



## Recording Insurance Claim Details in Strata Master

Insurance claim information can be recorded in Strata Master and

- Show in Reminders.
- Be finalised in receipts when receipting claim funds.
- Show amounts claimed and amounts actually refunded.
- Records work order numbers
- Notes for all details including witnesses, damage caused, amount of quotes, any claims made from other parties.

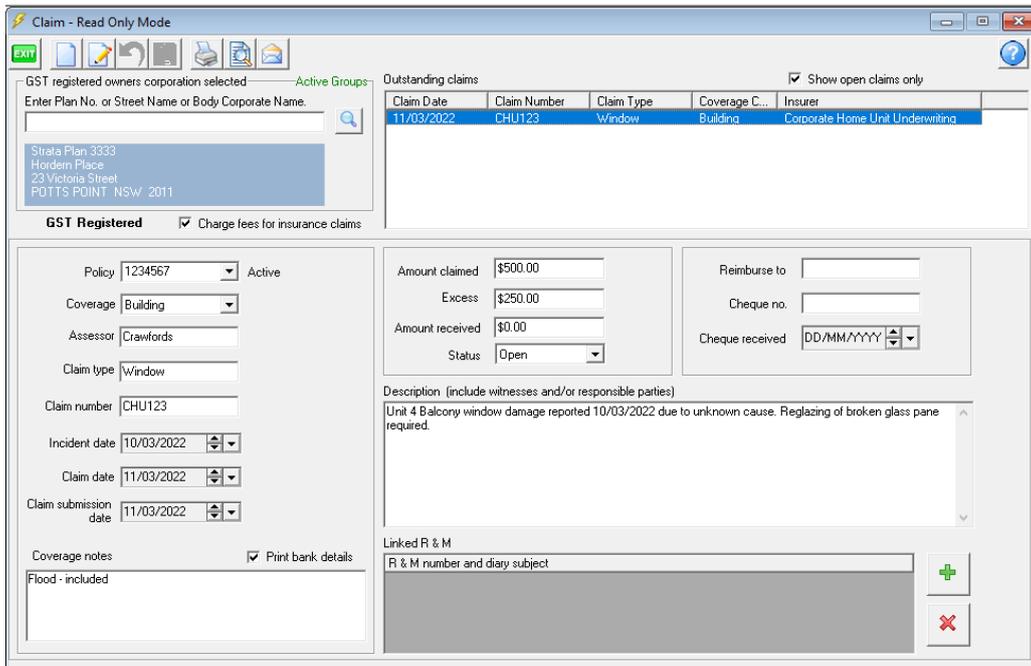
This becomes your go to screen for information about claims.

### A Preview of The Claim Screen

When you open a claim screen for a Plan, you can immediately see whether there is an existing claim, on the right hand side.

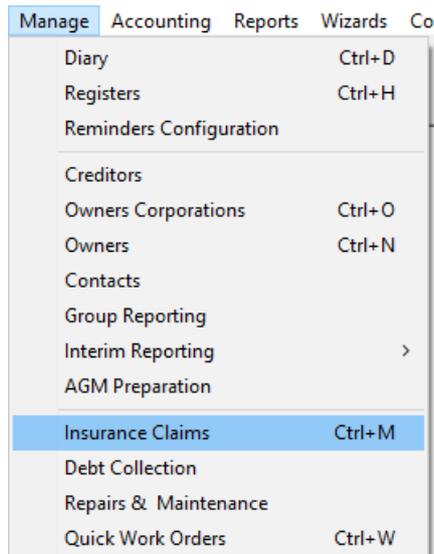


If you click on the existing claims, you will see the fields populate, an example is below. You can click edit button to edit or add information to this claim record.



## Navigating to the Claim Screen

Select Manage from the top toolbar, then select Insurance Claims from the drop down menu as shown below.



## To Add a Claim

1. Click the Add button



2. You will be presented with blank fields. Complete these blank fields with as much information as you have. As show below there will be drop down selections in some fields. The Policy number syncs from the Corp screen for the relevant Plan.

