

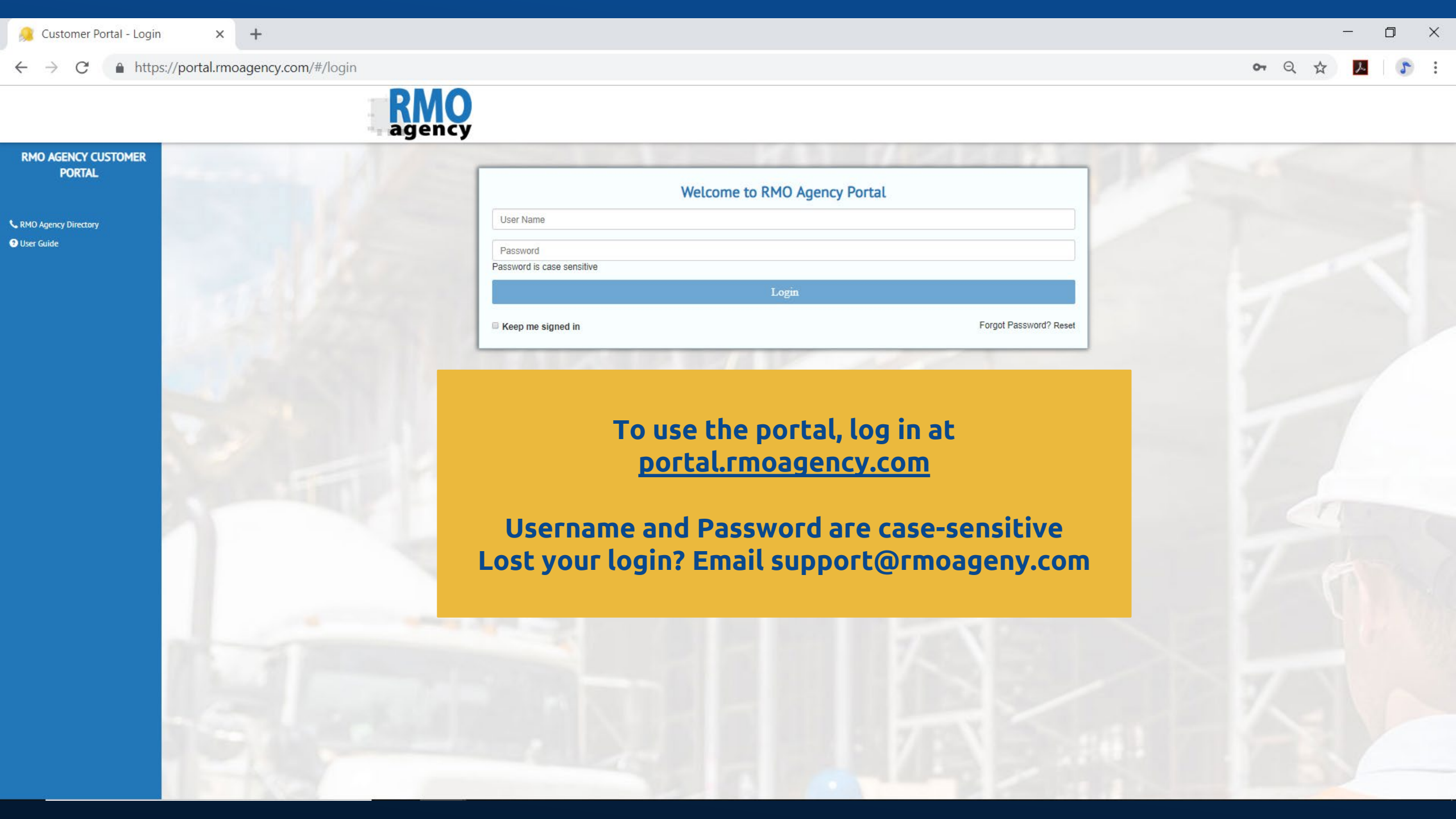
# WELCOME TO YOUR CUSTOMER PORTAL (APR. 2021)

*Proudly presented by RMO Agency*

Please see portal user guide below.  
Your feedback is greatly appreciated!

