



Insurance Claims

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INTRODUCTION

The Insurance Claims function in PropertyIQ allows you to:

- record, track and manage building insurance claims
- generate and send claims to insurance companies
- keep key stakeholders informed of the progress of the claim



Before you commence processing insurance claims, you will need to create a custom merge template for claim lodgement forms. The custom merge template is an A4 Insurance Claim. For full details about custom merge templates, see the manual “Templates”

Example of an insurance claim notice custom merge template:

The screenshot shows a word processing application window titled "Strata Community Insurance - Claim Form". The application has a ribbon menu with tabs for "Insurance Claim Notice" and "Folio: Global". The "Insurance Claim Notice" tab is active, showing a toolbar with various editing tools. The main content area displays the following:

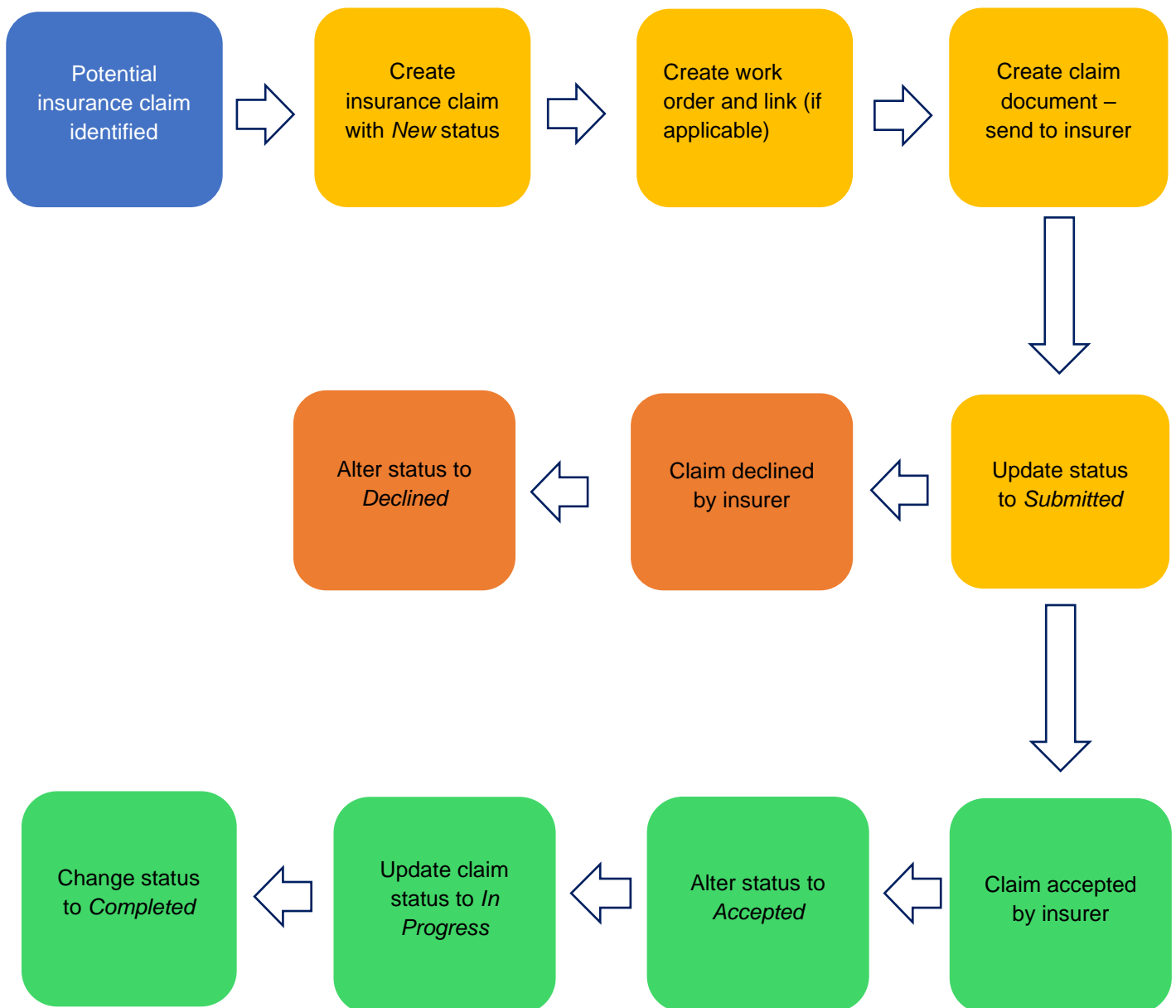
STRATA COMMUNITY INSURANCE Claim Form

Please provide accurate and thorough information throughout this Claim Form to allow us to resolve your claim as quickly and professionally as possible.

Insured Property Information

The Insured	Policy Number	
{{Building}}	{{Insurance_Policy}}	
Risk Street Address		
{{Building_Street_No}} {{Building_Street_Name}}		
Suburb	State	Postcode
{{Building_Suburb}}	{{Building_State}}	{{Building_PCode}}

