

NIXON MEDICAL

CARESHIELD PRIVACY CURTAIN PROGRAM SERVICE INSTRUCTION GUIDE

[Assessment](#) | [Initial Installation](#) | [Scheduled Exchange](#) | [Plant Return](#)

A visual field reference supporting the three controlling Service One Best Ways.

Because every patient deserves a safe space

COMPLETE SERVICE PROCESS OVERVIEW

HOW TO USE THIS GUIDE

The three Service 1BW's remain the controlling work instructions. This guide expands the major tasks into visual pages that help Service Management, Sales partners, Service Team Associates, and RSRs prepare, perform, verify, and communicate the work.

1. ASSESS**2. PREPARE****3. INSTALL & ASSIGN****4. EXCHANGE****5. RETURN & IN SCAN****CONTROL POINTS**

- ✓ Every Bay receives a standard Bay ID using numbers (1, 2, 3) or letters (A, B, C).
- ✓ The initial NAN is reviewed, and all Service assessment details and updates are recorded in the New Account Onboarding file and communicated to the implementation team.
- ✓ Every installed curtain is assigned to both the correct customer and Bay ID.
- ✓ Every scan must return green OK and every transaction must upload successfully.
- ✓ Every removed curtain is returned by the RSR, IN SCANNED, and placed in the assigned curtain-return area.

GUIDE PAGE MODEL

- ✓ Each task page shows the owner, expanded instructions, a field photo or system screenshot, a non-negotiable control, completion reminders, customer communication, and why the task matters.

SECTION 1 - CUSTOMER ASSESSMENT & FACILITY WALKTHROUGH

PREPARE | WALK | MAP | MEASURE | CONFIRM ACCESS | HAND OFF

Service Management leads the assessment and turns the initial Sales NAN into a complete New Account Onboarding record for installation.

Led by Service Management (RSD or SM), ideally with the Sales TSM.

Goal: leave the customer with a shared understanding of the program and leave Nixon Medical with complete, usable information for ordering, installation, electronic assignment, and recurring service.

STEP 1

PREPARE FOR THE CUSTOMER ASSESSMENT

Who: Service Management (RSD or SM), ideally with Sales TSM



INSTRUCTIONS

1. Review the approved scope, customer information, and known facility requirements before the visit.
2. Bring the 1BW, measuring tools, required PPE, note-taking materials, and any available floor plan or site map.
3. Confirm the customer contact, meeting time, and expected areas to be assessed.

! IMPORTANT

- ✓ Do not begin the walkthrough without a clear scope and the tools needed to document every Bay.

REMEMBER

- ✓ Know who will escort the team.
- ✓ Confirm all planned departments are included.
- ✓ Be ready to explain the CareShield process in plain language.

WHY THIS MATTERS

- ✓ Preparation prevents missed locations, incomplete measurements, and repeat visits.

STEP 2

MEET THE CUSTOMER AND CONFIRM THE WALKTHROUGH PLAN

Who: Service Management / Sales TSM



INSTRUCTIONS

1. Introduce the Nixon Medical team and explain that the visit will document each curtain location, quantity, mesh requirement, access need, and service window.
2. Confirm the primary program contact and the contacts responsible for access and ongoing service coordination.
3. Review safety, infection prevention, security, escort, restricted-area, and photography requirements before entering patient-care areas.

! IMPORTANT

- ✓ Customer requirements always control access. Stop if the team cannot meet the customer's safety or security expectations.

REMEMBER

- ✓ Explain what will be measured and documented.
- ✓ Confirm whether photography is permitted.
- ✓ Ask how the customer prefers questions or exceptions to be handled.

CUSTOMER COMMUNICATION

- ✓ "We will walk each approved area with you, identify every curtain Bay, confirm quantities and access needs, and review the completed information with you before we leave."

WHY THIS MATTERS

- ✓ A clear opening conversation builds trust and prevents access or communication issues later.

