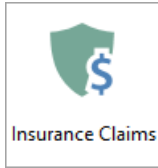


Insurance Claims

Last Modified on 21/08/2024 10:46 am AEST



The instructions in this article relate to **Insurance Claims**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Insurance Claims is where you can keep a track of all the insurance claims the property has lodged. Depending on your arrangement with the underwriter and/or broker, claim forms can also be produced within the system and sent to the insurer.

Reports can be produced, containing all the details in the claim, and each claim can be linked to other areas of StrataMax with the use of the [Premium Accounts](#), when receipting insurance refunds.

There is also an **Insurance Claims Special** menu, with the only difference being that it has a *Delete* button that allows insurance claims to be deleted.

Insurance Claims Video

Insurance Claims Configuration

General

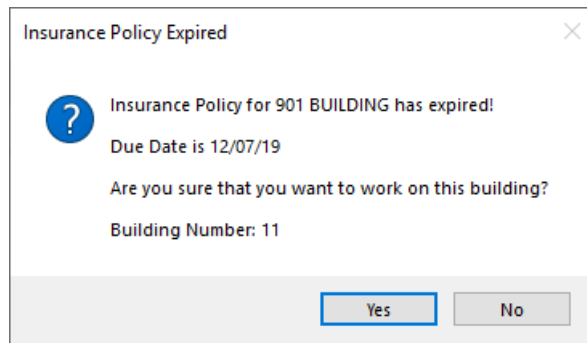
Always show code selection list at start

If ticked, the existing list of policies will always appear when the **Insurance** menu is opened.

Insurance

Insurance Expiry Test

Chose which insurance policy the system uses to compare against the working date, and if the insurance has expired, a notification will be displayed whenever the building is selected. The default main policy is **901 BUILDING**. You can remove this system check by clicking *Clear*.



Insurance Claims Register

Show Paid Claims

If set, paid claims will be listed in **Insurance Claims** and Insurance Claims Special

How to Create an Insurance Claim

1. Search or select **Insurance Claims** and if the list of current claims appears, click *Cancel*.
2. Click *New* (a claim number will be generated automatically).
3. Enter the relevant details:
 - *Reference Name* for the claim (e.g. Storm). The same name can be used more than once, despite the warning that appear.
 - Enter the *Date of Incident*.
 - Insurance Code No is the insurance policy item, which is entered in the **Insurance** menu, and is being claimed against.
 - This will populate insurer details (i.e. Insurer, Policy Number and Excess etc).
 - *Amount Claimed*, but this may be filled in by completing Events information if used previously.
 - *Excess* for this claim will populate automatically when the refund is present in the **Bank Reconciliation** menu and is receipted to the *Insurance Refund Code* (income code), which has been set up in the **Insurance** menu, in the *Premium A/c's* screen.
 - *What Happened?* is for the incident details, which caused the damage and the basis of the claim.
 - If theft was involved, then enter details of advice to police.
4. Click *Save*.

Insurance Claims Register STRATAMAX ONLINE HELP 11

File Help

Code: 8 Description: Storm Damage

Name	Data
3 Reference Name	Storm Damage
4 Date of Incident	08/06/16
5 Date Claim Lodged	05/09/16
6 Insurance Code No	901
7 Insurance Type	Building
8 Insurer	Corporate Home Unit
9 Policy Number	860530
10 Insurer's Reference	
11 Amount Claimed	0.00
12 Excess	250.00
13 Date Paid/Finalised	16/09/16
14 Amount Insurer Paid Out	968.18
15 Remarks	
16 What Happened?	On the 8th June we were advised
17 Property Owned by	The Insured

9 of 23

Save Notes Cancel

Entry Assistant
Enter a number (12 digits including decimal point)

Overwrite

New Report Insurance Claim Form Incident Report Events Document Exit

Linking a Document

Once a claim has been entered; a document from [DocMax](#) may be linked to the claim for quick access.

1. Open **DocMax**.
2. Locate the document, and click the *View Document* button in the ribbon.
3. Under the *References* section, click the *Insurance Claims* drop-down menu and select the appropriate claim.
4. Click the *Save and Close* button in the ribbon.

References

Linked Documents: Add Link Remove Link View

Insurance Policy: [Dropdown] [X]

Insurance Claim: [Dropdown] [X]

To view the document again, open the claim and click the *Document* button.

Adding Claim Events

Before adding an event, the invoice for the repairs must be entered first.

