

Search Insurance Claims

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

Search Insurance Claims is used to search **Insurance Claims** data across all buildings in a portfolio.

This search assists with reviewing insurance claim records and producing global reports across the portfolio. Results can be saved for ongoing use, exported to Excel, or produced as a PDF-style document.

It is recommended to use **Search Insurance Claims** for all global reporting of **Insurance Claims**.

Searches

Many [search screens](#) use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Insurance Claims | Security

To access Search Insurance Claims, the user must have permission set to Allow for *Search Insurance Claims* under the *Menu* category in **Security Setup**.

Search Insurance Claims | What it can report on


Search Insurance Claims can report on **Insurance Claims** records across the portfolio. This includes fields such as Incident Date, Claim Number, Date Lodged, Amount Claimed and others.

This is useful when you need to review insurance claims across one building or many buildings, identify specific claim records, or produce a list for reporting and export.

Search Insurance Claims | Recommended search examples

Review insurance claims by incident date

This search can be used to review insurance claims recorded for a specific policy type.

1. Search for or select **Search Insurance Claims**.
2. Review the default *Current Building* field and adjust as needed.
3. Click the  to add the *Incident Date* field.
4. Select the required *Condition* and *Value*.
5. Click *Refresh* to load the results.
6. Click *Export* for Excel results or *Print* for a PDF report.

Find insurance claims by insurer


This search can assist with reporting on claims recorded against a particular insurer.



1. Search for or select **Search Insurance Claims**.
2. Add the *Insurer* field to the *Restrict To* tab.
3. Select the required *Condition* and enter the *Value*.
4. Click *Refresh* to display the matching claims.
5. Click *Export* for Excel results or *Print* for a PDF report.

Review insurance claims that have been paid


This search can be used to report on insurance claims that have been paid using the *Date Paid* field. This field can also be inserted as a column to view.

1. Search for or select **Search Insurance Claims**.
2. Add the *Date Paid* field.
3. Select the required *Condition* and *Value*.
4. Click *Refresh* to load the results.
5. Click *Export* for Excel results or *Print* for a PDF report.

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Restrict To	 Field	Condition	Value
Columns	 Current Building		
Sort Order	 Date Paid	is in the last 30 days	
Advanced			

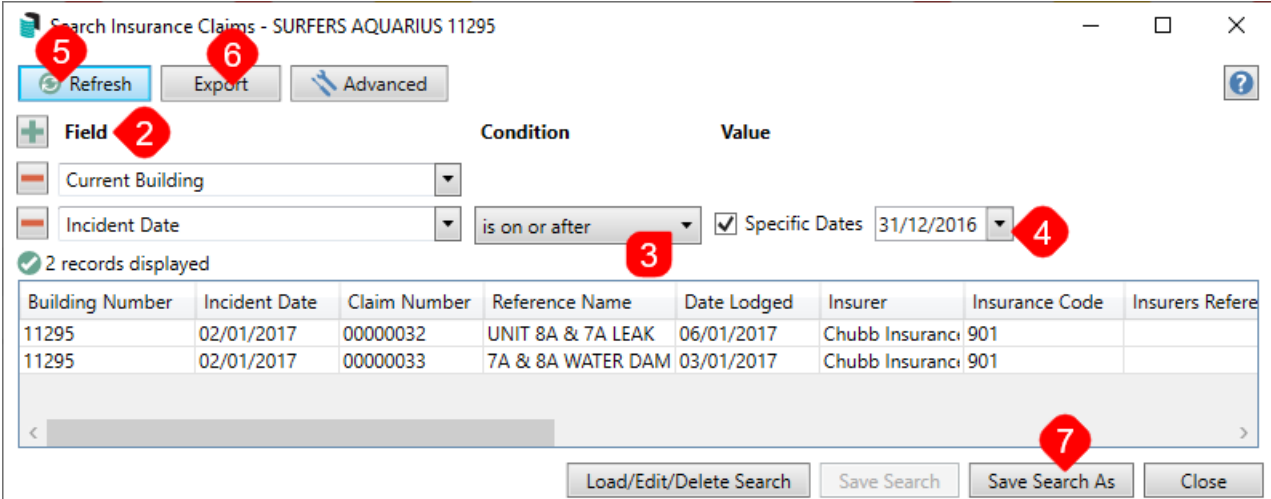
Current Building, Date Paid is in the last 30 days, Sorted By Incident Date Newest First, Limited to 1,000 records

 14 records displayed

Save and export insurance claim results

This search can be used to save a frequently used insurance claim search and export the results for reporting.

1. Search for or select **Search Insurance Claims**.
2. Set the required search fields, conditions, and values.
3. Click *Refresh* to load the results.
4. Click *Export* if the results need to be exported to Excel.
5. Optionally, save the results as a saved search for later use.



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Refresh Export Advanced

Field	Condition	Value
Current Building		
Incident Date	is on or after	31/12/2016

2 records displayed

Building Number	Incident Date	Claim Number	Reference Name	Date Lodged	Insurer	Insurance Code	Insurers Refere
11295	02/01/2017	00000032	UNIT 8A & 7A LEAK	06/01/2017	Chubb Insuranc	901	
11295	02/01/2017	00000033	7A & 8A WATER DAM	03/01/2017	Chubb Insuranc	901	

Load/Edit/Delete Search Save Search Save Search As Close