STEP 3

WALK THE FACILITY AND ESTABLISH BAY IDS

Who: Service Management / Sales TSM



INSTRUCTIONS

1. Walk every department and room included in the approved CareShield scope with the customer representative.
2. Identify every privacy curtain location and assign a standard Bay ID using the customer-approved number or letter sequence.
3. Record the number of curtain panels assigned to each Bay and keep the Bay sequence consistent throughout the facility.

! IMPORTANT

- ✓ Do not create informal or duplicate Bay names. Every Bay must have one unique, repeatable ID.

REMEMBER

- ✓ Use Bay 1, 2, 3 or Bay A, B, C as approved by the customer.
- ✓ Count every curtain panel at the Bay.
- ✓ Keep the map, notes, and New Account Onboarding information consistent.

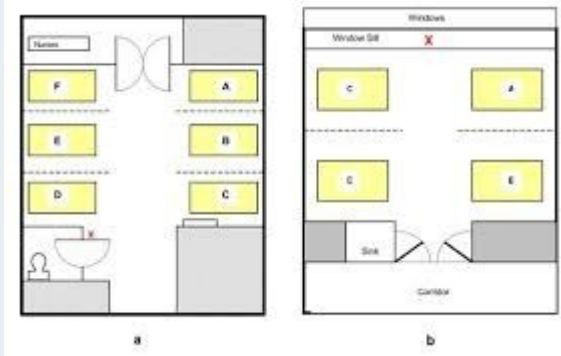
WHY THIS MATTERS

- ✓ Standard Bay IDs create the location reference used for ordering, installation, electronic assignment, and future exchanges.

STEP 4

CREATE THE FACILITY MAP AND PDA REFERENCE

Who: Service Management



INSTRUCTIONS

1. Mark every Bay ID on the facility map or create a clear field map when one is not available.
2. Ask the customer for permission before photographing any site map or facility reference.
3. When permission is granted, take a clear photo and have Service Management add it to the PDA account for field reference.

! IMPORTANT

- ✓ Never photograph or store a customer map without permission.

REMEMBER

- ✓ Make every Bay ID readable.
- ✓ Confirm the photo is clear and complete.
- ✓ Store the approved map reference where future Service associates can find it.

CUSTOMER COMMUNICATION

- ✓ “Would you permit us to take a photo of this site map and store it with the account so future Nixon Medical associates can locate the approved Bays accurately?”

WHY THIS MATTERS

- ✓ An accessible map helps future associates find the correct Bay without relying on memory or local knowledge.

STEP 5

MEASURE MESH AND INSPECT TRACK CONDITIONS

Who: Service Management / Trained Service Team Associate

Mesh Width			
Track Length	Mesh Width	Panels	Carriers
50-60"	66"	1	12
61-112"	124"	2	22
113-167"	184"	3	32
168-220"	242"	4	42
221-272"	300"	5	51
273-325"	358"	6	61

Mesh Height
Mesh Height* = Ceiling Height - 2" - Floor Clearance**
*Mesh height should typically be 20" minimum
**Floor clearance is typically 12" but can be reduced to meet 20" minimum mesh height

INSTRUCTIONS

1. Measure the mesh height where needed and record the required mesh and curtain quantity for each Bay.
2. Note specialty curtain requirements and inspect the track, carriers, hardware, and surrounding area.
3. Document damaged, missing, or non-standard conditions that could delay or prevent installation.

! IMPORTANT

- ✓ Do not assume a standard mesh size or ignore track conditions that could prevent a safe installation.

REMEMBER

- ✓ Record measurements by Bay ID.
- ✓ Photograph exceptions only with permission.
- ✓ Escalate conditions that require repair or customer action.

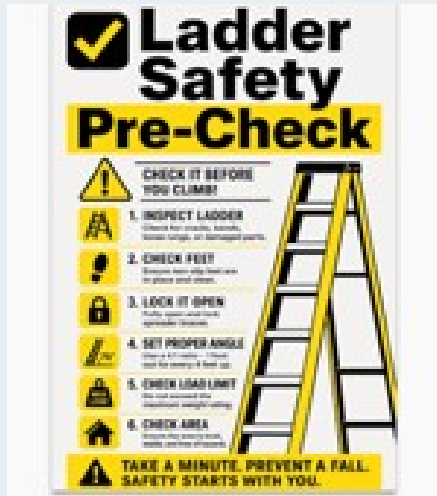
WHY THIS MATTERS

- ✓ Accurate measurements and early exception visibility prevent incorrect orders and incomplete installations.