INSURANCE CLAIMS FLOW CHART

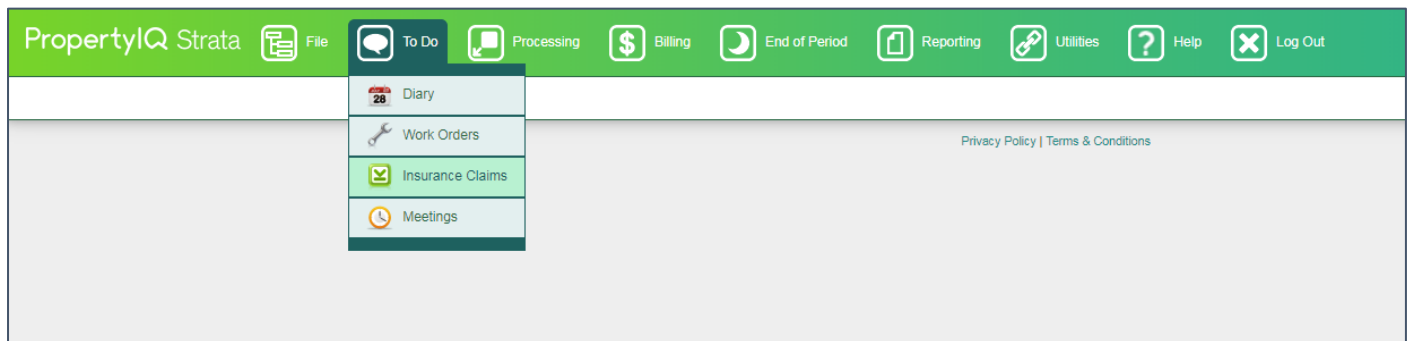


GETTING STARTED



To Do

To get started, go to **To Do** and select *Insurance Claims*.



INSURANCE CLAIMS SCREEN

The insurance claims screen allows you to filter and view insurance claims by status or use the search function to filter and select individual insurance claims.

1. **New** - claims that have been created but not yet submitted to the insurer
2. **Submitted** - claims that have been submitted to the insurer and are awaiting assessment.
3. **In Progress** - claims that have been assessed and are awaiting a decision
4. **Declined** - claims that have been declined by the insurer
5. **Accepted** - claims that have been accepted by the insurer, but not yet completed.
6. **Completed** - claims that have been completed
7. The default view is **All** – this shows all statuses
8. You can click on any of the column headings to filter by that heading.
9. To search for an individual claim, type some key letters to refine your search
10. Click on the claim you want to view, to highlight it and then double click *or*
11. Click on **View** on the bottom right of the screen to open the claim you want to view
12. **+Add** to add a new insurance claim
13. Select **Insurance Register** to print a list of all insurance claims

PropertyIQ Strata

File

To Do

Processing

Billing

End of Period

Reporting

Utilities

Log Out

Currently Logged In as: Bella Cammins
Role: Administrator
0.156.0.267/2018

Insurance Claims

1

2

3

4

5

6

7

New

Submitted

In Progress

Declined

Accepted

Completed

ALL

C.T.S.	Building Name	Street No	Street Name	Summary	Manager	Claim #	Status	Insurer	Broker	Submitted Date	Completed Date	Date of Loss	Age
416565	Smith Street Building	1	Smith Street	Storm damage to balcony	Ashley Jones	54565	New	Suncorp	Regina Holsworthy	15/3/2017	24/3/2017	3/1/2017	
10453	The Tempo	13	Mitroian Drive	Storm Water Claim	Training Manager	3463	Submitted	QBE	CRM Brokers	22/3/2017		21/3/2017	519
416565	Smith Street Building	1	Smith Street	Damaged Balcony	Ashley Jones	54565	Completed	Suncorp	Regina Holsworthy	13/3/2017	24/3/2017	1/3/2017	
416565	Smith Street Building	1	Smith Street	Mailboxes damaged by vandals	Ashley Jones	434565	New	Suncorp	Regina Holsworthy	23/3/2017		8/3/2017	518
10453	The Tempo	13	Mitroian Drive	Leaking pipes in driveway	Training Manager	6457	Completed	Suncorp	Regina Holsworthy				
10453	The Tempo	13	Mitroian Drive	Garage Remote controller not working	Training Manager	312	In Progress	QBE	CRM Brokers	23/3/2017		23/3/2017	518
99999	The Bachelor Pad	1-7	Hollywood Drive	Tree fell on balcony rail	Lea Mac	543456	New	CHU	Regina Holsworthy	24/3/2017		31/3/2017	517
888777	Hornsbys Towers	15	Florence Street	Foyer door damaged by vandals	Anne Fliva	5634	New	CGU Insurance	Kinnane Insurance Br...				
10453	The Tempo	13	Mitroian Drive	Internal staircase carpet damaged	Training Manager	375464h	New	QBE	CRM Brokers	28/3/2017		22/3/2017	513
955765	The Terrace	235	St Georges Tce	Storm Damage to roof	Stephanie Schipp	452	New	CGU Insurance	Kinnane Insurance Br...	28/3/2017		14/3/2017	513
955765	The Terrace	235	St Georges Tce	Security Gate malfunction	Stephanie Schipp	46346	New	CGU Insurance	Kinnane Insurance Br...				
10453	The Tempo	13	Mitroian Drive	Trees overhanging whilst need trimming	Training Manager	2222222	In Progress	Suncorp	Regina Holsworthy	21/3/2017		22/3/2017	520
416565	Smith Street Building	1	Smith Street	Worker injured whilst mowing	Ashley Jones	3454	New	Suncorp	Regina Holsworthy	29/3/2017		12/3/2017	512
99999	The Bachelor Pad	1-7	Hollywood Drive	Water damage to Lot 1	Lea Mac		New	CHU	Regina Holsworthy				
1008	Jordan Mews	1	Jordan Boulevard	Light not working in foyer	Anne Fliva		New	CGU Insurance	Kinnane Insurance Br...				
421234	The Cascades	42	Wallaby Way	Broken Window	Glen Gillman		New	Suncorp	Regina Holsworthy				
10453	The Tempo	13	Mitroian Drive	Broken Sewer Pipe	Training Manager	756383556h	New	Suncorp	Regina Holsworthy	6/5/2017			
68888	Small Building 688	688	High	Windows damaged in storm	Rohit Sachdeva	34536	New	CGU Insurance	Regina Holsworthy			1/5/2017	474