Enjoy!

The RMO Agency Team



RMO AGENCY CUSTOMER  
PORTAL

📞 RMO Agency Directory

📖 User Guide

### Welcome to RMO Agency Portal

Password is case sensitive

Login

☐ Keep me signed in

[Forgot Password? Reset](#)

**To use the portal, log in at  
[portal.rmoagency.com](https://portal.rmoagency.com)**

**Username and Password are case-sensitive  
Lost your login? Email [support@rmoagency.com](mailto:support@rmoagency.com)**



Use this button to return to  
your home screen

## RMO AGENCY CUSTOMER PORTAL



CONTRACTOR 1

Home

Check Your License

RMO Agency Directory

Open a Support Case

Your Case Log

Documents & Resources

User Guide

Profile Photo

Change Password

★ RMO Connect Community

Logout

contractor 1, Welcome to your customer portal!

Upload a new document/comment in your RMO folder below



RMO 1

ACTIVE

Contact Info

Communication Log

New Upload

New Comment

Project Tracker

Compliance CheckList

See your Match's contact info

See past communications with your Match

Fill out or upload Reports and Audits

Add a new comment to your log

Track your projects at any stage

Get set up for success

### Important Notes

To ensure compliance with CSLB requirements, a 'COMPLIANCE CHECKLIST' must be completed by clicking the button above and uploading the necessary documents for review.

**YOU are responsible for uploading these documents. Your RMO is responsible for reviewing for compliance and letting you know if something is NOT up to par.**

Instructions regarding compliance checklist button

A **RED** highlight means you have not completed the checklist

A **YELLOW** highlight means your documents are partially uploaded or under review

A **GREEN** means you have completed the compliance checklist



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Upload

Click 'Post' to upload your document.

RMO

RMO 1

Choose Upload Type

RMO Visit Report  
Business Document  
ANNUAL RMO Compliance Audit Checklist  
Other

Files:

Description

Currently, How satisfied are you with  
this RMO match?

- ☒ Very Satisfied  
☐ Satisfied  
☐ Dissatisfied

Satisfaction rating comment

Satisfaction rating comment

Post

To fill out or upload Monthly  
Reports or Annual Forms:  
Click on New Upload and select  
form type



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RMO

RMO 1

Choose Upload Type

RMO Visit Report

Document Type

☒ Manual

☐ Online

Choose Attachment(s)

Select Files

Files:

Description

Currently, How satisfied are you with this RMO match?

☐ Very Satisfied

☐ Satisfied

☐ Dissatisfied

Satisfaction rating comment

Satisfaction rating comment

Post

To upload a scan, picture, or saved file of a completed Report, select **Manual Document Type**

Click **"Select Files"** and choose the correct file from your computer

Include a brief description like "March 2021 Monthly Visit Report"

Indicate a satisfaction rating – anything less than Very Satisfied will let us know we need to connect with you

Don't forget to hit **Post** to save your work!



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RMO 1

Choose Upload Type

RMO Visit Report

Document Type

☐ Manual

☒ Online

My Email

claire@rmoagency.com

Other Email

sahal@rmoagency.com

Description

Currently, How satisfied are you with this RMO match?

☐ Very Satisfied

☐ Satisfied

☐ Dissatisfied

Satisfaction rating comment

Satisfaction rating comment

When ready to complete the form, please click POST and a new window will open for you to fill and sign

Post

To begin an online report, make sure to select **Online Document Type**

Put your own email under “**my email**” and your match’s email under “**other email.**”

Remember to add a **description**

When you click “**Post**” it will take you to a new screen, so be sure you’re ready to fill out the report.