1. Open the **Insurance Claims** menu.
2. In the *Insurance Claims Register* window, double-click the required claim in the list.
3. Click the *Events* button.
4. Click the *Add* button (this will create a blank record at the end of the list).
5. Double-click in the *Reference Number* field.
6. Select the Creditor who provided the goods or carried out the repair and click *OK*.
7. Select the appropriate **Creditor Invoice** record (Reference starts with 'D') and click *OK*.
 - This will populate the fields for *Replacement Cost*, *Claim Amount*, *Creditor Code* and *Repairer/Supplier*.
8. Double-click the *Event Category* field and select an option.
9. Double-click the *Property Affected* field and enter details, for example "All top floor units" or "Roof".
 - If required by the insurer, enter the *Date of Purchase* and *Original Purchase Price* fields.
 - The *Other Details* field can be used to enter details of *Power Rating* and *Equipment Use* if the claim *Event Category* is for *Fusion*.
 - The *Amount Claimed* figure will update as Events are added.
10. Click *Close* once all required information has been entered

Claim Event Entry > Options

Select From Transaction List

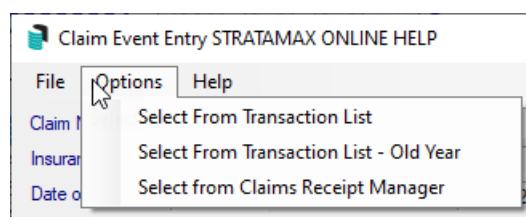
This allows an expense from the current year transaction list to be selected to create a claims event.

Select From Transaction List - Old Year

This allows an expense from the old year transaction list to be selected to create a claims event.

Select from Claims Receipt Manager

Is used to link a receipt to a claim event.



File > Edit Claim Form Lodged By

Details of who the claim is lodged by is populated onto the claim form using the *Account Manager* details, however this can be edited if required.

1. In the *Claim Event Entry* window, click *File > Edit Claim Form Lodged By*.
2. Change *Lodged By* and the phone number.

Insurance Claim Form ABC

The Insured

Name: TRAINING MANUALS
Address 175 Varsity Pd
Varsity

Input Tax Credit claimed on GST amount applicable to this policy
Entitled to claim an Input Tax Credit for Repairs and Replacement of damaged items

Lodged by
STRATA MANAGER - Mrs Willson

Policy No: 2578987
ABN: 14 989 999 999
GST Registered: No
Post Code: 4711

Amount claimed as percentage of GST 10 %
Applicable to the premium
Amount claimable 100 %

Telephone 0755757422

Ref No: 77889 00000003

Claim Amount: \$12400.00

Delete Insurance Claim

If an Insurance Claim has been entered in the incorrect property or if the claim needs to be removed entirely, this can be deleted from **Insurance Claims Special** menu, by selecting the record and clicking the *Delete* button. (Please use with caution as once the information is deleted it cannot be retrieved).

Processing an Insurance Refund

In order to update the insurance claim refund information when receipting refunds through the **Bank Reconciliation** menu, the **Premium Accounts setup** is needed, and the following setting in the **Receipt Entry** is also needed.

1. Open the **Receipt Entry** menu.
2. Click *File > Configure*.
3. Tick *Offer Insurance Claim Matching*. Be aware that this setting only applies to the current logged in user.

There are two ways an insurance claim refund can be processed and linked to a claim in order to finalise it.

- When the refund is present in the **Bank Reconciliation** menu, post and receipt the funds to the *Insurance Refund Code*, which has been set up in the **Insurance** menu, in the *Premium A/c's* screen.
- Linking the claim to an existing receipt through the *Claim Event Entry* menu, by clicking *Options > Select from Claims Receipt Manager*.

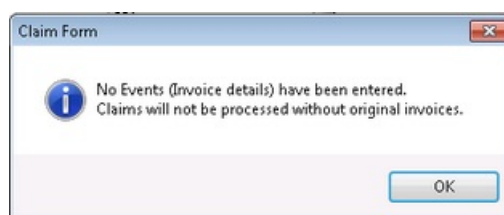
Work Orders for Insurance Claims

Work Orders in **TaskMax** can also create a new insurance claim by ticking the *Insurance Claims* box. See **TaskMax Work Orders** for more info.

Claim Forms

Once a claim has been created, a *claim form* can be created by adding details for each item being claimed. These can be added manually or by selecting a **Creditor Invoices** record. The total amount of the items is recorded in the Claims Register Record. The Claim Form can be submitted to the insurance company with the usual attachments.

