

Professional Standards of Practice For Structural Bat Management For Wildlife Control Operator's

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Abstract

The National Wildlife Control Operators Association, (NWCOA®) is a 501(c)6, nonprofit trade association organized exclusively as a mutual benefit association to assist persons or organizations providing commercial wildlife damage management and control activities. Following its primary mission, NWCOA® is active in training, educating and promoting competency, service and integrity to the members of the wildlife damage management industry. NWCOA® is the only trade association representing private wildlife control operators on a national basis. After receiving feedback from the public, regulatory authorities, and wildlife control operators, NWCOA has identified a need to define and quantify what constitutes a professional bat roost mitigation from a structure for property owners. NWCOA has also identified a need to inform service providers regarding the impact of White Nose Syndrome on existing bat populations and the importance of resolving human/bat conflicts in a manner that both protects human health and provides a conservation-minded approach to protecting our wild bat resources.

The purpose of this document is to define the National Wildlife Control Operators Association (NWCOA®) Standards of Practice and to establish a minimum uniform standard for Wildlife Control Operators (WCO) in the performance of work related to bats and resolving conflicts between humans, bats, and structures. It is NWCOA's® intent that these standards of practice for bat management by WCO's will be accepted and recognized by governmental regulators and professional groups as the minimum definitive and technical standard for professional performance. NWCOA® has developed these Standards of Practice in hopes that they will be the most widely-accepted bat management guidelines in use by the nuisance wildlife control industry and related professions and be applied to all entities that provide wildlife damage management services on a commercial basis by regulatory authorities.

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1. Introduction

- **1.1. Purpose** The purpose of this document is to define the National Wildlife Control Operators Association (NWCOA) Standards of Practice and to establish a minimum uniform standard for Wildlife Control Operators (WCO) in the performance of their work related to bats and in resolving conflicts between humans and bats in or on structures.
- **1.2. Intent** The intent of the NWCOA standards of practice for bat management for WCO's are to be recognized by governmental regulators and professional groups as the minimum definitive and technical standard for professional performance.
- **1.3. Goal** NWCOA has developed these Standards of Practice in hopes that they will be the most widely-accepted bat management guidelines in use by the nuisance wildlife control industry and related professions.
- **1.4. Prerequisite** These Standards of Practice shall be a prerequisite to the NWCOA Certified Bat Technician Course.

2. Definitions and Scope

- **2.1.** A **Wildlife Control Operator (WCO)** is any person, partnership or corporation that for compensation or other consideration or promise thereof and is acting as an agent for a property owner, a legal occupant, local jurisdiction or agency that is in the business requiring the art, experience, ability, knowledge, science and skill to abate or mitigate wildlife damage; and who inspects, consults, provides abatement services or otherwise mitigates wildlife damage through the taking, shooting, trapping, capturing, removing, evicting, excluding repelling, hazing, or harassing of wildlife for the purpose of controlling damage, alleviating nuisance problems, or resolving public health concern risks.
- **2.2.** The **Inspector** shall be a WCO with a general, well-rounded knowledge of residential and commercial structures, bat biology and behavior, and the physical ability to perform an honest inspection in order to provide the client with a solution to their bat problem.

2.3. Uncertainty

The client should understand that no pre bat eviction/venting inspection is completely accurate. And that an inspection report and/or service agreement/contract/proposal is only written communication of the observations made by the WCO. The report contains those items which, in the WCO's opinion, are likely to be of interest to his/her client.

2.4. Subjectivity

The client should understand that the inspection report and/or service agreement/contract/proposal is, to a large degree, the subjective opinion of the WCO based on his/her observations and experience within the limits of access or accessibility, time, budget, equipment, or detailed knowledge of the structure to solve the conflict. The inspection report and/or service agreement/contract/proposal is not much more than a subjective professional opinion.

2.5. A Preliminary Bat Eviction/Venting Inspection is a non-invasive, visual examination of the interior and exterior of a residential or commercial dwelling, that may be performed for a fee, which is designed to identify current and potential bat entry points, exterior

roosts, structural defects, rabies risk, contaminations, and Ectoparasites within specific components of said dwelling prior to exclusion and eviction/venting. Components may include any combination of mechanical, structural or other essential systems or portions of a structure, as identified and agreed to by the Client and WCO, prior to the inspection process.

