PropertyIQ™

Insurance Claims

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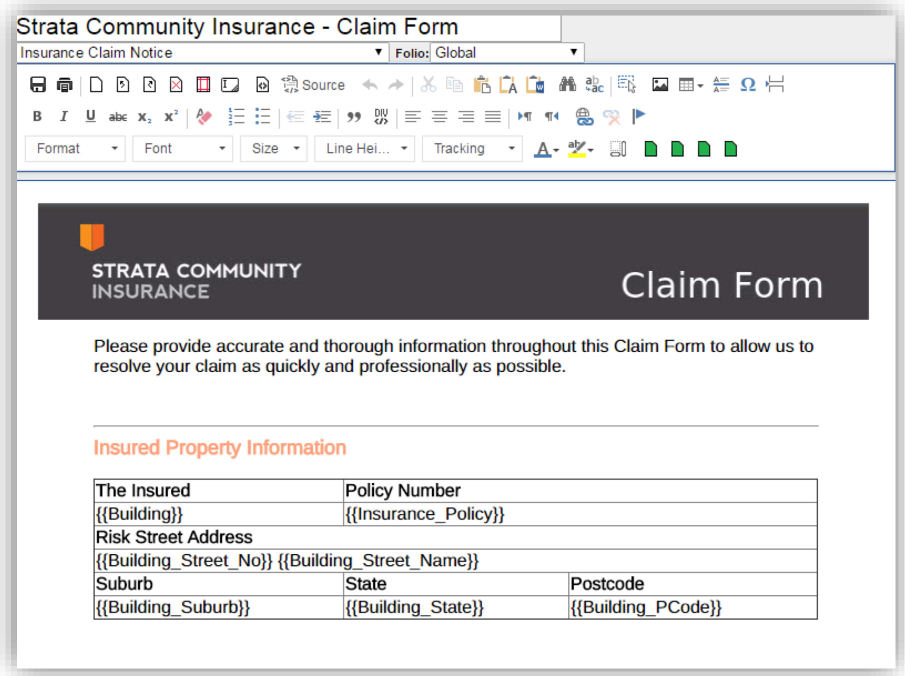
INTRODUCTION

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

NOTE *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:


Strata Community Insurance - Claim Form
Insurance Claim Notice
Folio: Global
Source
Format
Font
Size
Line Hei...
Tracking

STRATA COMMUNITY INSURANCE

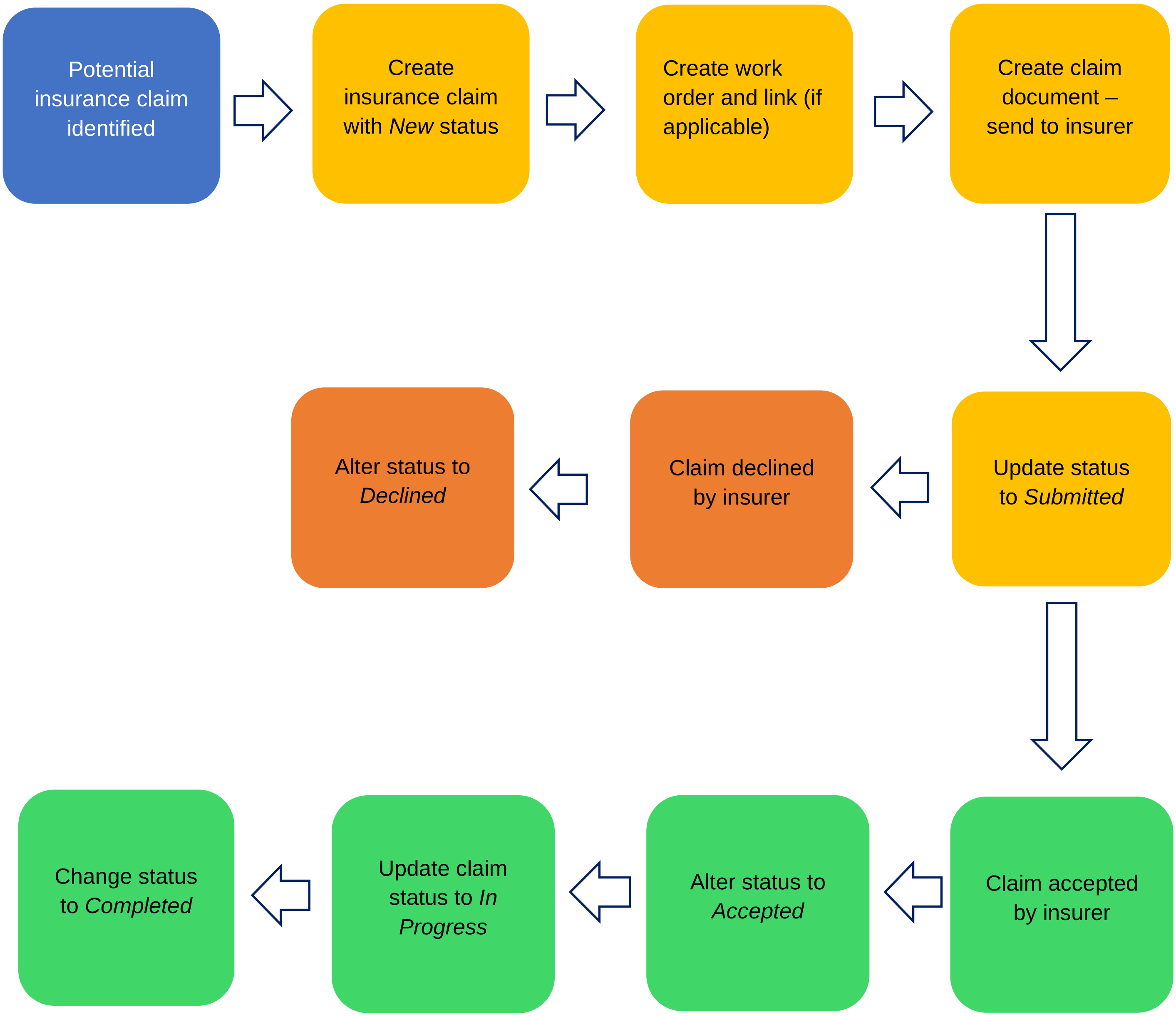
Claim Form

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}}

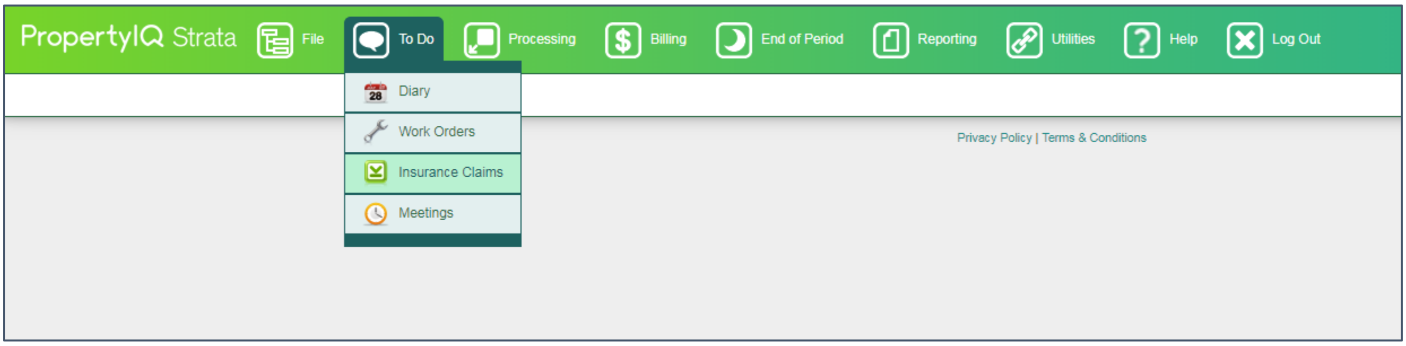
INSURANCE CLAIMS FLOW CHART



GETTING STARTED

To get started, go to 

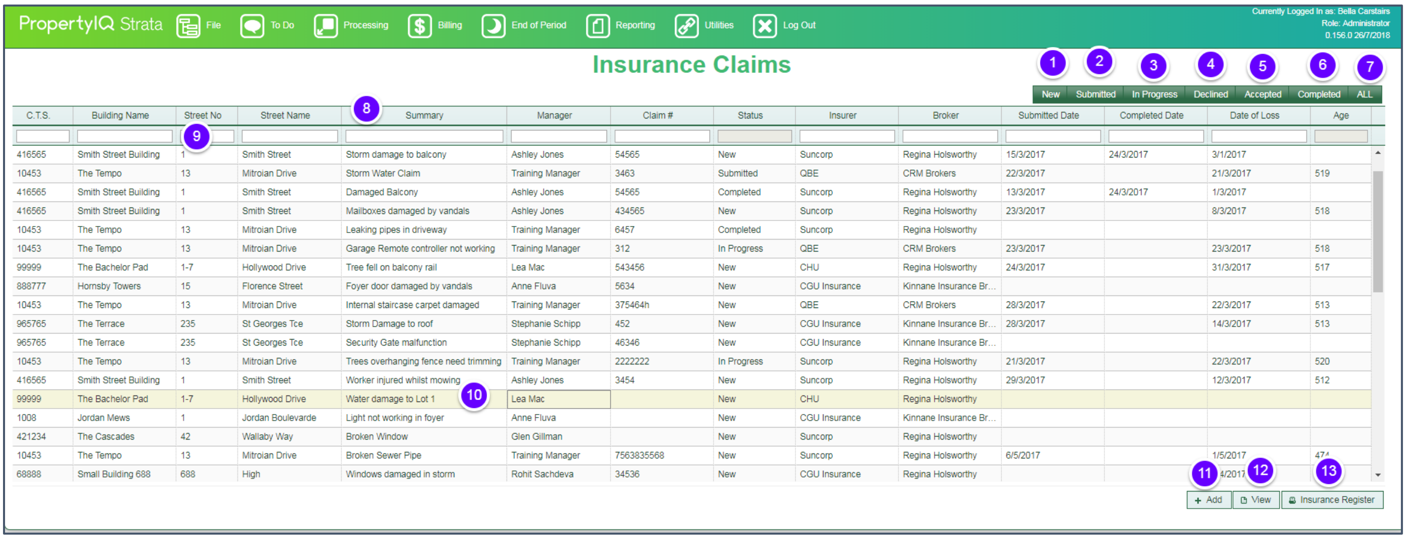
and select *Insurance Claims*.



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.

