



# SERVICE ORDER FORM

The services offered below can be purchased separately or as a complete umbrella service covering you from every angle

## All under one roof!

### Operating Authority

We file the documents required by the DOT to get your company the operating authority and to get you moving.

**What is included:** The service includes the direct contact with the DOT throughout the entire process, from the initial application, filing your BOC-3, and until you receive the "Authorized" status.

**How much does it cost:** The cost to get your interstate operating authority filed through CSI, including all insurance filing and BOC-3 is \$500.

### Arbitration

An alternative dispute resolution for interstate household goods claims when a settlement through the standard claims process cannot be reached.

**What is included:** The service includes the arbitration user guide which you will provide to your customers at time of pickup; an informal written hearing conducted by a neutral TAB arbitrator.

**How much does it cost:** CSI charges a one time fee of \$225.00. Once a request for arbitration has been made by your customer an additional administrative fee will be charged by TAB and will be split between you and your customer based on the total amount of the claim in dispute. TAB's low fees are available on the Arbitration Shield Carrier Guide. Arbitration membership fee is automatically renewed unless a cancellation of service has been requested in writing.

### Contracts

The contracts designed by us are natural addition to your tariff. The terms and conditions match the ones included in your tariff and protect you from conflicts between your two (2) most important governing publications.

**What is included:** The customization of the contracts includes 16 of the most popular forms any moving company uses. The contracts are customizable and will include your company logo, contact information, license numbers, pricing and your terms and conditions.

**How much does it cost:** The cost to have your customized contracts made is \$475 for up to 16 different templates.

### Tariff

The interstate tariff is your company's menu of services. Any carrier operating lawfully must have a unique tariff which includes the specific operating procedures, the service terms and the service pricing. It is designed to match our contracts and avoid conflicts which may escalate to lawsuits.

**What is included:** The service includes 4 hours of consultation with our compliance personnel over the phone & via email to support you in completing the tariff and contracts questionnaire. Once the tariff and contracts have been approved by you we will mail you your published tariff to keep in your office as required by law.

**How much does it cost:** The cost to customize and publish your company's unique tariff is \$950.

### Training

We train your employees and crews with the most up to date regulations and proper methods to coordinate and perform the moves.

**What is included:** The service includes 2 hours of training webinar with our compliance personnel. You will receive a hard copy of the slides used in the webinar for future use and as referral material.

**How much does it cost:** We offer training for Sales, Operation and Customer Service. Our Sales Training is \$575; Operations Training is \$500 and Customer Service Training is \$415.

## Claims & Complaints

The claims and complaints services are charged on a month to month basis with no contract. Services may start immediately after signing up or you may request to start on a specific date. Please select the size of Plan and the Level of service you desire.

### What is included

Claims & Complaints Plans	Basic	Extended	Complaints	Premium
60 Cents Per Pound Per Article	✓	✓		✓
Full (Replacement) Value	✓	✓		✓
Subrogation Claims	✓	✓		✓
Property Damage Claims	✓	✓		✓
Loss Claims	✓	✓		✓
Damage Claims	✓	✓		✓
Delay Claims		✓		✓
Overcharge Claims		✓		✓
Grievance Claims		✓		✓
Complaint Response			✓	✓
Chargeback Response			✓	✓
Online Review Response			✓	✓
Inspection Setup				✓

### How much does it cost

20 Claims / Complaints	\$ 450	\$ 575	\$ 325	\$ 600
10 Claims / Complaints	\$ 325	\$ 450	\$ 250	\$ 475
5 Claims / Complaints	\$ 200	\$ 325	\$ 175	\$ 350

## Integrates Customer Service

We take all your customer service calls as we were part of your daily operations, assist with resolution to customers' concerns and.

**What is included:** The service includes a representative who will take all customer service calls and will work with your sales and operation departments to find resolutions for customers concerns.

**How much does it cost:** We offer two levels of service: Dedicated representative at \$1400; Consolidated service (will work on several carrier accounts) at \$800 a month.

