



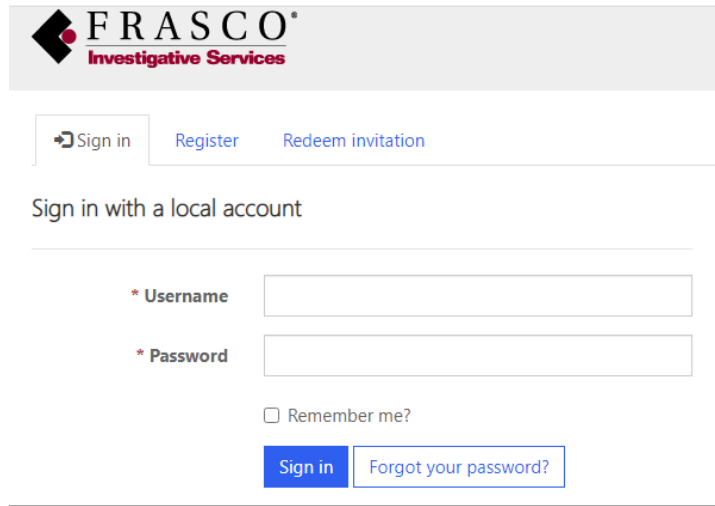
Customer Portal User's Guide

Phone: 1-877-372-7261 | Fax: 1-877-734-6478

frasco.com

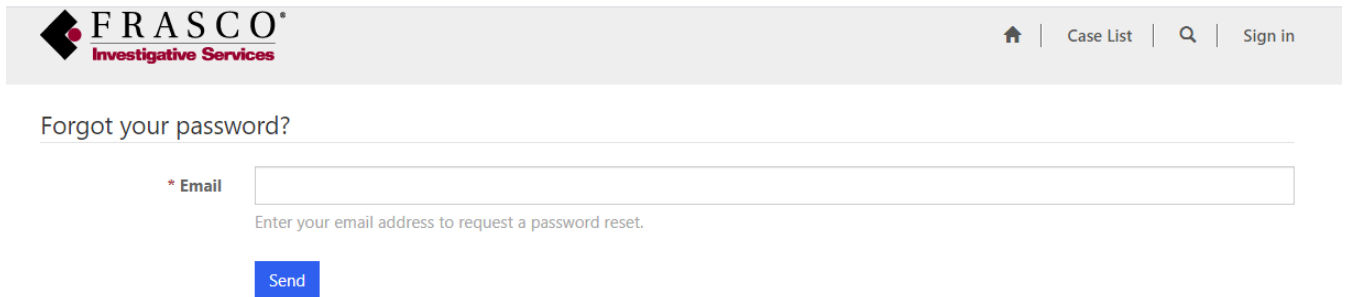
LOGIN

Login URL: <https://frascocustomerservices.microsoftcrmportals.com>



The login form features the FRASCO Investigative Services logo at the top. Below the logo are three links: "Sign in" (with a key icon), "Register", and "Redeem invitation". A horizontal line separates these from the "Sign in with a local account" section. This section contains two input fields: "* Username" and "* Password". Below the password field is a checkbox labeled "Remember me?". At the bottom of the form are two buttons: "Sign in" and "Forgot your password?".

- Use the Frasco used user name and password to login to your account.
- Select Sign In to access the portal.
- If you cannot remember your password select Forgot Password to have your password emailed

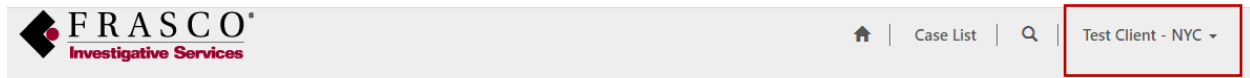


The forgot password form is located below the main login form. It features the FRASCO Investigative Services logo on the left and navigation links (Home, Case List, Search, Sign in) on the right. The heading "Forgot your password?" is followed by an input field labeled "* Email". Below the field is the instruction "Enter your email address to request a password reset." and a "Send" button.

