The information contained in this program manual supports the Dealers Service and Wholesale Parts Department by providing information about how to submit, change and appeal Ford Fleet Care claims in the OWS (One Warranty Solution) System.
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</tbody>
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Introduction to the Ford Fleet Care Program and its background

The Ford Fleet Care program is a comprehensive consolidated billing program for fleet customers.

The Service Billing Program provides a fleet customer a consolidated monthly bill and enables a single payment for all maintenance and repair services. Ford Protect Extended Service Plan covered repair detail is also provided to the customer. Enrolled vehicles may use any Ford or Lincoln dealership and Quick Lane Tire & Auto Center in the United States or Canada for service.

The Parts Billing Program extends consolidated billing convenience to include the purchase of Ford or Motorcraft branded parts direct from any Ford or Lincoln dealership in the United States or Canada.

Ford Fleet Care Service Billing Program – Customer Benefits

- No enrollment fee
- No administrative fee
- No monthly or per vehicle fees
- No credit card or cash for customer payment
- No membership card needed
- Non-Ford vehicle eligibility – All competitive-make vehicles eligible for enrollment
- Pre-set Spending Limit – Repair visits exceeding the pre-set limit require fleet approval prior to start of repair work (excluding warranty and Ford Protect Extended Service Plan deductibles)
- Consolidated Billing – One bill for services performed by USA and Canada approved service providers
- National Programs – Enhanced Roadside Assistance and Glass repair/replacement
- My Fleet Care – Online account management tool
- Website – No-charge business reports and program information available
- Electronic billing and EFT payment available

Ford Fleet Care Parts Billing – Customer Benefits

- No enrollment fee
- No administrative fee
- No monthly fee
- No credit card or cash for customer payment
- Purchase Control - All purchases require customer approval
- Consolidated Billing – One bill for parts purchased from USA and Canada approved service providers
- My Fleet Care – Online account management tool
- Website – No-charge business reports and program information available
- Electronic billing and EFT payment available

Ford Fleet Care – Dealership Benefits

- No merchant or transaction fees
- Payment to Dealer Parts Statement
  - Parts billed through Ford Fleet Care eligible for WINS
  - Online reports available at www.fleetcare.ford.com
  - Program and claim entry assistance available from Ford Fleet Program Headquarters at 1-800-367-3221.
Getting Started - Enrollment

All customers must complete the Ford Fleet Care Credit Application prior to enrollment. The application can be downloaded and printed online from the Ford Fleet Care website (www.Fleetcare.ford.com).

Before submitting a credit application to Ford Fleet Program Headquarters, please ensure that the provisions has been reviewed with the customer. This is located on the back of the Credit Application for your convenience.

Submit the Credit Application to Ford Fleet Program Headquarters:
Fax to 1-313-390-3555 or 1-313-390-7227        Email ffcadmin@ford.com
Mail to Ford Fleet Program Headquarters, 19855 W. Outer Drive, GPE #500, Dearborn, MI 48124

Incomplete, incorrect or obsolete applications cannot be processed and will be returned to the customer or dealership for correction or additional information. When completing the Ford Fleet Care Credit Application, remember to:

• Use the most current application (found online at www.fleetcare.ford.com)
• Print or type all information legibly
• Fully complete the Repair Service and Parts Authorization section
• Include tax exemption forms (if applicable)
• Identify and include any additional forms (corporate vendor, state requirements)
• Indicate payment method

All applicants are subject to credit verification through a National Credit Bureau prior to acceptance. Please inform the customer of the credit evaluation prior to submitting the credit application for review.

Ford Fleet Program Headquarters will provide notification of application approval or denial directly to the customer by mail. The enrolling dealership will also be notified of customer acceptance or denial. Approved applicants will receive a welcome packet including program information and answers to frequently asked questions.

Approved applicants for the Ford Fleet Care parts billing program will receive a Ford Fleet Care Parts Billing Card. The billing account number will be preprinted on the card, along with fleet customer contact information. This will also be sent along with the customer welcome packet upon enrollment.
Account Setup and VIN Maintenance

After a fleet customer has been approved for enrollment, a list of vehicles must be provided to Ford Fleet Program Headquarters in order to activate the customer account. VIN listings should be sent in electronically – preferably in a Microsoft Excel format to expedite enrollment.

Fleet customers are responsible for notifying Ford Fleet Care Headquarters when a vehicle is taken out of service. **Always verify through the OASIS system that a vehicle is currently enrolled in the program before performing service (see the Service Advisor Information section for additional details).** Fleet customers will be responsible for charges incurred on vehicles not removed from the program.

For account maintenance or questions, such as:

- Vehicle additions and removal
- Address and contact information changes
- Changing the pre-set repair authorization limit
- Billing disputes or corrections

Dealership personnel and fleet customers can contact Ford Fleet Program Headquarters at 1-800-367-3221.

Monthly Billing

For each billing period, customers will receive a consolidated bill of all repair services performed or parts purchased from authorized service providers. The billing packet will include a statement of account, an invoice for the billing period, summary and detail of charges.
Service Advisor Information - Identifying a Ford Fleet Care Vehicle

A vehicle can be identified by the OASIS system.

- Always verify through the OASIS system that the vehicle is currently enrolled in the program. This should be done prior to writing the repair order. Remember to write down the Fleet approval amount and to contact the customer for approval as needed.

**IMPORTANT!** If there is a Ford Protect Extended Service Plan (Ford Protect ESP) registered to the vehicle, verify repair coverage. If the repair is covered by the Ford Protect ESP plan, make sure to write the repair as a Ford Protect ESP covered repair – NOT as a customer paid repair. Incorrectly submitting a covered claim will result in a charge to the fleet customer and potential chargeback of the claim to the submitting dealer.

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- Ford Protect ESP Contract Coverage Information
- FORD FLEET CARE Enrollment Information
- Fleet Approval Amount and Fleet Customer Contact Information

---

**Important Tax Note:**
Be sure to charge applicable tax as required on a retail repair unless the account is tax exempt as noted in OASIS or advised by the customer.
Prepare Estimate and Obtain Approval

If the estimated Total Customer Paid Repair amount exceeds the Fleet approval amount displayed in OASIS:
Contact the Fleet Company Representative (displayed in OASIS) for approval prior to performing the repair. If the estimate changes, re-contact the Fleet Administrator for approval for the added costs.

**NOTE:** Repairs performed without the Fleet Company Representative approval or exceed the authorized amount the claim will be charged back.

If the estimated Total Customer Paid Repair amount does not exceed the fleet prior approval limit:
Do not contact the Fleet Administrator – proceed with the repair up to the dollar limit displayed in OASIS.

**NOTE:** Ford Protect Extended Service Plan Deductibles do not require an authorization code.

**IMPORTANT:** Drivers must sign and be provided with a copy of the Retail Repair Order indicating the amount the fleet will be billed.

Submit for Payment
Submit claim in OWS with either Sub Code:
- QFC (Ford, Lincoln, Mercury Vehicles)
- QFCC (Competitive Make Vehicles and trailers)
Detailed claiming instructions available in the Dealer Program Manual located at www.fleetcare.ford.com
For submitted claims returned unpaid, contact Fleet Program Headquarters at 1-800-367-3221 for assistance.

Charging Tax
Tax should be billed as required on a retail repair, unless the customer is tax exempt as advised by the customer or noted on OASIS. If a customer is tax exempt, the tax exemption number should be noted on the repair write-up. Repairs submitted through OWS for payment without a tax entry will be returned to the dealership.

**NOTE:** Tax should be billed as required on a retail repair, unless the fleet account is tax exempt as noted on OASIS, or as advised by the customer.
Parts Department Guide – Identifying Ford Fleet Care Wholesale Parts Billing Customer

All participants of the Ford Fleet Care Parts Billing program are issued a membership card. To ensure the customer is still an active member of the Ford Fleet Care Parts Billing program, please verify the status of billing customer privileges on the Ford Fleet Care website at www.fleetcare.ford.com and select the NFPP/Parts Billing Tab.

Purchase Order Write-Up

Preparing a parts purchase order write-up is a simple three-step process:

**Step One - Verify Consolidated Billing Account Status**
- Access the Ford Fleet Care website at: www.fleetcare.ford.com
- Select the tab labeled: "NFPP/Parts Billing"
- Select the link labeled: "Consolidated Billing Account Enrolled Fleets"
- View the spreadsheet to verify if the customer is still an active participant

**IMPORTANT!** If the fleet account is not listed, the customer is not eligible for Ford Fleet Care Parts Billing Program and payment arrangements for the parts purchase should be made directly with the customer.

**Step Two - Obtain Customer Approval**
- **All** parts purchased must be approved by the fleet account
- Contact the Fleet Administrator at the telephone number located on the back of the card with the total cost of the parts being purchased
- Obtain a purchase order for the full amount of the transaction

**Step Three - Bill Parts Purchase using OWS**
- Obtain the Customer’s 11 Digit Consolidated Billing Account Number
- Refer to page 64 for claiming instructions

**IMPORTANT!** Tax should be billed as required on a wholesale part sale, unless the customer is tax exempt as advised by the customer. If the customer is tax exempt, the tax exemption number should be noted on the purchase order write-up. Claims submitted through OWS

Questions: Contact Ford Fleet Program Headquarters at 1-800-367-3221 or by email at: ffadmin@ford.com
Introduction to OWS

The information contained in this user guide is to support the Dealers by providing information about how to submit Ford Fleet Care claims (claim type 61) in the ONE Warranty Solution (OWS) system. OWS provides a single interface to manage many aspects dealing with submitting, tracking and managing the claiming process including:

- Initial Preparation and Submission of Claims
- Tracking and Updating Claims when further action is required
- Appealing a Claim decision
- Tracking and Managing the Return of Parts
- Accounting (credits, debits and account reconciliation)
- Dealership Management System (DMS) connectivity with OWS

OWS is the Ford Motor Company warranty claim processing system. Integrate seamlessly with OWS online version to submit claims.

