



PARTNERING with FirstKey Homes

Onboarding Package

WELCOME

If you have been selected to onboard as a vendor with FirstKey Homes, please follow these steps to ensure a smooth and timely onboarding experience. Completing each step accurately will help avoid delays in activation.



1. SUBMIT REQUIRED DOCUMENTATION

To complete the first step of the onboarding process, please email your assigned VES Specialist with the required documentation. Your submission must include a completed and signed W-9, a summary outlining your areas of expertise, a detailed list of services provided, and the specific markets or territories you service.

2. VENDORCAFE REGISTRATION AND COMPLIANCE

You will receive an invitation to register in VendorCafe, our compliance management platform. A yearly fee of **\$89** is required to complete registration. Follow the attached **Certificate of Insurance (COI)** instructions.

After submitting your COI, confirm your account status shows: **“Awaiting Compliance”** and Confirm COI status shows: **“Received from Producer”**.

If your status shows **“No PPWK”**, Resubmit your COI, or contact VendorShield at **877-890-8627** for assistance.

Important:

The Description of Operations must be copied and pasted exactly as provided—do not modify or add wording.

3. EFT (DIRECT DEPOSIT) VERIFICATION

To set up payment, enter your **EFT/direct deposit details** in the system Complete the **penny test verification**, where small deposit amounts (e.g., \$0.32, \$0.75) will be sent to your account.

**This verification expires,
so please complete it promptly**

If needed, contact your Vendor Experience Specialist (VES) for assistance.

4. COMPLIANCE REVIEW

Once your account reaches compliance: Our team will receive a notification. You may follow up with your **VES** to confirm. Your file will then be submitted for **final review and approval**.

5. FACILGO REGISTRATION (SERVICE VENDORS ONLY)

If you are a service vendor, you must register with FacilGo.

Register here: [FacilGo®](#). Please Choose Starter Subscription.

We pay the \$50 fee. 2% invoice fee paid by vendor to Facilgo.

Once registration is complete, notify your **VES**.

Territories (**CBSAs**) will be assigned.

To access and configure your assigned locations, log into FacilGo and navigate to **Dashboard → Setup → Customers**.

From there, accept your assigned CBSAs and enter an account number using whatever preferred format works best for your system.

This platform is used for:

- Work orders
- Completion photos
- Quote requests
- Invoicing

6. SET UP FACILGO NOTIFICATIONS

To ensure you receive work orders promptly: Go to:
Profile (top right) → Account Settings → Notifications
and enable notifications for **incoming work orders**.

7. SCHEDULE FACILGO TRAINING

Coordinate with your **VES** to schedule a FacilGo training session to ensure you are fully prepared to use the platform effectively.

8. FACILGO REGISTRATION (SERVICE VENDORS ONLY)

At this stage: Your account should be fully approved (if all steps are completed correctly).

Service vendors should have:
an active FacilGo profile, territories assigned and accepted and notifications enabled.

Next schedule a kickoff call with your **VES**. This will be a Microsoft Teams meeting with FirstKey Homes local market managers.

Purpose of this call

- Review expectations
- Discuss how your services will be utilized
- Meet the team

COI INSTRUCTIONS

The Certificate of Insurance (COI) and endorsement instructions must be validated by VendorShield to confirm the vendor meets the client's compliance requirements.

Insurance Agents

Please review the COI/Endorsement requirements linked here, along with the details provided in your VendorShield email. Once reviewed, submit all required documentation directly through the Producer Portal.

Vendor Compliance Guidelines

Step 1: Check Your COI — Review the sample COI and ensure all highlighted fields and notations match your document. If your submission is marked non-compliant, compare it to the sample and request a revised copy from your agent.

Step 2: Verify Policy Limits — Visit the Insurance Information tab in VendorCafe to confirm your coverage amounts. Contact your agent immediately if you need to add policies or increase limits to meet compliance.

The email outlines the required policy limits and endorsements for this vendor.