STEP 6

CONFIRM LADDER AND INSTALLATION READINESS

Who: Service Management



INSTRUCTIONS

1. Identify Bays where one-time mesh installation requires ladder access.
2. Ask permission to use the onsite ladder and complete a general safety check of the rungs and overall condition.
3. If no acceptable ladder is available, arrange for Nixon Medical to bring approved access equipment to the installation.

! IMPORTANT

- ✓ Do not use an onsite ladder that appears damaged, unstable, or unsuitable for the task.

REMEMBER

- ✓ Confirm permission before use.
- ✓ Check rungs and overall condition.
- ✓ Record the final ladder arrangement in the New Account Onboarding file.

CUSTOMER COMMUNICATION

- ✓ “May we use your onsite ladder for the one-time mesh installation? Before the installation, we would also like to complete a brief visual safety check of the rungs and overall condition.”

WHY THIS MATTERS

- ✓ Confirming safe access equipment in advance prevents delays, unsafe improvisation, and incomplete mesh installation.

STEP 7

COMPLETE THE NEW ACCOUNT ONBOARDING HANDOFF

Who: Service Management

Customer Name	Customer Number	Install Date
When	What	Who
Pre-Install	- Service details and primary point of contact (Name, Phone, Email) - Provide customer with Local Service Manager & RSR contact info - Delivery entry requirements (Net, access doors, access codes, or escort) - Delivery day and time window - Initial per level for all items and garment items - Drop-off locations for clean linen and garments, and pick-up area for soiled linen and garments	SRM/RSR
Week 1 (Installation)	- Verify all contact information (name, email address, and phone numbers) - Provide expectations for routine servicing, including details on how the account will be serviced and anticipated service schedule	RSR
Week 2	- Explain GSA (Garment Inventory Management) & Linen (Linen Inventory Management) processes and our commitment to Expert Inventory Management - Establish week 3 intent to conduct inventory, if customer needs garments, week 3 will be a GSA if customer has no garments, a Flat Inventory will be conducted	RSR
Week 3	- Select and deliver a sample product that fits the customer's segment and needs - Drop off catalog and document either a product add attempt or catalog delivery in ABC (Pre-Install Instructions) CRI	RSR
Week 4	- Review call data with SR before service - Identify at least one item for potential per level adjustment - During visit, encourage adjustment and reinforce week 3 inventory commitment - Reconfirm GSA intent for Week 5 reinstallation	RSR/CR
Week 5	- Conduct scheduled inventory with customer - Identify issues, risks and linen storage areas - Review inventory results with SR before next service visit - Address any customer concerns during visit - Obtain customer commitment to continued inventory strategy and document expectations - RSR to review and SR must document in ABC (Pre-Install Instructions) CRI at least one inventory recommendation – even if "no changes needed"	RSR

INSTRUCTIONS

1. Review the Bay IDs, curtain quantities, mesh measurements, access windows, contacts, map, ladder plan, and exceptions with the customer representative.
2. Enter or attach the completed assessment information in the New Account Onboarding file.
3. Communicate the approved information to Sales, Customer Care, the installation team, the assigned RSR, and Service Management.

! IMPORTANT

- ✓ Do not release the account for installation while required information remains incomplete or unverified.

REMEMBER

- ✓ Customer review completed.
- ✓ New Account Onboarding file complete and accessible.
- ✓ Exceptions and ownership clearly assigned.

WHY THIS MATTERS

- ✓ A complete New Account Onboarding handoff turns the walkthrough into a usable installation plan and prevents information from being lost between teams.

