

F Y I Date  
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**F Y I**

## Inspector Tips and Tricks

### Photos :

- Clear photos are required by the Underwriters. QA will reject cases because photos are poor and inspectors will have to revisit the site to retake the photos. You don't have to be a professional photographer to take good pictures. When snapping shots H&S recommends the following.
  1. Use a camera and not a cell phone.
  2. Clean the lens.
  3. Focus before you take the shot.
  4. Steady the camera.
- If you are at the property, ALWAYS take plenty of pictures. Even if the insured does not show up. That way you can call the insured and you may not have to return to the property.
- If insured refuses the inspection, take at least one picture to show that you were there.

300 Valentine Street  
Suite F  
Hackettstown, NJ 07840

PHONE:  
(908) 850-4110

FAX:  
(908) 850-5422

E-MAIL:  
dweeks@hsreports.com

H&S Loss Control Inspections, Inc. (908) 850-4110

### Case Notes !

Good communication between the inspectors and H&S is essential. Case Notes are the best way to log your progress on a case. And they are also the best way to request help from H&S for issues you run across during the case.

Leaving a Case Note is easy. Just follow these simple steps.

1. From the Main Grid, click "View" next to the case for which you would like to enter a Case Note.
2. You are now on the "General Information" form. Scroll down the page until you see the "Case Notes" section.
3. Click into the pink box labeled "Note Text" and type the note. Notes can be progress that you have made on the case. Or notes can be requests to H&S for help and advice on the case.
4. If you are just recording normal progress on the case, simply click the "Save Note" button now and your note will be saved on the case.
5. If this note is not normal progress and you want to alert H&S about an issue, or if you need advice from H&S, click the "Send Notification to Inspector Manager" check box. Then click the "Save Note" button. Now the note will be saved on the case and a special message will also be sent to H&S alerting H&S to follow-up with you.

### Step 1 of 4 – Scroll down to the Case Note Section

The screenshot shows the H&S software interface. The top navigation bar includes the H&S logo, a message count of 72, and user information for RStults1 (Inspector). The main content area is titled 'General Information' and shows a 'Case Notes' section with the text 'No notes to display...'. Below this is a yellow box with the instruction 'Add case note to update progress/ status and provide inspection specific information.' The 'Note Text' field is a large pink box. There are two checkboxes for notifications: 'Send Notification to Inspector Manager' and 'Send Notification to Other'. A 'Save Note' button is at the bottom. A sidebar on the left contains 'Actions' (Submit to QA, Hide Photos, Manage Forms, Check Forms, Preview Final, Print Ticket) and 'Forms' (General Information, Attach Files, Commercial - 5003). A red arrow points to the 'General Information' form in the sidebar.

**The Case Notes are found on the "General Information" form.**



**Call H&S:**

- If you are going to be out of the office on vacation or for any other reason, call and notify H&S.
- If you are on site and cannot complete an inspection or if the insured did not show up, call H&S before you leave the site.
- If you have an issue with LC360, don't get frustrated and waste a lot of time trying to figure it out, call H&S.
- If you have a technical question about an inspection or if you need some advice about an issue with an inspection, call H&S.

300 Valentine Street  
Suite F  
Hackettstown, NJ 07840

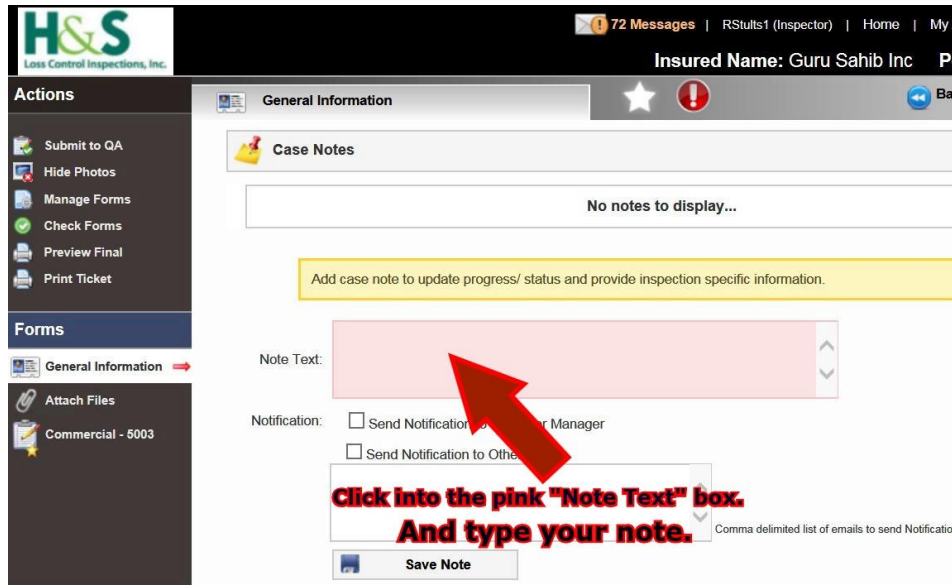
PHONE:  
(908) 850-4110

FAX:  
(908) 850-5422

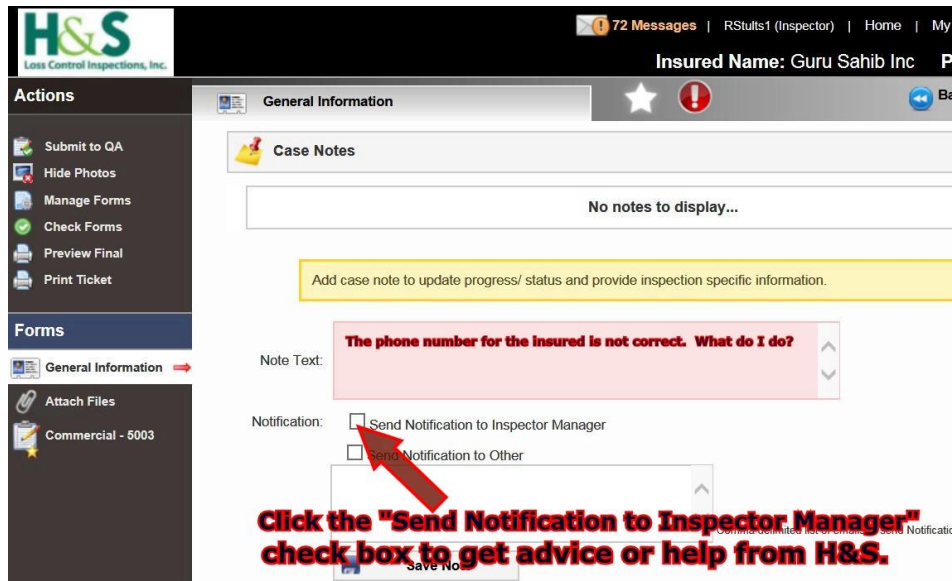
E-MAIL:  
dweeks@hsreports.com

We're on the Web!  
See us at:  
www.hsreports.com

**Step 2 of 4 – Type your Case Note**



**Step 3 of 4 – Check the box if you want to alert H&S**



**Step 4 of 4 – Save the Note**