Policy	Amount claimed		Reimburse to		
Insurer	Policy No.	Policy Type	Claims Contact	Phone Nos.	Status
QBE Mercantile Mutual	863372231	Building	QBE Mercantile Mutual	1300 365 788	Active
Assessor	Amount received		Cheque received		
	\$0.00		DD/MM/YYYY		
Claim type	Status				
	Open				
Claim number	Description (include witnesses and/or responsible parties)				
Incident date					
DD/MM/YYYY					
Claim date					
DD/MM/YYYY					
Claim submission date					
DD/MM/YYYY					
Coverage notes	<input checked="" type="checkbox"/> Print bank details		Linked R & M		
			R & M number and diary subject		

3. When you have completed as much information as you have at this time, the screen will appear similar to the example below. You can re-open this screen at enter time to add further information.

**Claim - Add Mode**

EXIT [Icons]

GST unregistered owners corporation selected Active Groups

Enter Plan No. or Street Name or Body Corporate Name.

Strata Plan 8888  
United Gardens  
1 Manchester Road  
Sydney NSW 2009

**Not Registered for GST**  Charge fees for insurance claims

Outstanding claims					
Claim Date	Claim Number	Claim Type	Coverage C...	Insurer	
04/04/2022		Storm	Flood Dama...	QBE Mercantile Mutual Insurance	

Show open claims only

Policy	863372231	Active	Amount claimed	\$6,000.00	Reimburse to	Plan 8888
Coverage	Machinery Breakd...		Excess	\$500.00	Cheque no.	
Assessor			Amount received	\$0.00	Cheque received	DD/MM/YYYY
Claim type	Plant fusion		Status	Open		
Claim number	1895236xyz		Description (include witnesses and/or responsible parties)			
Incident date	15/01/2023		Air conditioning for common areas has broken down and inspected by Wills & Co - found to be Fusion of the air conditioner motor and requires replacement. Quoted \$6,000 incl gst.			
Claim date	16/01/2023		Linked R & M			
Claim submission date	16/01/2023		R & M number and diary subject			
Coverage notes	<input checked="" type="checkbox"/> Print bank details					

4. Click Save



5. Once you have saved the claim entry, it will appear in the top right as an existing claim.

Outstanding claims					
Claim Date	Claim Number	Claim Type	Coverage C...	Insurer	
04/04/2022		Storm	Flood Dama...	QBE Mercantile Mutual Insurance	
16/01/2023	1895236xyz	Plant fusion	Machinery B...	QBE Mercantile Mutual Insurance	

## Recording Work Orders in the Claim Screen

1. Work orders will have a Repair Maintenance number. In this example it is 110 on the highlighted line.

Diary Record			Details				Reporting			
Subject: Water Damage Repairs			For action by: TEST		Due date: 04/04/2022					
			<input checked="" type="checkbox"/> Action required		Overdue					
Date entered	Time entered	User	Notes	Time spent	Charge	Invoiced?	Work order #	WD Status	Repair Maint. #	
2022-04-04	12:41 PM	TEST	Quote Request   Common Prop...		0	No			000109	
2022-04-04	12:42 PM	TEST	Work Order   Electrical Make-s...		0	No	000100	Sent	000110	

2. In the Claim screen, click the green plus sign and on the blank line that appears, you can click in and select the drop down arrow on the right. A selection of workorders will show. Select the matching number.

Linked R & M

R & M number and diary subject

Linked R & M

R & M number and diary subject

110 Water Damage Repairs

## Reminders For Claims

In Manager > Reminders Configuration, you have an option to select Insurance Claim Reminders. Refer to this Link for further instructions - <https://kb.rockend.com/help/reminders-setup-and-use-guide>

Reminders Configuration

Manager

Select All

Select	Name
<input checked="" type="checkbox"/>	Gerald Manager
<input checked="" type="checkbox"/>	Meg Manager
<input checked="" type="checkbox"/>	Sam Strata
<input checked="" type="checkbox"/>	Trainee McTrainer
<input type="checkbox"/>	TEST

Automatically show reminder list

Show diary items assigned to me

1st Reminder: 13 days prior to the diary due date

2nd Reminder: 0 days prior to the diary due date

Select All	Function	Criteria	1st Reminder	Type	2nd Reminder
<input checked="" type="checkbox"/>	Insurance Policy	Prior to the expiry date	30	Days	0
<input checked="" type="checkbox"/>	Insurance Valuation	Prior to the due date	30	Days	0
<input checked="" type="checkbox"/>	Insurance Claim	After the claim date	31	Days	91

19/01/2023 7:33 pm AEDT