



VMIA Portal

How do I filter 'My claims' and save different 'My claims' views?

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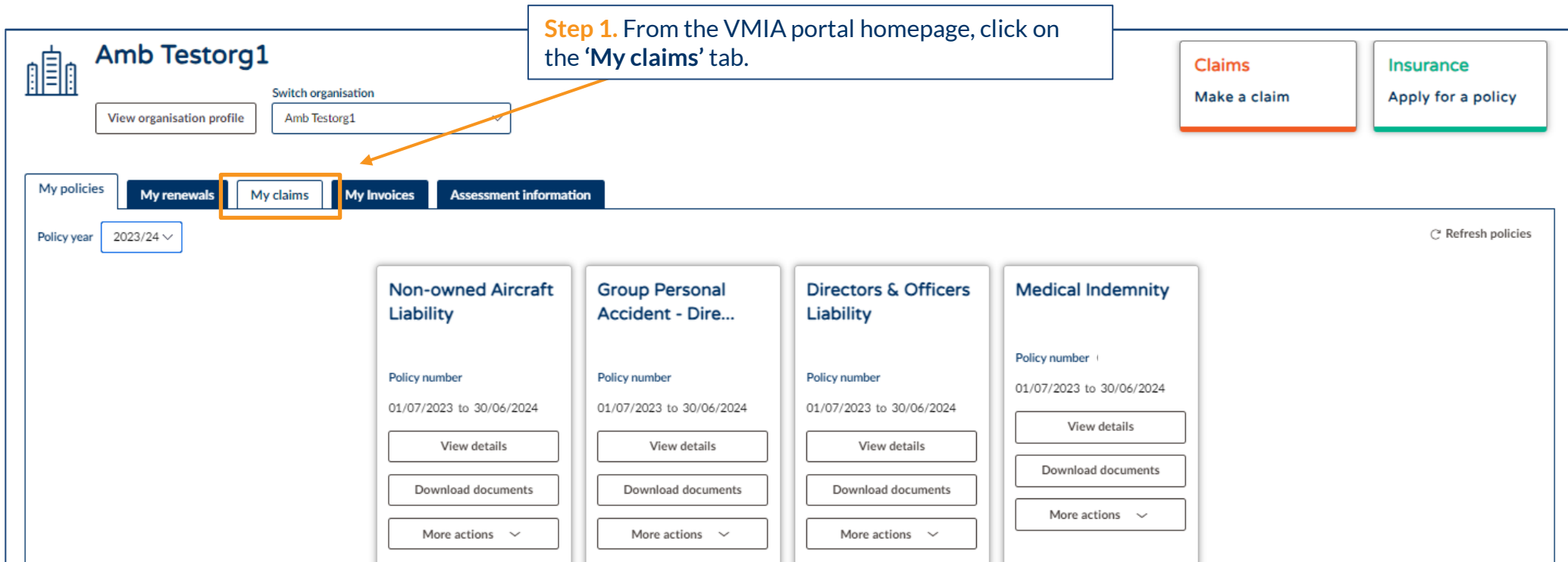
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How do I filter 'My claims' and save different 'My claims' views?

The following guide will show you how to filter the view from the 'My claims' tab and how to save a filtered view. Outlined below are steps on how to filter the claims by:

1. Group
2. Field
3. Column

Step 1. From the VMIA portal homepage, click on the 'My claims' tab.