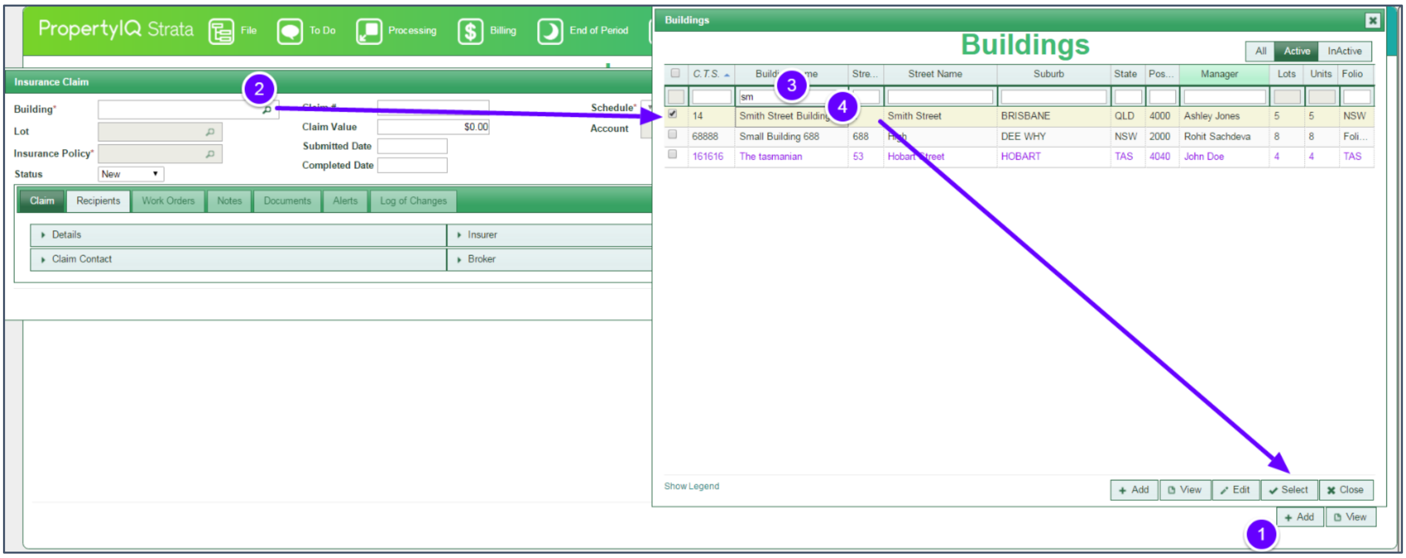
1. *New* - claims that have been created but not yet submitted to the insurer
2. *Submitted* - claims that have been submitted to the insurer and are awaiting assessment.
3. *In Progress* - claims that have been assessed and are awaiting a decision
4. *Declined* - claims that have been declined by the 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



ADDING A NEW INSURANCE CLAIM

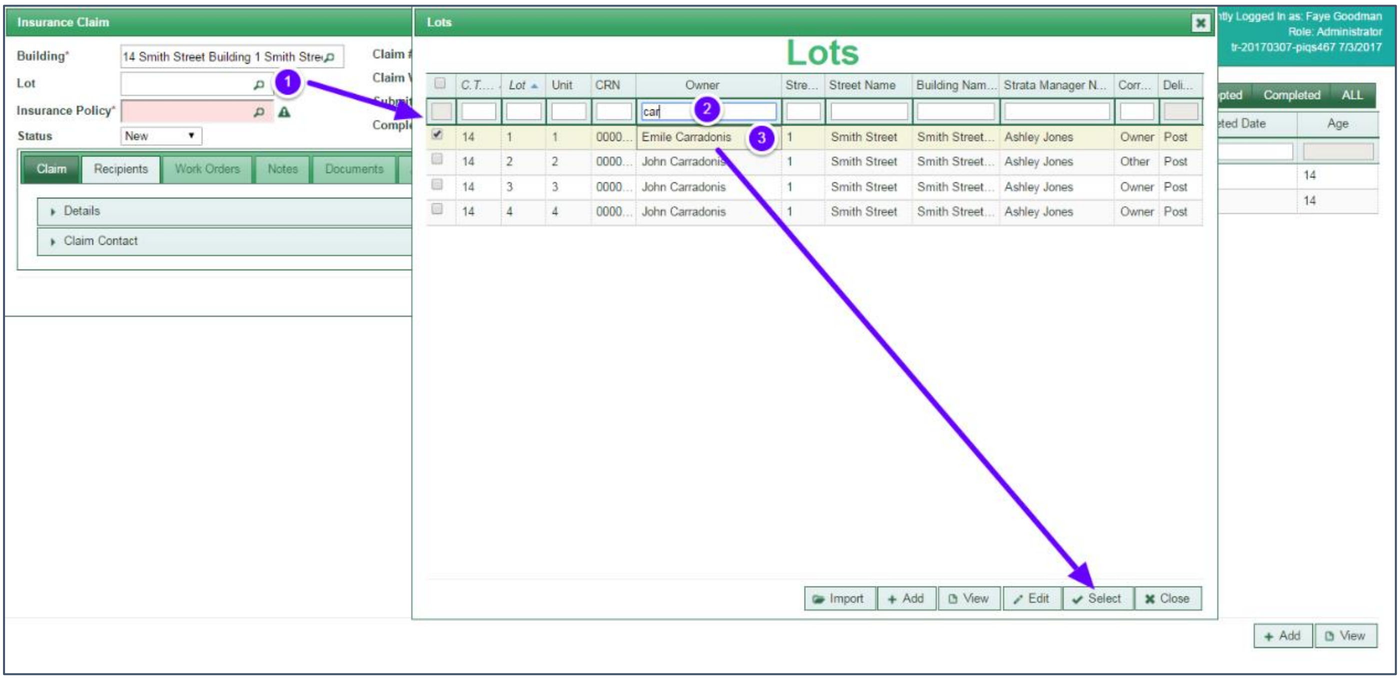
To add a new insurance claim,

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



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

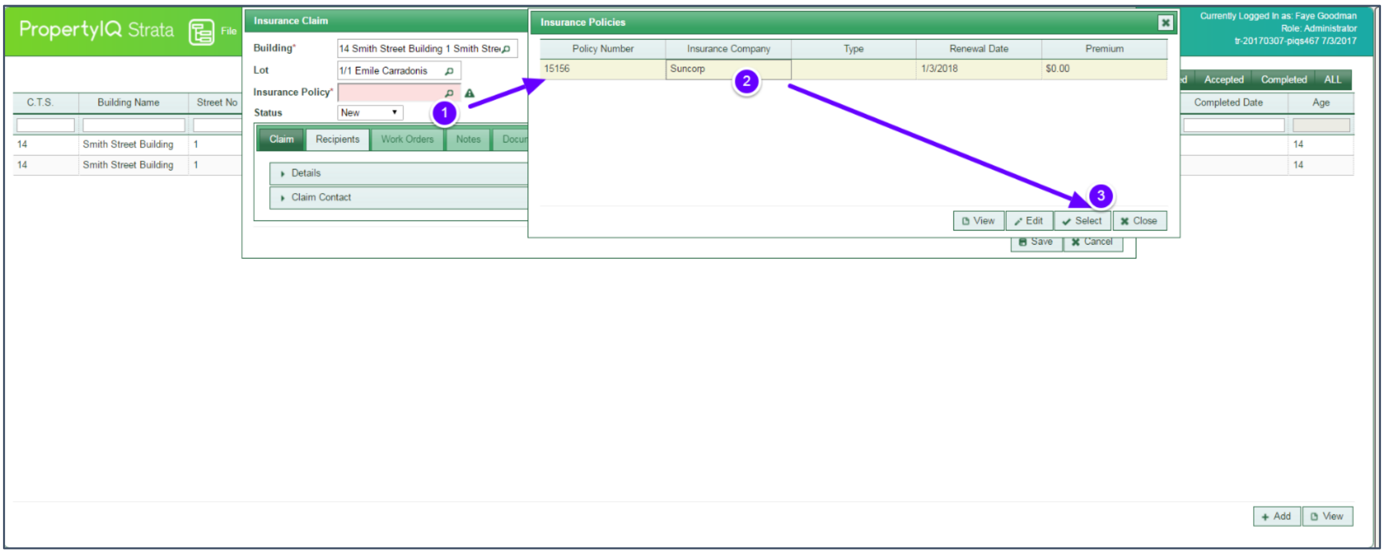
1. Click on the search icon to start looking for the lot owner you want
2. Type some key letters to refine your search and find the lot owner you want
3. Click on the lot owner you want to highlight it, and then double click *or* click on *Select* on the bottom right of your screen



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

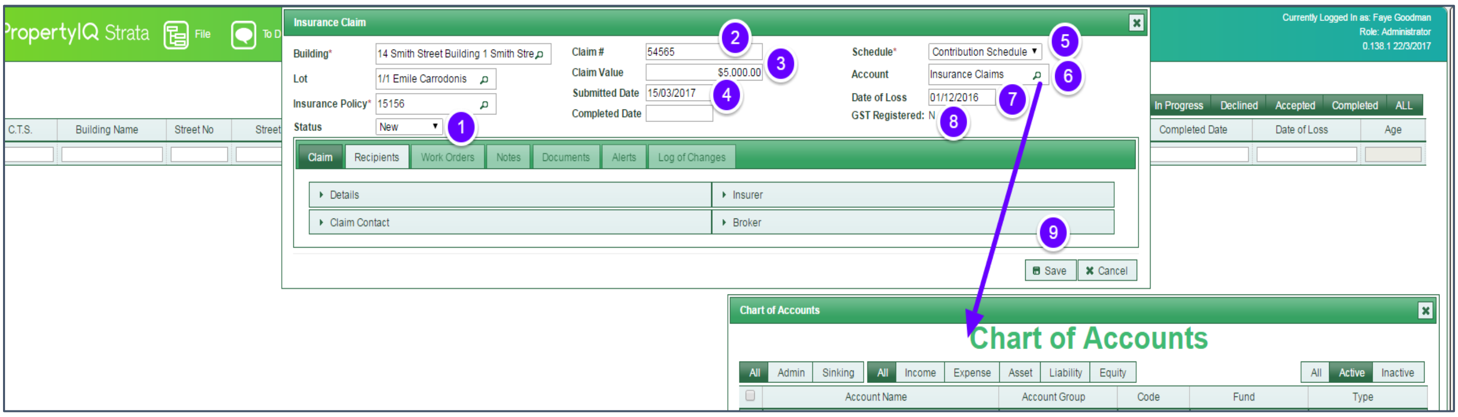
You will need to have the insurance policy details, including a renewal date, recorded in the Info tab>Insurance on the building card. For full details, see the Manual, "Buildings – Info Tab"