This user guide does NOT cover:

- DMS operation
  - If a dealer uses a DMS to electronically submit claims to Ford, this guide does not address operation of the DMS (including DMS screens which are called “OWS” or “One Warranty Solutions”). There are more than 150 DMS providers to Ford globally. Each DMS has a unique screen display. Please contact your DMS if support is required.

- Warranty Policies or other published policies
  - Please refer to the Warranty & Policy Manual for your specific country, along with other coverage and policy programs.

DMS Submission

Due to the variety of Dealer Service Providers (DSPs) and the various software platforms they provide, it is not possible for Ford to provide detailed instructions as to the usage of these dealership “in-house” software systems.

It is recommended that you refer to the documentation provided by your DSP and/or contact them for assistance with your software.
OWS Homepage/ Main Web-Portal Page

Log onto OWS using the portal which may utilize any of the following:

- Direct link to OWS at https://www.warrantyprocessing.dealerconnection.com
- FMCDealer – Parts & Service – Warranty Administration & Warranty Part Return – OWS Online Portal

After logging into OWS with your login and password, the below screen will appear, which we will refer to as the Home Page or Web-Portal page throughout this manual. This screen allows you to enter a claim, view a claim status report, view the parts status report and view posting statements.

Note: For the purpose of this User Guide, the Web-Portal page is referred to as the Home Page.
Getting Started

Let’s take a look at the screens that will be used to submit a Ford Fleet Care Program claim. Below is a close up view of the Home page. Note that after you log in your ID will show on the top bar to the right of the Ford and Lincoln logo. Click the “Enter a Claim” link to start the claim process.
**Repair Order Creation Screen**

Once you click the “Enter a Claim” on the Home Page, the “Repair Order Creation” screen will appear.

All fields with an asterisk are required to create the claim, however the more information entered, the more detailed the claim will be. Once you have entered the information on this screen, click the “Create” button to start creating the claim.

*Note: Your Dealership Name and Dealer Code will be displayed in the appropriate space where the arrows are pointing in the below image.*

![Image of Repair Order Creation Screen]

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIN</td>
<td>Vehicle Identification Number or Part Sale Number.</td>
</tr>
<tr>
<td>Service Advisor ID</td>
<td>A unique 9 digit number for the Service Advisor.</td>
</tr>
<tr>
<td>Repair Order Number</td>
<td>A unique number given for each Repair Order up to 10 digits.</td>
</tr>
<tr>
<td>Repair Order Open Date</td>
<td>The date that the Repair Order was opened.</td>
</tr>
<tr>
<td>Odometer at Repair Order Open</td>
<td>The odometer reading when the Repair Order was opened. For a QFCP (Parts only purchase) claim, the mileage is 20.</td>
</tr>
<tr>
<td>Special Use Vehicle Description</td>
<td>Description of the special vehicle like dump truck (may be specified by customer.)</td>
</tr>
<tr>
<td>Engine Operating Hours at Repair Order Open</td>
<td>Mostly diesel utility vehicles engine operating hours.</td>
</tr>
<tr>
<td>License Location</td>
<td>The location of the repair state.</td>
</tr>
</tbody>
</table>
Claim Entry Screen

Information will be displayed in the upper section from the information that was inputted onto the previous screen called the “Repair Order Creation” screen. This screen will need more information to complete the claim. This image shows the screen in its entirety. We will look at the different sections in further detail next.
### Repair Information

<table>
<thead>
<tr>
<th><strong>Repair Line Number</strong></th>
<th>The item entered into the field is a number, letter or alphanumeric character associated with each unique repair on the repair order.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Claim Type</strong></td>
<td>A two digit code identifies the claim repair type or category used to process a claim, for Ford Fleet Care use 61.</td>
</tr>
<tr>
<td><strong>Sub-Codes</strong></td>
<td>Use QFC for service on a Ford vehicle, QFCC for service on a non-Ford vehicle or trailer or QFCP for Wholesale Parts Purchase.</td>
</tr>
<tr>
<td><strong>Repair Line Completion Date</strong></td>
<td>The date can be typed using this format “mm/dd/yyyy” or just click the calendar icon next to the date field to select a date.</td>
</tr>
<tr>
<td><strong>Odometer Reading at Repair Completion</strong></td>
<td>The odometer reading at the time of the repair line completion. For a QFCP (Parts only purchase) claim, the mileage is 20.</td>
</tr>
<tr>
<td><strong>Customer Concern Codes</strong></td>
<td>Use customer concern code A99 only.</td>
</tr>
<tr>
<td><strong>Approval Code</strong></td>
<td>Enter each Approval code for each item needing an Approval code. If other approval codes are needed, click the “+” icon. Mostly used for dealer self-approval codes for time or mileage issues. Not used for Fleet customer Purchase Order numbers.</td>
</tr>
<tr>
<td><strong>Pre-Defined Repair Code</strong></td>
<td>A code that defines the authorized repair bill of material as identified in service publication. The code is entered by the dealer and will auto populate all individual parts, labor and miscellaneous amounts for that claim.</td>
</tr>
<tr>
<td><strong>Condition Codes</strong></td>
<td>Use condition code “82” only.</td>
</tr>
<tr>
<td><strong>Engine Operating Hours at Repair Completion</strong></td>
<td>Reading of engine operating hours if present in vehicle (e.g. diesel, industrial) at Repair Line close.</td>
</tr>
<tr>
<td><strong>Manual Review Required Indicator</strong></td>
<td>Dealer request that an assessor review the claim, prior to final disposition.</td>
</tr>
<tr>
<td><strong>Dealer Participation</strong></td>
<td>Special pricing or discount is entered here.</td>
</tr>
<tr>
<td><strong>License Num</strong></td>
<td>The license plate number.</td>
</tr>
<tr>
<td><strong>Driver Name</strong></td>
<td>Name of the Driver or ID number for the Fleet.</td>
</tr>
<tr>
<td><strong>Fleet Company Name</strong></td>
<td>Name of the Fleet Company.</td>
</tr>
<tr>
<td><strong>Fleet Approved Amount</strong></td>
<td>Provide the dollar amount of the Purchase Order (PO) value approved by the Fleet Administrator.</td>
</tr>
<tr>
<td><strong>Driver Card ID</strong></td>
<td>If available.</td>
</tr>
<tr>
<td><strong>Fleet Purchase Order Num</strong></td>
<td>This is required on QFC and QFCC claims that exceed the Fleet Approval Amount For QFCP claims, a call to the Fleet Administrator is required.</td>
</tr>
</tbody>
</table>

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OWS Instructions for the Ford Fleet Care Program V1.1
Comments Information Supporting OSP, OSL, Misc. and Other

Technician Comments are mandatory for getting claims paid and having detail information about what parts and/or labor are used including the cost. Here are technician comments that are required to get a claim through the approval process quicker and examples of how they should be spelled out:

- Outside Purchased Part (OSP) is used for any part that is not a Ford or Motor craft part
  - OSP for $$$ is for part description (OSP FOR $50.00 IS FOR SPARK PLUGS)
- Outside Labor (OSL) is used for any labor outside the dealership
  - OSL for $$$ is for labor description (OSL FOR $150 IS FOR GLASS REPAIR BY OUTSIDE VENDOR NAME)
- Misc. for $$$ is for item description (MISC. FOR $10.00 IS FOR TIRE DISPOSAL)
- Other for $$$ for item description (OTHER FOR $100 IS FOR SHOP SUPPLIES)

Misc. and Other include environmental fees, shop supplies, special disposal fees (tires/batteries), tire taxes, etc.

**Note:** If you get a claim returned, read the entire message from the Claim Specialist and return the claim with the needed information. If the information is incomplete, the Claim Specialist will return the claim until all the information has been given.

Customer Comment field has a limit of 2,000 characters. Technician Comments field has a limit of 2,000 characters. This is a mandatory field for the Ford Fleet Care Program. **Note:** The detail within the Technical Comments section is provided to the Fleet Customer when billed.

Parts Information

- Ford/Motorcraft/Omnicraft part numbers must be typed in without spaces or hyphens
  - Up to 200 additional lines can be added by clicking the “+” icon
- Pseudo Part Numbers are listed within the search icon if needed can be used in place of Ford, Motorcraft or Omnicraft recognized part numbers. However, an explanation will be required in the Technicians Comments to explain what is being entered.
- When specialty part is required from an outside source, use labor code OSP, add the Invoice Number, the amount being claimed and explain in the Technicians Comments section.

**Note:** OWS will **NOT** automatically price the claim.

<table>
<thead>
<tr>
<th>Causal PartNum</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Invoice Number</th>
<th>Markup</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>F8UZ 3851 AA</td>
<td>KNOB - HEATER BLOWER SWITCH</td>
<td>1</td>
<td>19.50</td>
<td></td>
<td></td>
<td>19.50</td>
</tr>
<tr>
<td>1U2Z 14511 BB</td>
<td>KIT - WIRING PIGTAIL</td>
<td>1</td>
<td>42.00</td>
<td></td>
<td></td>
<td>42.00</td>
</tr>
<tr>
<td>F492 35986 A</td>
<td>SWITCH ASY</td>
<td>1</td>
<td>25.50</td>
<td></td>
<td></td>
<td>25.50</td>
</tr>
</tbody>
</table>

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OWS Instructions for the Ford Fleet Care Program V1.1
Labor Information

- Labor code for Ford Fleet Care is L001. Note the code is the letter L followed by 2 zeros and the then number 1. All requested labor should be totaled and entered on this line.
- Additional lines can be added by clicking the “+” icon.
- When specialty labor is required from an outside source, use labor code OSL, add the Invoice Number, the amount being claimed and explain in the Technicians Comments section.

### Labor Information

<table>
<thead>
<tr>
<th>Labor Operation Code</th>
<th>Description</th>
<th>Technician ID</th>
<th>Hours</th>
<th>Labor Rate invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>L001</td>
<td>LABOR</td>
<td></td>
<td>2.0</td>
<td></td>
<td>200.00</td>
</tr>
</tbody>
</table>

Miscellaneous Information

- Additional lines can be added by clicking the “+” icon
- Click on the search icon to display ALL miscellaneous codes

**Note:** Information listed under Miscellaneous Information section must have a Technician note describing the amount and what part or labor was used. An example is “Misc. for $$$$$ is for tire disposal fee”.

