

Transmittal Recommendations for Market Centers Working Remotely

Now is the time to create a work from home plan with your OP, TL and Broker for your Market Center. To help you in this process, review the MC Business Continuity Toolkit at [Keller Williams](#), Reference Modules 1, 4 and 5.

TRANSMITTAL PREPAREDNESS

Confirm whether you can remotely access your information.

- VPN link - Do you utilize a VPN link? Your IT provider can set up a VPN link if desired.
- Remote login software - Work with your IT person or provider to provide this if they aren't able to set up a VPN link. Ensure that you have the password as they may change frequently.
- Ensure you **test this remote connection** before working remotely. (Do not test from the same network the market center is on.) Resolve any connection issues with your IT person or provider.
- Verify with your IT person that computers are not set to shut down or affect remote access in any way (ex. after Backups)
- We recommend the MCA desktop computer is connected to an uninterruptible power supply (UPS) in the event of a power outage.
- Desktop computer that houses WinMORE and AccountEdge - In a worst case scenario, take the computer home with you and connect to your home internet service. This solution works best if Winmore is not networked. **Discuss with your leadership prior to this step.**

During transmittal, the Angels will be working to support you as always. They are unable, however, to assist you with network or remote access login issues. This is why it is SO important for you to work with your IT person and ensure you can login remotely and conduct business **before transmittal**.

Transmittal Tips:

- Complete your soft close on a weekly basis to avoid transmittal issues:
<https://mcasupport.kw.com/hc/en-us/articles/360039523553-MCA-Daily-Weekly-Monthly-Soft-Close-and-Transmittal-Checklists>
- Ensure you have remote access to any backups. Refer to the following for more information on backups and a continuity plan for your market center:
<https://mcasupport.kw.com/hc/en-us/articles/360039780933-Back-up-Procedures>

Things to think about when working remotely:

- Review the MC Business Continuity Toolkit at [Keller Williams](#)
- Determine all of your transmittal tasks and due dates and how you will complete them remotely
- Outline your communication plan during transmittal
 - Leadership Team (including your OP's approval before transmittal)
 - Agents
- Identify necessary information to have with you or accessible
 - Remote login instructions
 - Contact information
 - Leadership team
 - IT company
 - All associates
 - Region leadership
 - All necessary online login information
 - Website login and password information
 - Bank login and password information
 - Ensure all contacts have your contact information
- Identify your market center operations plan
 - Determine market center status - will it be open or closed?
 - Who will be answering phones and how?
 - Establish communication methods with your Leadership Team and your associates
 - How will mail be accessed?
 - Identify the **critical** tasks that must be done remotely, and create a plan to complete them
 - Once documented and discussed with leadership, distribute this operations plan to leadership team
- Determine market center financial processes (Discuss with OP, TL and Broker)
 - Determine financial, payroll and reimbursement processes
 - How will checks be cut and signed?
 - How will bank deposits be processed?
 - How will you accept earnest money and get it out to closings?
 - How will bills be paid?
 - Will you be able to receive payments from agents?
 - Determine documentation flows
 - How will you receive your closing paperwork and closing funds?
 - Ensure whatever paperwork you need to continue conducting market center business is taken home with you (blank checks, invoices to be paid, etc)
 - Determine market center insurance coverage for business interruption/civil authority
 - Ensure you can remotely print any necessary documentation

- **Print to pdf is your friend!**
- Work with your IT company to ensure your remote solution allows you to print necessary documents wherever you are working (do not default to market center printer)
- Ensure you have print capabilities wherever you are working