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



CLAIMS TAB

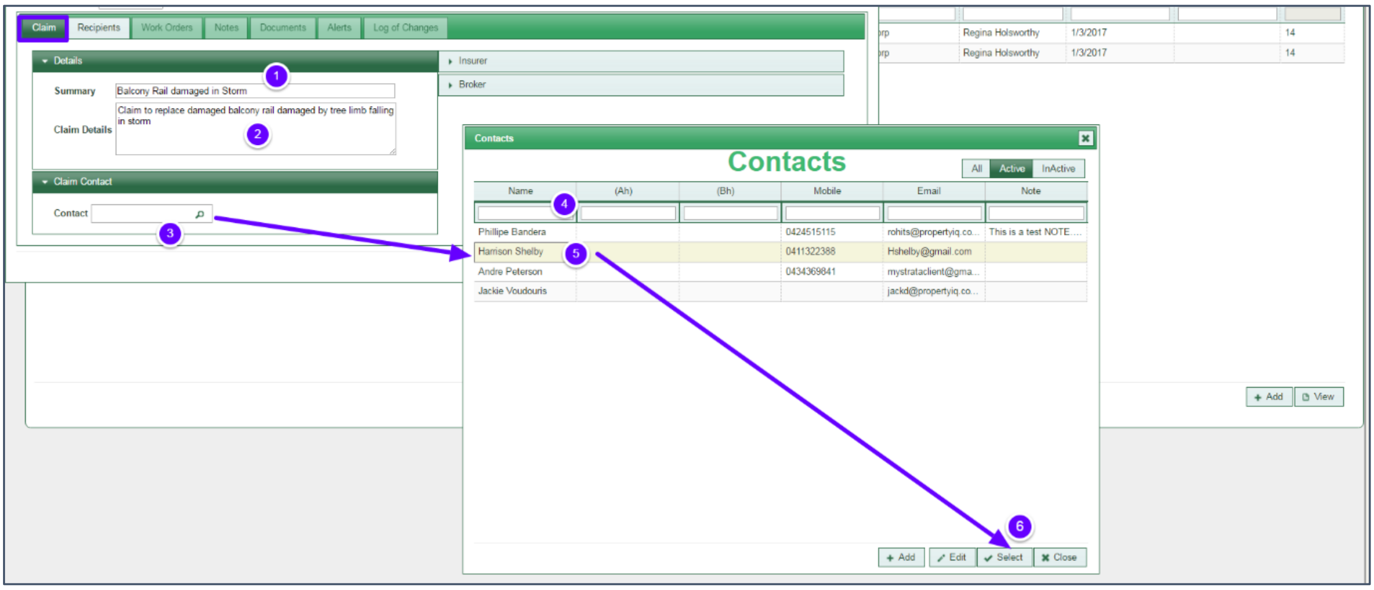
The claims tab allows you to record details of the claim and any additional contacts, such as an onsite building manager, that is an interested party.

Details

1. Type a summary of the claim here. The summary will show on the insurance screen in the summary column and in the insurance claim form
2. Type the claim details here. This will show on the insurance claim form

Contacts

3. Click on the search icon to search for a contact to attach to the claim, for example an onsite building managers
4. Type some key letters in any of the empty boxes on the top line to refine your search
5. Click on the contact you want, to highlight them and then double click to select *or*
6. Click on *Select* to select the contact you want

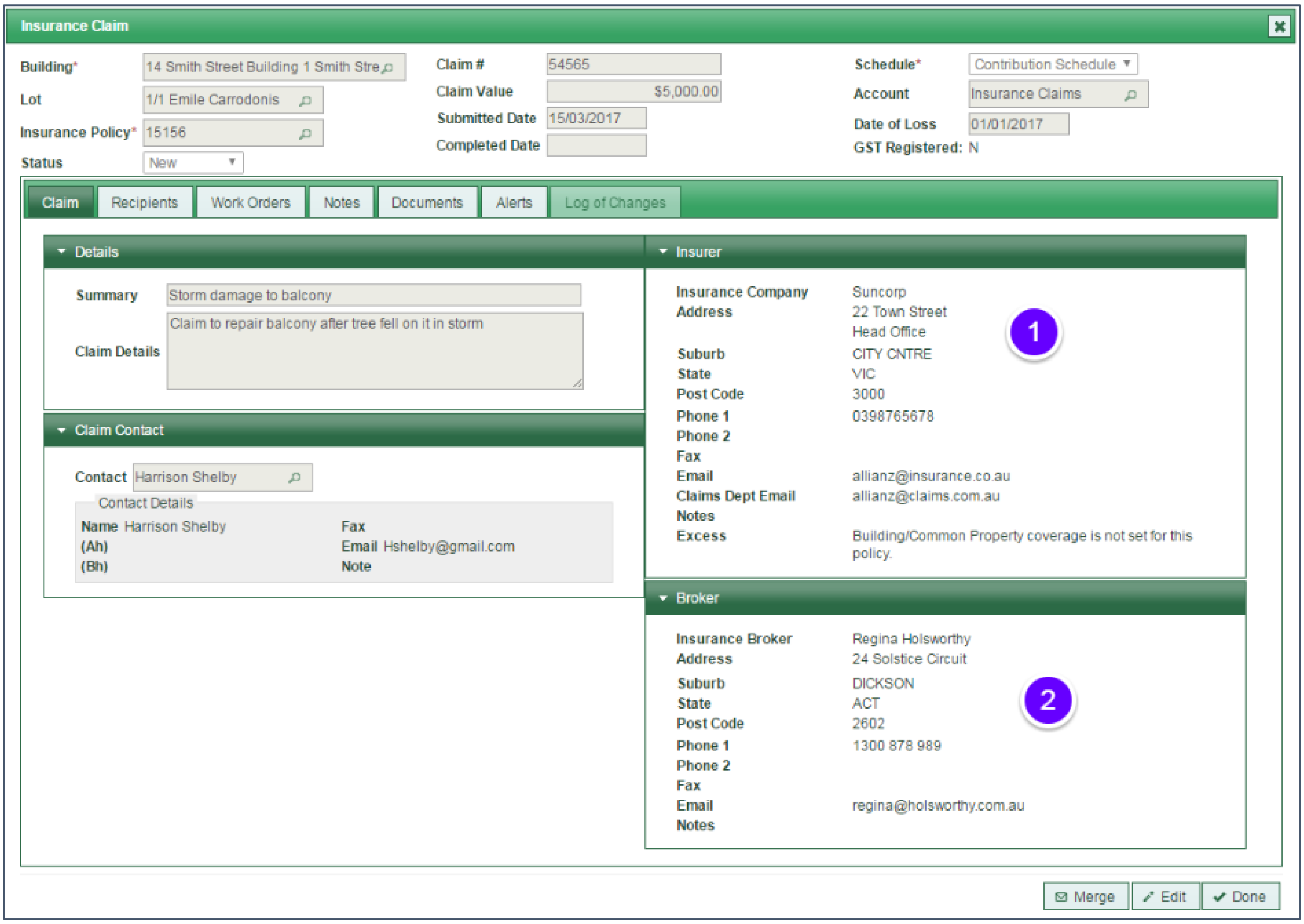


Insurer

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.



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

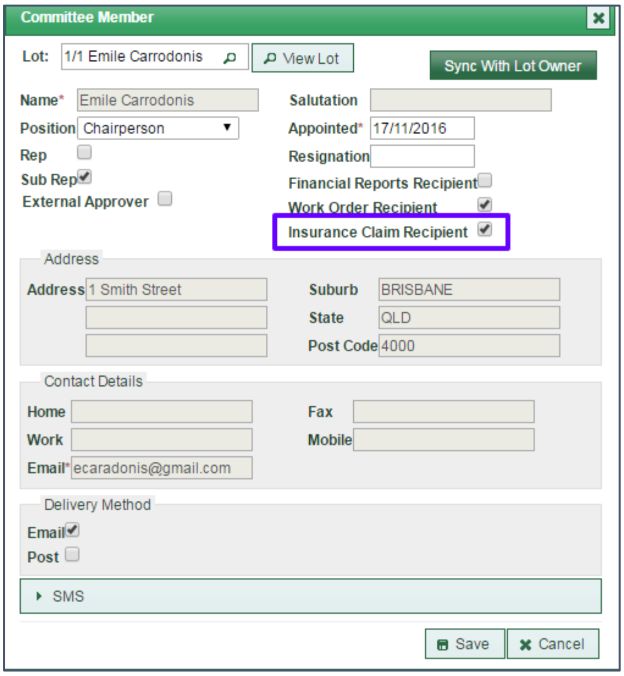
- *If you have made an insurer or broker inactive after entering the insurance policy details on the building card, they will still show here but will not be automatically added as a recipient and you will receive an error message if you try to add them manually.*
- *You can't edit the insurance or broker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

RECIPIENTS TAB

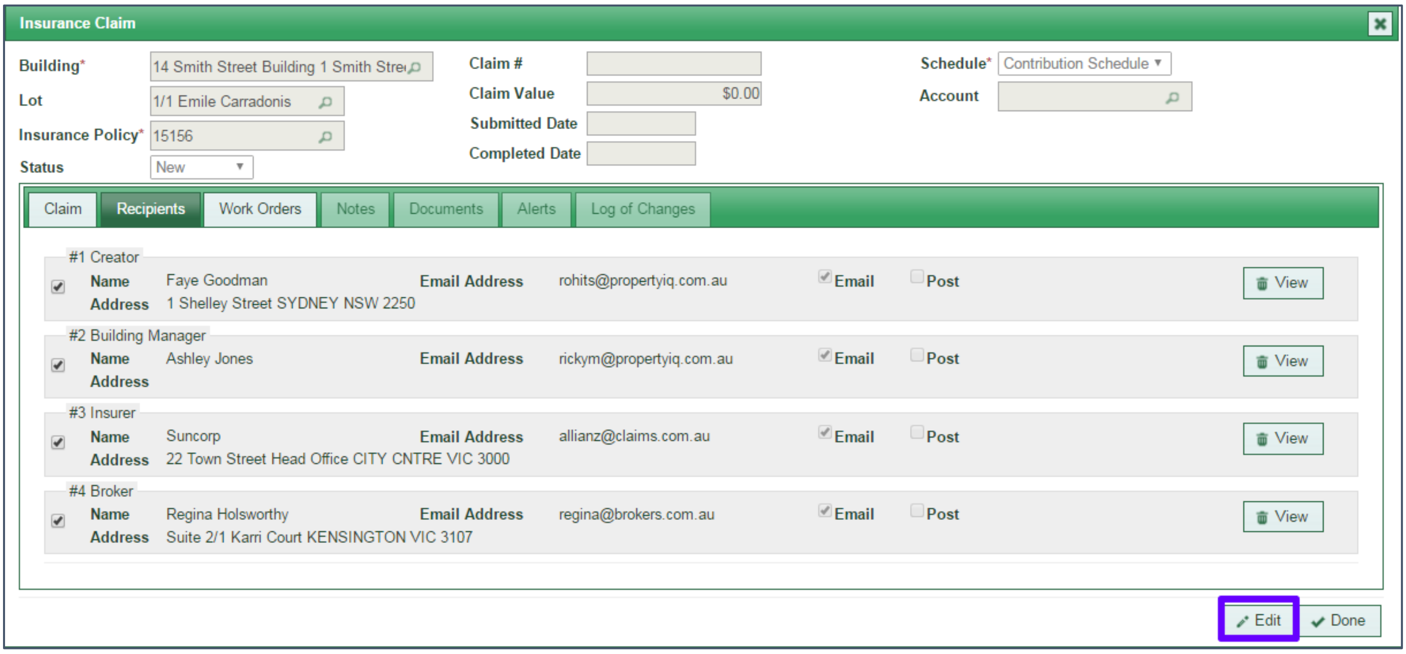
The recipients tab records all interested parties that you want to receive documentation relating to the claim.

