



INVESTIGATOR PORTAL USERS GUIDE

FOR INTERNAL UE ONLY

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1. NEW ASSIGNMENT NOTIFICATION

- a. You will receive an email notification when you are assigned to a case or scheduled to conduct surveillance
 - i. The email will include the case number and a link to the investigator portal
 1. Surveillance assignments will also include a link to Bing Maps and a Check-In hyperlink to be used while on surveillance

2. LOGIN TO THE INVESTIGATOR PORTAL: frascovendor.microsoftcrmportals.com

3. ACCEPTING ASSIGNMENTS

- a. Locate the assignment on the “New Assignment List”
- b. Select the down arrow in the right column
- c. Select “Accept Assignment”
- d. The screen will refresh, and the assignment will not be added to your “Active Case List”

4. INVESTIGATOR MEMO

- a. From the Active Case List, select the down arrow on the right side of the grid
- b. Select “Memo” from the drop down
- c. To save or print the memo for use while in the field:
 - i. Right click on the page
 - ii. Select “Print”
 - iii. To save the page as a PDF select the “Save” button
 1. Select the folder where you would like to save the memo
 2. Rename the document as desired
 3. Select Save
 - iv. To print the memo
 1. Select “Destination” and “See More”
 2. Select your local printer
 3. Select “Print”

5. REVIEW CASE DETAILS

- a. Select the case from the Active Case List by clicking on the “Case Service” in the left column
- b. Details: Include information about the claim, subject and assignment

- c. Documents: Includes any documents the manager or client provided for the investigator. Investigator can upload general documents on this tab
- d. Case Subjects: Lists all persons and business related to the case, including claimants, insured and third parties
 - i. The subject type in the first column indicates that type of subject as noted above
- e. Schedule: Provides additional detail about scheduled events such as surveillance and interviews
 - i. Claims investigators can schedule their own events on this tab
- f. Email Client: Allows Claims, Research and SIU investigators to email client directly, if authorized by their regional manager
- g. File Notes: Include notes from the regional manager and provides the investigator with the ability to enter file notes that will be visible to the regional manager
- h. Timesheets: Lists submitted/unapproved and approved timesheets
- i. Tasks: Lists items the investigator is to complete based on timesheet entries
- j. Related Assignments: List other open service related to this claim.
 - i. Allows for coordination between investigators, if applicable
- k. Red Flags: Allows investigators to indicate that an investigation identified red flags
 - i. Please reference Frasco or NICB red flag indicators list to describe red flags

6. FILE NOTES

- a. A new file note can be added by using the quick link in the Active Case List or from the Case details page by selecting the File Notes tab
- b. Enter a file note description (similar to an email subject line)
- c. Enter the file note text
- d. Select “Submit New File Note” in the upper right corner of the page
- e. File notes entered by the investigator can be viewed in the “File Notes” grid
- f. Case updates from related services can be viewed below the file notes
 - i. This provides the investigator with information from other investigative services provided on this claim

7. CLIENT INFORMATION & EMAIL

- a. In the even the assignment requires the investigator to contact the client, the Client Information tab will be visible in within the Case Details page
- b. To send the client an email:
 - i. Insert the text into the Email Body text box
 - ii. Select “Send Email” in the upper right hand corner

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- iii. The email subject line and email signature will be generated by the system
- iv. Prior emails can be viewed in the grid below the email entry text box

8. TIMESHEET ENTRY

- a. From the Active Case List, use the down arrow to select “Add Case Timesheet(s)”
- b. From the Case Details page, select the “Timesheet Entry” button
- c. Scroll or search for the proper Billing Code by entering the code number or text
- d. Select the code
- e. Enter the activity date
- f. Enter the hours and miles for timesheets
 - i. Some billing codes require an investigative summary and/or video minutes to be entered
 - 1. The investigative summary produces your daily update
- g. Enter any expenses along with a description and the expense amount
- h. Select “Add Line Item” to enter additional codes, hours, miles and/or expenses
- i. Line items can be edited or deleted until approved by the regional manager
- j. After all line items have been added. Select “Submit Timesheet”
- k. Wait for the submission process to complete before navigating to another page
- l. Upon receiving the submission confirmation, select “OK”