Start where the yellow marker indicates

Start

Use the TAB key to advance to the next field throughout the document

Required fields are marked with a Red \*

As much as possible, fields are prefilled from our records, but they can be adjusted as needed

## Monthly Visit Report

[SUPPORT@RMOAGENCY.COM](mailto:SUPPORT@RMOAGENCY.COM)

(800) 818-4962

Contractor Name: \* contractor 1

RMO Name: \* RMO 1

Meeting Location: \*

Meeting Date: Mon Apr 05 2021

Safety Meeting Date & Notes:

Any work injuries? \* ☐ Yes \* ☐ No

Any new employees? \* ☐ Yes \* ☐ No

Any new subcontractors? \* ☐ Yes \* ☐ No

New employee/Subcontractor info (Name, License #):

Any unresolved complaints/issues/collections/past due bills? \* ☐ Yes \* ☐ No

What are you stressed or challenged with?

What are your potential future challenges?

Additional Notes - RMO Recommendations - Project Walk-Through Notes:

## RMO Visit Report

Required fields completed ✓

Any unresolved complaints/issues/collections/past due bills? ☐ Yes ☒ No

What are you stressed or challenged with?  
Chairs

What are your potential future challenges?  
More chairs

Additional Notes - RMO Recommendations - Project Walk-Through Notes:  
Practice sitting in chairs

**\*\*Contractor certifies that all projects are reported to RMO and all important documents are shared with RMO\*\***

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Signature:



Claire Weatherdon (Apr 3, 2020)

Email: [claire@rmoagency.com](mailto:claire@rmoagency.com)

Signature:

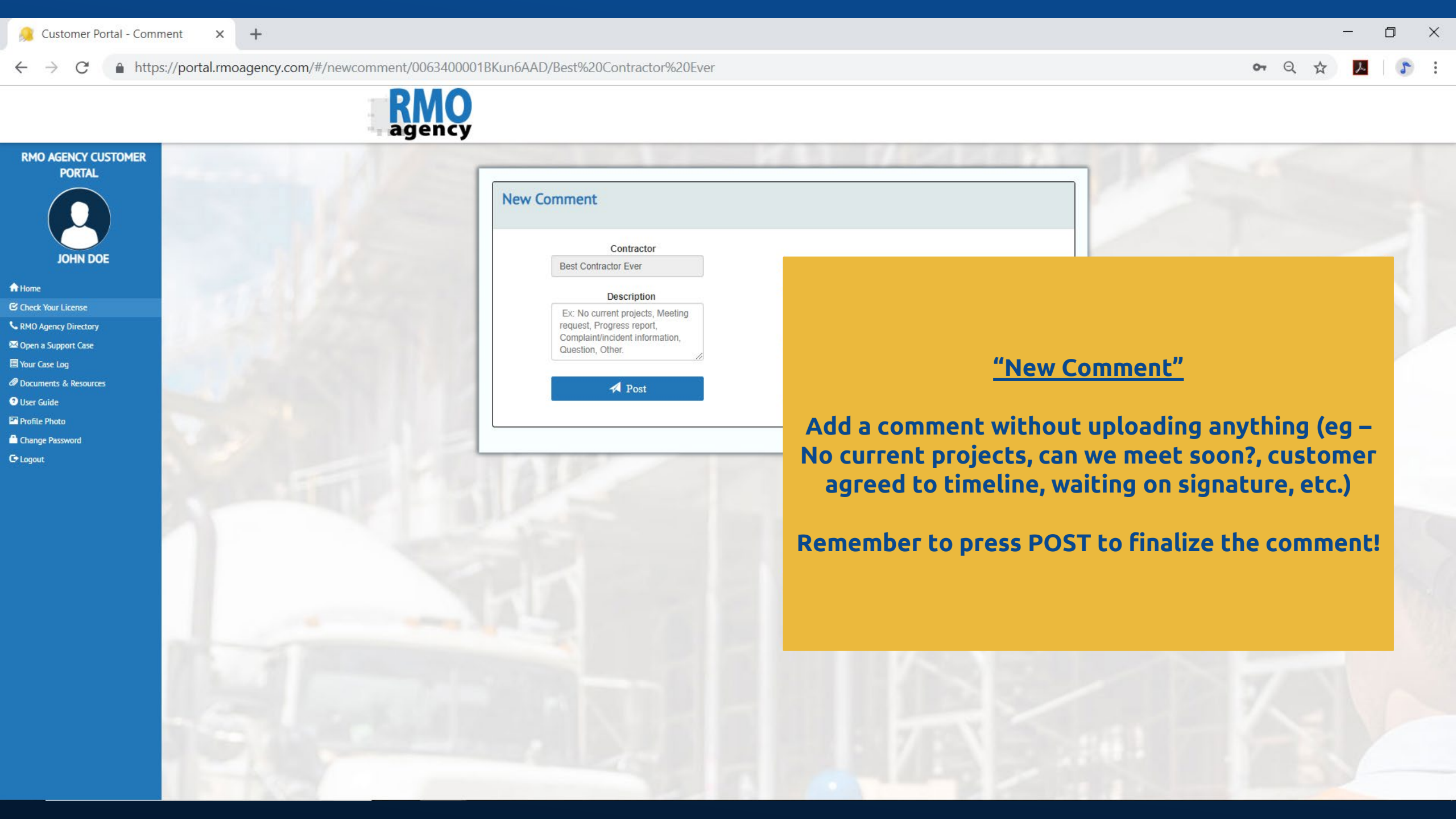
Email: [sahal@rmoagency.com](mailto:sahal@rmoagency.com)