11

12

13

+ Add

D View

Insurance Register

ADDING A NEW INSURANCE CLAIM

To add a new insurance claim,

1. Select **+Add** at the bottom right of the screen
2. Click on the search icon to start searching for the building you want
3. Type some key letters in the empty boxes on the top line to refine your search and find the building
4. Click on the building you want to highlight it, and then double click *or*
5. Click on **Select** on the bottom right of the insurance claims screen

The screenshot shows the 'Insurance Claim' and 'Buildings' screens. In the 'Insurance Claim' screen, a search icon is highlighted with a red circle (2), and a search input field is highlighted with a red circle (3). In the 'Buildings' screen, a building is highlighted with a red circle (4). The bottom right of the 'Buildings' screen has a 'Select' button highlighted with a red circle (1).

If this claim relates to a lot, select the lot.

1. Click on the search icon to start looking for the lot owner you want
2. Type some key letters to refine your search and find the lot owner you want
3. Click on the lot owner you want to highlight it, and then double click *or* click on **Select** on the bottom right of your screen

The screenshot shows the 'Insurance Claim' and 'Lots' screens. In the 'Insurance Claim' screen, a search icon is highlighted with a red circle (1), and a search input field is highlighted with a red circle (2). In the 'Lots' screen, a lot owner is highlighted with a red circle (3). The bottom right of the 'Lots' screen has a 'Select' button highlighted with a red circle (4).

The next step is to select the insurance policy this claim relates to.



You will need to have the insurance policy details, including a renewal date, recorded in the Info tab>Insurance on the building card. For full details, see the Manual, “Buildings – Info Tab”

1. Click on the search icon to start searching for the policy you want
2. Click to highlight the policy you want, and then double click to select or
3. Click on *Select* on the bottom right of the screen

The rest of the details can now be added

1. The status defaults to *New* but you can choose another status from the dropdown list. The choices are:
 - i. *New*
 - ii. *Submitted*
 - iii. *In Progress*
 - iv. *Declined*
 - v. *Accepted*
 - vi. *Completed*
2. Type the insurer's claim number here, if known
3. Type the amount being claimed here
4. Type the submitted date here
5. If the building the claim relates to has more than one contribution schedule, choose the schedule it relates to from the dropdown list
6. Click on the search icon to start searching for the chart of accounts code you want to allocate the funds to". For full details on chart of accounts – see the Manual “Chart of Accounts”
7. Type the date of the loss here
8. The GST Status will default to *N*. However, if the contribution schedule you selected is registered for GST, when you save the insurance claim the status will alter to *Y*.
9. Click *Save* when you are ready

Insurer

1. The insurer details will automatically fill from the insurance details recorded on the Info Tab – Insurance - in the building card. Ensure you have recorded the amount of the excess.

Broker

2. The broker details will automatically fill from the broker details recorded on the Info Tab – Insurance – Broker in the building card.

Insurance Claim

Building*

14 Smith Street Building 1 Smith Stre

Claim #

54565

Schedule*

Contribution Schedule

Lot

1/1 Emile Carrodonis

Claim Value

\$5,000.00

Account

Insurance Claims

Insurance Policy*

15156

Submitted Date

15/03/2017

Date of Loss

01/01/2017

Status

New

Completed Date

GST Registered:

N

Claim

Recipients

Work Orders

Notes

Documents

Alerts

Log of Changes

Details

Summary

Storm damage to balcony

Claim Details

Claim to repair balcony after tree fell on it in storm

Claim Contact

Contact

Harrison Shelby

Contact Details

Name

Harrison Shelby

(Ah)

(Bh)

Fax

Email

Hshelby@gmail.com

Note

Insurer

Insurance Company

Suncorp

Address

22 Town Street

Suburb

CITY CENTRE

State

VIC

Post Code

3000

Phone 1

0398765678

Phone 2

Fax

Email

allianz@insurance.co.au

Claims Dept Email

allianz@claims.com.au

Notes

Excess

Building/Common Property coverage is not set for this policy.

Broker

Insurance Broker

Regina Holsworthy

Address

24 Solstice Circuit

Suburb

DICKSON

State

ACT

Post Code

2602

Phone 1

1300 878 989

Phone 2

Fax

Email

regina@holsworthy.com.au

Notes

Merge

Edit

Done



Make sure the insurer and broker are still active on your system.

- If you have made an insurer or broker inactive after entering the insurance policy details on the building card, they will still show here but will not be automatically added as a recipient and you will receive an error message if you try to add them manually.
- You can't edit the insurance or broker details here ,but you can edit them from the insurance policy details on the building card – Info tab>insurance details.

RECIPIENTS TAB

The recipients tab records all interested parties that you want to receive documentation relating to the claim.

By default, the recipients are:

- the creator (user that entered the insurance claim)
- the strata manager for this building
- the insurer
- the broker (if any)
- any committee members that are ticked on their committee member card to receive insurance documents.