SECTION 2 - INITIAL INSTALLATION & ELECTRONIC ASSIGNMENT

VERIFY | INSTALL | INSPECT | DOWNLOAD | SCAN | UPLOAD | CLOSE

The Service Manager or assigned Service Team Associate completes the physical installation and ensures every curtain is electronically assigned to the correct customer and Bay.

Led by the Service Manager. An RSR or another trained Service Team Associate may lead when assigned.

STEP 8

PREPARE FOR THE INITIAL INSTALLATION

Who: Service Manager / Assigned Service Team Associate

Delaware - 42 (Live)
500 CENTERPOINT BLVD., 19720, NEW CASTLE

Phone: 877-776-4966
Fax: 302-764-7543

DELIVERYNOTE

Note Number : 4201005686
Year / week : 2026 / 30 For use from: Monday 07/20/2026 to 07/20/2026
Route : 38 38
Stop : 20
Customer : 42227427 ENDOSCOPY CENTER OF VA
420 WEST LINFIELD TRAPPE RD
BLOG B
19468 LIMERICK
Packed by :
Reference :
Department : 2 Bay 1
Distribution point : 2 Bed 2
Delivery point : 1 -

4201005686

Product	Product Description	Size	Fin method	Delivered Log	Unit Cog
Other Garments					
CSCURTBM	Blue Moon Curtain			4	0 NS

INSTRUCTIONS

1. Review the initial NAN, the current New Account Onboarding file, Delivery Note, facility map, Bay IDs, quantities, access instructions, and documented exceptions.
2. Confirm the curtains, mesh, tools, PDA, PPE, and approved ladder arrangement are ready before departure.
3. Verify the team understands who will install, who will scan, and how customer communication will be handled.

! IMPORTANT

- ✓ Do not depart until the installation scope, product, access, and system readiness are confirmed.

REMEMBER

- ✓ Correct customer and delivery date.
- ✓ Correct mesh and curtain quantities.
- ✓ PDA charged and Garment Assist credentials available.

WHY THIS MATTERS

- ✓ A complete pre-installation check prevents avoidable return trips and incomplete customer work.

**STEP
9****CONFIRM ACCESS AND LOCATE
THE FIRST BAY****Who: Service Manager / Assigned Service Team Associate****INSTRUCTIONS**

1. Meet the customer representative and reconfirm access, safety, escort, restricted-area, and infection-prevention requirements.
2. Use the approved facility map or PDA map reference to locate the first Bay.
3. Confirm the Bay ID, curtain quantity, mesh requirement, and any specialty information before installing product.

! IMPORTANT

- ✓ Stop when the Bay, quantity, map, or installation information does not match the approved New Account Onboarding file or Delivery Note.

REMEMBER

- ✓ Correct Bay ID confirmed.
- ✓ Customer access requirements followed.
- ✓ Exceptions raised before product is installed.

WHY THIS MATTERS

- ✓ Verifying the exact location before work begins prevents installation and electronic assignment to the wrong Bay.

**STEP
10****INSTALL THE MESH AND CURTAIN
PANELS**

Who: Service Manager / Assigned Service Team Associate

**INSTRUCTIONS**

1. Install the required mesh during the initial installation using the approved access equipment.
2. Snap each curtain panel securely into the mesh and orient the finished side consistently.
3. Confirm the curtain moves freely, closes properly, and provides the intended privacy coverage.

! IMPORTANT

- ✓ Mesh is installed one time. Routine scheduled exchanges replace the curtain panels, not the mesh.

REMEMBER

- ✓ Every snap is secure.
- ✓ Curtain panels hang evenly.
- ✓ Movement, closure, and coverage are confirmed.

WHY THIS MATTERS

- ✓ Correct installation provides safe, functional privacy and creates a consistent CareShield appearance.

**STEP
11****INSPECT AND COMPLETE EVERY
BAY**

Who: Service Manager / Assigned Service Team Associate

**INSTRUCTIONS**

1. Inspect the completed Bay for track movement, hardware condition, cleanliness, mesh fit, curtain appearance, and coverage.
2. Correct what can be safely corrected and document any unresolved condition.
3. Repeat the Bay verification, installation, and quality check until every Bay on the Delivery Note and facility map is complete.