### Miscellaneous Information

<table>
<thead>
<tr>
<th>Miscellaneous Expense Code</th>
<th>Description</th>
<th>Num of Days</th>
<th>Hours</th>
<th>Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX</td>
<td>TAX</td>
<td></td>
<td></td>
<td></td>
<td>4.79</td>
</tr>
</tbody>
</table>

All QFC, QFCC and QFCP claims require a tax line entry even if there is no tax being charged. Enter 0.00 if the Fleet is tax exempt.

Repair Line Subtotal

- The Repair Line Subtotal section automatically displays the sub totals for Parts, Labor, and Miscellaneous as well as any previously noted Customer/Dealer Participation.
- The Subtotal section will also apply the appropriate Tax and any needed deductions.
- This section gives the user a view of the financial impact of the claim to be submitted once PreValidation has been run.

### Repair Line Sub Total

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAWA</th>
<th>Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>87.00</td>
<td>0.00</td>
<td>0.00</td>
<td>87.00</td>
</tr>
<tr>
<td>Labor</td>
<td>200.00</td>
<td>0.00</td>
<td>0.00</td>
<td>200.00</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>4.79</td>
<td>0.00</td>
<td>0.00</td>
<td>4.79</td>
</tr>
<tr>
<td>(Customer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td>291.79</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Action Buttons

- **Next Repair**: Triggers PreValidation of current Repair Line and allows access to the next Repair Line.
- **PreValidate**: Allows OWS to instantly check a claim for most common exceptions before it is submitted. Make corrections as needed and pre-validate again until no exceptions appear.
- **Submit**: Allows the claim to be submitted if no critical exceptions are discovered.
- **Cancel RL**: Allows the user to cancel the displayed repair line prior to submission.
- **Cancel RO**: Allows the user to cancel an entire Repair Order.

*Note*: Selecting Submit triggers all applicable rules needed for the claim to be submitted to Ford. Any exceptions will appear in the top left area of the claim and will need to be corrected before the claim can be submitted.

If no exceptions are found, the claim will display a Green Check Mark with a successful submission note above the Repair Information section of the claim.

![Validation Successful]
Ford Fleet Care Program Claim Type

The chart below describes the Ford Fleet Care Program Claim Type and show examples of how Sub Codes relate to Claim Type. New Sub Codes may be added based on program needs and therefore are subject to change.

<table>
<thead>
<tr>
<th>Claim Type</th>
<th>Claim Use Criteria / Definition</th>
<th>New Sub Code Field (Program Code)</th>
</tr>
</thead>
<tbody>
<tr>
<td>61 - Fleet (QFC)</td>
<td>A comprehensive parts and service billing program for fleet customers with vehicle repairs or part purchases from Ford or Lincoln dealers.</td>
<td>QFC, QFCC, QFCP</td>
</tr>
</tbody>
</table>

Sub Code/Program Code Explanation

QFC, QFCC and QFCP are the 3 codes used for Ford Fleet Care Program.

- **QFC** is used to claim customer paid maintenance/repairs services for Ford/Lincoln/Mercury vehicles.
- **QFCC** is used to claim customer paid maintenance/repair services for non-Ford vehicles.
- **QFCP** is used for parts purchased over the counter.
Starting a Claim Entry

The Claim Entry process begins with selecting “Enter a Claim” on the OWS homepage which will take you to the Repair Order creation page.

Claim Entry Information

A Repair Order (RO) is the form which all repairs for a single repair visit are recorded or linked. A repair visit may have one or several repair lines and documents a repair visit.

- An RO is created by entering the RO Number (up to 10 digits) and entering an RO Open Date (as identified by the Red *). Once the RO is saved, these fields cannot be edited.

The following fields are commonly required and are available to input when creating the RO.

- VIN - Vehicle Information Number
- Service Advisor ID (STARS ID or 9 digit number)
- Odometer
- Special Use Vehicle Description
- Engine Operating Hours at Repair Order Open
- License Location

Click the “Create” once the RO information is inputted at the bottom of this section.
Claim File and Claim Unit Numbers

The Claim File and Unit Number is a filing tool within the OWS system and are not searchable or required by the Dealer.

- OWS Online Claim - Claim File and Claim Unit numbers are automatically assigned by OWS when a Claim is created
- DMS submitted Claim - Claim File and Claim Unit numbers are assigned when OWS receives the information

**Note:** Users are not required to track Claim File or Claim Unit numbers

Editing Claim Information

Once the RO is saved, all fields within the RO can be edited except the following:

- Repair Order Number
- Repair Order Open Date

**Note:** If an error was made to the RO Number or RO Open Date you must Cancel the RO and create a new one.

**Note:** If a claim has been submitted and an edit needs to be made the Claim Report will need to be accessed.
Save, Print, PreValidate and Submit a Claim

A Claim may be saved by clicking either “Save” at the top of the page or “PreValidate” at the bottom of the page. Until the Submit button has been clicked, the claim has not been entered into OWS for processing. These statuses will be displayed in the Claim Status Report.

1. **Save** - system will save the Claim as “Saved incomplete”
2. **Print** – system will print the Claim
3. **PreValidate** – system will save the claim as “Dealer Action Required”
4. **Submit** – system will submit the Claim
Submitting a Claim for a Maintenance Service for a Ford, Lincoln and Mercury Vehicle

In this example, the customer needs an oil change on an Escape. Note that this example is to show what information is needed to complete the claim for a maintenance service.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   **Comments**

   Customer Comments: CUSTOMER REQUEST OIL CHANGE SERVICE

   Maximum 2000 characters

   Technicians Comments: OIL CHANGE PERFORMED

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note:** The Technicians Comments are printed on the customer's invoice. See Page for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

   **Parts Information**

<table>
<thead>
<tr>
<th>Causal PartNum</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Invoice Number</th>
<th>Markup</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FL910SB12</td>
<td>ITEM: ELEMENT &amp; GASKET OIL FILTER</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>5.10</td>
</tr>
<tr>
<td>XO5W208SP</td>
<td>ELEMENT OF 5W-20 W/O ADD'ITIVE</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td>14.85</td>
</tr>
<tr>
<td>6731</td>
<td>ELEMENT ASY OIL FILTER</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

   Include the markup in the total amount. The system will not automatically add the markup.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   **Labor Information**

<table>
<thead>
<tr>
<th>Labor Operation Code</th>
<th>Description</th>
<th>Technician ID</th>
<th>Hours</th>
<th>Labor Rate Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>L001</td>
<td>LABOR</td>
<td></td>
<td>0.2</td>
<td></td>
<td>13.26</td>
</tr>
</tbody>
</table>

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1. Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Maintenance Service for a Ford, Lincoln and Mercury Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.
Submitting a Claim for a Diagnostics Test without Repair for a Ford, Lincoln and Mercury Vehicle

*Note: Additionally, this claim will also be used for state and safety inspections.*

In this example, the customer states that the brakes are squeaking. Note that this example is to show what information is needed to complete the claim for a diagnostics test only.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

*Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.*
Submitting a Claim for a Diagnostics Test without Repair for a Ford, Lincoln and Mercury Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   Customer Comments: CUSTOMER STATES BRAKES ARE SQUEAKING

   Technicians Comments: ROAD TEST 9 MILES. COULD NOT DUPLICATE CUSTOMER CONCERN.

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note: The Technicians Comments are printed on the customers invoice.** See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. In the Parts Information section, click the magnifying glass to scroll and select DTEST for the Casual Part Number. **Note: Only used as the Causal Part, enter “0” in the Quantity and Amount fields.**

   Include the markup in the total amount. The system will not automatically add the markup.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.

   Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Diagnostics Test without Repair for a Ford, Lincoln and Mercury Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAWA Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Labor</td>
<td>125.00</td>
<td>0.00</td>
<td>125.00</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Customer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td>125.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next Repair   PreValidate   Submit   Cancel RL   Cancel RO
Submitting a Claim for a Customer Paid Repair for a Ford, Lincoln and Mercury Vehicle

In this example, the customer states that the fan only works on low speed. Note that this example is to show what information is needed to complete the claim for a customer paid repair.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
Submitting a Claim for a Customer Paid Repair for a Ford, Lincoln and Mercury Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   **Comments**
   - **Customer Comments:** FAN ONLY WORKS ON LOW SPEED
   - **Technicians Comments:** VERIFIED CUSTOMER CONCERN, FOUND BLOWER MOTOR SWITCH MELTED, REPLACED SWITCH, PIGTAIL AND KNOB, RETESTED AND VERIFIED REPAIR COMPLETE.

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note:** The Technicians Comments are printed on the customers invoice. See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

   **Parts Information**
   - **Causal Part Num:** FR9Z 1851 AA
     - **Description:** KNOB—HEATER BLOWER SWITCH
     - **Quantity:** 1
     - **Unit Price:** ~
     - **Invoice Number:** ~
     - **Markup:** 19.50
     - **Amount:** ~
   - **Causal Part Num:** 1U22 14511 BB
     - **Description:** KIT—WIRING PIGTAIL
     - **Quantity:** 1
     - **Unit Price:** ~
     - **Invoice Number:** ~
     - **Markup:** 42.00
     - **Amount:** ~
   - **Causal Part Num:** F49Z 19986 A
     - **Description:** SWITCH ASY
     - **Quantity:** 1
     - **Unit Price:** ~
     - **Invoice Number:** ~
     - **Markup:** 25.50
     - **Amount:** ~

   Include the markup in the total amount. The system will not automatically add the markup.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   **Labor Information**
   - **Labor Operation Code:** L001
     - **Description:** LABOR
     - **Technician ID:** ~
     - **Hours:** 2.0
     - **Labor Rate Invoice Number:** ~
     - **Amount:** 200.00

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1. Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Customer Paid Repair for a Ford, Lincoln and Mercury Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.
Submitting a Claim for a Customer Paid Repair for non-Ford Parts for a Ford, Lincoln and Mercury Vehicle

In this example, the customer states that the front brakes need to be replaced. Note that this example is to show what information is needed to complete the claim for a customer paid repair for brakes.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
Submitting a Claim for a Customer Paid Repair for non-Ford Parts for a Ford, Lincoln and Mercury Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

6. If using OSP, OSL, Misc. or Other an explanation is needed in the Technicians Comments section to assist the claim getting approved the first submission.
   - The recommended format is “OSP FOR $59.95 IS FOR BRAKING PADS”

7. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

8. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.
Submitting a Claim for a Customer Paid Repair for non-Ford Parts for a Ford, Lincoln and Mercury Vehicle (cont.)

9. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

10. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

11. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

12. Click the submit button when the claim is ready to be submitted.

<table>
<thead>
<tr>
<th>Miscellaneous Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Miscellaneous Expense</strong></td>
</tr>
<tr>
<td>TAX</td>
</tr>
</tbody>
</table>

| Test Results |

<table>
<thead>
<tr>
<th>Repair Line Sub Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Parts</td>
</tr>
<tr>
<td>Labor</td>
</tr>
<tr>
<td>Miscellaneous</td>
</tr>
<tr>
<td>(Customer Participation)</td>
</tr>
<tr>
<td>(Dealer Participation)</td>
</tr>
<tr>
<td>(Deductibles)</td>
</tr>
<tr>
<td>Totals</td>
</tr>
</tbody>
</table>

Markup
Submitting a Claim for a Customer Paid Repair for Tires for a Ford, Lincoln and Mercury Vehicle

In this example, the customer states that the front 2 tires need to be replaced. Note that this example is to show what information is needed to complete the claim for a customer paid repair for tires.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   Customer Comments: Replace front tires

   Technicians Comments: MOUNT & BALANCE 2 NEW FRONT TIRES, OPS FOR $16.00 FOR 2 VALVE STEMS

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note: The Technicians Comments are printed on the customers invoice.** See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note: For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.**

   Causal PartNum | Description | Quantity | Unit Price | Invoice Number | Markup | Amount
   ------------- | ----------- | -------- | ---------- | -------------- | ------ | ------
   TIRE         | Tires      | 0        |            |                |        | 0.00   
   P00412345   | TIRES      | 2        |            |                |        | 250.00 |
   OSP          | VALVE STEMS| 2        |            |                |        | 16.00  |

   Include the markup in the total amount. The system will not automatically add the markup.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   Labor Operation Code | Description | Technician ID | Hours | Labor Rate | Invoice Number | Amount
   ---------------------|-------------|---------------|------|------------|----------------|------
   L001                 | LABOR       |               | 1.0  |            |                | 85.00|

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1. Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Customer Paid Repair for Tires for a Ford, Lincoln and Mercury Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. Scroll to Test Results and click the down arrow to the left of the words.

10. Select from the drop down list “REPLACED TIRE DOT CODE” for the tires being replaced and enter all the code from the tire to the fields under the Code section.

11. Select from the drop down list “REPLACEMENT TIRE DOT CODE” for the new tires and enter all the code from the tire to the fields under the Code section.

12. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

13. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

14. Click the submit button when the claim is ready to be submitted.
Submitting a Claim for a State Emissions Test for a Ford, Lincoln and Mercury Vehicle

In this example, the customer request for a state emissions test to be completed on the vehicle. Note that this example is to show what information is needed to complete the claim for a state emissions test.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
Submitting a Claim for a State Emissions Test for a Ford, Lincoln and Mercury Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

6. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.
Submitting a Claim for a State Emissions Test for a Ford, Lincoln and Mercury Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.
Submitting a Claim for a Customer Paid Body Shop Repair for a Ford, Lincoln and Mercury Vehicle

In this example, after a collision accident, the customer needs multiple body shop repairs. Note that this example is to show what information is needed to complete the claim for a body shop repair.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
Submitting a Claim for a Customer Paid Body Shop Repair for a Ford, Lincoln and Mercury Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

<table>
<thead>
<tr>
<th>Customer Comments:</th>
<th>REPAIR FRONT END COLLISION DAMAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Characters:</td>
<td>REPLACED FRONT FENDERS, HOOD, FRONT BUMPER &amp; SUPPORT, REPLACE ALL EMBLEMS &amp; MOLDING, PAINT &amp; MATERIALS</td>
</tr>
</tbody>
</table>

**Technicians Comments:**

If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note:** The Technicians Comments are printed on the customers invoice. See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

<table>
<thead>
<tr>
<th>Causal PartNum</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Invoice Number</th>
<th>Markup</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6E5Z 542055AA</td>
<td></td>
<td>1</td>
<td></td>
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<td>48.40</td>
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<tr>
<td>N803 758E100</td>
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<td>W713 102530D</td>
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<td>19.27</td>
</tr>
</tbody>
</table>

Include the markup in the total amount. The system will not automatically add the markup.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

<table>
<thead>
<tr>
<th>Labor Operation Code</th>
<th>Description</th>
<th>Technician ID</th>
<th>Hours</th>
<th>Labor Rate</th>
<th>Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>L001</td>
<td>LABOR</td>
<td></td>
<td>4.0</td>
<td></td>
<td></td>
<td>250.00</td>
</tr>
</tbody>
</table>

8. **Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.** **Enter the Labor Hours being charged for the repair.**
Submitting a Claim for a Customer Paid Body Shop Repair for a Ford, Lincoln and Mercury Vehicle (cont.)

9. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

10. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

11. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

12. Click the submit button when the claim is ready to be submitted.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAWA Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>332.17</td>
<td>0.00</td>
<td>332.17</td>
</tr>
<tr>
<td>Labor</td>
<td>250.00</td>
<td>0.00</td>
<td>250.00</td>
</tr>
<tr>
<td>Miscellaneous (Customer Participation)</td>
<td>19.93</td>
<td>0.00</td>
<td>19.93</td>
</tr>
<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td>602.10</td>
</tr>
</tbody>
</table>

Markup

- Next Repair
- PreValidate
- Submit
- Cancel RL
- Cancel RO
Submitting a Claim for a Ford Protect Deductible for a Ford, Lincoln and Mercury Vehicle

In this example, a customer has a repair with the Ford Protect Deductible. Note that this example is to show what information is needed to complete the claim for a Ford Protect Deductible.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

```
Customer Comments: FORD PROTECT COVERED REPAIR – BILL FORD PROTECT DEDUCTIBLE.
```

```
Technicians Comments: SEE RO # 123456 LINE 02 FOR DETAIL – CLAIMING FOR FORD PROTECT DEDUCTIBLE.
```

If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note: The Technicians Comments are printed on the customers invoice.**

See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

```
<table>
<thead>
<tr>
<th>Causal PartNum</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Invoice Number</th>
<th>Markup</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEDUCT</td>
<td>FORD PROTECT DEDUCTIBLE</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>
```

