availability any time so, if any work availability changes occur in the future, they will be able to indicate those changes through Deputy. Lastly, this access level will allow users to request time-off for personal days or vacation.

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Location Manager

If you have the access of a Location Manager, you are either the Store Manager or General Manager of your location. The location manager role has the ability to not only view the schedule, but edit the schedule as needed, post a new schedule and add and archive employees. Additionally, the location manager role is able to view and make changes to a schedule. As a location manager, you will have access to two tabs, the People tab and the Scheduling tab. Let's review each tab and its functions.

The People Tab

The people tab allows you to view all employees at your location, or locations, edit employee information, as well as archive employees that are no longer with WhiteWater. Let's review each of these tasks.

Completing Employee Registration

When a new employee completes their onboarding paperwork, an email invite will be sent and the following information will automatically be input into their profile:

- Full Name
- Email Address
- Phone Number
- Work Location
- Employee Number
- Access Level

Once the team member has completed creation of their account, you will need to add

Editing Employee Information

From time to time, an employee will need to make a change to their information in Deputy. When this occurs, you will need to perform the following steps:

1. Go to the people tab
2. Find the employee you are looking for
3. Once you have found the employee, click on the three dots on the right side of the screen on the line for that employee
4. Select the Edit Personal option
5. Edit the necessary information
6. Click save

Archiving Employees

Once an employee is no longer working at WhiteWater, you will need to archive the employee in Deputy. To archive employees, perform the following steps:

1. Go to the schedule tab
2. Find and select the terminated employee from the list on the left side of the screen
3. Click on the three dots next to their name
4. Select Turn All Shifts to Open
5. When the prompt appears select Remove
6. Go to the people tab
7. Find the employee you are looking for
8. Once you have found the employee, click on the three dots on the right side of the screen on the line for that employee
9. Select the option for Archive Employee
10. Once the prompt that appears, click archive employee

The Scheduling Tab

Each week, the management team will create a schedule to notify each employee of what shift they are working at each location. The scheduling tab is used for creating the schedule as well as making any updates or changes to the schedule.

Let's review how to schedule each employee and make updates to the schedule.

Adding Shifts

To add new shifts to a schedule, perform the following steps:

1. Go to the scheduling tab
2. Select the appropriate location
3. Go to the week you are scheduling for
4. Click on the plus sign at the bottom of the box for the day you are scheduling
5. In the window that appears, select the employee you are scheduling
 - a. If you would like to repeat the shift, click on the arrow to the right of the save button and select when the shift will repeat
6. Repeat for each employee and day of the week

Posting the Schedule

Once the you determine the schedule is complete, you are ready to post the schedule. To post the schedule, perform the following steps:

1. Click on the purple publish button in the upper, right corner
2. When the prompt appears, select if you want to notify all employees or only employees whose schedules have changed
3. Click Next
4. Select the work areas you wish to update
5. Select Notify (email and app only)
6. Click Publish

When the schedule has been posted, a notification will be sent to all employees that are scheduled. The notification will include a text message and a message from the Deputy app stating that a new schedule has been posted. After the schedule is posted, if any edits to the schedule are made, Deputy will notify users in the same manner. Users can choose to opt out of the notifications, but we want team members to be aware of their schedule and any changes that have been made. So, it is encouraged to leave the notifications turned on.

Editing the Schedule

On occasion, you will need to adjust the schedule after it has been posted. This could be due to a number of reasons such as weather, call-offs, etc. Anytime we make changes to the schedule, it is important that we discuss any changes with team members before the changes are posted. This ensures that we are respectful of the employee and their time while communicating the needs of the store and asking for their help. To edit the schedule, perform the following steps:

1. Go to the scheduling tab
2. Select the appropriate location
3. Go to the schedule you want to edit
4. Select the team member whose schedule is changing
5. Select the area, or role, for the team member
6. Set the start and end time for the shift
7. Indicate if there are any meal or rest breaks
8. Input any notes as necessary
9. Click save

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10. Click on the purple publish button in the upper, right corner
11. When the prompt appears, select if you want to notify all employees or only employees whose schedules have changed
12. Click Next
13. Select the work areas you wish to update
14. Select Notify (email and app only)
15. Click Publish

Deputy Management Quiz

Once the employee has completed the module, they will need to complete the quiz. In order to pass the quiz, the employee must score a 100%. If the employee does not pass on their first attempt, they will need to take the quiz again. If they do not pass on their second attempt, you will need to review the quiz and answers with them before they attempt the quiz again.

1. Which of the following tabs are used by Location Managers?
 - a. **People tab**
 - b. Location tab
 - c. **Scheduling tab**
 - d. All of the above
2. Which tab is used to add employee shifts?
 - a. People tab
 - b. Location tab
 - c. **Scheduling tab**
 - d. WhiteWater tab
3. The purpose of the Deputy Management Development Module is to learn how to utilize the _____ functions of Deputy to the best of your ability.
 - a. Employee functions
 - b. **Location management**
 - c. Area director
 - d. None of these
4. Employee access is used for _____.
 - a. **Team Leaders**
 - b. **Shift Supervisors**
 - c. Store Managers
 - d. General Managers
 - e. All of the above
5. Location Manager access is used for _____.
 - a. Team Leaders
 - b. Shift Supervisors
 - c. **Store Managers**
 - d. **General Managers**
 - e. None of the above
6. Employee information cannot be edited once they have registered their account.
 - a. True
 - b. **False**
7. You must click the purple publish schedule in order post a new schedule.
 - a. **True**
 - b. False
8. You will need to add additional employee information after they have registered.
 - a. True
 - b. **False**

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9. Deputy can be accessed using a cell phone or computer.
 - a. **True**
 - b. **False**
10. It is not important that we discuss any changes with team members before schedule changes are posted.
 - a. **True**
 - b. **False**

Deputy Management Demonstration

During the Demonstration, it is important that you do not stop to answer a team member's questions or provide additional information. The goal is for the team member to see the process performed as close to a real-life scenario as possible. This uninterrupted performance will help connect the steps or information learned. We will answer all questions and address any issues after the Demonstration.

Once the team member has passed the quiz, ask the team member if they have any questions and provide the answers. Once all questions have been answered, it is time to show the team member how to utilize the Location Manager-related tasks on Deputy. Once you have familiarized the team member with all the items, demonstrate completing a schedule by making a mock schedule for an upcoming week. Once you have completed the demonstration, answer any team member questions and review the schedule you just created, and the steps taken to get there. Then, proceed to the Perform & Coach step of the process.

Deputy Management Perform & Coach

During Perform & Coach, it is important that you do not stop to answer any team member's questions, and you shouldn't stop the team member to provide additional information. The goal is for the team members to complete the process. Coaching will be provided upon completion.

Have the team member complete a mock schedule for an upcoming week. After the team member completes the process, provide coaching and answer questions. At the next opportunity, have the team member complete the schedule and provide coaching. Repeat the process until the team member has completed the process correctly multiple times.

Once the team member demonstrates the ability to create an acceptable schedule, they are ready for development sign-off. Upon sign-off, the team member can begin completing the incident review portion of the claim process anytime the need arises.