1. Search or select **Insurance Claims**.
2. Select the *Claim* and press *OK* .
3. Select *Claim Form*.
 - If the following message appears, creditor invoices have not been added as per 'Adding Claim Events'. There may be quotes which will be attached via email to the claim. If this is correct, click OK. However if creditor invoices have been added to the claim, this message will not display.



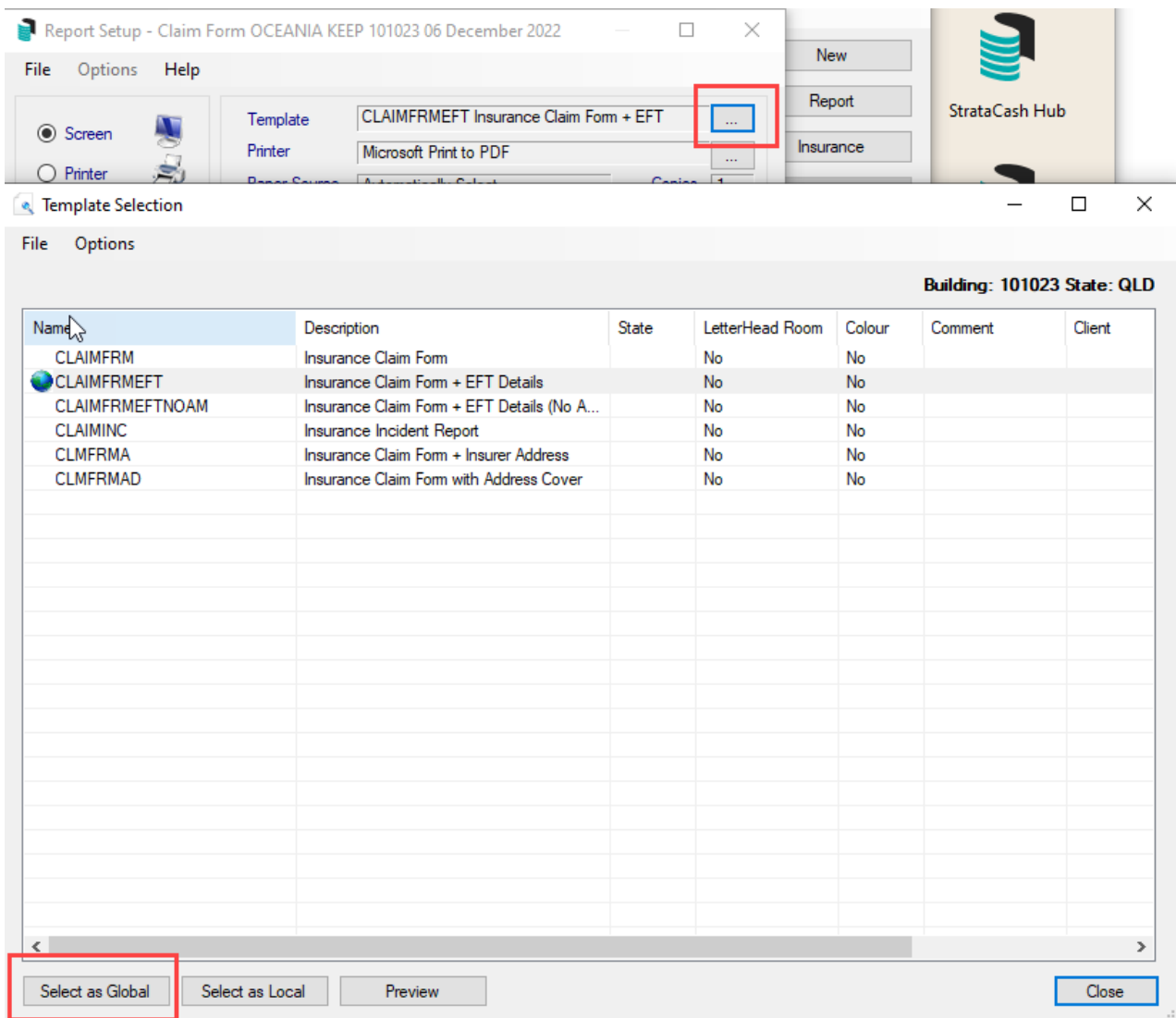
4. Click *OK*.
5. The report is in PDF, which may be emailed with attachments such as invoices or quotes.

To add the 'Amount claimed as percentage of GST' and 'Applicable to the premium Amount Claimable' on the claim form, these are updated in **Building Information** menu.