! IMPORTANT

- ✓ Do not leave a Bay incomplete or move forward without documenting an unresolved condition.

REMEMBER

- ✓ Every planned Bay addressed.
- ✓ Track and hardware concerns documented.
- ✓ Customer representative informed of unresolved items.

WHY THIS MATTERS

- ✓ A consistent quality check prevents missed locations and ensures the customer receives a complete installation.

STEP 12

OPEN GARMENT ASSIST AND SELECT THE CUSTOMER

Who: Service Manager / Assigned Scanner



INSTRUCTIONS

1. Minimize Route Assist, confirm Wi-Fi is on, and open Garment Assist.
2. Enter the assigned login and select the correct customer account.
3. Choose Download, confirm Start Inventory is highlighted, and verify the scan field is active.

! IMPORTANT

- ✓ Do not scan until the correct customer and active Start Inventory screen are confirmed.

REMEMBER

- ✓ Correct customer selected.
- ✓ Download completed.
- ✓ Blinking cursor or dash is active in the scan field.

WHY THIS MATTERS

- ✓ Starting in the correct electronic record ensures every scanned curtain is assigned to the intended customer and Bay.

**STEP
13****SCAN AND ASSIGN EVERY
INSTALLED CURTAIN****Who: Service Manager / Assigned Scanner****INSTRUCTIONS**

1. Scan each installed curtain barcode individually while working from the correct Bay ID.
2. After every scan, confirm green OK appears and the scan count increases.
3. Continue until every curtain installed at the customer and Bay has been recorded.

! IMPORTANT

- ✓ Never use one barcode for multiple curtains and never leave an installed curtain unscanned.

REMEMBER

- ✓ One physical curtain equals one successful scan.
- ✓ Green OK confirmed after each scan.
- ✓ Customer and Bay ID remain correct throughout the process.

WHY THIS MATTERS

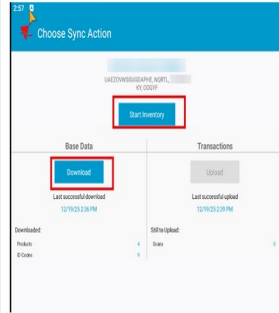
- ✓ Individual scanning creates the traceable inventory record needed for future exchange and customer accountability.

STEP 14

UPLOAD AND CLOSE THE INSTALLATION

Who: Service Manager / Assigned Scanner

Then select Download in order to get the latest data to the device – this has to be done when there is an internet connection, either on wifi or cellular network. Once this is downloaded to the device, press the !
Inventory to begin scanning



INSTRUCTIONS

1. Return to Choose Sync Action and select Upload after all required curtains are scanned.
2. Confirm the upload completes successfully, close Garment Assist, and return to Route Assist.
3. Review the completed installation with the customer, address or document concerns, and complete the service record.

! IMPORTANT

- ✓ The installation is not electronically complete until the upload succeeds.

REMEMBER

- ✓ Upload confirmation received.
- ✓ Customer review completed.
- ✓ Route Assist service close completed and exceptions documented.

CUSTOMER COMMUNICATION

- ✓ “We have completed the approved Bays and electronically assigned each curtain. Let’s review the installation together and note anything that still requires follow-up.”

WHY THIS MATTERS

- ✓ Successful upload and customer review close both the electronic and service portions of the installation.

SECTION 3 - SCHEDULED CURTAIN EXCHANGE & PLANT RETURN

VERIFY | LOCATE | REMOVE | INSTALL | SCAN | UPLOAD | RETURN | IN SCAN

The RSR owns the full exchange cycle from route preparation through customer service, return, plant IN SCAN, and controlled curtain placement.

Owned by the RSR from preparation through customer exchange, Garment Assist recording, plant IN SCAN, and return-area placement.