- **I.** A preliminary bat eviction/venting inspection is intended to assist in evaluation of the overall bat colony within and the condition of the dwelling. The inspection is based on observation of the current and potential bat entry points and apparent condition of the structure on the date of the inspection, and not the prediction of future populations or conditions.
- **II.** A preliminary bat eviction/venting inspection may be performed for a fee. Fees are usually associated with the experience of the WCO or company, distance to client's structure, and the time associated with the inspection.
- **III.** A preliminary bat eviction/venting inspection will not reveal every concern that exists or ever could exist, but only the current and potential entry points and defects observed on the day of the inspection.
- **IV.** A preliminary bat eviction/venting inspection may include a written and/or hand graphed Inspection Report or Service Agreement/Contract/Proposal of identified entry points and conditions in a residential or commercial structure.
- V. A preliminary bat eviction/venting inspection, when performed for a fee, shall include a written and/or hand graphed Inspection Report or Service Agreement/Contract/Proposal of identified entry points and conditions in a residential or commercial structure. This Inspection Report or Service Agreement/Contract/Proposal should include photo documentation as a recommended practice.
- **VI.** A preliminary bat eviction/venting inspection may reveal **Structural Defects**. A structural defect is a condition of a residential or commercial property, or any portion of it, that would have a significant, adverse impact on the bat eviction/venting process to the property, or that may prevent 100% eviction of bats from the property. Therefore, the structure may not be warranted.
- VII. A preliminary bat eviction/venting inspection may reveal **Structural Damage**. Structural damage may be caused by the accumulation of bat guano and/or urine to any part of the wood members of the structure. It is not and shall not be stated by the WCO to the client the severity of the structural damage. The WCO shall recommend to the client that a professional licensed contractor or structural engineer inspect and determine the severity of the potential structural damage.
- **VIII.** A preliminary bat eviction/venting inspection is designed to identify current and potential **Bat Entry Points** that lead into the interior of the structure. Bat entry points are defined as areas eighteen (18) inches above grade that may emit air draft from the structure that are greater than or equal to 5/8 inch round or 3/8-inch wide and ¾ -inch long regardless of its orientation. Building components harboring voids less than or equal to 5/8 inch round or 3/8-inch wide by ¾ inch long regardless of orientation that may be adversely affected by weather or other factors, may be considered by the inspector as potential entry points if those voids are likely to increase over time.
- **IX.** A preliminary bat eviction/venting inspection is designed to identify current bat roosting points 18 inches above grade on the exterior of the structure and may identify any additional potential roosting points post eviction/venting procedures. The WCO

- shall convey to the client at the time of the inspection the potential for **exterior roosts** post eviction/venting procedures.
- **X.** A preliminary bat eviction/venting inspection may reveal a **contamination** or accumulation of bat guano within the structure. Other than structural damage, the accumulation of bat guano can create biohazard that may put individual's health at risk within the structure. The WCO shall convey to the client at the time of the inspection the potential for individuals health at risk based on the amount of droppings, their location, risk of disturbance, and airborne contamination through HVAC units.
- (See 3.0 Cleaning and Remediation for additional information about the health risks associated with bat guano.)
- **XI.** A preliminary bat eviction/venting inspection may not reveal all the accumulations of bat guano within the structure. Bats will typically roost in areas that cannot be readily accessed or visually inspected, such as wall voids. The client should understand that disturbing these **inaccessible areas** where guano may have accumulated is not necessary, unless those areas are likely to be disturbed as a result of construction, remodeling, renovation, repair or other circumstance.
- (See 3.0 Cleaning and Remediation for additional information about the health risks associated with bat guano.)
- **XII.** A preliminary bat eviction/venting inspection may reveal **Ectoparasites or Bat Bugs** (*Cimex adjunctus*) in/around/close proximity of the bat roost. The WCO shall convey to the client at the time of the inspection the potential for the client to become a secondary host once eviction/venting procedures are completed.
- (See 2.8 Post Eviction/Venting III. for additional information about ectoparasites and bat bugs.)
- **XIII.** A preliminary bat eviction/venting inspection may reveal the risk of human exposure to the bats and the possibility of transmission of **Rabies** through contact with a bat. Bats often enter the living space of homes due to their roost being in close proximity to open windows, doors, and attic access panels and doors. Bat bites and other physical contact may go undetected by individuals who are asleep. For this reason, clients should be informed of the risk of a bat or bats entering the living space of the structure during the eviction/venting process and should take every precaution to avoid direct contact with a bat or bats.
- (See section 3.1 Public Health Concern Rabies Exposure for additional information about rabies and bats.)
- **2.6.** An **Inspection Report and/or Service Agreement/Contract/Proposal** shall describe and identify, in written and/or graphed format, all of the inspected areas of the structure, current and potential entry points, exterior roosts, identify any structural defects, contaminations, Ectoparasites, a description of the warranty, its limitations, and its time period, and a price to exclude and evict/vent the bats from the structure.
 - **I.** Inspection reports and/or service agreement/contract/proposals may also contain recommendations for post inspections/monitoring/bat watches or further evaluation by other industry professionals.
 - **II.** Inspection reports and/or service agreement/contract/proposal may also contain photo documentation. This documentation shall be of all of the inspected areas of the structure with current and/or potential bat entry points, exterior roosts, structural defects,