Insurance Claim Templates

Depending on what information is required to output on the template, there are a few to select from. Some of these include the EFT details for the building. To select from these templates complete the following:

1. Search or select **Insurance Claims**.
2. Select the *Claim* and press *OK* .
3. Select *Claim Form*. Click OK to *No Events (invoice details) have been entered. Claims will not be processed without original invoices.*
4. Select the template required and click 'Select as Global'



Insurance Claims Reports

Throughout StrataMax there are various reports and extracts that can be produced, which relate to insurance claims. An extract of insurance claim data can also be produced and exported to Excel using the [Search Insurance Claims](#) screen. This can be used for a single(local) or multiple or all buildings (global).

Insurance Claims Register (Local)

This report is produced from within the claim in the **Insurance Claims** menu, is limited to the building, has multiple templates to choose from, and can be produced in Excel as well. It displays all the claims for the building, but can be limited as well.

Page	1	Insurance Claims Register						14 July 2021		
STRATAMAX ONLINE HELP G.T.P. 104105										
Riverleigh Drive Hope Island Resort HOPE ISLAND QLD										
Claim No	Date of Incident	Date Lodged	Insurer	Policy Number	Policy Type	Claim	Excess	Date Paid	Amount Paid	Remarks
00000001	01/05/21	01/06/21	CHU Underwriting Agencies	CAH0002082	BUILDING	6000.00	50.00		0.00	-50.00
Records on file:	1					6000.00	50.00		0.00	
Records Printed:	1					6000.00	50.00		0.00	

1. Open the **Insurance Claims** menu, and if the current list of claims appears, click *Cancel*.
2. Click the *Report* button on the right, and the *Report Setup* screen will appear.
3. Choose your output method (Screen, Printer, Excel) by selecting the required radio button.
4. To change the template, click the ellipsis [...] button to the right of the *Template* field.
5. Click the *Preview* button to display the data in a *Preview* screen.
6. Change the *Limits* according to requirements.
7. Click *OK*.

Group Reports | Insurance Claims Report

This report can be produced for multiple buildings, and will displays all claims and their information across selected buildings:

Page Number: 1 Claims Register Report Support 5.6 Testing Version 14 July 2021										
Claim Number	Date of Incident	Date Claim Lodged	Insurer	Amount	Date Claimed	Amount Paid				
<u>134 MARINE PARADE</u> B.F.P. 29391										
00000001	16/11/09	20/01/10	CHU Underwriting	803.00	28/01/10	562.10				
00000002	05/03/16	07/07/16	LLOYDS OF LONDON	764.25	No Date	0.00				
<u>AMELIE COURT</u> B.F.P. 2085										
00000001	24/04/06	25/05/06	CGU	0.00	18/09/06	1,362.00				
00000002	15/05/08	26/05/08	CHU	0.00	02/06/08	0.00				
<u>CONTESSA CONDOMINIUMS</u> B.F.P. 6203										
00000001	26/01/13	26/01/13	CHU Underwriting Agencue	0.00	21/02/14	11,527.37				
00000002	01/03/11	No Date	CHU Underwriting Agencie	5,555.00	01/11/11	5,055.00				
00000003	24/11/10	No Date	CHU Underwriting Agencie	1,944.65	01/02/11	1,267.86				
<u>ROYAL PACIFIC PARK</u> G.T.P. 104274										
00000001	27/12/00	04/07/01	Allianz Aust. Advantage	540.50	03/08/01	440.50				
00000002	20/02/03	31/03/03	Allianz / BCB	2,995.00	18/12/03	2,895.00				
00000014	08/12/17	11/12/17	Strata Community Insuran	97,095.90	15/06/18	96,095.90				
<u>STRATAMAX ONLINE HELP</u> G.T.P. 104105										
00000001	01/05/21	01/06/21	CHU Underwriting Agencie	6,000.00	No Date	0.00				
End Claims Register Report										
Records Printed: 31										
Insurance Claims Report										