Click here to sign. It will automatically send itself to your match for them to review and sign themselves

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).  
Sender requests you be redirected to [portalrmoagency.com](http://portalrmoagency.com) after signing.

Click to Sign





RMO AGENCY CUSTOMER PORTAL



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- 🔑 Change Password
- 🚪 Logout

New Comment

Contractor

Best Contractor Ever

Description

Ex: No current projects, Meeting request, Progress report, Complaint/incident information, Question, Other.

🚀 Post

**“New Comment”**

**Add a comment without uploading anything (eg – No current projects, can we meet soon?, customer agreed to timeline, waiting on signature, etc.)**

**Remember to press POST to finalize the comment!**



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### Long Term Project List

New Project

Search:  Filter: All| Upcoming| In progress| On Hold| Completed| Terminated mid project| Cancelled before start Sort: Start Date ▼ | Completion Date

Previous 2/1 Next

TEST L 1

L1

Start: Dec 31, 2020  
End: Dec 31, 2020

Project details & Docs

UPCOMING

### Short Term Project List

+ Add ✎ Edit 📅 Update ✕ Cancel

Customer Name	Description	Address	Date ▼
			04/05/2021
sa	sds	sds	

1 of 1 pages (2 items)

## Short Term Projects

- Great for smaller daily/hourly jobs
- Log Name, description, address, and date
- Be sure to hit update to save your work



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Project Saved

## Project Info

[Return to Project List](#)

Project Name

Test

Customer Name

Start Date

04/05/2021



Status

Upcoming

Description

Test

Address

Completion Date

mm/dd/yyyy





Notes

Save

Please remember to upload important project documents below

## Project Documents

Item	Add	Files (Click To View Files)
Contract [Template]  	<input type="button" value="Upload"/>	
Permit	<input type="button" value="Upload"/>	
Plans	<input type="button" value="Upload"/>	
Change Order [Template]	<input type="button" value="Upload"/>	
Completion Notice [Template]	<input type="button" value="Upload"/>	

## Long Term Projects

- Track important documents such as contracts and permits
- Upload as many documents as needed.