## Final order

<input type="checkbox"/> Arbitration	<input type="checkbox"/> Claims & Complaints	<input type="checkbox"/> Contracts	<input type="checkbox"/> Interstate Tariff
\$ 225	\$ _____	\$ 475	\$ 950
<input type="checkbox"/> Operating Authority	<input type="checkbox"/> Integrated Customer Service	<input type="checkbox"/> Training	<input type="checkbox"/> Local Tariff
\$ 500	\$ _____	\$ _____	\$ 500

**Terms of payment:** We accept credit / debit card or ACH payments only. Credit / Debit card payments will be added a 3.5% processing fee. All services are prepaid and nonrefundable. All one-time payments are charged upon request and retainer services are charged on a specified billing cycle and will remain in effect until canceled in writing and within 15 days of the upcoming billing cycle. **New carriers will be charged a one time setup fee of \$150.** \* Cancellation requests must be sent to [billing@csipros.org](mailto:billing@csipros.org)

Carrier Information		
Carrier Name	DOT #	MC #
Address		
City	State	Zip Code
Company Phone #	Company Email	
Company Authorized Representative	Contact Phone #	
Service Authorization		
Signature	Date	



## CSI CLAIMS SERVICE AGREEMENT

This service agreement is between (carrier's legal name) \_\_\_\_\_  
located in: \_\_\_\_\_,  
here after called "Carrier", and **Claims Service International, Inc.** located in Port Saint Lucie, FL 34988 hereafter called "CSI",  
and is signed on this (day) \_\_\_\_\_ of (month) \_\_\_\_\_ of 20 \_\_\_\_\_

CSI Claims Service and CSIPros.org website use is offered to you conditioned on your acceptance without modification of the terms, conditions, and notices contained herein. Your signature hereunder constitutes your agreement to all such terms, conditions, and notices.

**CSI is not an insurance company and the employees of CSI are not acting as insurance adjusters.** CSI does not practice Insurance laws and does not provide legal advice. CSI services and CSIPros.org website is not intended to create an insurance claim, and by using CSIPros.org website, no insurance claim will be created with CSI. Instead, customers are filing Household goods claims against the carrier who moved them. CSIPros.org web site is not a substitute for the advice of an attorney. Furthermore, the information on CSIPros.org site and/or any information provided by CSI and its adjusters are not legal advice and are not guaranteed to be correct, complete, or up-to-date. Because the law changes rapidly, CSI cannot guarantee that all the information provided verbally and /or on the CSIPros.org website is completely current. The law is different from state to state; DOT regulations change from time to time and are also subject to interpretation by different courts. Therefore, if you need legal advice for your specific problem, or if your specific problem is too complex to be addressed by our tools and services, you should consult a licensed attorney in your area. CSIPros.org website and some of the articles on the site contain links to other resources and businesses on the Internet. Those links are provided as citations and aids to help you identify and locate other Internet resources that may be of interest, and are not intended to state or imply that CSI sponsors, is affiliated or associated with, or is legally authorized to use any trade name, registered trademark, logo, legal or official seal, or copyrighted symbol that may be reflected in the links.

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### **Modification of these terms of use**

CSI reserves the right to change the terms, conditions, and notices under which the services and website are offered, including but not limited to the charges associated with the use of our services and website, method of payment acceptable, etc.

### **Links to third party sites / Third party services**

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## No unlawful or prohibited use

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Carrier agrees to hold CSI's proprietary and confidential information in confidence, and agrees not to use or disclose, or allow use or disclosure or use of, such proprietary or confidential information or any information related to such proprietary and confidential information, directly or indirectly at any time by CSI. Carrier shall be responsible for any disclosure or use of such proprietary or confidential information by any person or entity which receives or otherwise learns of such information from Carrier. The forgoing shall not be interpreted to require CSI to disclose any proprietary or confidential information to the Carrier.

Carrier agrees to hold in confidence and not to use or disclose or allow the use or disclosure of the proprietary or confidential information of any other person or entity directly or indirectly which Carrier obtains or learns because of the relationship with CSI.

## Use of Claim service

CSI settles claims based on the carrier's legal liability as detailed in the carrier's Bill of Lading and Tariff. The carrier may not process or handle any claims outside the **CSI Claims Service Agreement**, it being understood and agreed that CSI is carrier's exclusive claims handling service provider. CSI has the sole and exclusive right to decline the handling of any claim which was initially processed by the carrier or any other parties prior to being transferred. Any claims transferred to the carrier by CSI to handle will not be refunded under any circumstances.