7. The Labor line is left blank due to no labor charge on this claim.

```
<table>
<thead>
<tr>
<th>Labor Operation Code</th>
<th>Description</th>
<th>Technician ID</th>
<th>Hours</th>
<th>Labor Rate Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```
Submitting a Claim for a Ford Protect Deductible for a Ford, Lincoln and Mercury Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.

<table>
<thead>
<tr>
<th>Miscellaneous Expense Code</th>
<th>Description</th>
<th>Num of Days</th>
<th>Hours</th>
<th>Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX</td>
<td>TAX</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>DEDUCT</td>
<td>FORD PROTECT DEDUCTIBLE</td>
<td></td>
<td></td>
<td></td>
<td>50.00</td>
</tr>
</tbody>
</table>

### Test Results

### Repair Line Sub Total

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAVVA Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Labor</td>
<td>50.00</td>
<td>0.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Miscellaneous (Customer Participation) (Dealer Participation) (Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td>50.00</td>
</tr>
</tbody>
</table>

Markup

[Next Repair] [PreValidate] [Submit] [Cancel RL] [Cancel RO]
Submitting a Claim for a Courtesy Inspection on Ford Motor Company Vehicle

In this example, an employee will be getting a new vehicle. Note that this example is to show what information is needed to complete the claim for a courtesy delivery.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFC for Ford/Lincoln/Mercury vehicles with parts and labor), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Service Advisor ID has 9 digits. Add zeros before the number to make it 9 digits long.

Company Name in OASIS

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
Submitting a Claim for a Courtesy Inspection on Ford Motor Company Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Comments:</td>
</tr>
<tr>
<td>FORD MOTOR COMPANY COURTESY DELIVERY</td>
</tr>
<tr>
<td>Maximum 2000 characters</td>
</tr>
<tr>
<td>Technicians Comments:</td>
</tr>
<tr>
<td>LICENSE, TITLE AND PREP OF VEHICLE FOR DELIVERY TO FORD EMPLOYEE</td>
</tr>
</tbody>
</table>

**Note:** The Technicians Comments are printed on the customers invoice.

6. In the Parts Information section, click the magnifying glass to scroll and select Courtesy for the Casual Part Number. **Note:** Only used as the Causal Part, enter “0” in the Quantity and Amount fields.

<table>
<thead>
<tr>
<th>Parts Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Causal PartNum</td>
</tr>
<tr>
<td>COURTESY</td>
</tr>
</tbody>
</table>

7. Enter the total of the claim amount in the Labor Information section by using the L001 labor code.

<table>
<thead>
<tr>
<th>Labor Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Operation Code</td>
</tr>
<tr>
<td>L001</td>
</tr>
</tbody>
</table>

**Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.**

**Add the title, tax, license & PDI fees in the Amount field.**
Submitting a Claim for a Courtesy Inspection on Ford Motor Company Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAWA</th>
<th>Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Labor</td>
<td>143.34</td>
<td>0.00</td>
<td>0.00</td>
<td>143.34</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Customer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td>253.39</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Markup</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Submitting a Claim for a Maintenance Service for a Non-Ford Vehicle

In this example, the customer needs an oil change on a Chevy Express. Note that this example is to show what information is needed to complete the claim for a maintenance services on a Non-Ford vehicle.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFCC for non-Ford vehicle), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.

Service Advisor ID has 9 digits. Add zeros before the number to make it 9 digits long.

QFCC is used with non-Ford vehicles.
Submitting a Claim for a Maintenance Service for a Non-Ford Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Comments:</td>
</tr>
<tr>
<td>Maximum 2000 characters</td>
</tr>
<tr>
<td>Technicians Comments:</td>
</tr>
</tbody>
</table>

- If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval.
- **Note:** The Technicians Comments are printed on the customers invoice.
- See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note:** Causal Part must be COMPMAKE with the total quantity and total amount of all parts used including mark up. Add another part line using the Ford base part number with zero quantity and zero in the amount for each additional part used.

<table>
<thead>
<tr>
<th>Parts Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Causal Part Num</td>
</tr>
<tr>
<td>COMPMAKE</td>
</tr>
<tr>
<td>FL9105</td>
</tr>
</tbody>
</table>

- Use the closest Ford Base Part Number with NO quantity and NO cost.
- Include the markup in the total amount. The system will not automatically add the markup.
- COMPMAKE has the total cost of all the parts used.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

<table>
<thead>
<tr>
<th>Labor Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Operation Code</td>
</tr>
<tr>
<td>L001</td>
</tr>
</tbody>
</table>

- Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.
- Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Maintenance Service for a Non-Ford Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.
9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.
10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.
11. Click the submit button when the claim is ready to be submitted.

### Miscellaneous Information

<table>
<thead>
<tr>
<th>Miscellaneous Expense Code</th>
<th>Description</th>
<th>Num of Days</th>
<th>Hours</th>
<th>Invoice Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX</td>
<td>TAX</td>
<td></td>
<td></td>
<td></td>
<td>1.30</td>
</tr>
</tbody>
</table>

### Repair Line Sub Total

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAWA</th>
<th>Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>21.55</td>
<td>0.00</td>
<td>0.00</td>
<td>21.55</td>
</tr>
<tr>
<td>Labor</td>
<td>25.00</td>
<td>0.00</td>
<td>0.00</td>
<td>17.10</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0.85</td>
<td>0.30</td>
<td>1.30</td>
<td></td>
</tr>
<tr>
<td><strong>(Customer Participation)</strong></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td><strong>(Dealer Participation)</strong></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td><strong>(Deductibles)</strong></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>39.95</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Markup
Submitting a Claim for a Diagnostics Test without Repair for a Non-Ford Vehicle

In this example, the customer states that the brakes are squeaking. Note that this example is to show what information is needed to complete the claim for a diagnostics test only of a Non-Ford vehicle. Additionally, this claim will also be used for state or vehicle pre-delivery, DOT and safety inspections.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFCC for non-Ford vehicle), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.

Service Advisor ID has 9 digits. Add zeros before the number to make it 9 digits long.

QFCC is used with non-Ford vehicles.
Submitting a Claim for a Diagnostics Test without Repair for a Non-Ford Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed technicians Comments.

   Customer Comments: CUSTOMER STATES BRAKES ARE SQUEAKING

   Maximum 2000 characters

   Technicians Comments: ROAD TEST & MILES, COULD NOT DUPLICATE CUSTOMER CONCERN.

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval.
   
   Note: The Technicians Comments are printed on the customer’s invoice.
   See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. Causal part must be COMPMAKE and include the total of all the parts. Note: Causal Part must be COMPMAKE, enter “0” in the Quantity and Amount fields.

   Causal Part
   Num
   Description  Quantity  Unit Price  Invoice Number  Markup  Amount
   COMPMAKE  1  0.00
   DTEST  0  0.00

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.

   Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Diagnostics Test without Repair for a Non-Ford Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.
Submitting a Claim for a Customer Paid Repair for a Non-Ford Vehicle

In this example, the customer states that the brake pedal feels low. Note that this example is to show what information is needed to complete the claim for a customer paid repair.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFCC for non-Ford vehicle), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Service Advisor ID has 9 digits. Add zeros before the number to make it 9 digits long.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.

QFCC is used with non-Ford vehicles.
Submitting a Claim for a Customer Paid Repair for a Non-Ford Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   Customer Comments: BRAKE PEDAL FEELS SLOW

   Technicians Comments: INSPECTED BRAKE FRONTS DOWN TO 2MM, REPLACE FRONT BRAKE PADS.

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note: The Technicians Comments are printed on the customers invoice.**

   See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. **Note: Causal Part must be COMPMAKE with the total quantity and total amount of all parts used including mark up. Add another part line using the Ford base part number with zero quantity and zero in the amount for each additional part used.**

   Use the closest Ford Base Part Number with NO quantity and NO cost. Include the markup in the total amount. The system will not automatically add the markup. COMPMAKE has the total cost of all the parts used.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1. Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Customer Paid Repair for a Non-Ford Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.

10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

11. Click the submit button when the claim is ready to be submitted.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAWA Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>380.52</td>
<td>0.00</td>
<td>380.52</td>
</tr>
<tr>
<td>Labor</td>
<td>80.00</td>
<td>0.00</td>
<td>80.00</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>15.22</td>
<td>0.00</td>
<td>15.22</td>
</tr>
<tr>
<td>(Customer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td>475.74</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Markup

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Submitting a Claim for a Customer Paid Repair for Tires for a Non-Ford Vehicle

In this example, the customer states that the 2 tires need to be replaced. Note that this example is to show what information is needed to complete the claim for a customer paid repair for tires for a Non-Ford vehicle.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFCC for Non-Ford vehicle), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.

QFCC is used with non-Ford vehicles.
Submitting a Claim for a Customer Paid Repair for Tires for a Non-Ford Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   Customer Comments: REPLACE FRONT TIRES.

   Maximum 2000 characters

   Technicians Comments: MOUNT & BALANCE 2 NEW FRONT TIRES, OSP FOR $0.00 FOR 2 VALVE STEMS.

   If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. 
   **Note:** The Technicians Comments are printed on the customer's invoice. See Pages 15-16 for details on OSP, OSL, Misc. or Other

6. Add the parts used in the Parts Information section. COMPMAKE part must be used as the Causal Part and include all parts total including mark up. **Note:** Causal Part must be COMPMAKE with the total quantity and total amount of all parts used including mark up. Add another part line using the Ford base part number with zero quantity and zero in the amount for each additional part used.

   Use the closest Ford Base Part Number with NO quantity and NO cost.

   Include the markup in the total amount. The system will not automatically add the markup.

   COMPMAKE has the total cost of all the parts used.

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.

   Enter the Labor Hours being charged for the repair.
Submitting a Claim for a Customer Paid Repair for Tires for a Non-Ford Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

9. Scroll to Test Results and click the down arrow to the left of the words.
10. Select from the drop down list “REPLACED TIRE DOT CODE” for the tires being replaced and enter all the code from the tire to the fields under the Code section.
11. Select from the drop down list “REPLACEMENT TIRE DOT CODE” for the new tires and enter all the code from the tire to the fields under the Code section.

12. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.
13. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.
14. Click the submit button when the claim is ready to be submitted.
Submitting a Claim for a State Emissions Test for a Non-Ford Vehicle

In this example, the customer request for a state emissions test to be completed on the vehicle. Note that this example is to show what information is needed to complete the claim for a state emissions test for a Non-Ford vehicle.

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFCC for non-Ford vehicle), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.

QFCC is used with non-Ford vehicles
Submitting a Claim for a State Emissions Test for a Non-Ford Vehicle (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

   ![Comments Section]

   **Customer Comments:**
   
   CUSTOMER REQUEST STATE EMISSIONS INSPECTION

   **Maximum 2000 characters**

   **Technicians Comments:**
   
   PERFORMED STATE EMISSIONS INSPECTION - PASS

   **Note:** The Technicians Comments are printed on the customer's invoice.

6. Add the parts used in the Parts Information section. **Note:** Causal Part must be COMPMAKE with the total quantity and total amount of all parts used including mark up. Add another part line using the Ford base part number with zero quantity and zero in the amount for each additional part used.

   ![Parts Information Table]

   **Include the markup in the total amount. The system will not automatically add the markup.**
   **COMPMAKE has the total cost of all the parts used.**

7. Enter the total labor of the claim in the Labor Information section by using the L001 labor code.

   ![Labor Information Table]

   **Use L001 as the Labor Operation – Labor code L001 is the letter L with 2 zeros and then the number 1.**
   **Enter the Labor Hours being charged for the repair.**
Submitting a Claim for a State Emissions Test for a Non-Ford Vehicle (cont.)

8. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section.
9. The Parts, Labor and Miscellaneous will total up in the Repair Line Sub Total automatically.
10. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.
11. Click the submit button when the claim is ready to be submitted.

### Miscellaneous Information

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Num of Days</th>
<th>Hours</th>
<th>Invoice Number</th>
<th>Amount</th>
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<tbody>
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<td></td>
<td></td>
<td>0.36</td>
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</table>

### Test Results

### Repair Line Sub Total

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>DAVA</th>
<th>Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
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<tr>
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<td>0.00</td>
<td>0.00</td>
<td>6.00</td>
</tr>
<tr>
<td>Labor</td>
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<td>0.00</td>
<td>0.00</td>
<td>22.95</td>
</tr>
<tr>
<td>Miscellaneous (Customer Participation)</td>
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<td>0.00</td>
<td>0.56</td>
</tr>
<tr>
<td>(Dealer Participation) (Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td>29.31</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Markup

[Next Repair] [PreValidate] [Submit] [Cancel RL] [Cancel RO]
Submitting a Claim for a Parts Purchase

In this example, the customer needs to purchase brake lining and hub assembly from the dealership. Note that this example is to show what information is needed to complete the claim for the part purchase claim.

1. After clicking the “Enter a Claim” button on the Home Page, enter the billing account number in the VIN, no vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, for the Repair Order Open enter “20”, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61-FLEET), Sub-Code (QFCP for over the counter parts purchase), Repair Line Completion Date, for the Repair Completion enter “20” for QFCP claims with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim.

   “20” and “M” are entered in the Odometer fields for Parts Purchase Claims only.

   QFCP is used with a Parts Purchase only.

Note: Enter Fleet Approval Amount and a P.O. Number from the Fleet if repair exceeds pre-authorization value.
Submitting a Claim for a Parts Purchase (cont.)

5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

6. Technicians Comments must include the parts counter ticket number even if it is the same at the RO number and the name of the PERSON who made the request and authorized the request or picked up the parts. **Note: The Fleet Name is not required in the comments.**

If also using OSP, OSL, Misc. or Other an explanation is required in the Technicians Comments to assist in claim approval. **Note: The Technicians Comments are printed on the customers invoice.**
See Pages 15-16 for details on OSP, OSL, Misc. or Other

7. Add the parts used in the Parts Information section. **Note: Causal Part must be PART SALE with the total quantity and total amount of all parts used including mark up. Add another part line using the Ford base part number with zero quantity and zero in the amount for each additional part used.**

8. Do not enter a labor code or labor amount for a Parts purchase claim.
Submitting a Claim for a Parts Purchase (cont.)

9. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

10. The Parts and Miscellaneous will total up in the Repair Line Sub Total automatically.

11. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

12. Click the submit button when the claim is ready to be submitted.
Appeal a Claim – Change of Price on Part and/or Labor and/or Misc

In this example, the claim was entered and paid; however, the prices were entered incorrectly on the part and labor. Note that this example is to show what information is needed to complete the appeal (chargeback) of a claim.

1. On the Home page of the OWS website, click the “View Claim Status Report” button to start the appeal process.


3. Enter Repair Order Number or VIN, From Date AND To Date, or Repair Order Open Date and then click the Inquire button to submit the search parameters.
4. The Claim Status Report will show the Work in Progress Claims (not paid) and the Dispositioned Claims (paid). Double click the Repair Order that you need to make the price adjustments to.