**STEP
15****REVIEW THE PUT-UP AND VERIFY
THE ROUTE BUNDLE****Who: RSR****INSTRUCTIONS**

1. Review the next service day's Put-Up to identify customers and Bay IDs scheduled for exchange.
2. Before departure, locate the correct route cubby and compare the curtain bundle and visible Delivery Note to the Put-Up.
3. Confirm the customer, route, delivery date, Bay IDs, and clean curtain quantity match.

! IMPORTANT

- ✓ Do not leave the plant with a missing, partial, damaged, or mismatched curtain bundle.

REMEMBER

- ✓ Put-Up reviewed before the service day.
- ✓ Delivery Note visible and attached.
- ✓ Quantity and route verified before departure.

WHY THIS MATTERS

- ✓ Pre-service verification prevents missed exchanges, wrong quantities, and unnecessary return trips.

STEP 16

LOCATE THE SCHEDULED BAY AND EXPLAIN THE EXCHANGE

Who: RSR

Delaware - 42 (Live)
500 CENTERPOINT BLVD., 19720, NEW CASTLE

Phone :
Fax :

DELIVERYNOTE

Note Number : 4201005686
Year / week : 2026 / 30 For use from: Monday 07/20/2026 to 07/20/2026
Route : 38 38
Stop : 20
Customer : 42077427 ENDOSCOPY CENTER OF VA
420 WEST LINFIELD TRAPPE RD
8 LOG 8
19488 LIMERICK
Department : 2 Bay 1
Distribution point : 2 Red 2
Delivery point : 1 -



4201005686

Product	Product Description	Size	Fin method	Delivered Log Cog	Unit
Other Garments					
CSCURBIM	Blue Moon Curtain			4	0 NS

INSTRUCTIONS

1. At the customer, use the Delivery Note and approved map reference to locate the exact Bay ID or Room ID.
2. Confirm access requirements and briefly explain the planned exchange to the customer contact or area representative.
3. Verify the clean curtain quantity before removing any existing curtain.

! IMPORTANT

- ✓ Do not remove a curtain until the correct Bay and replacement quantity are confirmed.

REMEMBER

- ✓ Correct Bay ID located.
- ✓ Customer aware of the work.
- ✓ Replacement product ready before removal begins.

CUSTOMER COMMUNICATION

- ✓ "We are here for the scheduled CareShield exchange at this Bay. We will remove the current panels, install the clean replacements, scan each new curtain, and contain the removed curtains for return to the plant."

WHY THIS MATTERS

- ✓ Confirming the location and plan protects the customer from an incomplete or incorrect exchange.

**STEP
17****REMOVE AND CONTAIN THE
SCHEDULED CURTAINS****Who: RSR****INSTRUCTIONS**

1. Remove every curtain panel assigned to the scheduled Bay.
2. Place each removed curtain immediately into the designated soiled-curtain bag.
3. Keep the bag controlled and separated from clean replacement curtains throughout the visit.

! IMPORTANT

- ✓ Never place removed curtains on beds, counters, floors, or clean product.

REMEMBER

- ✓ All existing panels removed.
- ✓ Soiled product contained immediately.
- ✓ Clean and soiled curtains remain separated.

WHY THIS MATTERS

- ✓ Immediate containment reduces cross-contamination risk and keeps the exchange controlled.

**STEP
18****INSTALL AND VERIFY THE CLEAN
REPLACEMENT CURTAINS****Who: RSR****INSTRUCTIONS**

1. Snap the clean curtain panels into the existing mesh at the correct Bay.
2. Confirm the panels are secure, oriented consistently, and move freely on the track.
3. Close the curtain fully to verify coverage, appearance, and function before scanning.

! IMPORTANT

- ✓ Do not consider the Bay complete until the clean curtains are secure, functional, and provide the intended coverage.

REMEMBER

- ✓ Correct number of clean panels installed.
- ✓ Every snap secure.
- ✓ Movement, closure, and privacy coverage verified.

WHY THIS MATTERS

- ✓ The physical quality check ensures the customer receives a clean, functional privacy solution at every scheduled exchange.