## RMO AGENCY CUSTOMER PORTAL

### Compliance Checklist

Click "upload" and select the file from your computer to add a document.

White – no document yet  
Red – document rejected – see remarks

Yellow – awaiting approval  
Green – approved!

Update our records and yours at the **SAME TIME!**

#### RMO 1

Item	Upload	Not Applicable	Remarks	File	Date	Status
Audit checklist [Online] [Template]	<input type="button" value="Upload"/>	<input type="checkbox"/>		View File	3/30/21	Pending Review
Contract Template [Template]	<input type="button" value="Upload"/>	<input type="checkbox"/>		View File	3/29/21	Pending Review
20% shares certificate	<input type="button" value="Upload"/>	<input type="checkbox"/>		View File	3/29/21	Pending Review
Change order [Template]	<input type="button" value="Upload"/>			View File	3/29/21	Pending Review
Completion certificate template [Template]	<input type="button" value="Upload"/>	<input checked="" type="checkbox"/>	Nothiond		3/7/20	Approved
Mid Project Separation Agreement [Template]	<input type="button" value="Upload"/>	<input checked="" type="checkbox"/>	dvd		3/7/20	Approved
Initial statement of information filed CLICK Secretary of State - Biz Look Up	<input type="button" value="Upload"/>			View File	3/7/20	Approved
Liability insurance certificate	<input type="button" value="Upload"/>			View File	1/26/20	Approved
Workers' compensation certificate	<input type="button" value="Upload"/>	<input type="checkbox"/>		View File	3/9/20	Approved
List of employees [Template]	<input type="button" value="Upload"/>	<input type="checkbox"/>		View File	3/12/20	Approved
List of your subcontractors [Template]	<input type="button" value="Upload"/>	<input type="checkbox"/>			3/3/20	Approved
Project estimate	<input type="button" value="Upload"/>			View File	3/5/20	Approved
Business license	<input type="button" value="Upload"/>			View File	1/26/20	Approved