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.

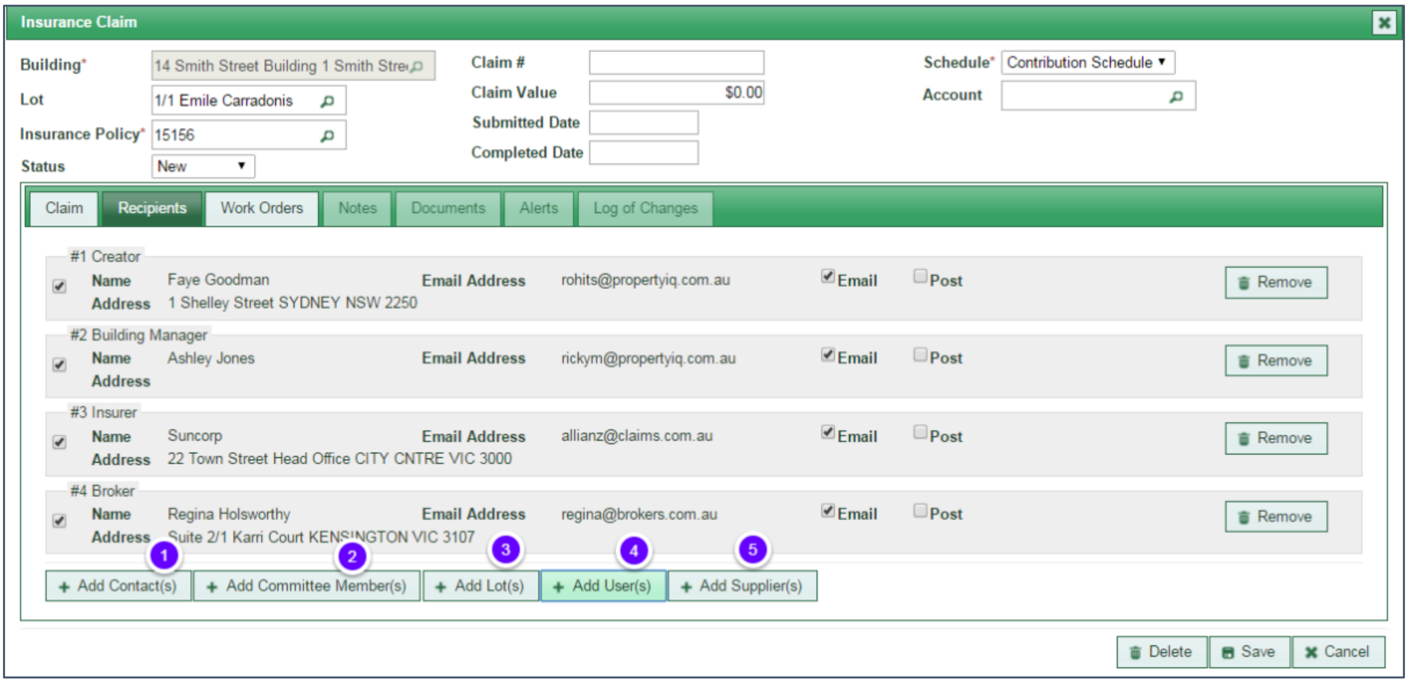


Use the *Edit* button on the bottom right of the screen to edit or add recipients.



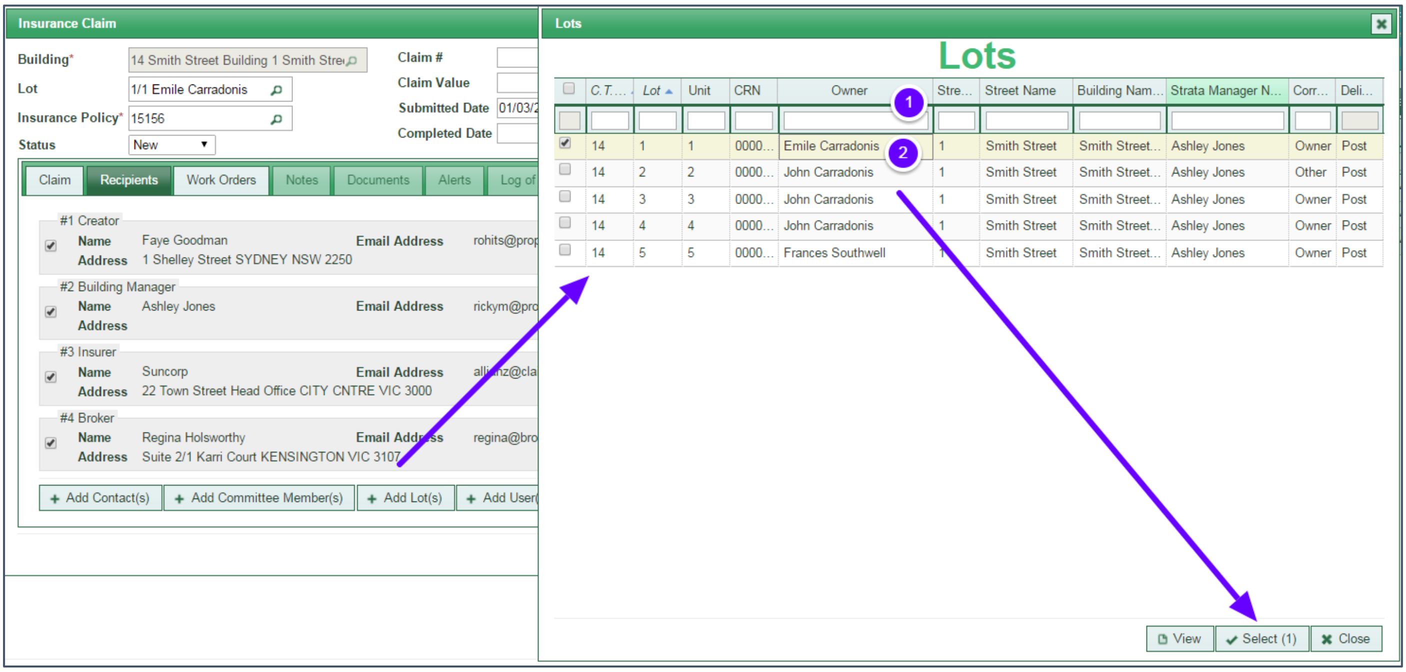
Once you're in edit mode you will be able to add additional recipients

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



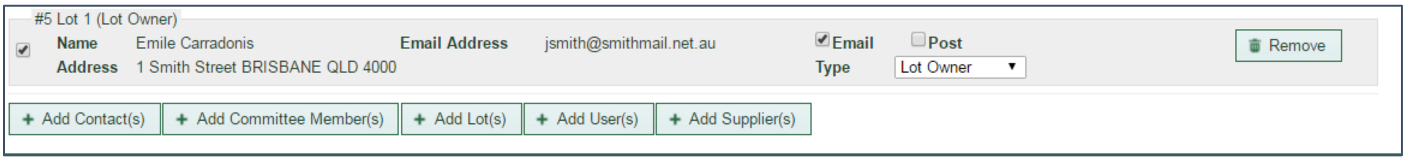
1. To add lot owners, click on *+Add Lots*
2. Type some key letters in the empty boxes on the top row to refine your search
3. Click on the lot owner you want, to highlight them and then double click *or*
4. *Select* at the bottom right of the screen

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



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:

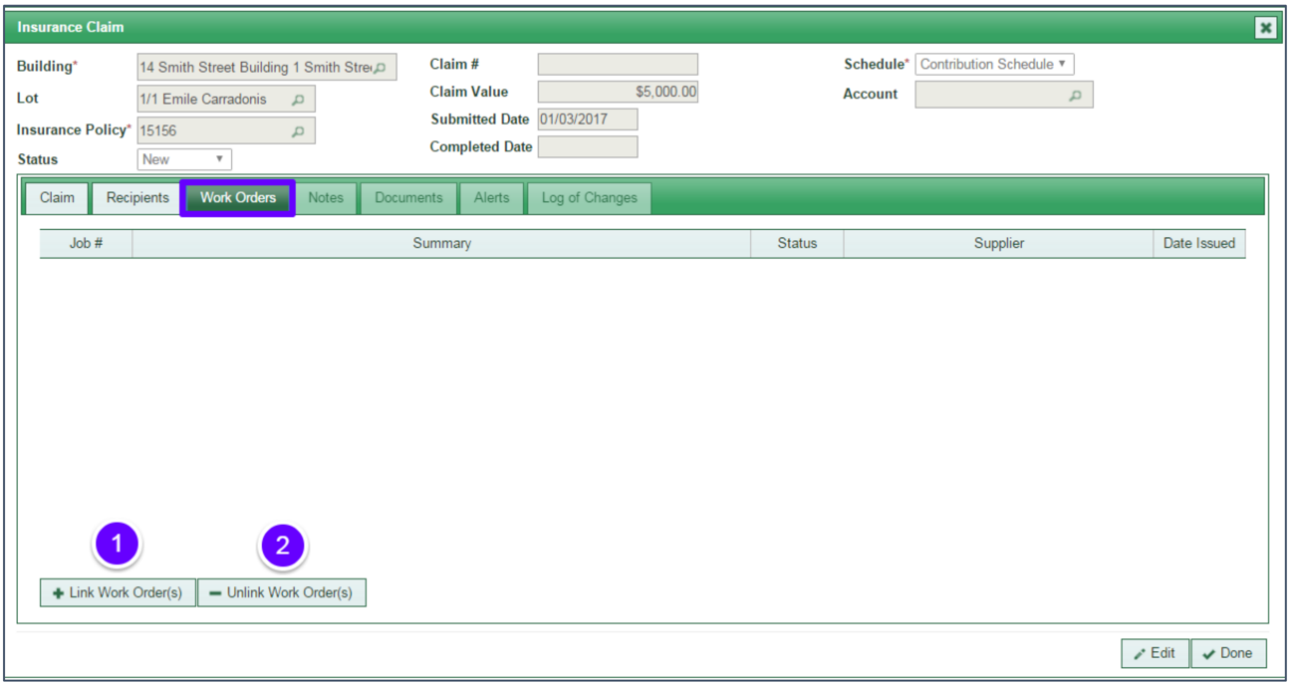
- Lot Owner
- Lot Property Manager
- Lot Tenant
- Lot Joint Owner



