Initial Contact, Preliminary Assessment & Investigation Reference Guide v2 (Case Manager – Lead Investigator)

1 Phone Assessment

- **Initial call assessment:**
  - Listen to information relayed and get a feel for consistency, truthfulness and credibility.
  - Record their story highlights
  - Use questionnaire guide to extract as much information as possible to fill in what was not revealed during their reveal.
- **Record as much history and information to perform research using interview document**
- **Be patient, supportive and reassure them**
- **Provide guidance. Explain:**
  - They need to stay positive and grounded
  - They need to be calm and not afraid. (Explain how fear can feed negative interactions)
  - Offer to send prayer list
  - Explain that you will do some basic research and get back to them. Make sure you have their name and phone#.
  - **Note:** Before team members do a preliminary visit some research of the area, client and home should be done. Make sure to check sex offender site. Let them know they can contact you while you collect prelim information
- **Note**: You should assess team and date availability at this point so you can schedule your upcoming visits.

2 Research

Basic research should be performed to confirm information and determine if a visit is to be done.

- Confirm home ownership, heritage using county clerk's office for that locale. If Kimberly is availably ask her to check Ancestry.
- Check with Zillow to get home layout, year built and other specific information
- Google any specific history information given. Look for historical maps, war references, Underground Railroad connections, Indian references etc. You can get a brief geological make up to know whether this could be an influence – a more in depth geological survey will be needed.
- **Note:** Additional research will need to be done such as local historical references, graveyard locations etc.

3 Preliminary Visit

Two investigators should always go to any visit. If you are not one of the investigators make sure you tell client who will be visiting.

This applies to both preliminary and investigation.

- **Call client back to**: Check on their current status and schedule the Preliminary visit.
- **Basic gear to bring:** digital recorder, emf detector, KII and a camera.
- **At location – ask if ok to run recorder:**
    - Review previous information with client
    - Ask them to show you the active locations
    - Take readings as you tour the location – make note of high readings as you tour, check electronics that register high, check switches, plugs, PCs, circuit breaker, cable boxes etc.
- Ask if they intend to have any visitors attend and how many. Get names. Limit if you feel it is necessary. Base this on size and activity.
    - Children should not be present for either preliminary or investigation unless it is necessary to empower the children
- **Schedule a date/time** for your investigation visit (you should have a few dates before you attend prelim)
    - **If something doesn't feel right or you have reason to think you don't want to do this investigation – just say you will get back to them with a date. Trust your instincts.**
    - **Never tell the client while you're there that you don't want to do the investigation. Wait till you are safe and call back.** At this point you can tell them you are booked or that you don't feel an investigation is warranted.
- **Note:** Ask if you can take photos of location to help with camera placement. Use your gut on this. If you don't think they would be receptive don't ask.

4 Investigation Prep

Preparing for the investigation is extremely important.
Note: Minimally two investigators should attend an investigation. If you can't get at least two you will need to reschedule. Preferred amount is three.

✓Pick a TEAM
Picking the right team is extremely important.

Step 1: Determine how many investigators will be able to attend based on size of the location, # of guests and type of problems experienced.
Step 2: Call the team members chosen and tell them details and date. (You should already know who was available)
Step 3: Determine meet time and travel arrangements. It is always preferable to travel together to a residential investigation. This reduces impact on client's home.
Note: Team assignment is the call of the Lead Investigator.