Committee Member

Lot: 1/1 Emile Carrodonis [View Lot](#) [Sync With Lot Owner](#)

Name* Emile Carrodonis Salutation
Position Chairperson Appointed* 17/11/2016
Rep ☐ Resignation
Sub Rep ☒ Financial Reports Recipient ☐
External Approver ☐ Work Order Recipient ☒
Insurance Claim Recipient ☒

Address
Address 1 Smith Street Suburb BRISBANE
State QLD
Post Code 4000

Contact Details
Home Fax
Work Mobile
Email* ecaradonis@gmail.com

Delivery Method
Email ☒
Post ☐
SMS

[Save](#) [Cancel](#)

Use the *Edit* button on the bottom right of the screen to edit or add recipients.

Insurance Claim

Building* 14 Smith Street Building 1 Smith Street [View](#) Claim #
Lot 1/1 Emile Carradonis [View](#) Claim Value \$0.00
Insurance Policy* 15156 [View](#) Submitted Date
Status New Completed Date
Schedule* Contribution Schedule
Account [View](#)

[Claim](#) [Recipients](#) [Work Orders](#) [Notes](#) [Documents](#) [Alerts](#) [Log of Changes](#)

#1 Creator
☒ Name Faye Goodman Email Address rohits@propertyiq.com.au ☒ Email ☐ Post [View](#)
Address 1 Shelley Street SYDNEY NSW 2250

#2 Building Manager
☒ Name Ashley Jones Email Address rickym@propertyiq.com.au ☒ Email ☐ Post [View](#)
Address

#3 Insurer
☒ Name Suncorp Email Address allianz@claims.com.au ☒ Email ☐ Post [View](#)
Address 22 Town Street Head Office CITY CENTRE VIC 3000

#4 Broker
☒ Name Regina Holworthy Email Address regina@brokers.com.au ☒ Email ☐ Post [View](#)
Address Suite 2/1 Karri Court KENSINGTON VIC 3107

[Edit](#) [Done](#)

Once you're in edit mode you will be able to add additional recipients

1. **+Add Contacts** to add contacts, for example an onsite building manager, as recipients
2. **+Add Committee Member(s)** to add committee members as recipients (you only need to add committee members that are not already ticked to receive insurance claim documentation)
3. **+Add Lot(s)** to add lot owners as recipients
4. **+Add User(s)** to add users as recipients
5. **+Add Suppliers** to add suppliers as recipients

Insurance Claim

Building*14 Smith Street Building 1 Smith Street

Lot1/1 Emile Carradonis

Insurance Policy*15156

StatusNew

Claim #

Claim Value\$0.00

Submitted Date

Completed Date

Schedule*Contribution Schedule

Account

Claim

Recipients

Work Orders

Notes

Documents

Alerts

Log of Changes

#1 Creator

☒

NameFaye Goodman

Email Addressrohits@propertyiq.com.au

☒Email☐Post

Remove

Address

1 Shelley Street SYDNEY NSW 2250

#2 Building Manager

☒

NameAshley Jones

Email Addressrickym@propertyiq.com.au

☒Email☐Post

Remove

Address

#3 Insurer

☒

NameSuncorp

Email Addressallianz@claims.com.au

☒Email☐Post

Remove

Address

22 Town Street Head Office CITY CENTRE VIC 3000

#4 Broker

☒

NameRegina Holsworthy

Email Addressregina@brokers.com.au

☒Email☐Post

Remove

Address

Suite 2/1 Karri Court KENSINGTON VIC 3107

1

2

3

4

5

+ Add Contact(s)

+ Add Committee Member(s)

+ Add Lot(s)

+ Add User(s)

+ Add Supplier(s)

Delete

Save

Cancel

1. To add lot owners, click on **+Add Lots**
2. Type some key letters in the empty boxes on the top row to refine your search
3. Click on the lot owner you want, to highlight them and then double click or
4. **Select** at the bottom right of the screen



You can use the above procedure to add all recipient types.

Insurance Claim

Building* **Claim #**
Lot **Claim Value**
Insurance Policy* **Submitted Date**
Status **Completed Date**

[Claim](#) [Recipients](#) [Work Orders](#) [Notes](#) [Documents](#) [Alerts](#) [Log of](#)

#1 Creator

☒ **Name** Faye Goodman **Email Address** rohits@prop...

Address 1 Shelley Street SYDNEY NSW 2250

#2 Building Manager

☒ **Name** Ashley Jones **Email Address** rickym@pro...

Address

#3 Insurer

☒ **Name** Suncorp **Email Address** allianz@cla...

Address 22 Town Street Head Office CITY CENTRE VIC 3000

#4 Broker

☒ **Name** Regina Holsworthy **Email Address** regina@bro...

Address Suite 2/1 Kari Court KENSINGTON VIC 3107

[+ Add Contact\(s\)](#) [+ Add Committee Member\(s\)](#) [+ Add Lot\(s\)](#) [+ Add User](#)

Lots

<input type="checkbox"/>	C.T...	Lot	Unit	CRN	Owner	Stre...	Street Name	Building Nam...	Strata Manager N...	Corr...	Deli...
<input checked="" type="checkbox"/>	14	1	1	0000...	Emile Carradonis	1	Smith Street	Smith Street...	Ashley Jones	Owner	Post
<input type="checkbox"/>	14	2	2	0000...	John Carradonis	1	Smith Street	Smith Street...	Ashley Jones	Other	Post
<input type="checkbox"/>	14	3	3	0000...	John Carradonis	1	Smith Street	Smith Street...	Ashley Jones	Owner	Post
<input type="checkbox"/>	14	4	4	0000...	John Carradonis	1	Smith Street	Smith Street...	Ashley Jones	Owner	Post
<input type="checkbox"/>	14	5	5	0000...	Frances Southwell	1	Smith Street	Smith Street...	Ashley Jones	Owner	Post

[View](#) [Select \(1\)](#) [Close](#)