and contaminations as evidence/proof to the client of the issues associated with the bat and to protect the inspector from any potential liabilities.

- **III.** Inspection reports and/or service agreement/contract/proposal shall contain a description of the warranty, its limitations, and its time period. Warranties shall not start until the final eviction/venting devices are installed on the structure or 100% eviction is confirmed by the WCO and the client. Warranties may be limited to colonies of bats entering the interior of the structure. Warranty time periods shall not be less than one year and shall not exceed the manufacturer's minimum service life of any exclusion material used on the structure. Warranties must not exceed the ability of the installing company or WCO to service said warranty.
- **IV.** Inspection reports and/or service agreement/contract/proposal shall contain a price to exclude and evict/vent the bats from the structure. Price shall reflect the company's or WCO's ability or experience to perform the bat removal services based upon these standards, material costs, labor, and profit.
- **2.7. Exclusion** is a technique where *all potential* bat entry points stated in the inspection report and/or service agreement/contract/proposal, is made uninhabitable or impervious to a bat by the use/application/installation of exclusion materials,
 - I. Exclusion materials are building materials or components that may be used/applied/installed/dispensed, but are not limited to, are caulk, adhesives, or sealants, backer rod, chinking, foam, wire mesh, metal flashing or coil stock, chimney caps, or any other building construction materials that will prevent the colony of bats from relocating on the structure once the eviction/venting devices have been installed on/over the current entry points.
 - **II.** Exclusion materials must have a minimum service life of one year or a service life that is equal to or greater than the warranty provided in the inspection report and/or service agreement/contract/proposal provided to the client by the WCO.
 - **III.** Exclusion materials shall be applied to all potential bat entry points that lead into the interior of the structure from the exterior of the structure. Bat entry points are defined as areas eighteen (18) inches above grade that may emit air draft from the structure that are greater than or equal to 5/8 inch round or 3/8-inch wide and 3/4 -inch long regardless of its orientation. Bat entry points in use should not be closed until all volant bats have been evicted/vented from the structure.
 - **IV. Cure Period** is the time that it takes an uncured material, such as foam, chinking, caulk, adhesive, or sealant, to fully dry or solidify once it has been exposed or dispensed into a gap/opening/space between two surfaces. Cure periods vary among foams, caulks, adhesives, and sealants. Cure periods of these products are also subject to temperature, humidity, and volume. Therefore, the WCO must refer to the manufacturer's technical data, label, or directions to determine the cure period prior to use.
 - **V. Caulking or Sealing** may be referred to as the process of dispensing/applying/injecting an uncured material from a tube, with the aid of a caulking gun, into a gap/opening/space between two surfaces for the purpose of making it uninhabitable or impervious to bats. Gaps/openings/spaces equal to or greater than a

½ inch should have rigid backing material installed in the gap/opening/space prior to caulking or sealing.

VI. Backing Materials, such as but not limited to backer rod, wire mesh, or non-woven fibers, are rigid materials that may be installed in gaps/openings/spaces equal to or greater than a ½ of an inch. These materials will prevent bats from being exposed to uncured materials, hold sealant materials in place while curing, and will reduce volume of curable materials necessary to seal gaps/openings/spaces. Backing materials will allow application of sealants to manufacturer's recommendations and can decrease the curing period for some sealants.