```
<table>
<thead>
<tr>
<th>Repair Order Number</th>
<th>Repair Line Number</th>
<th>VIN</th>
<th>Repair Order Open Date</th>
<th>Part</th>
<th>Labor</th>
<th>Miscellaneous</th>
<th>Repair Amount</th>
<th>Status</th>
<th>Claim Type</th>
<th>Last Action Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>012345</td>
<td>1</td>
<td>1FMCUXXXXXX00000000</td>
<td>07/15/2016</td>
<td>23.98</td>
<td>14.94</td>
<td>3.80</td>
<td>42.72</td>
<td>PAID</td>
<td>61</td>
<td>07/21/2015 2:26 PM</td>
</tr>
</tbody>
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```

5. The claim will open to view it, note in the upper right section of the screen above the Print icon, there is an “Appeal” button. Click the Appeal button to begin the appeal process.
6. The claim will open on the screen.
7. Under the Repair Information Section of the claim, the Appeal Reason has a drop down list to select the type of Appeal and in this case it is an Adjustment.
   - Adjustment – change the number or price to a new number or price
   - Full Chargeback – completely zeroing out the entire claim
   - Full Reversal – reversal of a full chargeback

There are 3 Appeal Reasons that can be used for an appeal:
1. Adjustment – change the existing info in the quantity, amount or misc. to the correct amount
2. Full Chargeback – completely zeroing out the entire claim
3. Full Reversal – reversal of a full chargeback – can only be used when the entire claim was charged back
Appeal a Claim – Change of Price on Part and/or Labor and/or Misc (cont.)

8. Scroll down the claim to change the Parts and Labor prices.
   - Under the Parts Information section, select the Action code from the drop down list. In this case, we selected “C” for change.
   - Enter the New amount for the Parts section and the system will calculate the adjustment automatically.
   - Under the Labor Information section, select “C” from the Action code drop down list to change the price. Enter the Present (new) price for the labor and the system will calculate the adjustment automatically.
     a. C is for change part, labor and or miscellaneous
     b. B is for zeroing out a part and/or labor to a cost of $0.00
     c. R is for reverse chargeback of the previous appeal
     d. A is for adding a part, labor or miscellaneous to the claim
   - Under the Miscellaneous Information section, select the Action code “C” to change the tax amount. Enter the Present (new) tax amount and the system will calculate the adjustment automatically.

There are 4 Action codes that can be used for an adjustment:
1. C is for change part, labor and or miscellaneous
2. B is for zeroing out a part and/or labor to a cost of $0.00
3. R is for reverse chargeback of the previous appeal
4. A is for adding a part, labor or miscellaneous to the claim
Appeal a Claim – Change of Price on Part and/or Labor and/or Misc (cont.)

9. Scroll down the page to the Repair Line Sub Total section. The changes are present in this area with the Prior Paid, Present, Adjustment and Revised Total amounts.

10. Click the “PreValidate” button to verify information.

11. Finally, click the “Submit” button to save and submit the claim information into the OWS.

<table>
<thead>
<tr>
<th>Description</th>
<th>Prior Paid</th>
<th>Present</th>
<th>Adjustment</th>
<th>DAWA Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
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<td>2.95</td>
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<td>Miscellaneous</td>
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<td>0.00</td>
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<td>0.00</td>
</tr>
<tr>
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<td>0.00</td>
<td>0.00</td>
<td></td>
<td>0.00</td>
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<tr>
<td>(Deductibles)</td>
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<td>0.00</td>
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</tr>
<tr>
<td>Markup</td>
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<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

The Adjustment column shows the difference in price and the Revised Total column shows the new total.
Appeal a Claim – Add Part and/or Labor and/or Misc.

In this example, the claim was entered and paid; however, a part was entered on this claim. Note that this example is to show what information is needed to complete the appeal process for adding a part to a paid claim.

1. On the Home page of the OWS website, click the “View Claim Status Report” button to start the appeal process.


3. Enter Repair Order Number or VIN, From Date AND to Date, or Repair Order Open Date and then click the Inquire button to submit the search parameters.
Appeal a Claim – Add Part and/or Labor and/or Misc. (cont.)

4. The Claim Status Report will show the Dispositioned Claims (paid). Double click the Repair Order that you need to make the price adjustments to.

5. The claim will open to view it, note in the upper right section of the screen above the Print icon, there is an “Appeal” button. Click the Appeal button to begin the appeal process.
6. The claim will open on the screen.
7. Under the Repair Information Section of the claim, the Appeal Reason has a drop down list to select the type of Appeal and in this case it is an Adjustment.
   - Adjustment – change the number or price to a new number or price
   - Full Chargeback – completely zeroing out the entire claim
   - Full Reversal – reversal of a full chargeback

There are 3 Appeal Reasons that can be used for an appeal:
1. Adjustment – change the existing info in the quantity, amount or misc. to the correct amount
2. Full Chargeback – completely zeroing out the entire claim
3. Full Reversal – reversal of a full chargeback – can only be used when the entire claim was charged back
Appeal a Claim – Add Part and/or Labor and/or Misc. (cont.)

8. Scroll down the claim to change the Parts and Labor prices.
   • Under the Parts Information section, select the Action code from the drop down list. In this case, we selected “A” to add the missing part to the claim.
   • Under the Miscellaneous Information section, select the Action code “C” to change the tax amount. Enter the Present (new) tax amount and the system will calculate the adjustment automatically.

There are 4 Action codes that can be used for an adjustment:
1. C is for change part, labor and/or miscellaneous
2. B is for zeroing out a part and/or labor to a cost of $0.00
3. R is for reverse chargeback of the previous appeal
4. A is for adding a part, labor or miscellaneous to the claim
9. Scroll down the page to the Repair Line Sub Total section. The changes are present in this area with the Prior Paid, Present, Adjustment and Revised Total amounts.
10. Click the “PreValidate” button to verify information.
11. Finally, click the “Submit” button to save and submit the claim information into the OWS.

The Adjustment column shows the difference in price and the Revised Total column shows the new total.
Appeal a Claim – Parts Return

In this example, the claim was entered and paid; however, the customer is returning one of the parts purchased on this claim. Note that this example is to show what information is needed to complete the appeal (chargeback) of a parts purchase claim.

1. On the Home page of the OWS website, click the “View Claim Status Report” button to start the appeal process.


3. Enter Repair Order Number or VIN, From Date AND to Date, or Repair Order Open Date and then click the Inquire button to submit the search parameters.
Appeal a Claim – Part Return (cont.)

4. The Claim Status Report will show the Dispositioned Claims (paid). Double click the Repair Order that you need to make the price adjustments to.

5. The claim will open to view it, note in the upper right section of the screen above the Print icon, there is an “Appeal” button. Click the Appeal button to begin the appeal process.
Appeal a Claim – Part Return (cont.)

6. The claim will open on the screen.

7. Under the Repair Information Section of the claim, the Appeal Reason has a drop down list to select the type of Appeal and in this case it is an Adjustment.
   - Adjustment – change the number or price to a new number or price
   - Full Chargeback – completely zeroing out the entire claim
   - Full Reversal – reversal of a full chargeback

There are 3 Appeal Reasons that can be used for an appeal:

1. Adjustment – change the existing info in the quantity, amount or misc. to the correct amount
2. Full Chargeback – completely zeroing out the entire claim
3. Full Reversal – reversal of a full chargeback – can only be used when the entire claim was charged back
Appeal a Claim – Part Return (cont.)

8. Scroll down the claim to change the Parts and Labor prices.
   - Under the Parts Information section, select the Action code from the drop down list. In this case, we selected “B” to zero out the returned part line.
   - Under the Miscellaneous Information section, select the Action code “C” to change the tax amount. Enter the Present (new) tax amount and the system will calculate the adjustment automatically.

<table>
<thead>
<tr>
<th>Action code</th>
<th>Causal PartNum</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Invoice Number</th>
<th>Markup</th>
<th>Discount Pct.</th>
<th>Prior Paid</th>
<th>Present</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
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<table>
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<th>Hours</th>
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<th>Discount Pct.</th>
<th>Prior Paid</th>
<th>Present</th>
<th>Adjustment</th>
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</thead>
<tbody>
<tr>
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</table>

There are 4 Action codes that can be used for an adjustment:
1. C is for change part, labor and or miscellaneous
2. B is for zeroing out a part and/or labor to a cost of $0.00
3. R is for reverse chargeback of the previous appeal
4. A is for adding a part, labor or miscellaneous to the claim
9. Scroll down the page to the Repair Line Sub Total section. The changes are present in this area with the Prior Paid, Present, Adjustment and Revised Total amounts.