If the recipient you add is a **lot owner** you will be able to use the dropdown to select which recipient you want to send documents to. The choices are:

- Lot Owner
- Lot Property Manager
- Lot Tenant
- Lot Joint Owner

#5 Lot 1 (Lot Owner)

☒ **Name** Emile Carradonis **Email Address** jsmith@smithmail.net.au ☒ **Email** ☐ **Post** [Remove](#)

Address 1 Smith Street BRISBANE QLD 4000 **Type**

[+ Add Contact\(s\)](#) [+ Add Committee Member\(s\)](#) [+ Add Lot\(s\)](#) [+ Add User\(s\)](#) [+ Add Supplier\(s\)](#)

WORK ORDERS TAB

The work orders tab allows you to link work orders to the insurance claim

1. Click on **+Link Work Order(s)** to link a work order to the insurance claim
2. If you have already linked a work order, click on **–Unlink Work Order(s)** to unlink

Insurance Claim

Building* 14 Smith Street Building 1 Smith Street
 Lot 1/1 Emile Carradonis
 Insurance Policy* 15156
 Status New

Claim #
 Claim Value \$5,000.00
 Submitted Date 01/03/2017
 Completed Date

Schedule* Contribution Schedule
 Account

Claim Recipients **Work Orders** Notes Documents Alerts Log of Changes

Job #	Summary	Status	Supplier	Date Issued
-------	---------	--------	----------	-------------

1 2

+ Link Work Order(s) - Unlink Work Order(s)

Edit Done

Linking a Work Order

1. Type some key letters in the empty boxes on the top row to refine your search and find the work order you want
2. Click on the work order you want, and the double click it to select *or*
3. Click on **Select** on the bottom right of the screen

Insurance Claim

Building* 14 Smith Street Building 1 Smith Street
 Lot 1/1 Emile Carradonis
 Insurance Policy* 15156
 Status New

Claim #
 Claim Value
 Submitted
 Completed

Work Orders

Quote Pending In Progress Complete Cancelled ALL

C.T...	Building Nam...	St...	Street Name	Manager	Jo...	Summary	Status	Supplier	Date ...	Est C...	Com...	Quot...
14	Smith Street...	1	Smith Street	Ashley Jones	275	Repairs to Balcony - Insuranc...	In Pro...		15/3/...			

+ Link Work Order(s) - Unlink Work Order(s)

+ Add View Job Register Select (1) Close

Unlinking a Work Order

1. Click on – *Unlink Work Order(s)*
2. Click on the highlighted work order to unlink it

Insurance Claim

Building*

14 Smith Street Building 1 Smith Stre

Claim #

54565

Schedule*

Contribution Schedule

Lot

1/1 Emile Carrodonis

Claim Value

\$5,000.00

Account

Insurance Claims

Insurance Policy*

15156

Submitted Date

15/03/2017

Date of Loss

01/01/2017

Status

New

Completed Date

GST Registered:

N

Claim

Recipients

Work Orders

Notes

Documents

Alerts

Log of Changes

Job #	Summary	Status	Supplier	Date Issued
283	Balcony Repairs - Insurance Claim	In Progress		22/3/2017

+ Link Work Order(s)

- Unlink Work Order(s)

Merge

Edit

Done

NOTES TAB

The notes tab allows you to record any notes relating to the claim and set reminders, so you don't miss any important tasks.

Adding a Note

1. Click **+Add Note** to add a new note
2. Type a name for the note
3. Type more details
4. The status will default to pending but you can alter the status to completed if you want to record something that has already been done. If the status is pending, you can set a reminder by clicking in the box next to **Reminder**. The reminder will appear in your diary and will also create a pop up reminder on your screen.
5. Click on the **Now** button if you want to set the reminder for now
6. Click on the **Done** button when you have finished creating the reminder
7. Click on the **Save** button when you are ready to save the note

The screenshot shows the 'Insurance Claim' and 'Note' windows. The 'Insurance Claim' window has fields for Building, Lot, Insurance Policy, and Status. The 'Note' window has fields for Name, Details, Status, and Reminder. A calendar for September 2018 is open, showing the 19th selected. A time picker is also visible. The 'Add Note' button is highlighted with a red arrow and a red circle with the number 1. The 'Name' field is highlighted with a red circle with the number 2. The 'Details' field is highlighted with a red circle with the number 3. The 'Status' dropdown is highlighted with a red circle with the number 4. The 'Reminder' field is highlighted with a red circle with the number 5. The 'Now' button is highlighted with a red circle with the number 6. The 'Save' button is highlighted with a red circle with the number 7.

1. A note will be created automatically when the insurance claim is saved
2. To view an existing note, click on the note you want to view to highlight it, and then click *View Note*
3. *Print* to print a PDF of all notes for the claim. This will open a PDF in a new tab

Insurance Claim

Building*

416565 Smith Street Building 1 Smith

Claim #

54565

Schedule*

Contribution Schedule

Lot

1/1 Emile Carrodinis

Claim Value

\$5,000.00

Account

Insurance Claims

Insurance Policy*

15156

Submitted Date

15/03/2017

Date of Loss

03/01/2017

Status

New

Completed Date

24/03/2017

GST Registered:

N

Claim

Recipients

Work Orders

Notes

Documents

Alerts

Log of Changes

Name	Details	Status	Created	Creator
Follow up on quotes	Follow up on three quotes for broken window	complete	19/09/2018 - 12:13 pm	Bella Carstairs
Claim Documents submitt...	Claim documents and quote details submitted to insurer	complete	22/03/2017 - 2:10 pm	Faye Goodman
Insurance Claim Created		complete	22/03/2017 - 1:56 pm	Faye Goodman

2

3

+ Add Note

View Note

Print

Save

Cancel

Print Notes screen

PropertyIQ Strata Testing

PO Box 330 CANNING VALE QLD 2000

ABN: 123456789

Ph: 1300 724 256 Email: stephanieb@propertyiq.com.au

Printed: 22/03/2017 02:31 pm

User: Faye Goodman

Page 1

Notes Report

54565

Name	Details	Status	Reminder Time
Insurance Claim Created		complete	
Claim Documents submitted to Insurer	Claim documents and quote details submitted to insurer	complete	

DOCUMENTS TAB

The documents tab allows you to store all documents relating to the claim. If you have attached a work order to a claim you will also be able to see all documents that were added to the work order too.