Dispensed foam products shall be used as a backing material only. Any dispensed foam that requires a cure period of more than four hours shall not be applied within a two foot radius of any active bat entry point on a structure four hours prior to sundown.

VII. Caulks, Sealants, and Adhesives are uncured materials that may be package in a tube and dispensed/applied/injected, with the aid of a caulking gun, into a gap/opening/space between two surfaces. This process is referred to as "caulking or sealing" bat entry points for the purpose of making them uninhabitable or impervious to bats. Gaps/openings/spaces equal to or greater than a ½-inch should have rigid backing material installed in the gap/opening/space prior to the caulking or sealing process. These materials come in a variety of formulations to accommodate any surface application. Therefore, the WCO must refer to the manufacturer's technical data, label, or directions to determine the product that best fits his application needs.

VIII. Foaming Materials are uncured materials that are packaged in an aerosol can and dispensed/applied/injected into a gap/opening/space between two surfaces and or may be used as a backing material for caulking and sealing. This process is referred to as "foaming" bat entry points for the purpose of making them uninhabitable or impervious to bats. Uncured foaming materials may endanger the welfare of the bat colony. Any foaming material that requires a cure period of more than four hours shall not be applied within a two foot radius of any active bat entry point on a structure four hours prior to sundown. These materials come in a variety of formulations to accommodate any surface application. Therefore, the WCO must refer to the manufacturer's technical data, label, or directions to determine the product that best fits their application needs.

IX. Chinking Materials are uncured materials that are packaged in one to five gallon containers and applied, with the aid of a chinking tool, into a gap/opening/space between two logs. Chinking is a flexible, elastomeric material with the appearance of concrete mortar. This process is referred to as "chinking" bat entry points for the purpose of making them uninhabitable or impervious to bats. Gaps/openings/spaces equal to or greater than a ½-inch should have rigid backing material installed in the gap/opening/space prior to chinking. Any chinking material that requires a cure period of more than four hours shall not be applied within a two foot radius of any active bat entry point on a structure four hours prior to sundown. Therefore, the WCO must refer to the manufacturer's technical data, label, or directions to determine the cure period prior to use.

X. Uncured materials may endanger the welfare of the bat colony. Any material that requires a cure period of more than four hours shall not be applied within a two foot radius of any active bat entry point on a structure four hours prior to sundown. The

WCO shall also make an effort to re-inspect all potential entry points prior to an application of such materials in order to prevent bat exposure to the uncured materials.

- **XI.** Materials that require a cure period of more than four hours that are applied after the placement of a rigid backing material in the gap/opening/space may be applied within the two foot radius of an active bat entry point at any time during daylight hours.
- **XII.** A **Fastener** is a building material, such as a screw, nail, or a staple, that requires a hand tool to fasten another material firmly in place, such as wire mesh, flashing, or plywood. Adhesive tapes or tape-like materials shall not be used as a fastener for bat exclusion or bat eviction/venting.
- **XIII. Metal Materials**, such as flashing, coil stock, and sheet metal, are building materials that may be used as an exclusion material and shall be fastened to the structure. These materials can be composed of stainless steel, galvanized steel, copper, or aluminum and shall not be less than .019 gauge.
- **XIV. Siding Materials**, such as Wood, Vinyl, and Wood Composite Materials, are building materials that are used to protect a structure or that may be used as a bat exclusion material.
- **XV. Chimney Cap** is a device that is fastened to a chimney or chimney flue that will prevent bats from entering the flue. Manufactured and custom chimney caps can be composed of stainless steel, galvanized steel, copper, or aluminum and shall not have an expanded metal mesh size that exceeds ¾ of an inch. Placing screen, wire mesh, or expanded metal over or in the flue is not acceptable and is illegal in most states. The WCO is responsible for complying with all local, state and federal laws that pertain to chimney caps and chimneys.