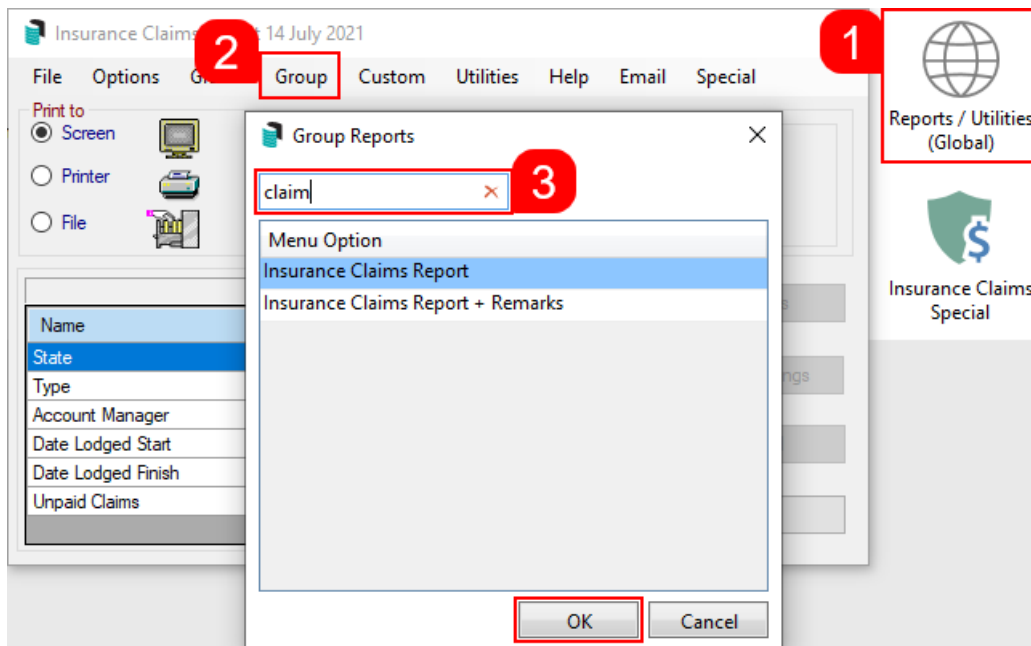
Claim Number	Date of Incident	Date Claim Lodged	Insurer	Amount Claimed	Date Paid	Amount Paid	Ref Name	Remarks
134 MARINE PARADE B.F.P. 29391								
00000001	16/11/09	20/01/10	CHU Underwriting	803.00	28/01/10	562.10	POOL PUMP	
00000002	05/03/16	07/07/16	LLOYDS OF LONDON	764.25	No Date	0.00	INTERNAL ROLLER DOOR LOT 2	Car damaged internal roller do
00000003	01/06/17	07/06/17	Lloyds Of London	5,460.00	23/06/17	5,160.00	GARAGE DOOR	
AMELIE COURT B.F.P. 2085								
00000001	24/04/06	25/05/06	CGU	0.00	18/09/06	1,362.00	DAMAGED FENCE	DAMAGED FENCE
00000002	15/05/08	26/05/08	CHU	0.00	02/06/08	0.00	UNIT 4 - WATER DAMAGE	UNIT 4 - WATER DAMAGE
00000003	01/05/08	20/06/08	CHU	282.30	02/10/08	282.30	UNIT 7 - WATER DAMAGE	UNIT 7 - WATER DAMAGE
00000004	16/11/13	18/11/13	CHU	2,852.00	17/12/13	2,602.00	HAIL DAMAGE NOVEMBER 2013	HAIL DAMAGE NOVEMBER 2013
CONTESSA CONDOMINIUMS B.F.P. 6203								
00000001	26/01/13	26/01/13	CHU Underwriting Agencies	0.00	21/02/14	11,527.37	STORM DAMAGE	STORM DAMAGE
00000002	01/03/11	No Date	CHU Underwriting Agencies	5,555.00	01/11/11	5,055.00	WATER DAMAGE	WATER DAMAGE
00000003	24/11/10	No Date	CHU Underwriting Agencies	1,944.65	01/02/11	1,267.86	MALICIOUS DAMAGE	MALICIOUS DAMAGE
ROYAL PACIFIC PARK G.T.P. 104274								
00000001	27/12/00	04/07/01	Allianz Aust. Advantage Ltd	540.50	03/08/01	440.50	U3108 BOKEN WINDOW	FINALISED
00000002	20/02/03	31/03/03	Allianz / BCB	2,995.00	18/12/03	2,895.00	LOT 6 INTERNAL WALL DAMAGE	FINALISED
00000008	21/07/04	05/02/04	Strata Unit Underwriters / BCB	258.00	26/03/04	158.00	GROUND FLOOD LIGHTS FOUND DAMAGED	FINALISED
00000009	16/12/03	20/04/04	Strata Unit Underwriters / BCB	100.00	20/10/04	0.00	HEDGE DAMAGE UNIT 3103	OUTSTANDING

