



VMIA Portal

How to filter your claims

vmia.vic.gov.au



Table of Contents

#	Step	Slides
1	Introduction: New features	3
2	How to filter by 'Group'	4-6
3	How to filter by 'Field'	7-8
4	How to filter by column	9
5	How to save a filtered view	10-11

How to filter your claims

Introduction



New features

1. We have added 'Triage category' as a new column and removed 'Policy holder'.
2. You can manually click to expand or shrink each column (e.g., expand the 'Incident description' column).

New field/column 'Triage category'.

Change the size of any column by clicking on the grey line and dragging to shrink or expand.

Triage Category Definitions

1. **Actual:** the insurance policy has been triggered and a claim for compensation or request for coverage under the policy has been made
2. **Potential:** assessed by VMIA as likely medium/high potential of eventuating into an actual claim (claim not yet made)
3. **Notification:** assessed by VMIA as low potential of eventuating into an actual claim

Claim number	Type of loss/damage	Triage category	Claimant	Claim handler	Incident description	Claiming organisation	Date of loss	Claim status	Actions
24-00844	Property						02/10/2023	Closed-Cancelled	Actions
24-00803	Property						25/09/2023	Closed	Actions
24-03053	Property						01/05/2024	Open	Actions
24-03004	Property						03/04/2024	Open	Actions
24-02711	Property						23/04/2024	Open	Actions
24-02563	Public and Product Lia						16/04/2024	Open	Actions
24-02484	Property						15/04/2024	Open	Actions
24-02012	Property						02/01/2024	Open	Actions
24-01933	Travel Insurance						31/01/2024	Closed-Cancelled	Actions
24-01518	Property						29/11/2023	Open	Actions

How to filter your claims

Locating 'My claims'



Step 1: Open the Client Portal and click on "My claims".

The screenshot displays the Amb Testorg1 Client Portal interface. At the top left, the user is logged in as 'Amb Testorg1' with a 'View organisation profile' button and a 'Switch organisation' dropdown menu. On the top right, there are two main action buttons: 'Claims Make a claim' and 'Insurance Apply for a policy'. Below the navigation bar, the 'My claims' tab is highlighted with a red box and an arrow pointing to it from the 'Step 1' instruction. The main content area shows a 'Policy year' dropdown set to '2023/24' and a 'Refresh policies' button. Four policy cards are displayed, each with a title, policy number, and dates. Each card includes 'View details', 'Download documents', and 'More actions' buttons. The policies are: 'Non-owned Aircraft Liability' (C07344), 'Group Personal Accident - Dire...' (C07343), 'Directors & Officers Liability' (C07342), and 'Medical Indemnity' (C07341). A 'View more' button is located at the bottom of the policy list.

How to filter your claims

Filtering by 'Group' (1/2)



When filtering by 'Group', your claims will be organised by the group filter selected. For example, if you group by 'Type of loss/damage', your claims will be organised and grouped in alphabetical order by the type of loss/damage.

Step 1: Click on the symbol next to 'Group'.

Claim number	Type of loss/damage	Triage category
24-00844	Property	
24-00803	Property	Actual
24-03053	Property	
24-03004	Property	
24-02711	Property	
24-02563	Public and Product Liability	
24-02484	Property	
24-02012	Property	
24-01933	Travel Insurance	
24-01518	Property	Actual

Step 2: Click on '+ Add a field to group'.

No fields are used to group

+ Add a field to group

24-03053	Property	
24-03004	Property	
24-02711	Property	

Step 3: Click on the drop-down arrow next to 'Select field' and choose the field you wish to group your claims by (e.g., 'Claim handler').

Select field

- Claim number
- Type of loss/damage
- Triage category
- Claimant
- Claim handler
- Incident description
- Claiming organisation
- Date of loss
- Claim status

How to filter your claims

Filtering by 'Group' (2/2)



When filtering by 'Group', your claims will be organised by the group filter selected. For example, if you group by 'Type of loss/damage', your claims will be organised and grouped in alphabetical order by the type of loss/damage.