#### Expiration Dates

Worker's Comp Insurance

03/30/2021

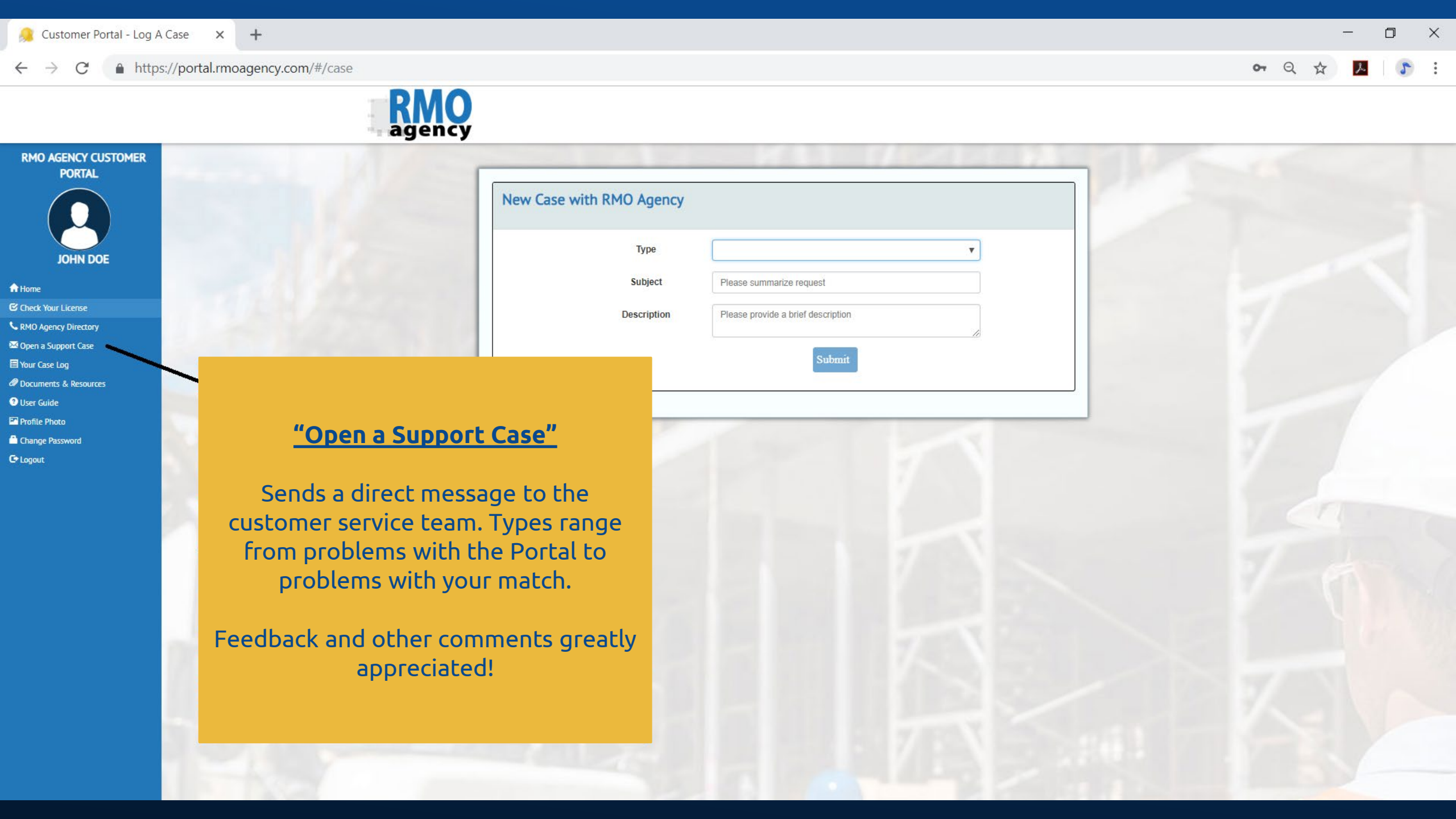


Liability Insurance

02/22/2021



I certify that the above list has been completed and reviewed.