End Claims Register Report

Records Printed: 31

Insurance Claims Report + Remarks

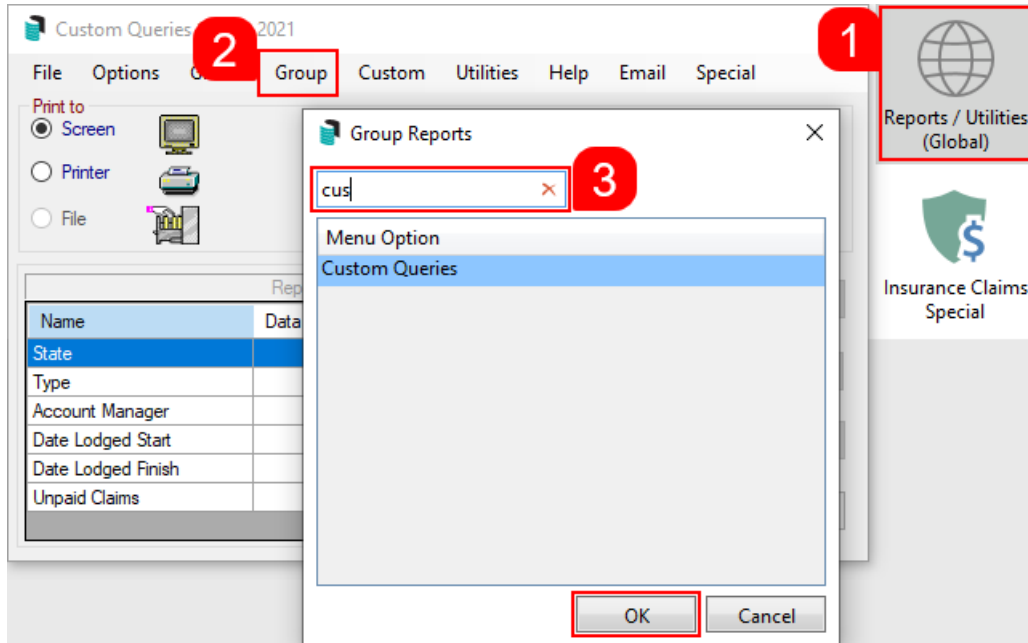
1. Open the **Reports/Utilities (Global)** menu.
2. Click **Group**.
3. Use the **Search** to find 'claim', then select the required report and click **OK**.



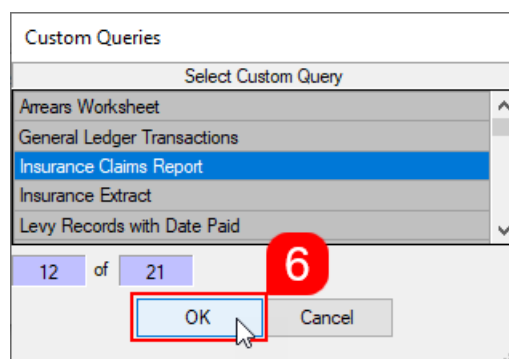
4. Choose the radio button for your output method; *Screen*, *Printer*, *File* (.txt file, which can be opened in Excel afterwards).
5. Click the *Select Buildings* button, then tag the required buildings (Ctrl + A for all), then click **OK**.
6. Change any of the *Limits* if required.
7. Click the *Proceed* button, then change the *Sort Preference* if needed before clicking **OK**.

Custom Query | Insurance Claims Report

1. Open the **Reports/Utilities (Global)** menu.
2. Click **Group**.
3. Use the **Search** to find 'cus', then select the 'Custom Queries' report and click **OK**.



4. Click the **Select Buildings** button, then tag the required buildings (Ctrl + A for all), then click **OK**.
5. Click the **Proceed** button, and the **Select Custom Queries** list will appear.
6. Select the 'Insurance Claims Report' then click **OK**.



7. In the **Insurance Claims Query** window, the following settings can be selected:
 - **Claims Status:** Limit the data to claims with a certain status.
 - **Incident Dates:** Limit the data to incidents that occurred between two dates.
 - **Report Order:** Changes the order of the displayed data to be either building name or number.
 - **Report in Excel:** Will output the data to Excel.

- *Summary*: When ticked, the report will not display the data for each building on a separate page.
- *Replace Remarks with Events*: Replaces the data in the 'Remarks' field in the claim with the data in the 'Repairer/Supplier' field in the claim's event.