10. Click the “PreValidate” button to verify information.

11. Finally, click the “Submit” button to save and submit the claim information into the OWS.

<table>
<thead>
<tr>
<th>Description</th>
<th>Prior Paid</th>
<th>Present</th>
<th>Adjustment</th>
<th>DAWA Percentage</th>
<th>Revised Total</th>
</tr>
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<td>0.00</td>
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<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
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</table>

The Adjustment column shows the difference in price and the Revised Total column shows the new total.
In this example, the claim was entered and paid; however, the customer is returning the core on this claim and is refunded the core cost. Note that this example is to show what information is needed to complete the appeal (chargeback) of a claim with core cost.

1. On the Home page of the OWS website, click the “View Claim Status Report” button to start the appeal process.


3. Enter Repair Order Number, VIN, From Date AND to Date, or Repair Order Open Date and then click the Inquire button to submit the search parameters.
Appeal a Claim – Core Return (cont.)

4. The Claim Status Report will show the Dispositioned Claims (paid). Double click the Repair Order that you need to make the price adjustments to.

```
<table>
<thead>
<tr>
<th>Repair Order Number</th>
<th>Repair Line Number</th>
<th>VIN</th>
<th>Repair Order Open Date</th>
<th>Part</th>
<th>Labor</th>
<th>Miscellaneous</th>
<th>Repair Amount</th>
<th>Status</th>
<th>Claim Type</th>
<th>Last Action Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>105412</td>
<td>1</td>
<td>QXXXX000000</td>
<td>08/30/2016</td>
<td>290.00</td>
<td>0.00</td>
<td>17.40</td>
<td>367.40</td>
<td>PAID</td>
<td>61</td>
<td>09/03/2016 1:19 PM</td>
</tr>
</tbody>
</table>
```

5. The claim will open to view it, note in the upper right section of the screen above the Print icon, there is an “Appeal” button. Click the Appeal button to begin the appeal process.
6. The claim will open on the screen.
7. Under the Repair Information Section of the claim, the Appeal Reason has a drop down list to select the type of Appeal and in this case it is an Adjustment.
   - Adjustment – change the number or price to a new number or price
   - Full Chargeback – completely zeroing out the entire claim
   - Full Reversal – reversal of a full chargeback

There are 3 Appeal Reasons that can be used for an appeal:
1. Adjustment – change the existing info in the quantity, amount or misc. to the correct amount
2. Full Chargeback – completely zeroing out the entire claim
3. Full Reversal – reversal of a full chargeback – can only be used when the entire claim was charged back
8. Scroll down the claim to change the Parts and Labor prices.
   - Under the Parts Information section, select the Action code from the drop down list. In this case, we selected “B” to zero out the line if all cores were returned or “C” for change if the quantity changed.
   - Under the Miscellaneous Information section, select the Action code “C” to change the tax amount. Enter the Present (new) tax amount and the system will calculate the adjustment automatically.
   
   There are 4 Action codes that can be used for an adjustment:
   1. C is for change part, labor and or miscellaneous
   2. B is for zeroing out a part and/or labor to a cost of $0.00
   3. R is for reverse chargeback of the previous appeal
   4. A is for adding a part, labor or miscellaneous to the claim
9. Scroll down the page to the Repair Line Sub Total section. The changes are present in this area with the Prior Paid, Present, Adjustment and Revised Total amounts.
10. Click the “PreValidate” button to verify information.
11. Finally, click the “Submit” button to save and submit the claim information into the OWS.

### Repair Line Sub Total

<table>
<thead>
<tr>
<th>Description</th>
<th>Prior Paid</th>
<th>Present</th>
<th>Adjustment</th>
<th>DAWA Percentage</th>
<th>Revised Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>290.00</td>
<td>253.00</td>
<td>-35.00</td>
<td></td>
<td>255.00</td>
</tr>
<tr>
<td>Labor</td>
<td>17.40</td>
<td>15.30</td>
<td>-2.10</td>
<td></td>
<td>15.30</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Customer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Dealer Participation)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Deductibles)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>307.40</td>
<td>270.30</td>
<td>-37.10</td>
<td>0.00</td>
<td>270.30</td>
</tr>
<tr>
<td>Markup</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Adjustment column shows the difference in price and the Revised Total column shows the new total.
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- Service Advisor Guide - Penske Vehicles enrolled in Ford Fleet Care ........................................... 88
- Parts Department Guide - National Fleet Parts Pricing Program ..................................................... 90
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- Claim Entry Tips and Reminders ....................................................................................................... 96
- Helpful Hints for Ford Fleet Care Claim Entry .................................................................................. 97
Service Advisor Guide - Penske Vehicles enrolled in Ford Fleet Care Program

To identify a Penske Vehicle enrolled in Ford Fleet Care use OASIS

Verify active enrollment in the Ford Fleet Care Program by entering the VIN in OASIS; if the system is unavailable contact Ford Fleet Program Headquarters at 800-367-3221.

**NOTE:** Penske participates in the National Fleet Parts Pricing Program and as such should receive parts pricing not to exceed Ford Suggested Fleet Pricing for both Service and Wholesale Parts Department transactions through participating Ford and Lincoln dealerships.

**Prepare Estimate and Obtain Approval**

Contact the Penske Fleet Administrator for approval PRIOR to performing the repair when the estimated Total Customer Paid Repair amount (including applicable CORE charges) exceeds the Penske Prior Approval Limit.

A Penske authorization for service will consist of the district / location number in the first 6 positions followed by numbers, up to 6 numbers   Example: 067310789789

**IMPORTANT:** If CORE was included in the Purchase Order Estimate it must be included in the claimed amount.

If the estimate changes, contact the Penske Fleet Administrator for approval for the added costs. Repairs performed without authorization or that exceed the authorized amount will be charged back.

**NOTE:** Ford Protect Extended Service Plan deductibles do not require an authorization code.

**IMPORTANT:** Drivers must sign and be provided with a copy of the Retail Repair Order indicating the amount Penske will be billed. DO NOT provide a No Charge Warranty Repair Order claim copy – this will result in a chargeback of the claim.

**Submit for Payment**

Submit a Ford Fleet Care claim in OWS using either **Program Code** below depending on vehicle make:

- QFC (Ford, Lincoln, and Mercury Vehicles)
- QFCC (Competitive Make Vehicles)

Claiming instructions are available in the **Dealer Program Manual** located at [www.fleetcare.ford.com](http://www.fleetcare.ford.com).

For claim questions contact **Ford Fleet Program Headquarters @ 1-800-367-3221**.

**TAX NOTE:** A Tax entry is required. Enter Tax as $0 for tax exempt status.
IMPORTANT FLEET PURCHASE ORDER NOTE:
Ensure your DSP Software version accommodates 13 character PO #’s
Parts Department Guide for Penske - National Fleet Parts Pricing Program

Penske Truck Leasing is a participant of the Ford National Fleet Parts Pricing (NFPP) program and as such should receive parts pricing “not to exceed” Ford Suggested National Fleet Pricing for both Service and Wholesale Parts Department transactions.

In combination with the NFPP program, Penske Truck Leasing has elected to use the Ford Fleet Care Program as their billing and payment option to your dealership.

This replaces payment made by “P – card” commonly referred to as PEMS and/or FORD X.

The following provides the required information your dealership will need to obtain from the Penske Truck Leasing location and the steps to submit for payment.

### Step 1: Obtain an Account Billing Code

Obtain the Ford Fleet Care Account Billing Code from the Penske Truck Leasing location

- The Account Billing code will be 11 characters in length
  - **Position 1**: A capital ‘Q’
  - **Positions 2-4**: A series of numbers
  - **Positions 5-6**: A capital ‘FC’
  - **Positions 7-11**: A series of numbers

**Ford Fleet Care Account Billing Code**

Example: Q999FC99999

### Step 2: Obtain a Purchase Order

Obtain a Purchase Order for the full amount of the transaction including any applicable CORE or freight charges. All part purchases require approval

1. A Penske Truck Leasing **Purchase Order** for Wholesale Parts will consist of:
   - **Positions 1-6**: Penske Truck Leasing district / location number
   - **Positions 7-8**: A capital ‘PN’
   - **Positions 9-13**: A series of computer assigned numbers
     (There may be a range of 1 to 5 numbers after the ‘PN’)
2. Be sure to include (zero) 0’s when provided at the beginning or end of a PO

**PO Example:**

067310PN2536

### IMPORTANT:

- DSP Software Information
  
  Ensure your DSP Software version accommodates 13 character PO #’s

- Purchase Order Information
  
  A Penske representative must sign and be provided with a copy of the Purchase Order indicating the amount Penske will be billed. DO NOT provide a No Charge Purchase Order copy – this will result in a chargeback of the claim.
Parts Department Guide for Penske - National Fleet Parts Pricing Program (cont.)

**Step 3: Submit for Payment**

1. After clicking the “Enter a Claim” button on the Home Page, enter the VIN, Vehicle, Service Advisor ID, Repair Order Number, Repair Order Open Date, Odometer at Repair Order Open, select “M” for miles or “KM” for kilometers, Special Use Vehicle if applicable and License Location (State).

2. Click the “Create” button to continue entering the claim.

3. The information will populate into the “Repair Order Creation” screen in the top section.

4. Enter the additional information in the Repair Information section including the Repair Line Number, Claim Type (61- FLEET), Sub-Code (QFCP for Ford/Lincoln/Mercury vehicles with parts and labor OR QFCP for Part purchase ONLY), Repair Line Completion Date, Odometer Reading at Repair Completion with M or KM selected from the drop down, Customer Concern Code (A99), Condition Code (82), License Number, Driver Name, Driver ID, Fleet Company Name, and Fleet Approval Amount are mandatory fields and the rest are if applicable to the claim. If the total repair amount exceeds the approval amount in OASIS, contact the number provided in OASIS to obtain a P.O. number from the Fleet which should be entered in the Fleet Purchase Order Num field.