Once a claim has a document attached to it you will not be able to delete the claim

1. To view documents uploaded within a specific timeframe, select a date range here
2. Highlight a document to view it
3. Click on the *Upload Files* button to upload new documents – see instructions below
4. Click the *View Doc* button to view a document you have highlighted
5. Click on the *Email* button to email a document you have highlighted– see instructions below
6. Click the *Print* button to generate a PDF copy of a document you have highlighted.
7. Click the *Download* button to download a document you have highlighted
8. Click the *Delete* button to delete a document you have highlighted

Insurance Claim

Building*
14 Smith Street Building 1 Smith Stre

Claim #
54565

Schedule*
Contribution Schedule

Lot
1/1 Emile Carrodonis

Claim Value
\$5,000.00

Account
Insurance Claims

Insurance Policy*
15156

Submitted Date
15/03/2017

Date of Loss
01/01/2017

Status
New

Completed Date

GST Registered: N

Claim

Recipients

Work Orders

Notes

Documents

Alerts

Log of Changes

From 01/02/2017 To 01/04/2017

Filter: All

<input checked="" type="checkbox"/>	Created Time	Date	User	Name	Type	Details
<input checked="" type="checkbox"/>	22/03/2017 - 3:04 p...	22/3/2017	Faye Goodman	Balcony Railings.pdf	Insurance Claim Atta...	

1 documents selected

3

4

5

6

7

8

Upload File(s)

View Doc

Email

Print

Download

Delete

Upload Files

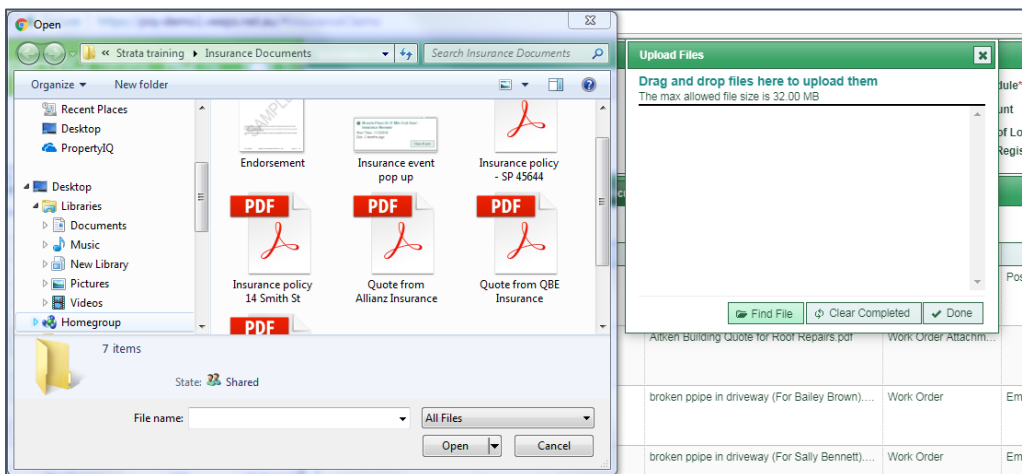


Files must be in PDF or Image (JPEG or PNG) format and the maximum file size is 32 MB. Documents you upload here will also show in the building's documents, under the type "Insurance Claim Attachment"

1. Click on the *Upload Files* button
2. Click on *Find File*

The screenshot shows the 'Insurance Claim' form with fields for Building, Lot, Insurance Policy, and Status. Below these are tabs for Claim, Recipients, Work Orders, Notes, and Documents. The 'Upload Files' dialog box is open, displaying a list of files with columns for Name, Date, and User. The 'Find File' button is highlighted with a red circle and the number 2. The 'Upload File(s)' button is highlighted with a red circle and the number 1.

Find the file where it is saved on your computer. If you have more than one file to upload from the same location, hold your control key down to select multiple files.



1. When the document has been uploaded, it will show here with the status *Complete*
2. Click Find File to look for more files to upload
3. Click Clear Completed to clear the list on the screen
4. Click on the *Done* button to upload the file(s)

Upload Files

Drag and drop files here to upload them

The max allowed file size is 32.00 MB

Quote from Allianz Insurance.pdf

1 Complete

2

3

4

Find File

Clear Completed

Done

Email Documents

1. Click on a document(s) you want to email, to highlight them
2. Click on the *Email* button
3. The document(s) you are emailing show here
4. The total size of any attachments shows here
5. Tick the delivery options you want to send the email to
6. You can add a manual email address – tick the box and type the email address
7. You can add a manual BCC email address – tick the box and type the email address
8. Type an email subject
9. Type the body of the email
10. Click on the *Email Documents* button when you are ready to send the email