WORK ORDERS TAB

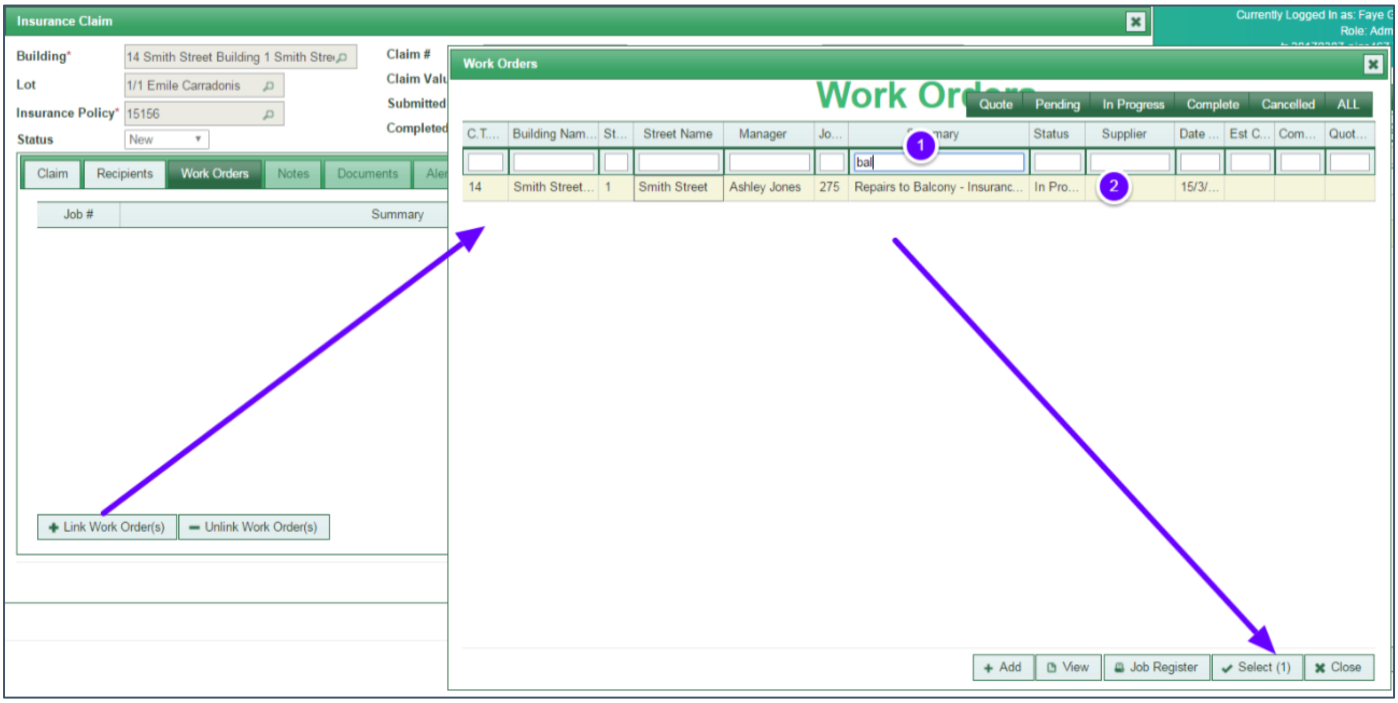
The work orders tab allows you to link work orders to the insurance claim