See National Fire Code and National Fire Protection Association

http://www.nfpa.org/aboutthecodes/AboutTheCodes.asp?DocNum=211&cookie%5Ftest=1

- **XVI.** A **Vent** is a device that allows air to escape or enter a structure. Round hat vents, square roof vents, gable vents, flap vents, and dryer vents may have forced air from a fan or blower. Square roof vents, ridge vents, soffit vents, gable vents, and sewer vents may allow air to enter and escape the structure.
- **XVII.** A **Vent Cover** is a device that covers an existing vent, it must be fastened to the vent or structure and will prevent bats from entering the vent. Manufactured and custom vent covers can be composed of stainless steel, galvanized steel, copper, aluminum, or plastic and shall not have an expanded metal or mesh size greater than 0.375 of an inch. Perforated vinyl siding, wire mesh, or expanded metal covering the vent is acceptable in most states with the exception of dryer vents. Vent covers placed on dryer vents may create a fire hazard, and extreme caution should be used when excluding these type vents. Non-woven fiber materials meeting the aforementioned tolerances may be placed inside of a ridge vent or any other entry point that vents air from the structure. The WCO is responsible for complying with all local, state and federal laws that pertain to covering or screening vents.

XVIII. Drip Edge is a material comprised of aluminum or other metal sheeting that may be fastened to span the gap between a fascia board and the roof sheathing around the perimeter of a structure.

(See XIII. Metal Materials for gauge specifications.)

XVIII. Wire Mesh and Screening is a material comprised of woven or welded metal strands to a specific sieve size not greater than 0.375 inch.

(See XIII. Metal Materials for gauge specifications.)

2.8. Bat Eviction/Venting is a process of removing bats from a residential or commercial property by the use of a one –way exit device that allows bats to leave the structure but not reenter.

I. Time of Year Concerns

The WCO should consider both the time of year and the life cycle of bats within their respective geographic region prior to eviction venting. WCO's should exercise caution between the months of April through August to ensure that non-volant, juvenile bats are not present in the structure. Between the months of October through March, WCO's should exercise caution that a winter hibernaculum may exist in the structure and install eviction/venting devices during any exclusions performed at this time. In addition, eviction/venting devices should remain in place until such time that average night-time temperatures regularly exceed 50°F.

II. Valves: Tubes, Cones, Mesh, and Chutes

Bat eviction/venting devices can be fabricated from metal, mesh, or rigid plastic materials that have a base opening greater than or equal to 3 square inches in area. Exit opening of the device shall not exceed one square inch in area unless a flap of flexible material is attached to the exit opening. Bat eviction/venting device shall be installed at an angle greater than or equal to 30° below the horizontal plane or shall be outfitted with a flap of flexible material attached to the exit opening.

III. Plastic Netting & Sheeting shall be constructed from a polymer that retains flexible and pliable properties above 50 degrees Fahrenheit. Plastic netting shall be less than or equal to 0.375 inch mesh size. Plastic sheeting shall be between 2 and 4 mil thickness. Both materials shall be attached using an approved fastener.

V. Bat Traps

Bat trapping is not a biologically sound method of eviction/venting and should not be used to mitigate a structural bat infestation. In some cases, however, bat trapping may be ordered by a regulatory authority to address specific health concerns such as human rabies exposure or to perform scientific research.

2.9. Post Eviction/Venting

I. Bat Watches and Site Monitoring may be performed as a method of quality control to ensure that bat exclusion has been successful or as a means to troubleshoot a warranty issue. If a bat watch or site monitoring is performed, multiple observers should

be placed at the corners of the structure to maximize field of view and ensure that all portions of the structure are viewed simultaneously.

II. Cleaning & Remediation

- **a.** All WCO's who encounter, remove, clean, or otherwise disturb accumulations of bat guano shall follow guidelines established by US Centers for Disease Control (CDC) and National Institute of Occupational Safety and Health (NIOSH) regarding prevention and transmission of Histoplasmosis.
- **b.** The Department of Health and Human Resources (DHHS) and NIOSH have issued Publication No. 2005-109 *Histoplasmosis Protecting Workers at Risk.* This document shall be used as the guide for all WCO's who encounter, remove, clean, or otherwise disturb accumulations of bat guano.

http://www.cdc.gov/niosh/docs/2005-109/pdfs/2005-109.pdf

- **III. Ectoparasites** are insects that live on the outside of a host rather than within the host's body. Bat Bugs (*Cimex adjunctus*) are ectoparasites, similar to Bed Bugs (*Cimex lectularius*), are commonly found in the presence of bats and accumulations of bat guano. Infestations of bat bugs are important for the client because bat bugs may bite humans once the eviction/venting process has been completed. The WCO shall inform the client regarding the presence of bat bugs and that bat bugs may enter the living spaces of the structure in search of alternate hosts. A bat bug infestation may require a pesticide application for mitigation.
- **III.** A **Bat Bug** (*Cimex adjunctus*) is an ectoparasite that is commonly found in the presence of bats or accumulations of bat guano.