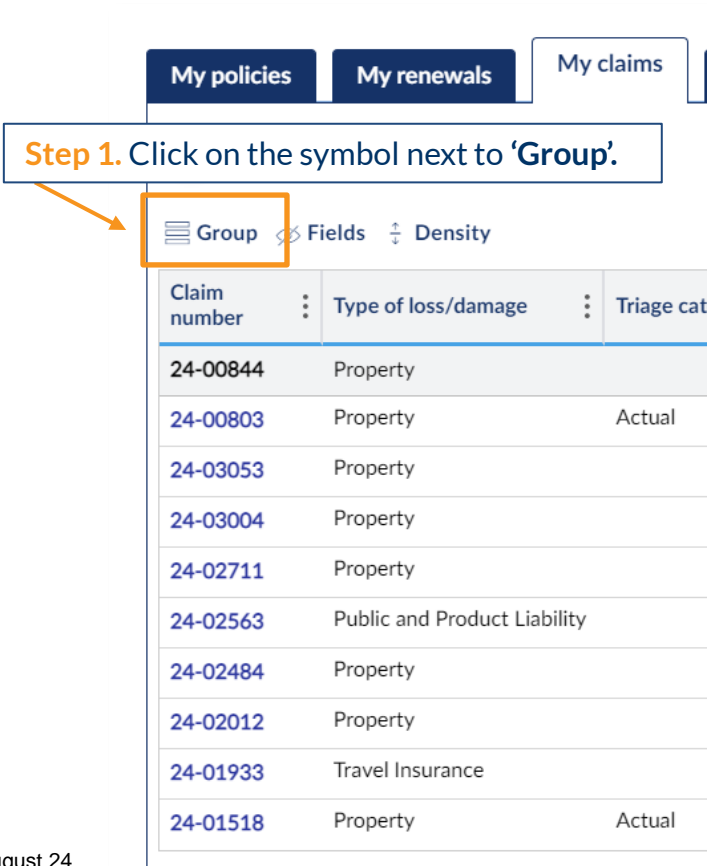


The screenshot displays the VMIA portal interface for the organization 'Amb Testorg1'. At the top, there are navigation buttons for 'Claims' (Make a claim) and 'Insurance' (Apply for a policy). Below this is a horizontal menu with tabs for 'My policies', 'My renewals', 'My claims' (highlighted with an orange box), 'My Invoices', and 'Assessment information'. A callout box with an orange arrow points to the 'My claims' tab, containing the text: 'Step 1. From the VMIA portal homepage, click on the 'My claims' tab.' Below the menu, there is a 'Policy year' dropdown set to '2023/24' and a 'Refresh policies' button. The main content area shows four policy cards, each with a title, 'Policy number', a date range, and three action buttons: 'View details', 'Download documents', and 'More actions'.

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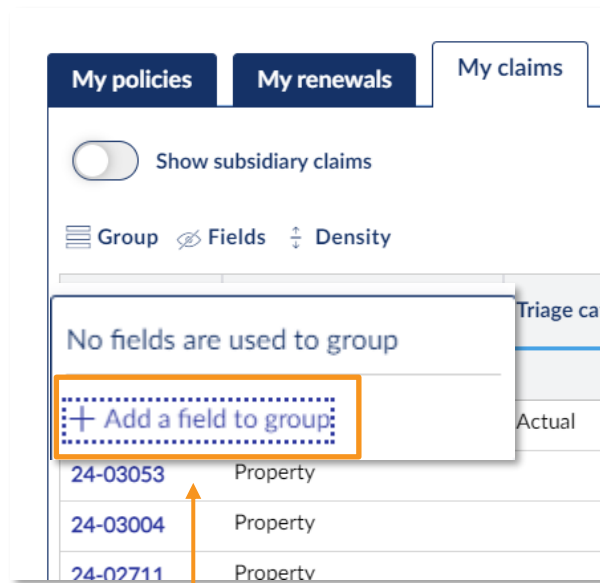
This section steps through how to filter claims by 'Group'. When filtering by 'Group', your claims will be organised by the group filter you selected. For example, if you group by 'Type of loss/damage', your claims will be organised and grouped in alphabetical order by the type of loss/damage.

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'.