PropertyIQ Strata

File

To D

Building*

14 Smith Street Building 1 Smith Stre...

Lot

1/1 Emile Caradonis

Insurance Policy*

15156

Status

New

Claim #

54565

Claim Value

\$5,000.00

Submitted Date

15/03/2017

Completed Date

Claim

Recipients

Work Orders

Notes

Documents

Alerts

Log of Changes

From

01/02/2017 To 01/04/2017

Created Time	Date	User	Name	Type
22/03/2017 - 3:29 p...	22/3/2017	Faye Goodman	Insurance policy 14 Smith St.pdf	Insurance Claim
22/03/2017 - 3:04 p...	22/3/2017	Faye Goodman	Balcony Railings.pdf	Insurance Claim

Documents To Be Emailed:

Balcony Railings.pdf (83.67 KB)

Total Attachments Size: 83.67 KB

Delivery Options

Insurance Claim Delivery Options

Insurer Email

Broker Email

Manual Delivery

Manual Email

Manual Bcc Email

Email Settings

Email Subject*

Copy of Insurance Policy

Email Body*

Accepted

Completed

ALL

Date of Loss	Age
22/3/2017	0
	0
1/1/2017	7

Currently Logged In as: Faye Goodman

Role: Administrator

0 138.1 22/3/2017

You will receive a confirmation of the emails that were sent successfully (and any failures)

!

Your email was successfully sent to:

allianz@claims.com.au,

regina@holsworthy.com.au,

ecaradonis@gmail.com,

george@gmail.com

Your email failed to send to:

Ok

ALERTS TAB

You can add alerts that will pop up, and can choose when you want them to activate. For insurance claim alerts, you can set them to trigger either when you access the insurance claim or when you access a linked work order

1. Click on an existing alert to highlight it
2. Click on the *+Add* button to add a new alert (see instructions below)
3. Click on the *View* button to view an alert you have highlighted
4. Click on the *Edit* button to edit an alert you have highlighted
5. Click on the *Delete* button to delete an alert you have highlighted

Insurance Claim

Building*

14 Smith Street Building 1 Smith Stre

Lot

1/1 Emile Carrodonis

Insurance Policy*

15156

Status

New

Claim #

54565

Claim Value

\$5,000.00

Submitted Date

15/03/2017

Completed Date

Schedule*

Contribution Schedule

Account

Insurance Claims

Date of Loss

01/01/2017

GST Registered:

N

Claim

Recipients


Work Orders

Notes

Documents

Alerts

Log of Changes

<input checked="" type="checkbox"/>	Icon	Text	Contexts	Active	User
<input checked="" type="checkbox"/>		Insurance claim in dispute - do not process work order.		<input checked="" type="checkbox"/>	Faye Goodman

2

3

4

5

+ Add

View

Edit

Delete

Add a new Alert

1. Click *+Add* to add an alert
2. Add some text to describe the alert
3. The active box will be ticked by default.
4. You can click here if you want to stop the operator from continuing once the alert is activated
5. Select the event that will activate the alert – either when clicking on the insurance claim or when clicking on a work order that is linked to the insurance claim.
6. Select the style you want to use for this alert
7. Click the *Test Alert* button to test the alert
8. Click *Save* when you are ready

Insurance Claim

Building*

14 Smith Street Building 1 Smith

Lot

1/1 Emile Carodonis

Insurance Policy*

15156

Status

New

Claim

Recipients

Work Orders

Note

Icon

Insurance claim in dispute - do not

Alert

Text

Do not process anything in relation to this Insurance Claim

Options

Active

Don't allow operator to continue after alert is shown

Contexts

Insurance Claim Card

Work Orders

Select an Icon

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Test Alert

Save

Cancel

Contribution Schedule

Insurance Claims

01/01/2017

d: N

Active

User

✓

Faye Goodman

1

+

Add

D

View

↗

Edit

🗑

Delete

⌵

Merge

↗

Edit

✓

Done

LOG OF CHANGES TAB

The log of changes tab records the creation and any alterations to the insurance claim. You don't need to enter anything here.

MERGE BUTTON

Use the *Merge* button to merge information about the claim onto a claim form or other custom merge template and email it to the insurance claim recipients

1. Click on the *Merge* button
2. Click on the *+New* button to take you to custom merge templates, where you can create a new template. For detailed information, see the manual “Templates”
3. To clone a template, click on the template you want to clone, to highlight it. This will open the template in custom merge templates, where you can clone the template. For detailed information, see the manual “Templates”
4. To edit a template, click on the template you want to edit to highlight it, then click on *Edit*. This will open the template in custom merge templates, where you can edit the template. For detailed information, see the manual “Templates”
5. To select a template, click on the template you want and click *Select*. This will open the emailing box
6. To preview the merged document, click on *Preview*. This will create a PDF preview that opens in a new tab.

PDF Preview:

STRATA COMMUNITY INSURANCE Claim Form

Please provide accurate and thorough information throughout this Claim Form to allow us to resolve your claim as quickly and professionally as possible.

Insured Property Information

The Insured	Policy Number
Building	Insurance Policy
Risk Street Address	
Building Street No Building Street Name	
Suburb	State
Building Suburb	Building State
Postcode	Building PCode
Building Postcode	Building PCode

Your Details

Your Relationship to the Insured	Strata Manager
Name	Faye Goodman
Company Name	PropertyIQ Strata
Email	fayeg@propertyiq.com.au
Phone	1300 793 156

Insurance Claim

Building* 14 Smith Street Build
 Lot 1/1 Emile Carrodonis
 Insurance Policy* 15156
 Status New

Custom Merge Templates

Name	Type
CHU Insurance Claim form	A4 Insurance Claim
Strata Community Insurance - Claim Form	A4 Insurance Claim
testing	A4 Insurance Claim

1 Merge **2** + New **3** Clone **4** Edit **5** Select **6** Preview **Close**

After you click *Select*, the emailing/generating box will appear on the screen.