✓**Gear Preparation**	**Note:** You should always prepare as if you will use all your equipment on an investigation. This way there is no surprises the night of the investigation. Tech manager/Lead Investigator should preplan gear placement ahead of time.
✓**Battery Checks**	Battery checks are the most important part of preparation. Always use a battery check meter. Ensure that the dial is set to the correct battery size – i.e.: AA, 9v. **Check the following:** ➢ Turn on each digital audio recorder and check battery gauge. If a recorder doesn't have a gauge, remove the battery and check on meter. ○ If you change battery on audio recorder make sure to reset time and date. ➢ All emf detector batteries. (Mel, KII, Ghost Meter etc) ➢ Flir by turning on and checking gauge. (Flir is a rechargeable battery inside so it can't be changed just charged) ➢ Rem Pod ➢ Spirit Box ➢ Speaker(s) for spirit box. Some can be changed others need charging ➢ Full Spectrum Cameras – turn on camera to check gauge. Check back up batteries as well. ➢ IR and IR/UV lights ➢ Geophone ➢ Other Camera's. ➢ Walkie Talkie's **Note: If any battery is close to weak just change it. Better to change now then night of investigation. Check that you have refilled your battery boxes so you have spares if you need them.**
✓**Charge Batteries**	The charging process can be very time consuming. This should be started 2 days before. **Note:** If you are not going to be using drop cameras you should still charge batteries for at least 1 Drop camera just in case you need it. • **Drop Camera's** The Sr100 and Sr42 use the same batteries. Charge all using the cameras with power cord and external chargers to reduce time. Sr40 power cord will only work in the camera cradle. Place battery in camera and camera in cradle to charge its batteries. • **Flir -** Is a rechargeable battery – use its own power cord. • **Full Spectrum Cameras** - The SVP battery must be charged in the camera. Check both batteries. The Canon has an external charger. • **Walkie talkies** must be charged in their chargers

✓**Audio Recorders**	**Note:** Ensure that all previous files have been removed. If you find any files remove to usb device or dropbox for later achiving. Make a note to be in folder A when recording.
✓**Additional Information**	Check for all tripods, surge suppressor boxes, extension cords, blue tape etc. **Note: Always turn each device on to check its functionality, especially after battery changes/charging. This includes walkie talkies, IRs, recorders etc.**
5 Investigation	A screen capture of the moon phase and geomagnetic/solar activity should be made. (This will be used for report and cannot be acquired post investigation). A note should be made of temperature and weather conditions. (This information can be found post investigation if necessary) • Tell team of group assignments before you leave. Establish who is to be at base first so that everyone is on board. • Drive in tandem to location if more than one car is necessary. Greet client and introduce members. If you haven't already determined base station location ask client where it is best to set up. • Put gear cases out of the way if possible as you set up. Close and move cases as soon as possible. • Explain to the client what you are doing, including the use of the blue tape to allay any worries or fear they may have. • Treat the client's house with total respect and ensure all members do the same. • Explain how the team set up will be. • Ensure whenever possible that someone is at base so that no dvr review is necessary beyond any notes.

✓**Set Gear**	• **Set base up and place dvr cameras & matching audio.** Ensure you have good coverage.
	• **Set additional audio recorders** Ensure we have all activity locations covered with audio. Avoid redundancy to reduce processing time.
	    ○ **Mark start date and time on recorders**
	    ○ **Employ timed restarts to reduce file deployment**.
	    ○ Set alternate gear in place
	    ○ Assemble full spectrum cameras.
	    ○ Pull all gear to be used
	    ○ Set cases aside

✓**Break into Teams**	Remember the point of the investigation is to help the client understand and deal with their situation. Every attempt should be made to make contact. • **Say protection prayers**. • Ensure the client and their visitors are part of the team structure. • Always explain what you are doing to the client. • Encourage them to take part. • Debunking is essential but don't lose momentum to do so. • Explain tagging and make sure all team members remember to do so.
✓**Exhaust all possibilities**	You need to gage the atmosphere of the investigation. Control the approach but don't over manage it. There is a fine line between allowing the investigation to take its course and allowing it to go out of control. If one thing isn't working then you need to switch to another piece of gear to try to get some interaction. Exhaust all options, gear and interactions. **Note:** If anyone feels sick, gets nauseous, lightheaded, gets scratched, becomes afraid or exhibits aggressive or strange behaviors have them leave location until the side effect clears. If it doesn't clear after multiple times they should sit out the remainder of the investigation. **Remember safety first. If at any point you feel the team is in danger pack it up and leave.**
6 Investigation's End	Deciding when to call the investigation and leave is a personal call. If you have exhausted everything you can and there is no longer any interaction or if you notice the client is losing interest then it's probably a good idea to call it a night.
✓**Announce the end of the investigation and begin tear down.**	Leave the residence in the same shape you found it. • Pack up quickly and clean up behind us • Do a quick review to ensure all gear has been stowed. • Make sure all blue tape has been removed. • **Say closing prayer**.