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



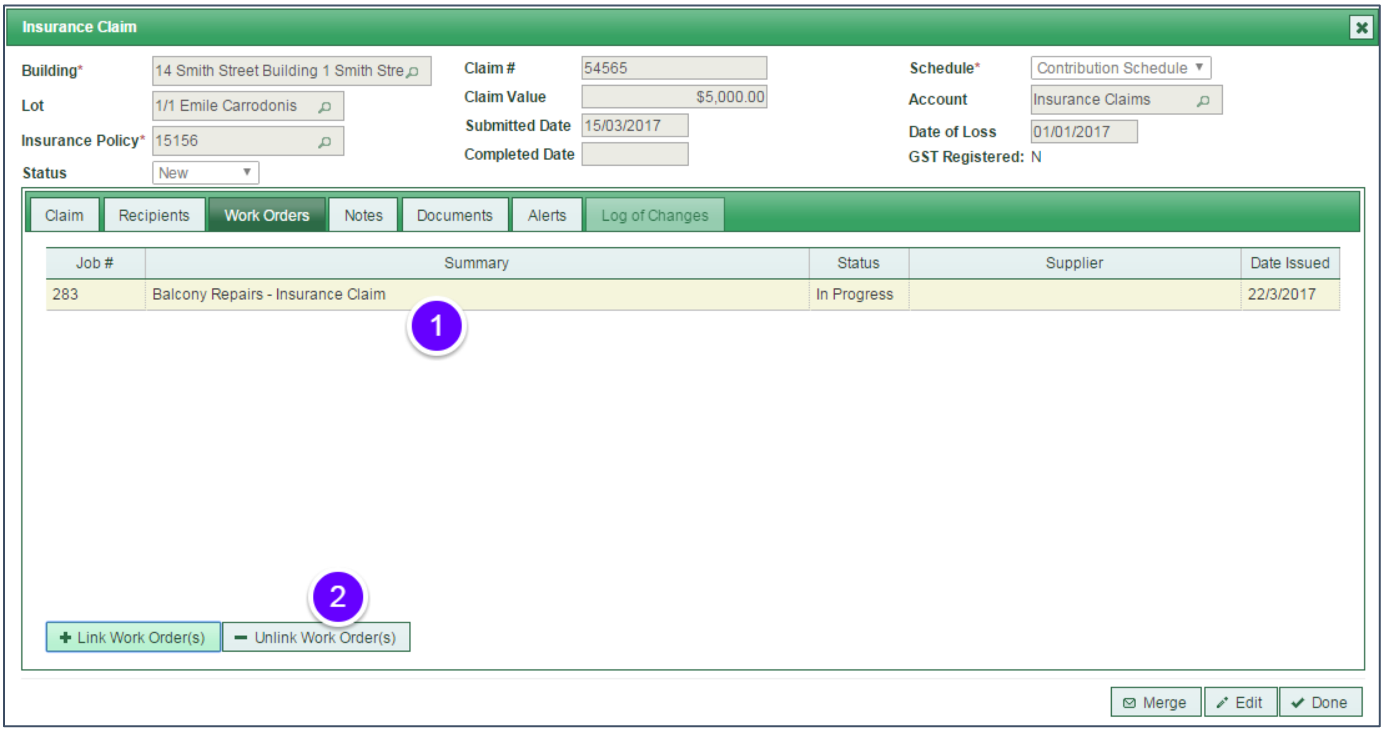
Linking a Work Order

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



Unlinking a Work Order

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

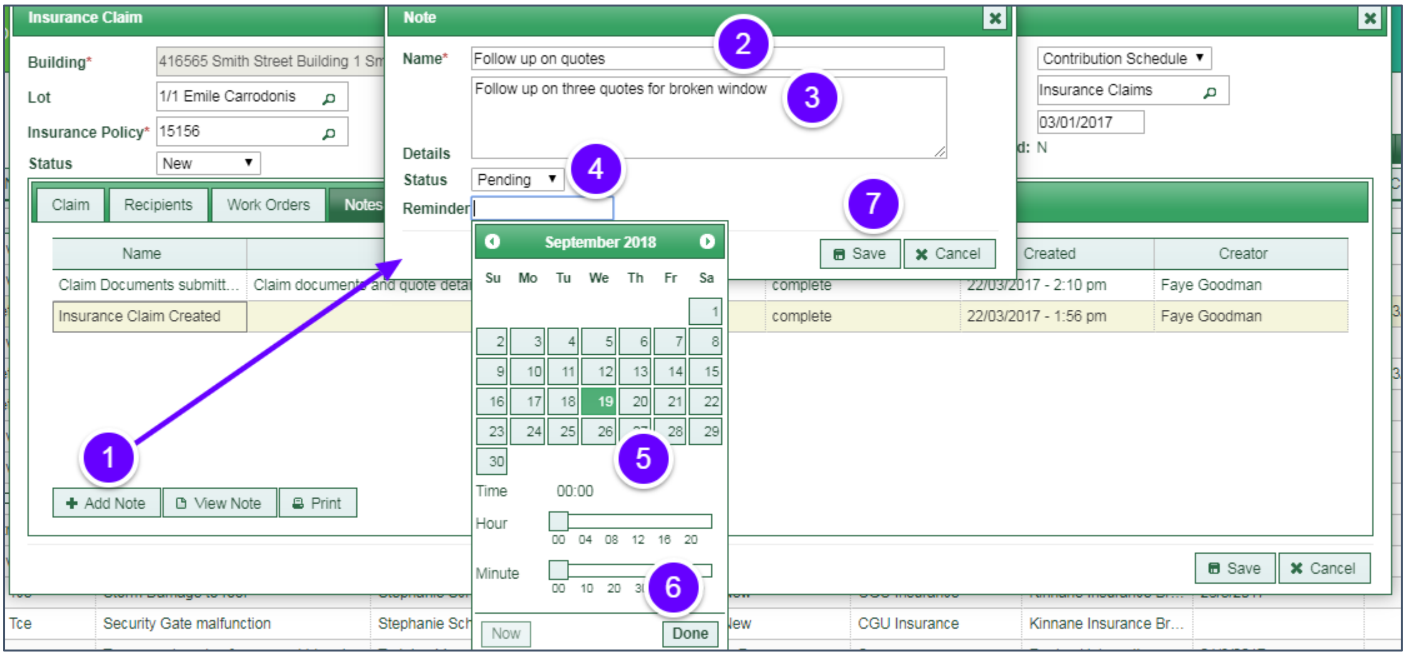


NOTES TAB

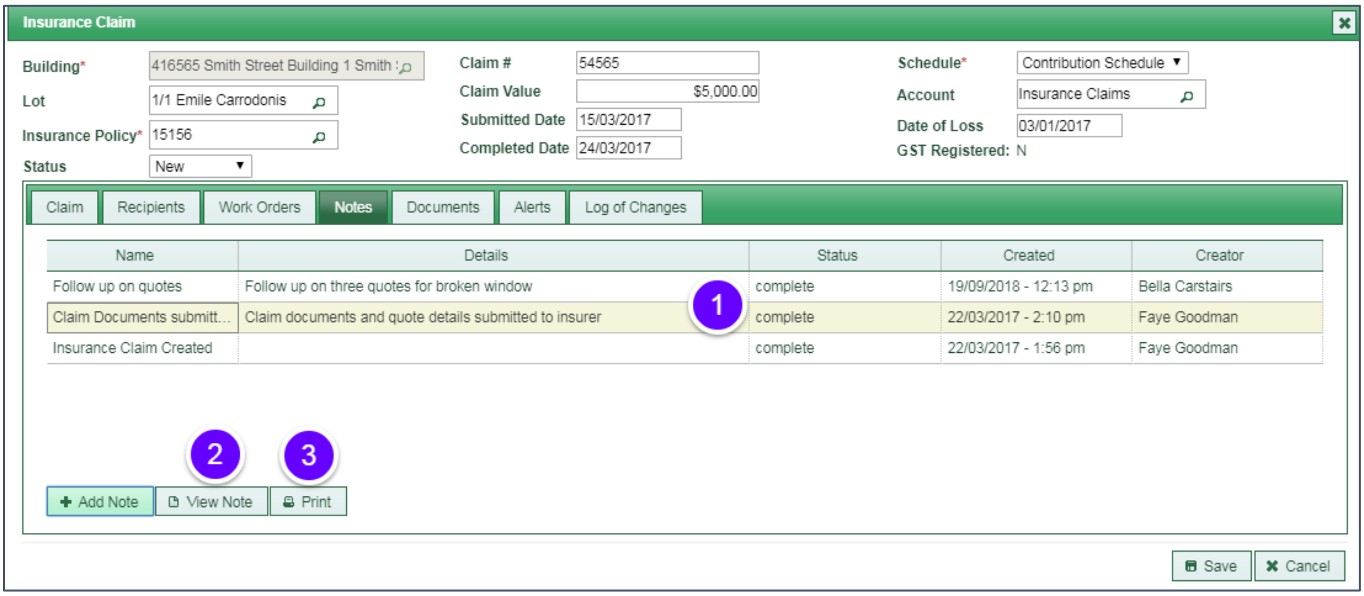
The notes tab allows you to record any notes relating to the claim and set reminders, so you don't miss any important tasks.

Adding a Note

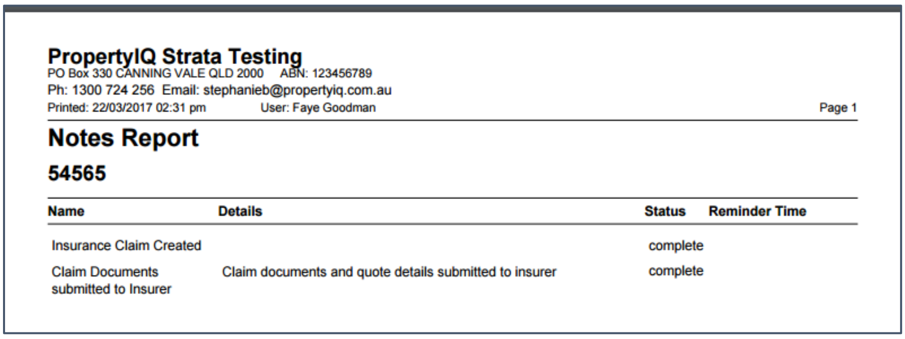
1. Click *+Add Note* to add a new note
2. Type a name for the note
3. Type more details
4. The status will default to pending but you can alter the status to completed if you want to record something that has already been done. If the status is pending, you can set a reminder by clicking in the box next 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



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



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

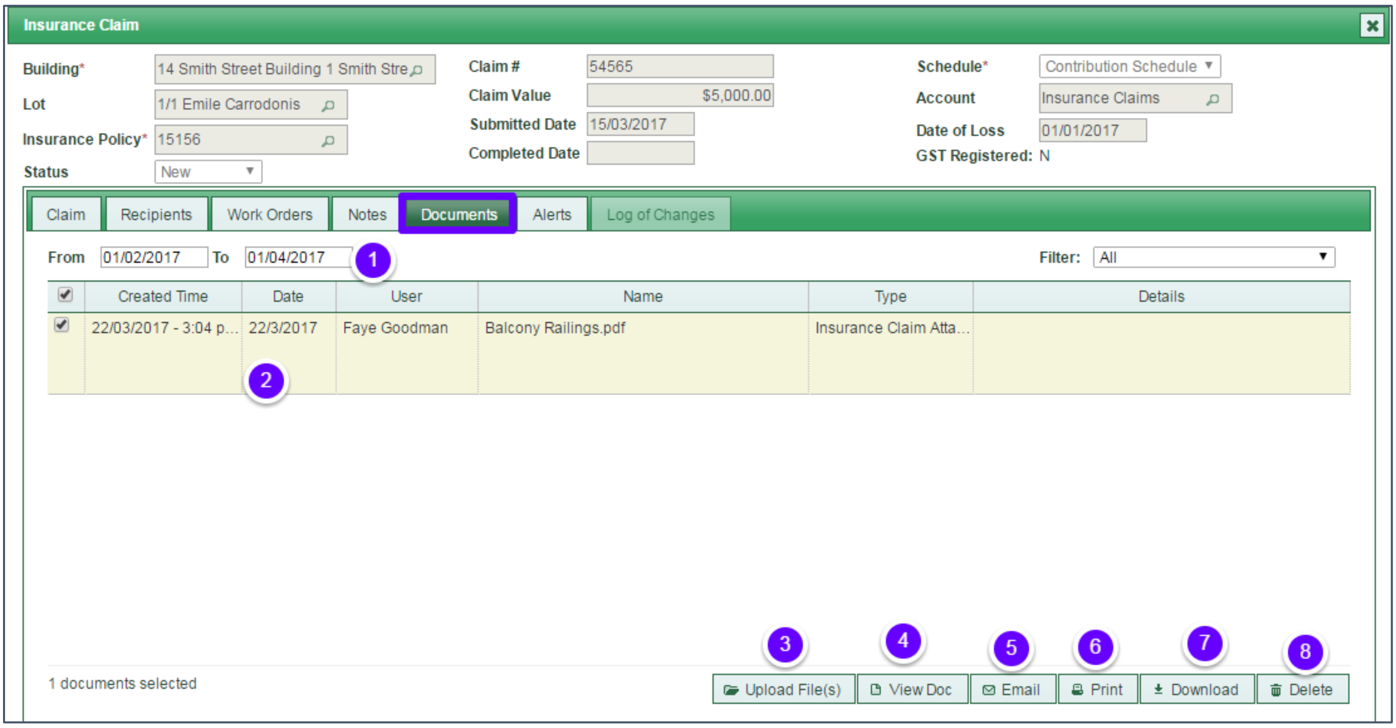
Name	Details	Status	Reminder Time
Insurance Claim Created		complete	
Claim Documents submitted to Insurer	Claim documents and quote details submitted to insurer	complete	

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.

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

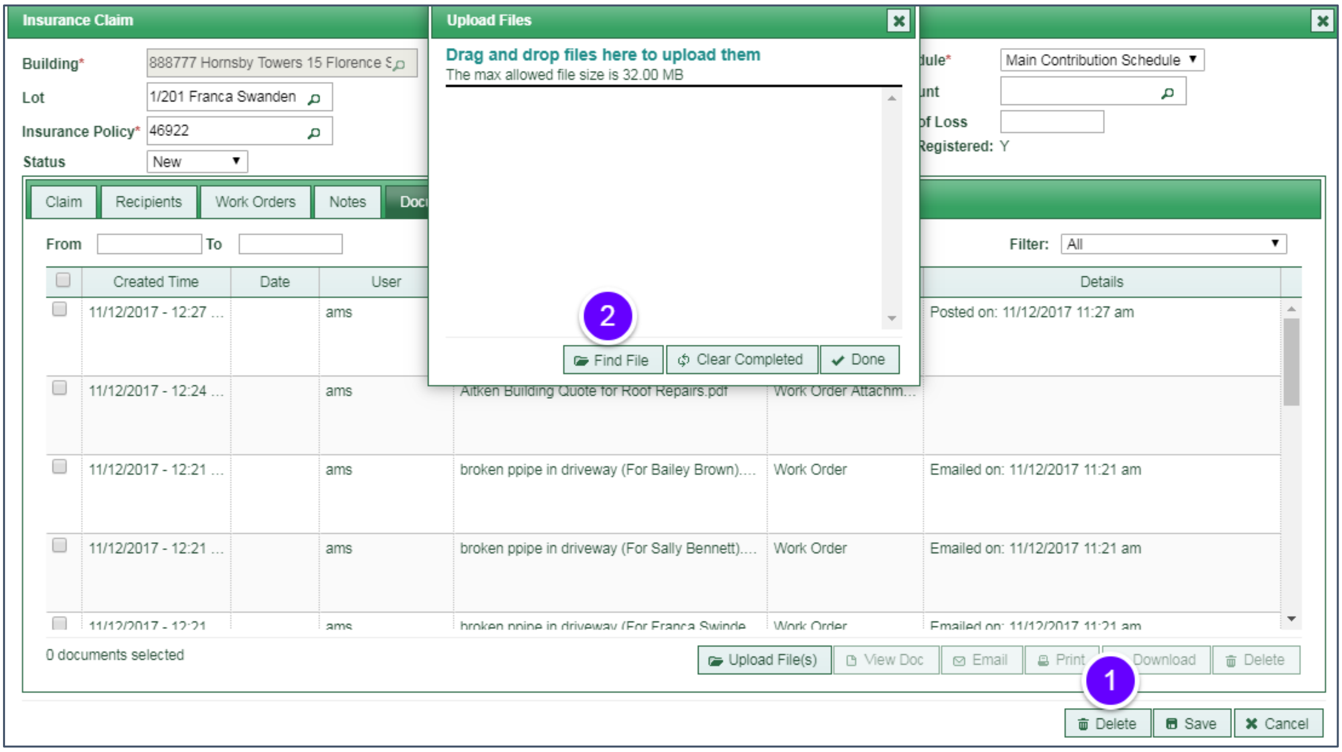
1. To view documents uploaded within a specific timeframe, select a date range here
2. Highlight a document to view it
3. Click on the *Upload Files* button to upload new documents – see instructions below
4. Click the *View Doc* button to view a document you have highlighted
5. Click on the *Email* 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



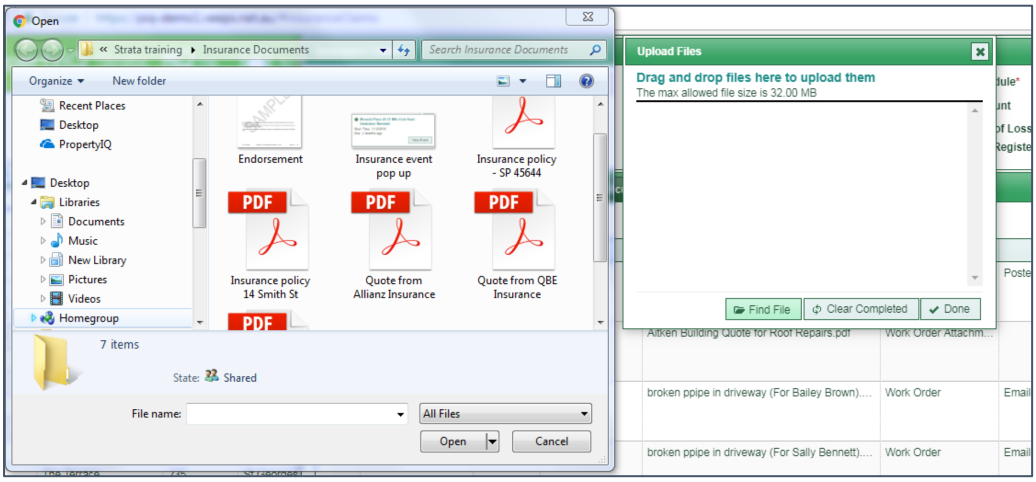
Upload Files

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"