WCO shall inform client of the presence of bat bugs and the possibility that bat bugs may enter the living space of the structure in search of an alternate host post eviction/venting procedures.

3.0. White-nose Syndrome (WNS)

I. The intent of this section is to promote awareness to the WCO about the white-nose syndrome. It is recommended that WCOs review these protocols provided by the U.S. Fish and Wildlife Service, United States Department of Agriculture Forest Service, and The U.S. Geological Survey National Wildlife Health Center and that they may adopt these protocols as a tool in their standard practice when mitigating bats from residential and commercial structures.

II. Protocols

USFWS White-Nose Syndrome Decontamination Protocols for Researchers, June 2010

www.fs.usda.gov/Internet/FSE_DOCUMENTS/stelprdb5187597.ppt

Disinfection Protocol for Bat Field Research/Monitoring, June 2009

http://www.fws.gov/northeast/whitenose/FINALDisinfectionProtocolforBatFieldResearch_June2009.pdf

Quick Reference for White-Nose Syndrome Containment and Decontamination Procedures for Cave Activity, July 2010

http://www.fws.gov/whitenosesyndrome/pdf/WNS1pageDecontaminationProtocol_0731 10.pdf

Wing-Damage Index

http://www.fws.gov/northeast/PDF/Reichard_Scarring%20index%20bat%20wings.pdf

Instructions for Reporting Wildlife Mortality Events

http://www.nwhc.usgs.gov/mortality_events/reporting.jsp

3.1. Public Health Concern - Guano Accumulations

I. All WCO's who encounter, remove, clean, or otherwise disturb accumulations of bat guano should follow guidelines established by US Centers for Disease Control (CDC) and National Institute of Occupational Safety and Health (NIOSH) regarding prevention and transmission of Histoplasmosis. .

DHHS (NIOSH) Publication No. 2005–109 Histoplasmosis – Protecting Workers at Risk

http://www.cdc.gov/niosh/docs/2005-109/

3.2. Public Health Concern - Rabies Exposure

I. All WCOs shall follow the CDC Rabies Exposure Protocol and/or any Local or State Rabies Exposure Protocol that may be applicable when providing bat capture and removal services for bats within a structure.

http://www.cdc.gov/rabies/exposure/

- **II.** Once positive rabies exposure criteria has been met, WCOs shall employ capture techniques for bats that will ensure a viable sample for testing and offer the utmost protection for himself, the client, and the Public at Large.
- **III.** Once positive rabies exposure criteria has been met, WCOs shall not release bats to the outside or commit any acts that would otherwise compromise the chain of custody of a bat needed for testing.
- **IV.** The CDC recommends pre-exposure rabies vaccination for persons in high-risk groups, such as veterinarians, animal handlers, and certain laboratory workers. The

WCO shall consider pre-exposure rabies vaccination as a precaution against the disease and seek consultation with his primary healthcare provider regarding its impact on his personal health.

3.3. Conflicts

Conflicts with Other Standards, Codes, Local Laws, and Manufacturer's Instructions. There likely exist other standards, codes, local laws, and manufacturer's instructions that differ or are in conflict with this Standard and with each other. Although this Standard does not require a WCO to know or discover all the provisions that may pertain to every situation, this Standard does require a WCO to author the inspection report based on the requirements that in the WCO's judgment, provide the greatest protection of human life and property, and secondarily bat viability. This Standard is not intended to override adopted national, state, and local codes or ordinances.

3.4. Substantial Compliance

The WCO shall substantially abide by this Standard, unless otherwise agreed to in writing by the WCO and client.

3.5. Disclaimer of Liability

NWCOA administers the process in the development of its standards. NWCOA does not independently test, evaluate, or verify the accuracy of any information or the soundness of any judgments contained in its standards. NWCOA disclaims liability for any personal injury, property or other damages of any nature whatsoever, whether special, indirect, consequential or compensatory, directly or indirectly resulting from the publication, use of, or reliance on this document. NWCOA also makes no guarantee or warranty as to the accuracy or completeness of any information published herein.

Anyone using this document should rely on his or her own independent judgment, or, as appropriate, seek the advice of a competent professional in determining the exercise of reasonable care in any given circumstances.

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