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New Case with RMO Agency

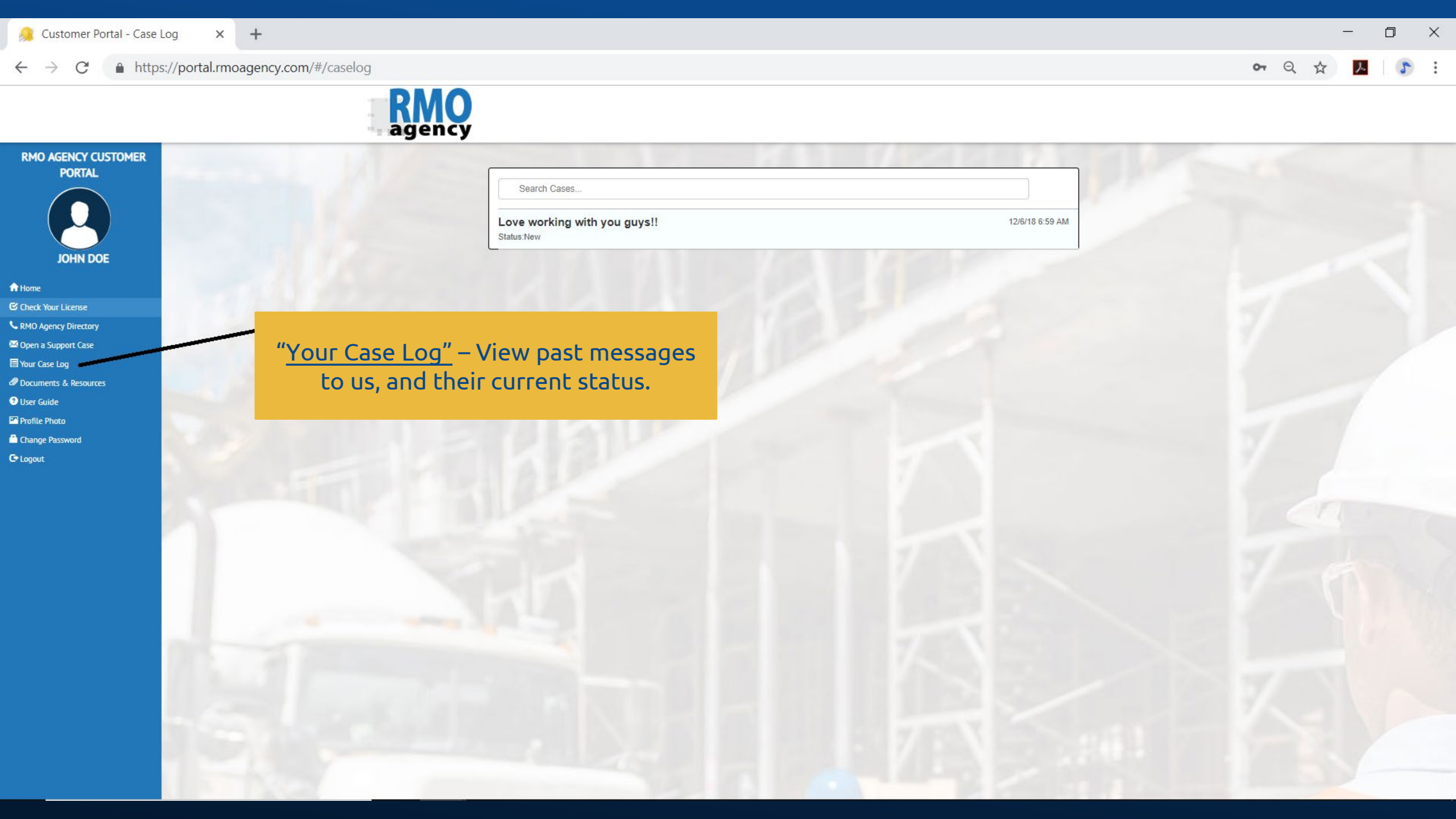
Type	<input type="text"/>
Subject	<input type="text" value="Please summarize request"/>
Description	<input type="text" value="Please provide a brief description"/>

Submit

**“Open a Support Case”**

Sends a direct message to the customer service team. Types range from problems with the Portal to problems with your match.

Feedback and other comments greatly appreciated!



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Search Cases...

Love working with you guys!!  
Status: New

12/6/18 6:59 AM

"Your Case Log" – View past messages to us, and their current status.





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## "Documents & Resources"

Includes frequently used CSLB documents, compliance forms, and other reference documents.

### Click On the Documents Below to Download

#### State Applications

- RMO Application Packet
- Application for new license (waiver)
- Background Questions
- Certification of work experience
- Additional Classification Application
- Application for replacing the qualifying individual
- Disassociation notice
- Disclosure Statement Regarding Criminal Plea
- Corporate Name Change Application
- Request for License Number Reissuance

#### Education

- Certification Booklet
- Certification Questionnaire and Answer Sheet

#### Compliance

- RMO Visit Report
- RMO Compliance Audit Checklist
- RMO Communication Log
- CSLB Audit Compliance
- New Business Plan worksheet
- Construction Contract - Sample
- Common problems with home improvement contract

#### Safety

- Safety Meeting Log Report
- Report work-related accidents to Cal/Osha
- OSHA worker safety tips