Group (1) Fields Density Default view

Claim number	Type of loss/damage	Triage category	Claimant	Claim handler	Incident description	Claiming organisation	Date of loss	Claim status	
Type of loss/damage:									Total 1
Type of loss/damage: Property									Total 9
24-00844	Property						02/10/2023	Closed-Cancelled	Actions
24-00803	Property	Actual		Claims Portf...			25/09/2023	Closed	Actions
24-03053	Property						01/05/2024	Open	Actions
24-03004	Property						03/04/2024	Open	Actions
24-02711	Property						23/04/2024	Open	Actions
24-02484	Property						15/04/2024	Open	Actions
24-02012	Property						02/01/2024	Open	Actions
24-01518	Property	Actual		Claims Offic...			29/11/2023	Open	Actions
24-01516	Property						29/11/2023	Closed-Cancelled	Actions
Type of loss/damage: Public and Product Liability									Total 1
24-02563	Public and Product Liabil...						16/04/2024	Open	Actions
Type of loss/damage: Travel Insurance									Total 1
24-01933	Travel Insurance						31/01/2024	Closed-Cancelled	Actions

Example of your claims grouped by 'Type of loss/damage'

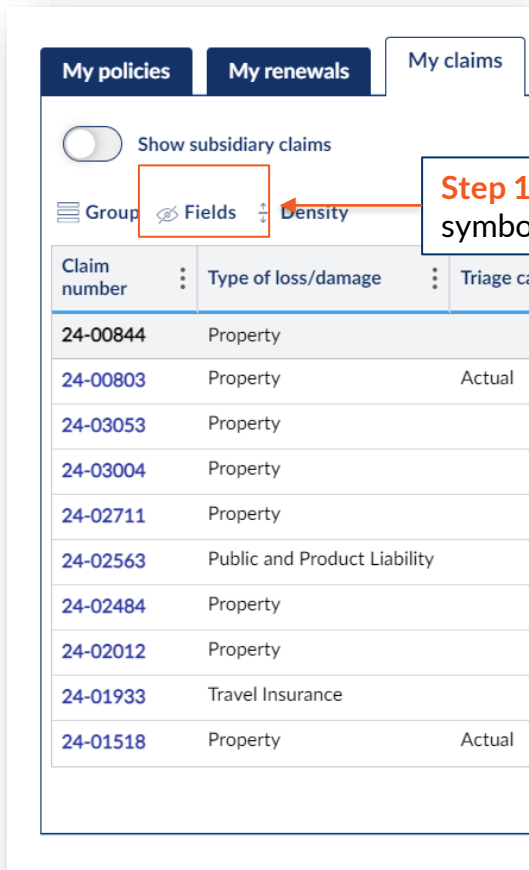
How to filter your claims

Filtering by 'Fields' (1/2)

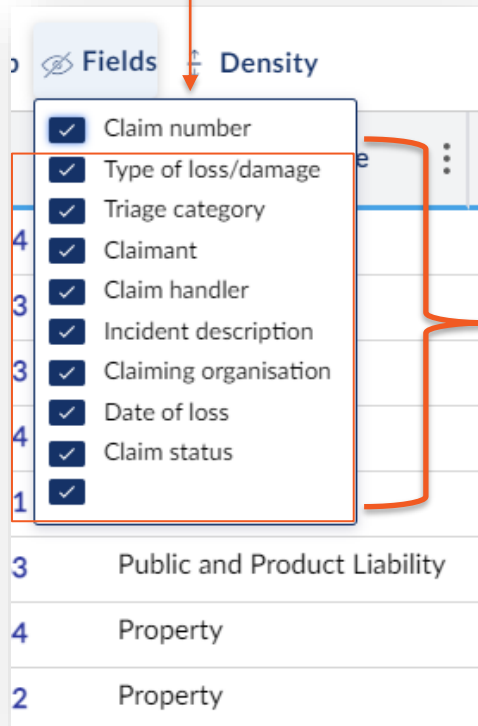


When filtering by 'Fields', you can select the columns you wish to show/hide on your 'My Claims' view.

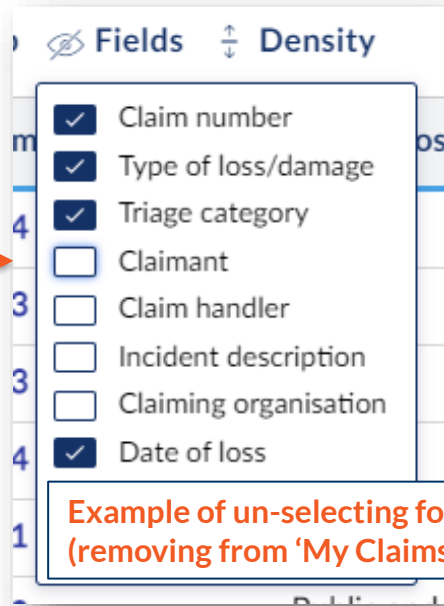
Step 2: Un-select/select the fields you wish to show on your claim view.