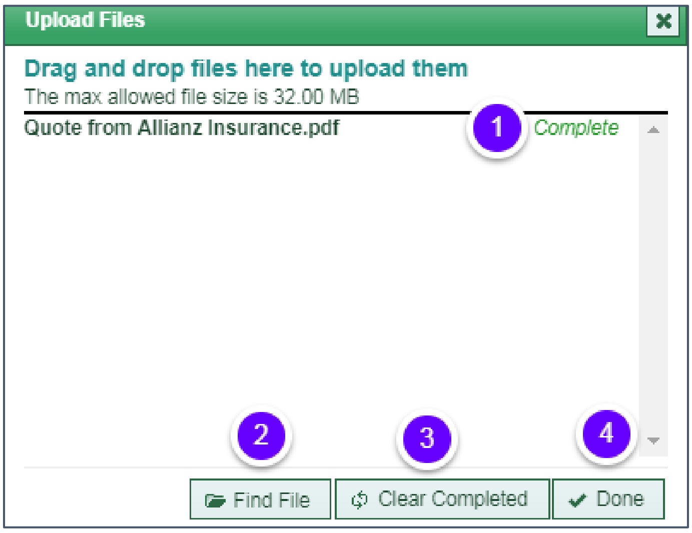
1. Click on the *Upload Files* button
2. Click on *Find File*



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.

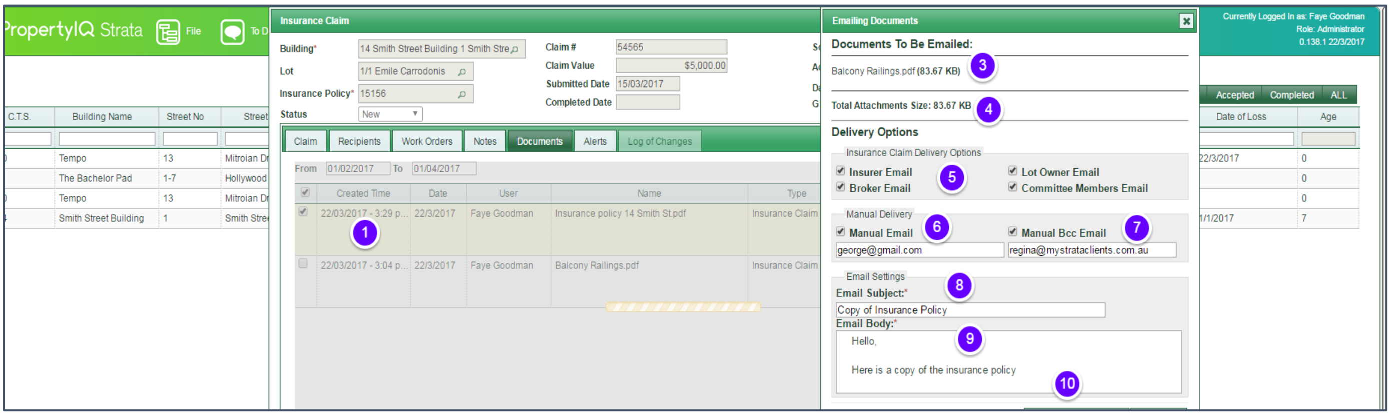


1. When the document has been uploaded, it will show here with the status *Complete*
2. Click Find File to look for more files to upload
3. Click Clear Completed to clear the list on the screen
4. Click on the *Done* button to upload the file(s)

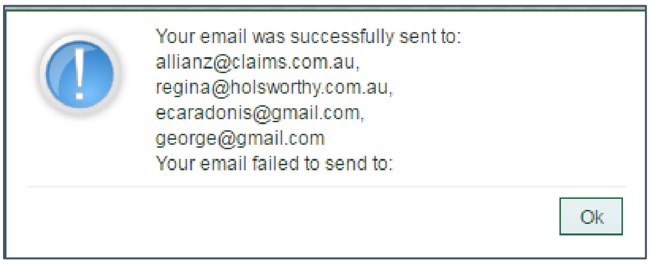


Email Documents

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



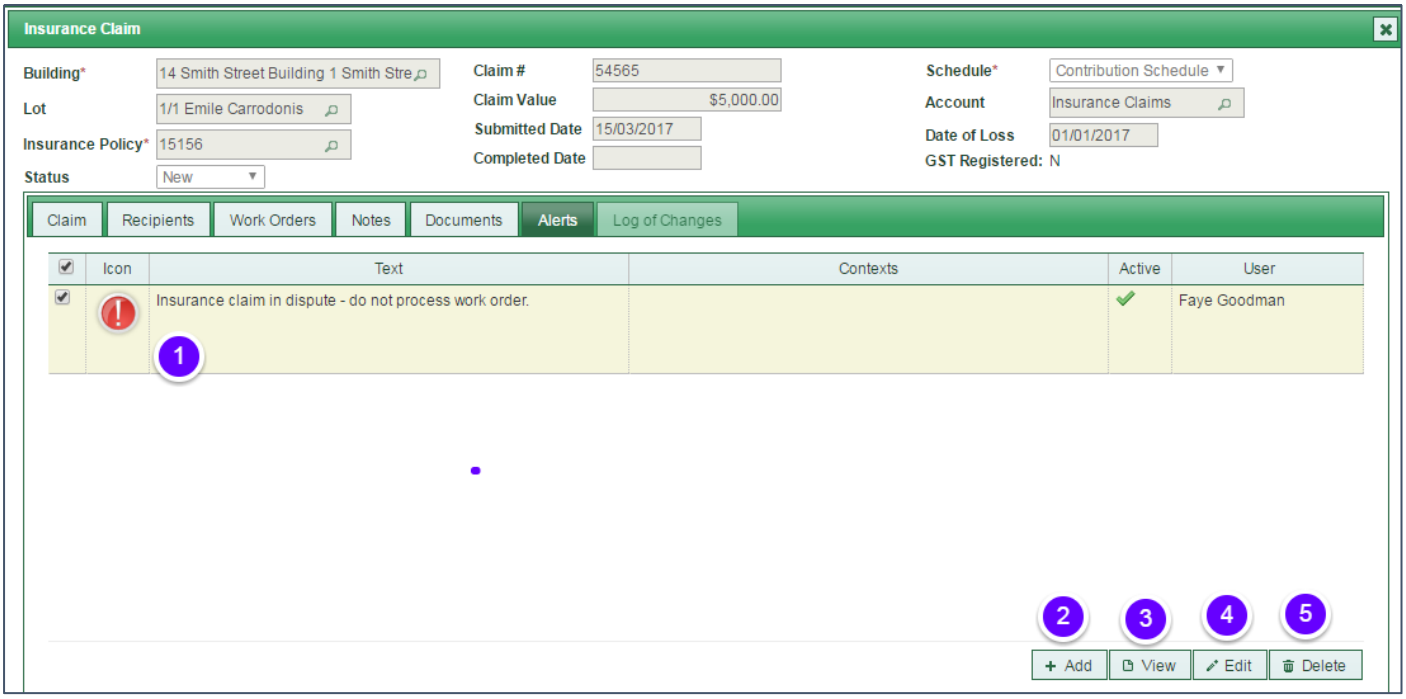
You will receive a confirmation of the emails that were sent successfully (and any failures)



ALERTS TAB

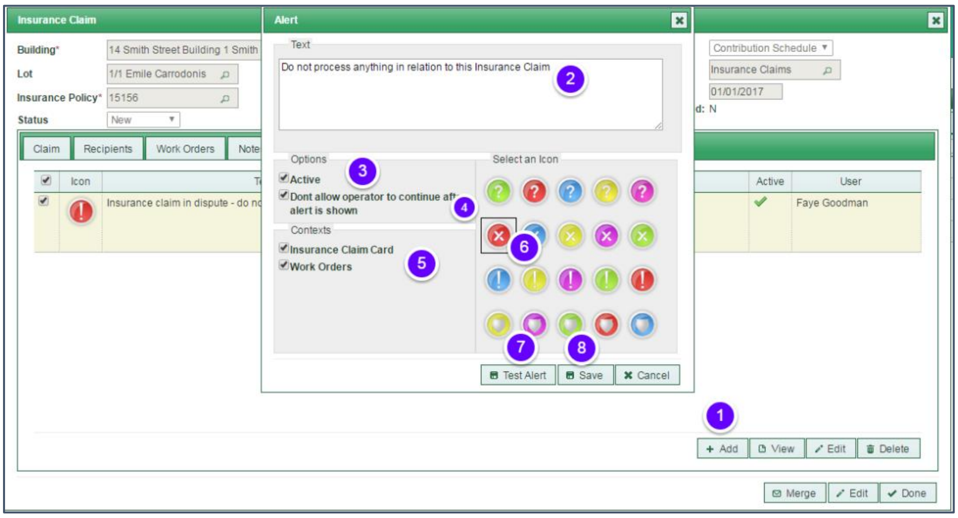
You can add alerts that will pop up, and can choose when you want them to activate. For insurance claim alerts, you can set them to trigger either when you access the insurance claim or when you access a linked work order

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



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



LOG OF CHANGES TAB

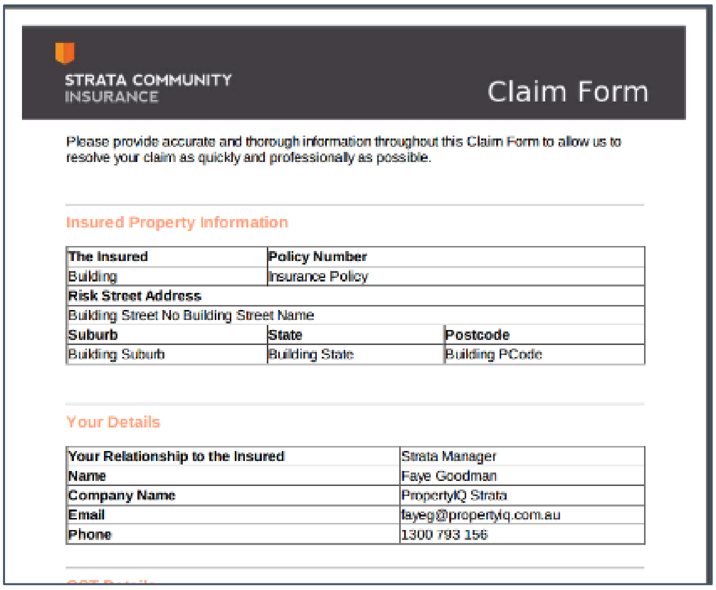
The log of changes tab records the creation and any alterations to the insurance claim. You don't need to enter anything here.