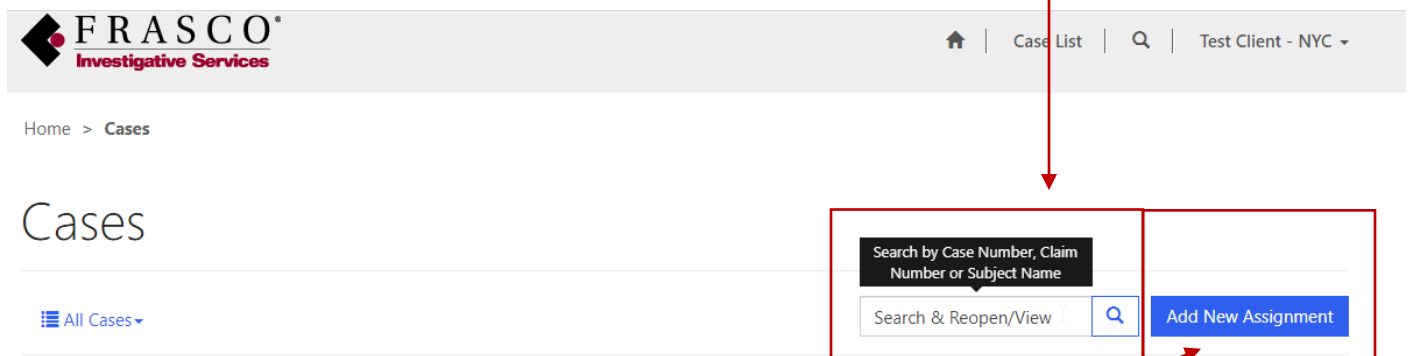
HOME PAGE

Upon logging into the customer portal the home page provides the user with:

- A validation of the logged in User



- A tool bar to search by Claim Number, Frasco Case Number or Subject Name



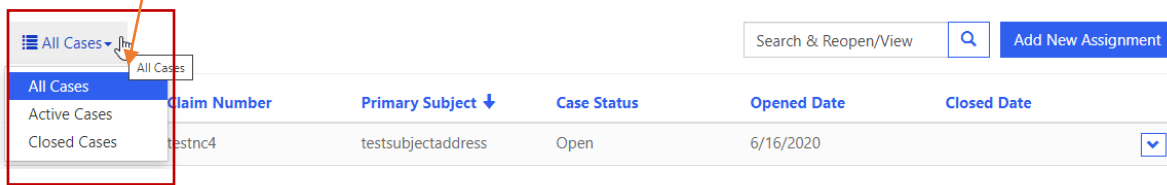
- Access to refer a new or previously assign claim for investigation
- A list of all cases referred by the user

Cases

All Cases ▾ Search & Reopen/View Add New Assignment					
Case Number	Claim Number	Primary Subject ▾	Case Status	Opened Date	Closed Date
2000063	testnc4	testsubjectaddress	Open	6/16/2020	
2000064	testnc5	testsubjectaddress	Open	6/16/2020	

The Case List can be filtered by All Cases, Active Cases or Closed Cases by selecting the drop down menu

Cases



ADD NEW ASSIGNMENT

To request a New Investigation, Re-Open an Investigation or Add Services to an active Investigation, select Add New Assignment on the Home Page

Submit a new service request

Case Details

Client Contact

Test Client - NYC

Claim/Client Reference Number *

Claim Type

Assigning Company

TEST COMPANY - NYC

Have you previously requested an investigation on this claim

☒ No ☐ Yes

Is Subject Represented

☐ No ☒ Yes

- Type the Claim Number and Claim Type/Line of Business
- Indicate if you have previously referred an investigation to Frasco on this claim
 - Re-opens and additional service requests require less information and the form will be truncated; only requiring the user to select services to be performed and a validation of the subject's name
- Indicate if the subject is represented by an attorney
 - If yes, the form will request your defense attorney information

Defense/Client Attorney

Defense Attorney

Phone

Email

Street 1

Street 2

City

State/Province

ZIP/Postal Code

- Use the check boxes to select services to be performed and type any Assignment Instructions into the provided text box.
 - Selecting services such as Background Investigation Medical Canvass will open sub-service menus to provide additional detail about the service requested

Services

Rush ☒ No ☐ Yes	Client Due Date
☐ Surveillance ☐ Activity Check ☐ AOE/COE ☐ SIU Investigation ☐ Vehicle Locator ☐ Background Investigation ☒ Medical Canvass ☐ Primary Physician Canvass	☐ Unmanned Surveillance ☐ Recorded Statement ☐ Social Media Investigation ☐ Locate Investigation ☐ Hospital Canvass ☐ Physical Therapy Canvass
☐ Scene Investigation ☐ Business Due Diligence ☐ Asset Check ☐ Pharmacy Canvass ☐ Chiropractic Canvass	☐ Subrogation Investigation ☐ Subpoena Service ☐ Clinic Canvass Other Canvass

Other

Assignment Instructions

- Include any information used to identify and/or contact the subject

Subject Information

First Name 	Last Name
Date of Birth 	SSN
Driver License 	DL State
Occupation 	Aliases (AKA)
	Date of Hire

Subject Address/Telephone

Street 1		Street 2
City	State/Province	ZIP/Postal Code
Email	Home Phone	Business Phone

Subject Demographics

Gender ☐ Male ☐ Female	Height	Weight
Hair Color	Ethnicity	Other Description

Subject Vehicle

Vehicle Description	Vehicle License Plate Number

Employer/Insured

OK to Contact Employer/Insured
☒ No ☐ Yes

Employer/Insured	Contact Name	Phone Number
Street 1	Street 2	
City	State/Province	ZIP/Postal Code

Add attachments or continue

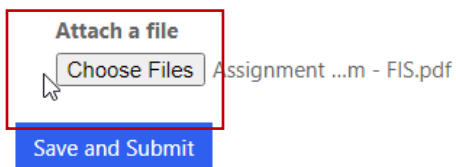
- To Save the referral form, Add Attachments and continue to request submission, select the button on the bottom of the page
- Adding Attachments and submitting an Investigative Referral
 - Select “Choose Files”
 - A file bowers will open allowing the user to select one or multiple files

Add Attachments

CP Claim Number

abc 123

There are no notes to display.



