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**DIVISION/BULLETIN NO. HHGS Operations 07-06**

**DATE:** February 24, 2006  
**FROM:** Domestic Household Goods Operations  
**TO:** All United Domestic Agents

**SUBJECT:** Overflow Procedures

**PURPOSE/OBJECTIVE:**

To provide a comprehensive overview and clarification of all participants' responsibilities regarding overflows.

**KEY POINTS:**

- 1) The UniGroup Board of Directors recently approved changes to the disincentive policy for overflows (Operations Bulletin 01-06 dated 1/13/06). While it is difficult to address all the variables that cause an overflow to occur, this bulletin will outline specific procedures for each agent participant.
- 2) A potential overflow should be reported to UniGroup Operations as early as possible. When advised prior to loading, the planner will work with the booking agent. If there are no other loading options, the planner will authorize the overflow by issuing the van operator/hauling agent a control number using the new OVFL category on the control authorization screen. This protects the **van operator** from being assessed a disincentive. Per the new policy, an origin agent may be held responsible if an overflow is due to a bad estimate.
- 3) The timeliness in reporting an overflow is an additional factor in assessing a chargeback. Overflows should be reported to UniGroup Operations by the **hauling agent/van operator** no later than 9 a.m. Central time the next business day after the shipment is loaded. To address the late reporting of overflows, effective February 1, 2006, an overflow which is reported to UniGroup Operations two or more days after the actual load date of the shipment shall be subject to a \$50 per day assessment for each day beyond the required reporting date. The \$50 per day assessment will be capped at a maximum charge of \$500 per incident.

**ACCOUNTABILITY:**

All van operators and appropriate agency staff are responsible for following these procedures.

**CONSEQUENCES FOR NON-COMPLIANCE:**

Possible chargebacks to van operator or agency.

**ACTION REQUIRED:**

Distribute this bulletin to all van operators and appropriate agency staff.

**CONTACT:** Questions may be directed to your Household Goods Operations manager or director at United Headquarters.

**ATTACHED:** Procedures to follow when an overflow occurs.

## OVERFLOW PROCEDURES

### Van Operator/Hauling Agent Responsibility:

- If it is apparent a future loading assignment will result in an overflow, contact Headquarters Operations immediately. Operations will attempt to find another van to load the shipment. If no other van is available, a planner will authorize the overflow and issue the van operator/hauling agent a control number. This control number will be documented on the control authorization screen using the category OVFL. This control number protects the hauler from a disincentive being assessed. However, if the overflow is a direct result of an inaccurate estimate, the agent who provided the estimate may be charged a disincentive.
- If the van operator realizes an overflow is probable on the day of loading, contact the origin agent as early as possible, but no less than three hours before the close of business. This will allow the OA time to assemble a crew to pick up the overflow that same day.
- Notify Headquarters dispatch or the origin area planner of an overflow on the day of loading, but no later than 9 a.m. (Central time) the following business day after loading.
- The van operator should coordinate with the shipper to determine which items are essential and should go with the main portion and which items may be left as part of the overflow. **The van operator may need to explain to the customer that he is expected to load all bulky items and such items should not be left as the overflow.** Only nonessential, rectangular items that can be handled by one person should be left as the overflow.
- Beds, bedding, kitchen items, clothing, linens, computers, wheelchairs, medical equipment, and carpets should not be left as an overflow. While Item 1305, Note 12 of Tariff HGB 104-G states that delay claim settlements do not apply to overflow portions of a shipment, the Customer Service Department at Headquarters may offer a goodwill gesture to a customer for basic necessities left behind in an overflow. If the Customer Service Department must compensate the customer, these charges may be assessed to the responsible party.
- **If an overflow situation is identified prior to preparing the inventory,** prepare an inventory listing only those items that will be transported on your van. A second inventory is to be prepared listing all items that will be shipped as an overflow. This inventory is to be given to the head of the origin agent crew responsible for transporting the shipment to the origin warehouse.
- **If an overflow situation is identified after the inventory is prepared,** you must clearly indicate the items that will be included in the overflow portion of the shipment. Line items are to be marked in the exceptions at destination column as "OF". A separate inventory must then be prepared listing the overflow items.

- The hauling agent/van operator has the ultimate responsibility for the removal of the overflow from the residence. The van operator should remain at the residence until the origin agent has arrived for pickup. The hauler/van operator should notify Headquarters Operations when the OA is not available to pick up the overflow.
- **If you cannot be present when the overflow is picked up**, prepare only the inventory listing those items that will be transported on your van. The origin agent will be responsible for inventorying the overflow items at the time the overflow is picked up from residence.
- **If you cannot be present when the overflow is picked up and you became aware of the overflow situation after the inventory was prepared**, you must properly void all items that will be shipped in the overflow. Line items are to be marked in the exceptions at destination column as “VOID” and initialed by the customer. The origin agent will be responsible for inventorying the overflow items at the time the overflow is picked up from residence.
- **When picking up an overflow from the origin warehouse**, the van operator should take exceptions if the condition of the goods is different than described on the inventory.

#### **Origin Agent Responsibility:**

- Provides an accurate estimate.
- **If the van operator is present at the time the overflow is picked up**, the van operator or crew leader picking up the overflow must verify that all items listed on the overflow inventory prepared by the original van operator are present and in the condition described on the inventory. Any discrepancies must be resolved before leaving the residence.
- **If the van operator is not present at the time the overflow is picked up**, the origin agent crew must prepare an inventory of the items being picked up. The customer or the customer’s designated representative must sign this inventory. No items are to be taken from the residence until the overflow inventory is properly signed by both the origin agent representative and the customer/customer’s representative.
- Verifies in RORD the day after loading that the overflow is registered in the system.
- Updates actual weight, cube, and piece count as required.

#### **Headquarters Responsibility:**

- Issues control number to van operator/hauling agent when authorization to leave an overflow occurs.

- Registers the overflow within one hour of notification.
- Investigates noncompliance with these procedures and determines responsibility.