Step 1: Click on the symbol next to 'Fields'.



Step 2: Un-select/select the fields you wish to show on your claim view.



Example of un-selecting four fields (removing from 'My Claims' view)*.

**See next slide.*

How to filter your claims

Filtering by 'Fields' (2/2)



When filtering by 'Fields', you can select the columns you wish to show/hide on your 'My Claims' view.

To revert to the default view, click on 'Refresh'.

Show subsidiary claims

Example of un-selecting four fields (removing from 'My Claims' view) – shown in previous slide.

Export Refresh

Group Fields Density Default view

Claim number	Type of loss/damage	Triage category	Date of loss	Claim status	
24-00844	Property		02/10/2023	Closed-Cancelled	Actions
24-00803	Property	Actual	25/09/2023	Closed	Actions
24-03053	Property		01/05/2024	Open	Actions
24-03004	Property		03/04/2024	Open	Actions
24-02711	Property		23/04/2024	Open	Actions
24-02563	Public and Product Liability		16/04/2024	Open	Actions
24-02484	Property		15/04/2024	Open	Actions
24-02012	Property		02/01/2024	Open	Actions
24-01933	Travel Insurance		31/01/2024	Closed-Cancelled	Actions
24-01518	Property	Actual	29/11/2023	Open	Actions

1 2 Next

How to filter your claims

Filtering by individual columns (1/1)



You can also filter by individual column by using the three dots next to each column heading.

Step 1: Click on the three dots next to any column on the 'My claims' page.

Claim number	Type of loss/damage	Triage category
24-00844	Property	
24-00803	Property	Actual
24-03053	Property	
24-03004	Property	
24-02711	Property	
24-02563	Public and Product Liability	
24-02484	Property	
24-02012	Property	
24-01933	Travel Insurance	
24-01518	Property	Actual

Filter options for 'Type of loss/damage':

- N/A
- Property
- Public and Product Liability
- Travel Insurance

When selecting 'Apply filter', you can filter by the available options within the selected column.

How to filter your claims

Saving a filtered view (1/2)



When saving a filtered view, you can switch between the default view and your saved views at any time. You can also save multiple different views (and switch between each view as required).

Step 1: Click on the drop-down arrow next to 'Default view'.

Step 2: Click on 'Save as new view'.

Step 3: Enter a name for your new 'View'.

Step 4: Click on 'Save'.

n	Date of loss	Claim status
nar...	02/10/2023	Closed-Cancelled
nar...	25/09/2023	Closed
nar...	01/05/2024	Open
nar...	03/04/2024	Open
nar...	23/04/2024	Open
nar...	16/04/2024	Open
nar...	15/04/2024	Open
nar...	02/01/2024	Open
nar...	31/01/2024	Closed-Cancelled
nar...	29/11/2023	

How to filter your claims

Saving a filtered view (2/2)



When saving a filtered view, you can switch between the default view and your saved views at any time. You can also save multiple different views (and switch between each view as required).

The screenshot shows a claims management interface. At the top left, there is a toggle for 'Show subsidiary claims'. To the right are 'Export' and 'Refresh' buttons. Below these are controls for 'Group', 'Fields', and 'Density'. The main area is a table with columns: Claim number, Type of loss/damage, Triage category, Claimant, Claim handler, Incident description, Date, Status, and Actions. A dropdown menu is open over the 'Actions' column, showing options: Default view, Test View (checked), Save as new view, Edit this view, and Delete this view. A red box highlights the dropdown menu, and a red callout box points to it with the text: 'You can switch between your 'views', edit your saved 'views', delete your views etc.,'. At the bottom right, there are pagination controls: '1', '2', and 'Next'.

Claim number	Type of loss/damage	Triage category	Claimant	Claim handler	Incident description	Date	Status	Actions
24-00844	Property							
24-00803	Property	Actual				25/09/2023	Closed	Cancel
24-03053	Property					01/05/2024	Open	
24-03004	Property					03/04/2024	Open	Actions
24-02711	Property					23/04/2024	Open	Actions
24-02563	Public and Product Liability					16/04/2024	Open	Actions
24-02484	Property					15/04/2024	Open	Actions
24-02012	Property					02/01/2024	Open	Actions
24-01933	Travel Insurance					31/01/2024	Closed-Cancelled	Actions
24-01518	Property	Actual				29/11/2023	Open	Actions

Thank you

If you have any questions, please email contact@vmia.vic.gov.au