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Account Details

Profile Picture

Choose File No file chosen

Upload Photo



Name

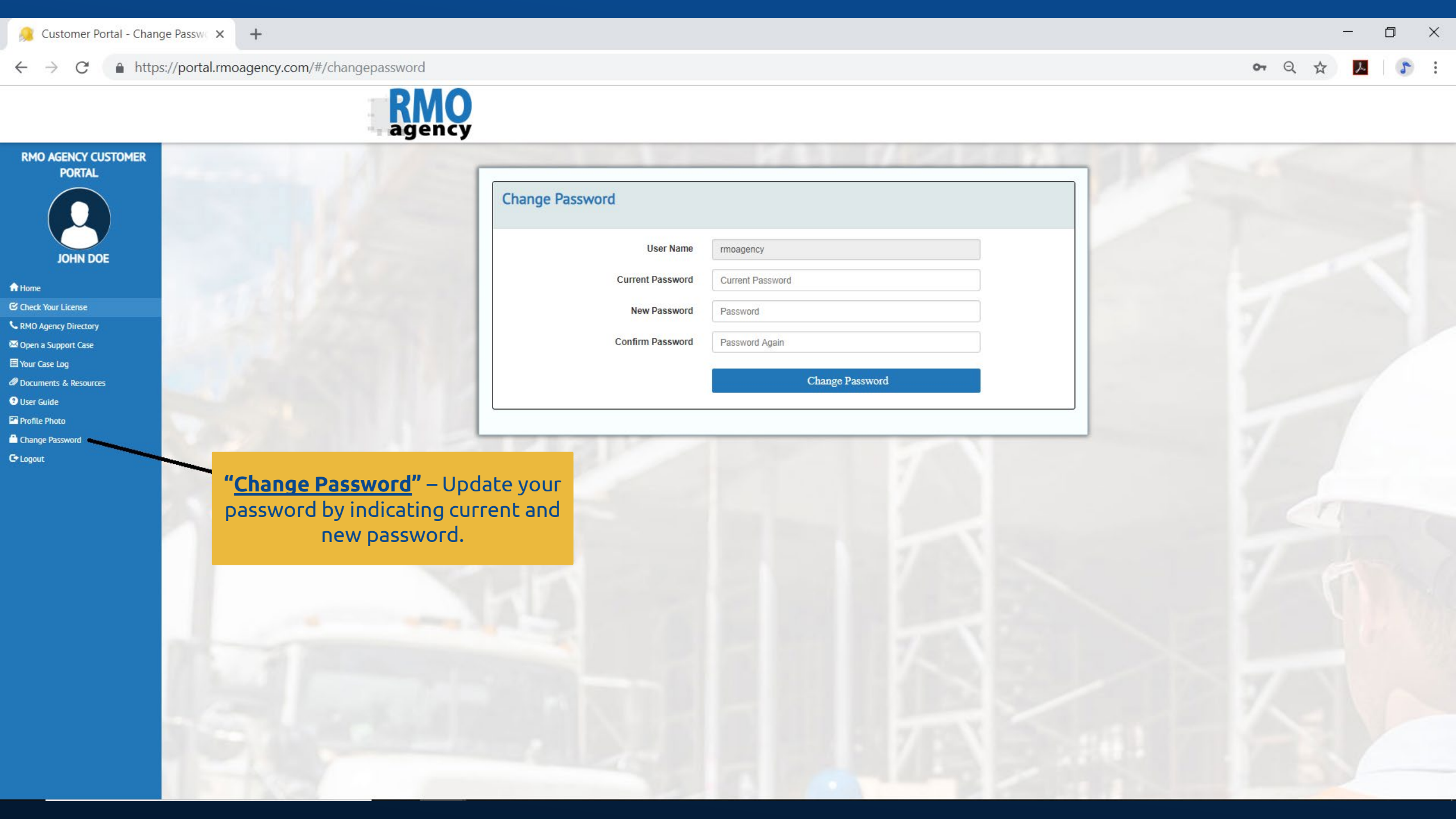
John Doe

User Name

rmoagency

**"Profile Photo"** – Update your profile photo.





**"Change Password"** – Update your password by indicating current and new password.