CSI responds to all claims and complaints received for processing within the time period required by DOT regulations. If such claims or complaints are not received in a timely manner, CSI is not responsible and will not be held responsible if any legal actions will be taken against the carrier. CSI keeps all records available for inspection at our business location for the time periods required by law.

CSI handles all claims and complaints as required by DOT rules and regulations and will not negotiate any settlement offers unlawfully and/or against DOT regulations.

The carrier must follow all DOT regulations and State laws always while using CSI services. CSI has the right to discontinue its services without an advanced notice if the carrier violates any applicable laws or regulations with the State and/or DOT. If CSI is unable to obtain necessary information for proper analysis of a claim, the customer will be referred to the carrier for the handling of the claim. If no contact is possible between CSI adjusters and the carrier's contact person or business owner, CSI will automatically terminate the service and will withdraw from the handling of all claims referred by the carrier. No refunds will be issued to carriers who fail to abide by this services agreement.

CSIPros.org website contains Online Claim Filing Service designed to enable you to communicate with the CSI's Adjusters online (collectively, "Online Service"), you agree to use the Online Service only to post, send and receive messages and material that are proper and related to the Claim File. By way of example, and not as a limitation, you agree that when using the Online Service, you will not:

Defame abuse, harass, stalk, threaten, or otherwise violate the legal rights (such as rights of privacy and publicity) of others.

Publish post, upload, distribute, or disseminate any inappropriate, profane, defamatory, infringing, obscene, indecent, or unlawful topic, name, material, or information.

Upload files that contain software or other material protected by intellectual property laws (or by rights of privacy or publicity) unless you own or control the rights thereto or have received all necessary consents.

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Upload files that contain viruses, corrupted files, or any other similar software or programs that may damage the operation of another's computer.

Advertise or offer to sell or buy any goods or services for any business purpose, unless such online Service specifically allows such messages.

Conduct or forward surveys, contests, pyramid schemes or chain letters. Falsify or delete any author attributions, legal or other proper notices or proprietary designations or labels of the origin or source of software or other material contained in a file that is uploaded.

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Harvest or otherwise collect information about others, including e-mail addresses, without their consent.

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Always use caution when giving out any personally identifying information about yourself or your children in any Online Service. CSI does not control or endorse the content, messages, or information found in any Online Service and, therefore, CSI specifically disclaims any liability with regard to the Online Service and any actions resulting from your participation in any Online Service. Managers and operators are not authorized CSI spokespersons, and their views do not necessarily reflect those of CSI.

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THE CARRIER SHALL INDEMNIFY CSI FOR ANY AND ALL LOSS OR DAMAGE INCLUDING BUT NOT LIMITED TO LEGAL FEES, TRAVEL EXPENSES, LOSS OF BUSINESS SUSTAINED BY CSI WHETHER RESULTING DIRECTLY OR INDIRECTLY FROM CLAIMS OR SERVICES PROVIDED TO THE CARRIER, THE CARRIER'S AGENTS, AND / OR THE CARRIER'S CUSTOMERS.

**Payment Terms & Conditions**

CSI Claims Service Plans are provided on a retainer basis. Payments are advanced and must be made on the billing cycle date as selected on the Carrier Information Form each month to allow service for the following 30 days. Invoices will be sent via email 5 days prior to the selected billing cycle.

Acceptable payment method: Credit Card payments only. We Accept: American Express, Master Card, and Visa. Payments will only be accepted accompanied by a signed Credit Card authorization form, signed Service Order Form and an enlarged copy of the front and back of the card.

All payments must be received no later than the billing cycle date each month. Payments received after the due date will result in a **late fee** automatically added to that month's invoice and charge. If payment is not received, the service will be temporarily on hold, no additional claims will be accepted, customers will be sent back to carriers, and open claims will become pending until payment is received in full. If payment is not received within 15 days, a termination notice may be sent to the carrier and to all carriers' customers. If such notice has been issued and the carrier has been authorized to continue the relationship with CSI, a setup fee will be charged for the resumption of our services. Payments are non-refundable unless a cancellation notice is provided in writing up to 15 days prior to the scheduled payment.