✓**Thank the client**	• The client may have questions – make sure you ask if they do. • If the night was quiet explain that many times that's when we get the most evps • Thank client and explain that review can take approximately 10-14 days and that we will call to schedule the reveal. • Reassure them that they should call if anything happens or if they have any questions.
7 Post Investigation	Now the fun and work starts. Evidence review and distribution.
✓**File Distribution**	Whenever possible let an investigator review all files or file parts of audio recorder. Only break up reviewers if it's in the interest of a speedy review • Never do anything to destroy the original file. A pristine, original copy must always be maintained. • Audio files over 2 hours long will need to be split otherwise they may cause Audacity to crash. • Files should be distributed via dropbox. • Records should be kept on which file or file part is distributed and to whom. This is done till all the files are distributed
✓**Evp review**	• As file review is completed the extracted evps will be place by extraction team in dropbox. • These files should be copied over and placed into folders labeled appropriately by location and file number. • The lead investigator should review each potential evp file for usability. • The files to be used should be isolated from all others. • If a file is enhanced for clarity then a copy of the original unenhanced evp should be maintain • Create an evidence folder (this will be used to create disk and for reveal.) Copy only those files to be used in the reveal and ensure they are in the appropriately labeled folder.
✓**Additional**	• At this time any remaining research should be completed. • Research should be conducted on any names or information of interest that has been gleaned from the investigation (evps, spirit box, video etc) • Get investigators to write up their personal experiences. • Video should be edited down and saved in an appropriate format.

✓Report	The report should be written using the report template, appendices template and any other associated templates used to create report. All research, screen captures and evidence is assembled at this time. • Make sure to include all investigators personal experiences. (Some editorial license is allowed to correct spelling or sentence structure. Any impression that is likely to scare the client or possible create a hostile experience should be removed. Make sure you inform the investigator that you have done so) • Make a copy of the evidence disk and include in report. • Reports should be printed on the grey stock paper. There is 2 types of grey stock paper. One regular weight and one of a heavy weight. Only the evidence disk page is printed on the heavy weight stock. • Reports are bound using the Ibico machine and the appropriate clear cover page and dark last page. The comb should be chosen depending on the size of the report. • The report should be tabbed for ease of review and reveal.
8 Reveal	Call the client and schedule a date for the reveal. A copy of the evidence should be placed on your PC.
✓Client Contact	• Set up PC. While it is booting begin report review. • Take the time to go through the entire report with the client. **Note:** Remember the client is going to have questions and want to talk about the report and evidence found. They will want to share their experiences with you. Let them talk and discuss the evidence with you. **Never rush the client. This is what they have been waiting for. It is their opportunity to share their personal feelings. Let them.**
✓Report Review	Begin reviewing the report with the client. • Take care to explain each section and the information contained herein. • Be patient and explain all of it. • Share the moment with them.
✓Evidence Reveal	Ensure that you have attached an external speaker to ensure a cleaner sound. • Using Audacity for audio files play and explain each and every evp or spirit box file to the client. • Explain that any enhanced file has the original unaltered file included

	for their review. • Use loop function to help them hear the evp more easily • Explain that it is not uncommon for different people to hear different words and this is just what we think. If they hear something else or something that makes sense they should go with it. • Video files should be played on the appropriate player for that file type. • Take as much time as needed. **Note:** Reassure the client that you are there for any additional questions or guidance. ✦ Present the release form/waiver to the client at the very end. Make sure they understand their choices. It is not essential that they give us permission to use the evidence but they must choose an option and sign. Don’t leave without the signature. Finish up and leave