- Selecting Save and Submit completes the investigative referral process

CASE REVIEW

- The Case List can be sorted by any of the column headers
- From Case List, select the Case Number of the Case/Claim to be viewed

Cases

All Cases ▾		Search & Reopen/View 🔍		Add New Assignment	
Case Number ↓	Claim Number	Primary Subject	Case Status ↓	Opened Date	Closed Date
2000137	Test 34134		Open	8/4/2020	▾

Case Detail

[Return to Case List](#)

[Add Services to Case](#)

Case Details

Claim Number *

123456789

Primary Subject

John Test Willson

Case Number

2000049

ADD SERVICES TO CASE

Add Services to Case

Services

Rush

☒ No ☐ Yes

Client Due Date

☐ Surveillance

☐ Unmanned
Surveillance

☐ Activity Check
☐ AOE/COE

☐ Recorded
Statement

☐ Scene
Investigation

☐ Subrogation
Investigation

☐ SIU Investigation

☐ Social Media
Investigation

☐ Business Due
Diligence

☐ Subpoena
Service

☐ Vehicle Locator

☐ Locate
Investigation

☐ Asset Check

☐ Background
Investigation

☐ Medical Canvass
Other

Assignment Instructions

Add Attachments

CP Claim Number

Reopen

There are no notes to display.

Attach a file

Choose Files No file chosen

Save and Submit

- To request additional services on an active or closed case, select “Add Services to Case”
 - Select the assignment type
 - Type any specific instructions
 - Add any document you wish to submit
 - Select “Save and Submit” to send the referral to Frasco’s intake team

ASSIGNMENTS LIST

- A list of all assignments will be listed. This allows the filter their view to specific assignments of interest
- The assignment list also contained a hyperlink to email the Case Manager in addition to listing the Case Manager’s telephone number

Assignments

Service	Status	Manager	Manager Email	Manager Phone	Opened Date ↑	Closed Date
Surveillance	02-Prep	Scott Cornelison	SCornelison@frasco.com	877-372-7261 x306	6/12/2020	▼
AOE/COE	01-New	Scott Cornelison	SCornelison@frasco.com	877-372-7261 x306	8/20/2020	▼

- A list of all case related documents is available to view/download. On the assignment page, this list is limited to only those documents related to that assignment.

Documents and Files

Document Locations (Regarding)

Name ↑	Modified
 AOE COE Sample.pdf (408 KB)	31 minutes ago
 Invoice AOE COE.pdf (60 KB)	28 minutes ago
 Invoice Surveillance.pdf (60 KB)	27 minutes ago
 Recorded Statement John Wilson Test.m4a (34 KB)	22 minutes ago
 Sample Surveillance Report.pdf (635 KB)	33 minutes ago
 Sample Surveillance Video.MTS (4416 KB)	26 minutes ago

- Case Updates from the manager can be viewed on the portal at either the case/claim or assignment level

Updates

Subject	Created On ↓	From	To	Description
AOE/COE Client Update	8/20/2020 4:29 PM	[object Object]	[object Object]	<div data-wrapper="true" style="font-size: 9pt; font-family: "Segoe UI", "Helvetica Neue", sans-serif;"> <div style="font-size: 9pt; font-family: 'Segoe UI', 'Helvetica Neue', sans-serif">Sample client update text</div> </div>
John Wilson Surveillance Update	8/20/2020 4:27 PM	[object Object]	[object Object]	<div data-wrapper="true" style="font-size: 9pt; font-family: "Segoe UI", "Helvetica Neue", sans-serif;"> <div style="font-size: 9pt; font-family: 'Segoe UI', 'Helvetica Neue', sans-serif">Sample client update text</div> </div>

- File notes from the Case Manager and Investigator can be viewed at either the case/claim or assignment level.

File Notes and Messages

Case Note Title	Date Created ↓	Body	
Report & Invoice Delivery	8/20/2020 4:30 PM	Attached you will find your report and invoice on the above referenced matter	
Surveillance Update	8/20/2020 4:21 PM	On April 1, 2020, we conducted surveillance at the subject's address from 10 a. to 6 p.m. Approximately 1 hour of video was obtained of the subject, jumping, dancing and doing back flips. An additional day of surveillance has been schedule pursuant to your request.	
AOE/COE Client Update	8/20/2020 4:19 PM	This is an update on the requested AOE/COE Investigation	
Case Acknowledgement	8/20/2020 4:18 PM	We have received your request and opened a case to conduct an AOE/COE investigation and surveillance. If we can be of any further service to you on this or any other matter, please do not hesitate to contact us.	