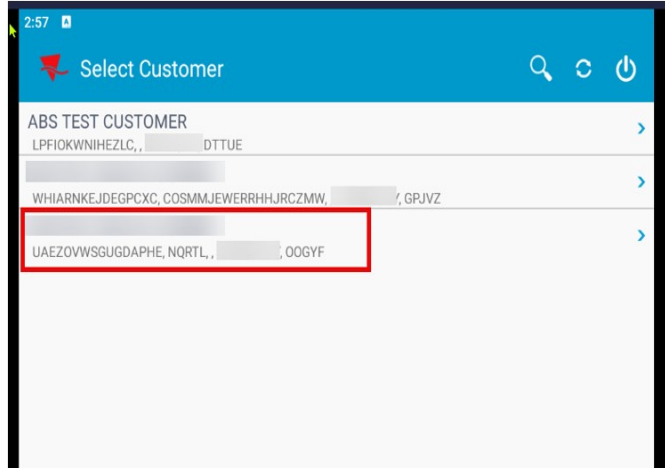
STEP 19

RECORD THE EXCHANGE IN GARMENT ASSIST

Who: RSR

Garment Assistant scanning

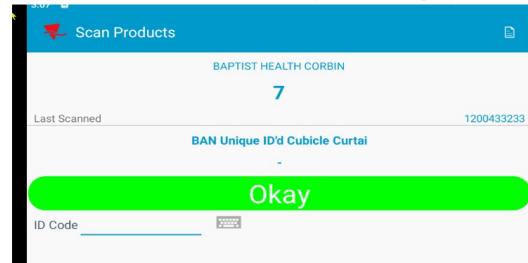
On the Garment Assistant, after logging in, select the customer where the scanning will be done



INSTRUCTIONS

1. Open Garment Assist, confirm Wi-Fi, sign in, select the correct customer, and Download the current customer data.
2. Confirm Start Inventory and the active scan field, then scan every clean curtain installed during the visit.
3. Confirm green OK and the increasing scan count after each barcode.

On the scan screen – when the curtains are scanned, a confirmation is given, and the count increases accordingly



! IMPORTANT

- ✓ Every clean curtain installed during the visit must be scanned individually to the correct customer and Bay.

REMEMBER

- ✓ Correct customer selected.
- ✓ Green OK after each scan.
- ✓ Scan count matches the installed quantity.

WHY THIS MATTERS

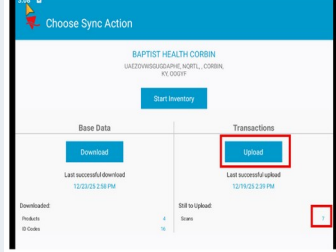
- ✓ Accurate Garment Assist records keep customer inventory and future compliance scheduling reliable.

STEP 20

UPLOAD AND COMPLETE EVERY SCHEDULED BAY

Who: RSR

Once scanning is done – go back to the sync action screen in the app and the number of scans to upload is visible – press the Upload button to connect to the server and pass the data back accord



INSTRUCTIONS

1. After scanning is complete, select Upload and confirm the activity transmits successfully.
2. Return to Route Assist and complete the customer service record.
3. Repeat the remove, bag, install, scan, verify, and upload process until every scheduled Bay on the Put-Up is complete.

! IMPORTANT

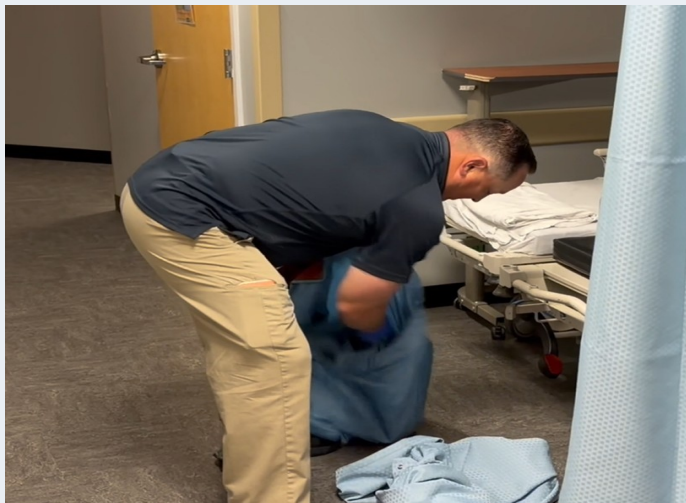
- ✓ Do not leave the customer with an unuploaded transaction or an undocumented incomplete Bay.