1. The document you selected shows here. You can change the document by clicking on the search icon
2. Type an email subject here
3. You can add an email address here if you want to cc anyone
4. The recipients and their delivery method show here.
5. To add attachments click on the little white arrow on the Attachments accordion
6. Click on *Add Document* to add a document to attach
7. The screen will show all documents that have already been attached to the Insurance Claim. Click on the document you want to highlight it and then double click to select *or*
8. Click on *Select* to select it
9. Click on *Remove Document* to detach a document you have selected
10. Click on *Customise* to customise the template just for this instance. This won't alter the template
11. Click on *Preview* to generate a PDF preview of the merged document. This opens a PDF in a new Tab.
12. Click *Generate* to generate PDFs for any recipient receiving by post and send the email to any recipients receiving by email. This sends the email and creates a job in your job centre if you need to print any PDFs for posting.

Insurance Claim Merge

Current Selected Template: Strata Community Insurance - Claim Form

Template Type: Existing Template

Email Subject: Claim Form - 14 Smith Street

CC Email: accounts@mystrata.co

Template will be sent to 4 recipients

Name	Recipient	Delivery
Faye Goodman	Creator	Email
Ashley Jones	Manager	Email
Suncorp	Insurer	Email
Regina Holsworthy	Broker	Email

Attachments

Name	Date	Size
+ Add Document		
- Remove Document		

Documents

Date	Name	C.T.S.	Building Name	Street Name	Lot	U...	Supplier	Document ...	On P...
22/3/...	Balcony Railings.pdf	14	Smith Street Building	Smith Street				Insurance ...	✗
25/...	Insurance policy 14 Smith Street	14	Smith Street Building	Smith Street				Insurance ...	✗

Buttons: Customise, Preview, Generate, Close, Select, Close

Insurance Claim Notices

Completed Time: March 22nd 2017, 6:07 pm

Results:

- There are no custom templates to be printed/posted.
- Sent 4 of 4 emails.
- Clean up succeeded.

Today **Jobs**

REPORTING

INSURANCE CLAIM REGISTER REPORT

You can generate a PDF report for insurance claims that are stored within PropertyIQ.

Firstly, go to *To Do > Insurance Claims* screen.

1. Click *Insurance Register* button
2. Select all buildings here, or tick *Single Building* to select a single building
3. Select all insurers here, or tick *Single Insurer* to select a single insurer
4. Select all managers here, or select a single manager from the dropdown
5. Select the claim status you want to report on – you can select one or multiple statuses
6. Select the date type. The options are *Created date*, *Submitted date*, *Completed date* and *Date of loss*.
 - a. For example, you can report on all claims **created** within a selected date range, or report on all claims that have a **date of loss** within a selected date range.
7. Select your date range here
8. Click *Generate* to create the PDF report. It will open in a new browser tab for viewing.
9. Click *Close* to exit the screen.

The screenshot shows the PropertyIQ Insurance Claims interface. At the top is a navigation bar with icons for File, To Do, Processing, Billing, End of Period, Reporting, Utilities, Help, and Log Out. The main area displays a table of insurance claims. An 'Insurance Register' dialog box is open, allowing users to filter claims by building, insurer, manager, status, and date type/range. The dialog box includes checkboxes for 'Single Building', 'Single Insurer', and 'Single Manager', as well as checkboxes for various claim statuses and radio buttons for date types. A 'Generate' button and a 'Close' button are at the bottom of the dialog. The background table lists claims with columns for S/Plan, Building Name, Street, Summary, Manager, Claim #, Status, Insurer, Broker, Submitted Date, Completed Date, Date of Loss, and Age.

Example report:

My Strata Co - piq-dev1 Level 20, 111 Eagle Street SYDNEY NSW 2000 ABN: 32 345 645 Ph: 13 13 121 Email: info@mystrataco.com.au Printed: 29/10/2020 01:33 pm User: Nicki Scrivener													
Insurance Register Submitted Date From 01/01/2020 To 29/10/2020 For All Managers													
S/Plan	Building	Claim #	Status	Summary	Date of Loss	Submitted Date	Completed Date	Claim Value	Insurer	Policy #	Broker	Manager	Work Order Job #s
1	The Bachelor Pad	XW987651	In Progress	Water damage Lot 1	03/02/2020	01/03/2020		\$1,000.00	CGU Insurance	Policy1	ABC Brokers	Anne Fluva	
23	Camellia Grove	5432	New		10/02/2020	12/02/2020		\$10,000.00	CGU Insurance	46544	Kinnane Insurance Brokers	Nick Dorcas	229
23	Camellia Grove	654	New			13/02/2020	10/02/2020	\$5,000.00	CGU Insurance	46922		Nick Dorcas	239
1	The Bachelor Pad	123456	In Progress	Fence damage - Common property	02/03/2020	13/03/2020		\$8,800.00	CGU Insurance	Policy1	ABC Brokers	Anne Fluva	124, 150
1	The Bachelor Pad	RT134984	New	Insurance claim Lot 7	19/09/2020	01/10/2020		\$1,350.00	CGU Insurance	Policy1	ABC Brokers	Anne Fluva	
6969	A Big Building	75273	New	Claim against common ppty - no lot linked nor recipient lot selected	31/03/2020	01/07/2020		\$2,000.00	QBE	C1567820		AMS Mick	