VENDOR ONBOARDING PACKAGE

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ACORD CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY)																																			
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.																																					
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Producer

Your insurance agent's company information (This information should match what you entered in your VendorCafe profile under the "insurance information" tab)

Insured

Your legal business name and/or your DBA, along with your corresponding address information, must be similar to what you entered into your VendorCafe profile in order to be validated as compliant.

Date

Issue date shown must be within the last 30 days. Industry standard is that information must be recent to be deemed valid (30 days maximum timeframe).

Contact Name

Phone | Fax | Email

Insurance agents contact info

Insurer A and B:

Insurance carrier for 1st and 2nd policy (if applicable)

VENDOR ONBOARDING PACKAGE

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Limits

Limits must meet or exceed the amounts required by the client based on your vendor insurance category (Refer to VendorCafe profile or producer email instructions for specific numeric limits).

Commercial General Liability

✓ Commercial general liability

✓ Occur

Policy Number: Should match what is entered in VendorCafe under the "Insurance information" tab

Policy EFF: Effective date must be current term (If future term, must also have a current term on file)

Policy EXP: Must be in the future

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Auto Liability

Policy Number: Policy # if required

Policy EFF: Effective date

Umbrella Liability

✓ Umbrella liability

✓ Occur

Policy Number: Policy # if required

Policy EFF: Effective date

Policy EXP: Expiration date

Workers Compensation

✓ Per statute

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					\$
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Description of Operatinos (DOO)

FirstKey Homes, LLC and subsidiaries (Cerberus SFR Holdings, L.P.; Cerberus SFR Holdings II, LP.; Cerberus SFR Holdings III, L.P.; CSMA BLT, LLC; CSMA FT, LLC; CSMA SFR Holdings II - LSE, LLC)

The Descriptor of Operations (DOO) can be either copy/pasted exactly as it appears or summarized by the agent in their own words. A summary of the coverage must reference all the required information in order to be compliant.

Certificate Holder

FirstKey Homes LLC c/o VendorShield
PO BOX 1576, Hicksville, NY 11802-1576

Cancellation

Notice of Cancellation: All insurance policies and certificates of insurance shall either include a physical endorsement or language on the standard Accord form providing written notice for cancellation.

Signature

Your legal business name and/or your DBA, along with your corresponding address information, must be similar to what you entered into your VendorCafe profile in order to be validated as compliant.

Endorsment Form Tips

Policy/Insured Identifiers

All endorsement forms that have sections which require policy information, must have those fields filled out with information matching either the certificate of insurance or other policy document (ex: declarations page)

- Example: If there is a field present for effective dates, it should be filled out with dates matching the COI. If it is left blank, it will be marked non-compliant.

Scheduled endorsement forms

(Additional Insured and Waiver of Subrogation) must include the exact language outlined in the instructions above.

(Note: This is not required for blanket endorsements).

When a Declaration Page must be submitted:

- If a scheduled endorsement refers to a declarations page for proof of the covered party, then that declarations page must also be submitted.
- If a scheduled or blanket endorsement refers to a declarations page for proof that the endorsement was paid for, then that declarations page must also be submitted

VendorShield uses any version of endorsements forms, declarations pages, or the entire policy jacket to determine whether endorsement will satisfy the client requirements.

NEED HELP?

Our goal is to empower your success. The quickest way to get answers to common onboarding questions is via our extensive online resources.

Step 1: Consult the Resources

Please visit our [Help Center](#). The Help Center is designed to be your self-service primary support tool, with solutions to the majority of questions.

Step 2: Contact Your VES

If you are unable to find the support you need within the Help Center, you are always welcome to reach out to your assigned Vendor Experience Specialist (VES).

CONTACTS

Bronte Hampton

Vendor Experience Specialist: Texas, Oklahoma City

bhampton@firstkeyhomes.com | 214-868-1708

Tony Lambert

Vendor Experience Specialist: Florida

alambert@firstkeyhomes.com | 407-949-1045

Stacy Lusader

Sr. Manager – Vendor Experience

slusader@firstkeyhomes.com | 480-326-9589

Octavio Martinez

Vendor Experience Specialist:

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