<b>CLAIMS SERVICE INTERNATIONAL INC.</b>		<b>Carrier Name:</b>	
<b>Authorized Person:</b> Donna Gotlib		<b>Authorized Person:</b>	
<b>Title:</b> President		<b>Title:</b>	
<b>Signature:</b> X 	<b>Date:</b>	<b>Signature:</b> X	<b>Date:</b>





# ARBITRATION SHIELD

**General Information:** CSI offers an arbitration shield program through Transportation Arbitration Board, Inc (TAB) in New York. TAB was established in 1975 sponsored jointly by the Transportation Loss Prevention & Security Association of the American Trucking Association, Inc and Transportation & Logistics Council, Inc.

**When is Arbitration used:** When you cannot resolve a claim with your customer, the customer can contact us for information about the program and to receive the necessary arbitration forms. Once the customer is sent the form we will notify you via email to let you know your customer has contacted us. If the customer chooses to proceed and files the arbitration forms with TAB, you will be notified and the adjuster assigned to the claim will assist you by answering any questions you might have. Our arbitration shield program fee is \$225.00 a year.

**Program Terms & Conditions:** The terms and conditions of the program will be provided fully in the Arbitration Shield Program Brochure you will receive once you sign up. Participating carriers must agree to abide by the rules of the program as detailed in our brochure. Failure to respond to arbitration requests made by customers will result in the carrier being removed from the program, at which point we are required to notify federal authorities that the carrier no longer participates in our program.

Carrier Information		
Carrier Name	DOT #	MC #
Address		
City	State	Zip Code
Company Phone #	Company Email	
Company Authorized Representative	Contact Phone #	

THIS SERVICE SHALL BE AUTOMATICALLY RENEWED FOR SUCCESSIVE ONE (1) YEAR TERMS THEREAFTER (EACH A RENEWAL TERM) UNTIL AND UNLESS EITHER PARTY PROVIDES THE OTHER PARTY WITH THIRTY (30) DAYS PRIOR WRITTEN NOTICE OF ITS DESIRE TO CANCEL THE AUTOMATIC RENEWAL OF THIS SERVICE. **NOTE:** UNTIL WE RECEIVE THIS SIGNED DOCUMENT WE WILL NOT BE ABLE TO ACTIVATE YOUR PROGRAM MEMBERSHIP. DO NOT DELAY RETURNING THIS FORM.

Signature	Date
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**CSI** KEEP ON MOVING

Phone: (772) 742-5246 Ext. 655 / Fax: (772) 204-0677  
billing@csipros.org / PO Box 880505 Port St. Lucie, FL 34988

# CREDIT CARD AUTHORIZATION FORM

CONFIDENTIAL

Carrier Information				
Carrier Name			Toll Free #	
Address			Local Phone #	
City	State	Zip Code	Main Fax #	
Billing & Payment Information				
Card Holder's Name			DL #	
Billing Address			Phone #	
City	State	Zip Code	Phone #	
Visa / MasterCard/ AMEX CC #			Exp. Date /	CSC (Security Code)

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**Payment Terms:** The credit card listed above will be used for the payment of the services chosen on Service Order Form. All credit card payments are non refundable and are subject to a 3.5% processing fee. To avoid credit card processing fees you may use our ACH payment option. Please contact our billing department to get the ACH payment information. Monthly rates are not prorated after the first month of service. If the card is declined and a payment has not been received 5 days after the due date listed on your invoice, a late fee of \$35 will be added to your outstanding invoice automatically. Cancellation of services must be made in writing to [billing@csipros.org](mailto:billing@csipros.org) no less than 15 days prior to the scheduled billing cycle.

I, hereby authorize CSI – Claims Service International, Inc. to charge my credit card for the services listed on the Service Order Form (s) whether billed jointly or separately. I fully understand that my payment is non refundable and that to cancel my service I must follow the cancellation instructions explained above. I fully understand that a late payment will result in a late fee.

Print Full Name	Title	Signature	Date
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