Service Advisor ID has 9 digits. Add zeros before the number to make it 9 digits long.
5. Scroll down to the Comments section of the claim. Enter the Customer Comments and detailed Technicians Comments.

6. If using OSP, OSL, Misc. or Other an explanation is needed in the Technicians Comments section to assist the claim getting approved the first submission.

7. Add the parts used in the Parts Information section. **Note:** For each line/part, enter the quantity used and total amount including mark up. The system will calculate the Unit Price automatically.

8. No labor cost is added to the Part Sale.

   - **Enter Causal Code as PARTSALE**
   - **Enter CORE (If cost was included in PO)**
Parts Department Guide for Penske - National Fleet Parts Pricing Program (cont.)

9. Scroll down the webpage to the Miscellaneous Information section, add any Misc, Other and Tax into this section. A tax line is required for every claim. If the customer is tax exempt, or if tax is not applicable, enter amount as $0.00.

10. The Parts and Miscellaneous will total up in the Repair Line Sub Total automatically.

11. Click the PreValidate button to verify if additional information is needed or if there are any common errors that require correction prior to submitting.

12. Click the submit button when the claim is ready to be submitted.

Questions: Contact Ford Fleet Program Headquarters at 1-800-367-3221 or by email at: ffcadmin@ford.com
HERZOG DOT Inspection Process

This document is intended to provide information to assist with Department of Transportation (DOT) inspections using the Herzog Annual Vehicle Inspection Report. Questions regarding the adequacy of the inspection should be directed to Herzog directly. Ford Motor Company makes no representations regarding the sufficiency or compliance of the Herzog inspection process with DOT inspection requirements.

When a Herzog vehicle is presented for DOT inspection service, please follow the direction included below. Before proceeding with the inspection, the driver must present you with a DOT Safety Inspection Sticker. Please be sure to review the instructions on the reverse side of the sticker to ensure the inspection is completed appropriately.

To begin the Herzog DOT inspection process, you can download and print the Herzog Annual Vehicle Inspection Report from the Ford Fleet Care website (www.fleetcare.ford.com) or the Quick Lane Tire and Auto Center website (www.quicklane.dealerconnection.com). After reviewing the form and instructions provided, perform the inspection as indicated.

- Herzog has preapproved up to 0.7 hours to perform a vehicle inspection
- Herzog must be contacted for approval of additional time required to complete the inspection (including completion of the form and sticker application)
- If the total inspection and associated repairs exceed $250, approval (PO) must be obtained from the driver or by calling Ford Fleet Program Headquarters (800-367-3221) for the appropriate approving Herzog location.
- Job Code and Cost Code must be obtained from the driver before contacting Herzog

Upon completion of the annual vehicle inspection, complete the DOT Safety Inspection Sticker and affix to the vehicle as shown in the illustration below.

When completing the form, vehicle inspector (technician) should note the following:

- The Annual Vehicle Inspection – Inspector Certification form may need to be completed (if one has not been completed previously). The form can be found on the Ford Fleet Care website.
- Document the vehicle road flare kit and secured fire extinguishing device presence as applicable on the inspection report form. If the devices are not present for inspection, note “Needs Repair” and inform driver of his responsibility to acquire for DOT & Herzog policy compliance.
- For any items that are not applicable, please indicate “NA” as appropriate on the inspection report form.
- A Herzog vehicle may also have a trailer that requires inspection. A separate Annual Vehicle Inspection Report should be completed for the trailer. For areas that are not applicable to a trailer, please indicate "NA" as appropriate on the inspection report form. For all other items, a reasonable visual inspection should be performed. Herzog has preapproved up to 0.7 hours to perform a trailer inspection.

After the Annual Vehicle Inspection Report form(s) have been completed, the original form and RO must be provided to the driver for retention in the vehicle. A copy should be faxed to Ford Fleet Program Headquarters at the following number: (313) 390-3555. An additional copy should also be kept for the service file.
Dealer Frequently Asked Questions

Fleet Customer

How can a customer update Ford Fleet Care account information or add/delete vehicles? 
Customers and Dealers may contact Ford Fleet Care Headquarters for any account or vehicle questions or requests.

How does a customer resolve questions about a Ford Fleet Care monthly bill? 
Contact Ford Fleet Care Headquarters for assistance.

Dealership

How do I get help entering a Ford Fleet Care Claim or ask questions regarding a chargeback? 
Download the Dealer Program Manual from www.fleetcare.ford.com, under the “My Ford Fleet Care” tab, select “Manuals/Guides” or contact Ford Fleet Program Headquarters for assistance.

Who can I contact with National Fleet Parts Program Billing through Ford Fleet Care Questions? 
Contact your FCSD Region Representative. General Program questions can be directed to Ford Fleet Program Headquarters at (800) 367-3221.

Are Ford Fleet Care billed parts purchases eligible for wholesale incentives (WINS)? 
Yes. Parts billed through Ford Fleet Care and purchased using the Ford Fleet Care Parts program are eligible - provided they meet the requirements outlined in the Ford Parts Policy and Procedure Manual. It can be located on FMCDealer.com:

Select: Parts and Service Tab 
Select: Parts Department Tools Link 
Select: Procedures and Manuals Link 
Select: Dealer Parts Policy and Procedure Manual 
Select: 2200 Incentives & Allowances

Additional information is also available on Wins-on-the-web; simply access the site by selecting the WINS link or contact WINS Program Headquarters at (734) 713-3437.

Ford Fleet Care Program Headquarters Contact Information
Website: www.fleetcare.ford.com
Email: ffcadmin@ford.com Phone: 800-367-3221 Fax: 313-390-3555
Mail: Ford Fleet Care Program Headquarters, 19855 W. Outer Drive #500E, Dearborn, MI 48124

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Claim Entry Tips and Reminders

Ford Fleet Care Claims

- Verify the fleet customer pre-set authorization limit on OASIS before performing any repair work. If the repair exceeds the authorization amount, contact the customer using the information located in OASIS. A Purchase Order Number or Approval Code should be obtained. This number must be entered when submitting the claim for payment.

- Be aware of state tax laws regarding customer paid repairs. Ford Fleet Care repairs should be treated like retail repairs. If your dealership taxes retail repairs, most likely, fleet repairs should also be taxed. Ensure that tax is entered on the OWS claim when submitting for payment.

- If the fleet is tax exempt, remember to note the tax exemption number on the repair write-up. Enter the tax on the claim at zero dollars.

- Before submitting a repair for payment, confirm Ford warranty or Ford Protect Extended Service Plan coverage. OASIS will display any Ford Protect Extended Service Plan coverage registered to the vehicle.

- Due to variations in DSP software, Ford Fleet Program Administration recommends that all Ford Fleet Care claims be submitted directly in One Warranty Solution (OWS). By submitting claims directly, dealers have the ability to manually mark up for parts, resulting in a reduction of Ford Fleet Care claims that require an appeal.

- All customer and technician comments entered with Ford Fleet Care claims are passed to the customer as part of their Ford Fleet Care billing documentation. Please ensure that comments entered are descriptive and appropriate in documenting the customer concern and technician activity on a repair.

- OWS will not mark-up parts on Ford Fleet Care claims, this is a manual process.

- Remember to clear error messages for all claims (see the Error Code Guide in the OWS User Manual).

Parts Billing Claims

- ALL parts purchases require authorization from the fleet customer.

Customer Loyalty Program (CLP) Claims

- Directions for submitting CLP claims are located in the OWS Manual. Chapter 3 – Special Claim Preparation provides specific entry assistance for CLP claims for fleet customers. The most current version of the OWS Manual can be viewed and downloaded online from FMCDealer.com at the link below: https://team.extsp.ford.com/sites/OneWarrantySolution/EXTD延长/Dealer%20Launch%20Documents/Forms/AllItems.aspx

Ford Fleet Care Program Headquarters Contact Information

Website: www.fleetcare.ford.com

Email: ffcadmin@ford.com Phone: 800-367-3221 Fax: 313-390-3555

Mail: Ford Fleet Care Program Headquarters, 19855 W. Outer Drive #500E, Dearborn, MI 48124

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OWS Instructions for the Ford Fleet Care Program V1.1
### Helpful Hints for Ford Fleet Care Claim Entry

**Review OASIS for coverage and Fleet Account Pre-Set Authorization Limits prior to performing the repair.**

**Contact the Fleet Administrator if the cost exceeded the Fleet Pre-Set Authorization Limit.**

#### Submitting a Claim for Customer Paid Repairs
- Claims require the complete Ford or Motorcraft Part Number(s) being serviced or replaced.
- **Labor code L001** is the letter L with 2 zeros and then the number 1. The letter “O” is not accepted.

#### Submitting a Claim for Customer Paid Repairs with OSP, OSL, Misc. and Other
- A description of the codes are required in the Technician comments. The comments are to include the code, the amount and the description of each part or labor billed.
  - Example: “OSP for $10.50 = competitive make air filter”

#### Submitting a Claim for Customer Paid Maintenance Services
- Enter the full Ford or Motorcraft Part Number being serviced or replaced as the causal part for maintenance services. **Do not use MAINT as the causal part.**

#### Submitting a Claim for Non-Ford Vehicles
- Submit claims using program code QFCC with causal part COMPMAKE and labor operation L001.
- Ford or Motorcraft base part number of all parts repaired or replaced must be included in the claim.

#### Submitting a Claim for Over the Counter Parts Purchases
- Enter the 11-character billing account number provided by the Fleet customer.
- The billing account number format is “Q###FC####” for example “Q000FC12345”. Use zero, not the letter “O” for any numbers.

#### Submitting an Appeal
- **Part numbers entered incorrectly** cannot be changed. Debit the existing part line and add a new part line with the correct part number.
- Cores must be billed against the original sale invoice. **Cores cannot be billed on a separate R.O.**

**Note: DO NOT…**
- Include Ford Warranty repairs, Ford Protect repairs or Ford Protect deductibles in the repair cost estimate.
- Use the same P.O. for second repair or repairs for which the claim value has changed without reconfirming with the Fleet Administrator.