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

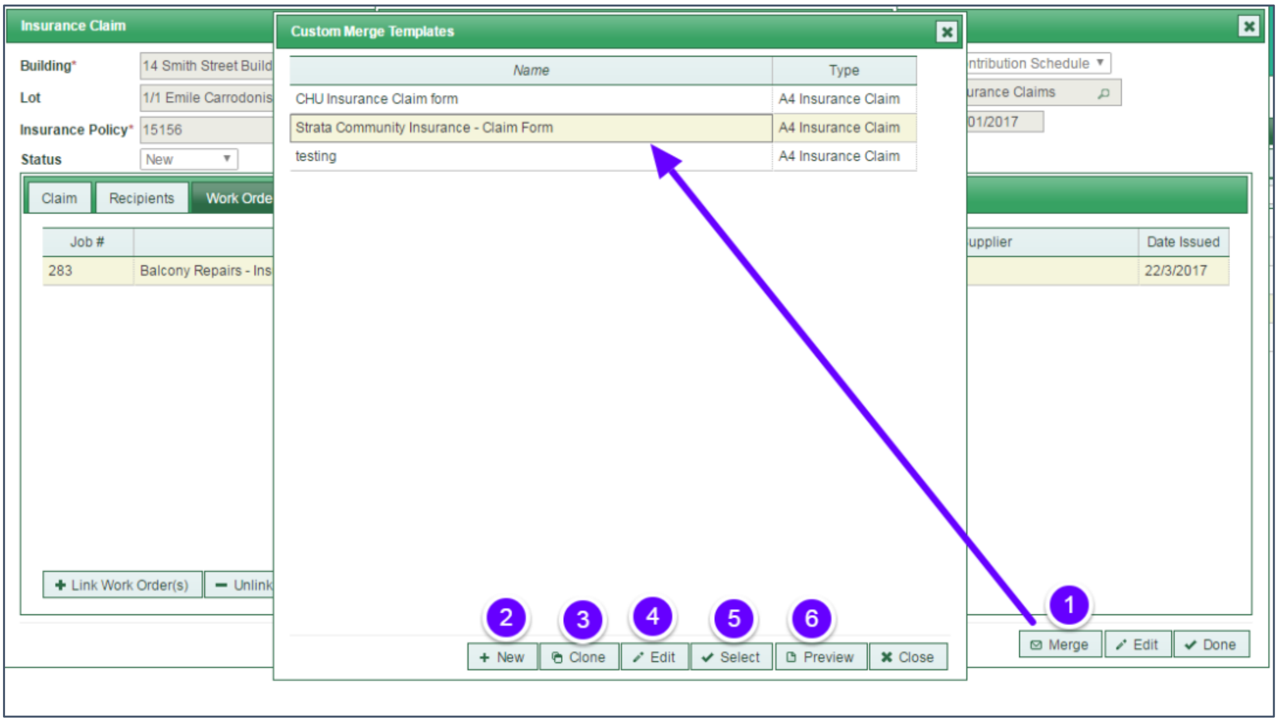
Please provide accurate and thorough information throughout this Claim Form to allow us to resolve your claim as quickly and professionally as possible.

Insured Property Information

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

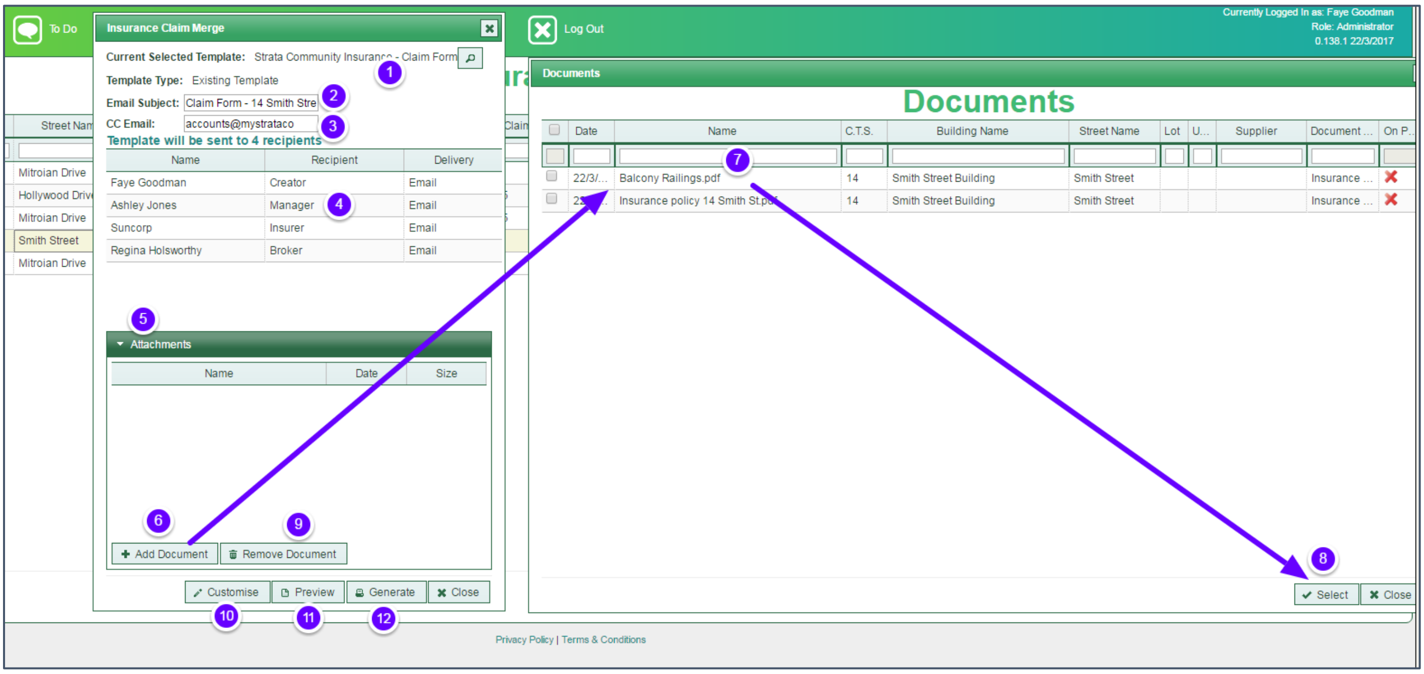
Your Details

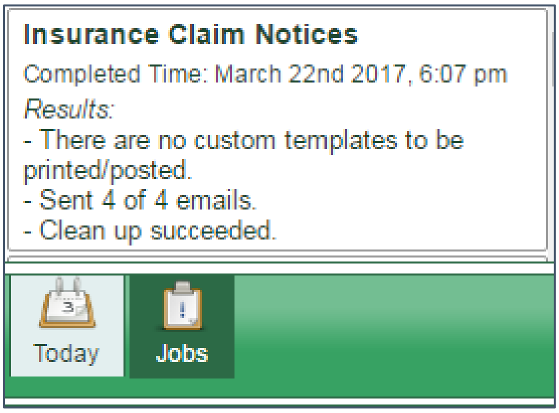
Your Relationship to the Insured	Strata Manager
Name	Faye Goodman
Company Name	PropertyIQ Strata
Email	fayeg@propertyiq.com.au
Phone	1300 793 156



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.



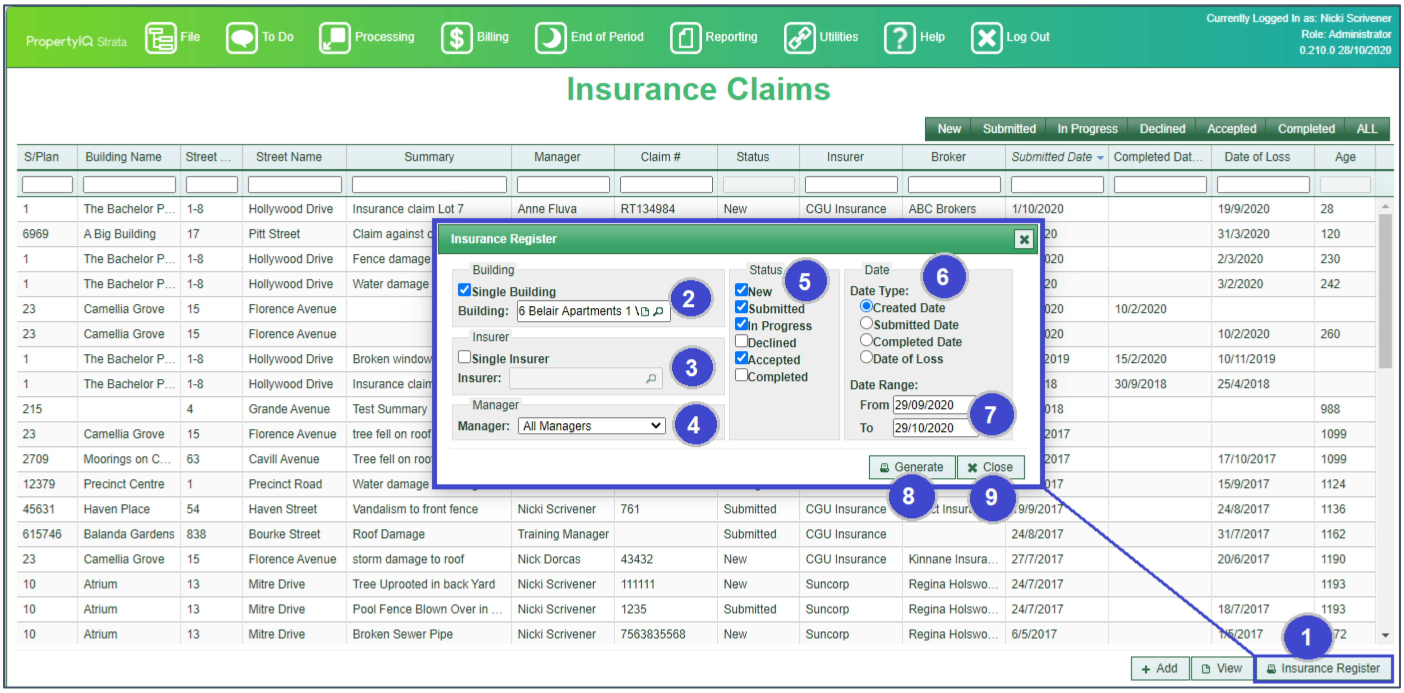


INSURANCE CLAIM REGISTER REPORT

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.



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 Page 1

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	456544	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	