9. UPLOAD REPORT DOCUMENT OR DICTATION

- a. 411 and 441 codes require a report/dictation upload
- b. From the Case Dashboard, select the Tasks tab at the top of the page
- c. From Case Details select the Tasks tab
- d. Locate the Report/Dictation Pending Upload section
- e. Use the drop down on the right to select either “Upload Report Dictation” or “Upload Word Document”
- f. Enter a page count for Word Documents
- g. Select “Choose File”
- h. Select the file(s) to be uploaded
- i. Select “Upload and Complete Task”

10. VIDEO AND IMAGES UPLOAD

- a. 250 codes for surveillance require videos and photos to be uploaded
- b. From the Case Dashboard, select the Tasks tab at the top of the page
- c. From Case Details select the Tasks tab

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- d. Locate the “Video and Images Pending Upload” section
- e. Use the drop down on the right side to select “Upload you Video and Images”
- f. Click “Select File(s)”
- g. Select all video and photos to be uploaded
- h. Select the appropriate “Document Type” for each file
- i. Select “Start Upload”
- j. Upon receiving the upload confirmation, select “Ok”
- k. Select “Close this Task as Complete”

11. AUDIO STATEMENT UPLOAD

- a. Several Claim Investigation billing codes, such as 120, require the audio file for a recorded statement to be uploaded
- b. From the Case Dashboard, select the Tasks tab at the top of the page
- c. From Case Details select the Tasks tab
- d. Locate the “Audio Pending Upload” section
- e. Use the drop down on the right side to select “Upload your Audio”
- f. Click “Select Files”
- g. Chose the file(s) to be uploaded
- h. Ensure the “Document Type” is set correctly for each file
- i. Select “Start Upload”
- j. Upon receiving the upload confirmation, select “Ok”
- k. Select “Close this Task as Complete”

12. EXPENSE RECEIPT UPLOAD

- a. Some expense codes require investigators to upload receipts
- b. From the Case Dashboard, select the Tasks tab at the top of the page
- c. From Case Details select the Tasks tab
- d. Locate the “Expense Receipt Pending Upload” section
- e. Use the drop down on the right side to select “Upload your Receipt”
- f. Click “Select Files”
- g. Chose the file(s) to be uploaded
- h. Ensure the “Document Type” is set correctly for each file
- i. Select “Start Upload”
- j. Upon receiving the upload confirmation, select “Ok”
- k. Select “Close this Task as Complete”

13. UPLOAD CASE DOCUMENTS (other than reports, video & audio)

- a. From Case Details, select the “Documents” tab
- b. Click “Select Files”
- c. Chose file(s) to be uploaded
- d. Select the appropriate “Document Type”
- e. Select “Start Upload”
- f. Upon receiving the confirmation that the upload completed, select “Ok”
- g. Refresh the bowser to video the uploaded document(s)

14. INVESTIGATOR SCEHDULED EVENT (CLAIMS ONLY)

- a. To schedule a field investigation even such as a recorded statement, alive & well or scene investigation navigate to the Case Details page
 - i. This will log your appointments in the Case Management System
- b. Select the “Schedule” tab and scroll down to the Add New Appointment section
- c. Add the description for the New Appointment
- d. Add the location for the New Appointment
- e. Enter the start date and time for the appointment
- f. Enter an estimated end date and time for the appointment
- g. Select “Save Changes” at the top of the page

15. RED FLAG IDENTIFICATION

- a. Investigator can add fraud indicators (Red Flags) identified in the course of the investigation
- b. From the Case Details page
- c. Select the Red Flags tab
- d. Select the Red Flags “Yes” radio button
- e. Enter a red flag description (required if “Yes” is selected)
 - i. Use either Frasco’s red flag list or the list of red flags from the National Insurance Crime Bureau (NICB) to properly document fraud indicators

16. PHOTO REPORT – Claims Only

- a. From the Active Case List
- b. Select “Create Photo Report” from the right hand drop down menu
- c. Select “Choose File”
- d. Select the file you would like to upload
- e. Type the Caption for the photo
- f. Select “Add Next Photo” to add additional photos & captions

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- g. Select the date the photos were obtained
- h. Select "Submit Photos"

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