REMEMBER

- ✓ Upload success confirmed.
- ✓ Every scheduled Bay addressed.
- ✓ Incomplete work communicated to the Service Manager before the end of the route day.

WHY THIS MATTERS

- ✓ Completing each Bay and uploading each transaction closes the planned customer service activity.

**STEP
21****SECURE AND RETURN THE
SOILED CURTAINS****Who: RSR****INSTRUCTIONS**

1. Secure all bagged soiled curtains on the route truck so they remain contained during transport.
2. Return the curtains to the plant at the end of the route or established return time.
3. Take the bagged curtains directly to the assigned CareShield curtain-return area.

! IMPORTANT

- ✓ Do not leave returned curtains on the truck or in an uncontrolled plant location.

REMEMBER

- ✓ Bags secured for transport.
- ✓ All removed curtains returned.
- ✓ Assigned curtain-return area used.

WHY THIS MATTERS

- ✓ Controlled return keeps soiled product accounted for and ready for the required plant inventory scan.

**STEP
22****IN SCAN EVERY RETURNED
CURTAIN****Who: RSR****INSTRUCTIONS**

1. At the designated ABS plant scanning station, choose IN SCAN.
2. Scan each returned curtain barcode or manually enter the barcode when required.
3. Confirm each curtain is removed from the customer and Bay ID and returned to pool inventory before placing it in the return area.

! IMPORTANT

- ✓ No returned curtain may enter plant processing without a successful IN SCAN.

REMEMBER

- ✓ Every barcode processed.
- ✓ Customer and Bay assignment removed.
- ✓ Exceptions held in the controlled area and reported.

WHY THIS MATTERS

- ✓ The IN SCAN closes the customer inventory cycle and prevents curtains from remaining incorrectly assigned.

FINAL FIELD CHECKLIST**ASSESSMENT COMPLETE**

- ✓ Every approved area assessed
- ✓ Standard Bay IDs assigned
- ✓ Curtain quantities and mesh measurements recorded
- ✓ Map completed and approved photo added to PDA when permitted
- ✓ Ladder plan confirmed
- ✓ Initial NAN reviewed; New Account Onboarding file completed and communicated

INITIAL INSTALLATION COMPLETE

- ✓ Correct Bays and quantities installed
- ✓ Curtains snapped securely into mesh
- ✓ Movement, closure, and coverage verified
- ✓ Every barcode scanned to customer and Bay ID
- ✓ Green OK confirmed after each scan
- ✓ Upload and Route Assist close completed

SCHEDULED EXCHANGE COMPLETE

- ✓ Put-Up and bundle verified
- ✓ Every scheduled Bay exchanged
- ✓ Removed curtains bagged and returned
- ✓ Every clean curtain scanned and uploaded
- ✓ Every returned curtain IN SCANNED
- ✓ Curtains placed in assigned return area
- ✓ All exceptions communicated

STOP AND ESCALATE WHEN

- ✓ Access or safety requirements cannot be met.
- ✓ The customer, Bay ID, quantity, product, map, or Delivery Note cannot be verified.
- ✓ A barcode does not return green OK, the scan count does not increase, or the upload fails.
- ✓ A returned curtain cannot be IN SCANNED.
- ✓ The work would be left incomplete or undocumented.

TRAINING AND DOCUMENT CONTROL

TRAINING METHOD

- ✓ Review the controlling 1BW.
- ✓ Use this guide to demonstrate the task.
- ✓ Allow supervised practice.
- ✓ Verify competent performance before independent work.

Trainer:

Date:

Trainee:

Date:

Role:

Location:

Verification:

- ☐ Demonstrated ☐ Practiced
☐ Verified Competent