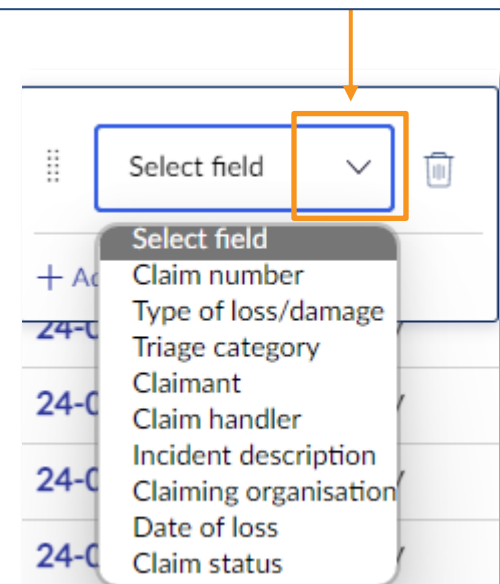


No fields are used to group

+ 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

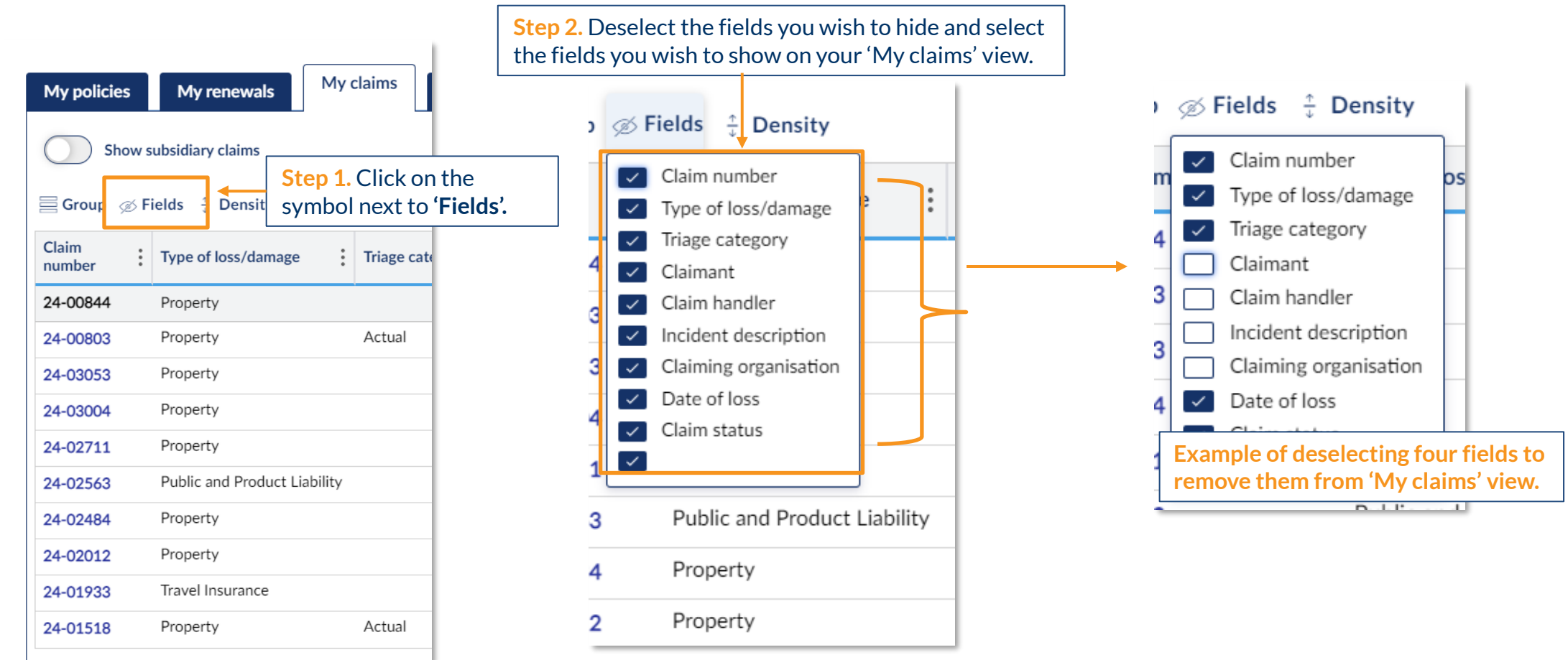
How do I filter 'My claims' and save different 'My claims' views?

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		Testing		Why soo many q...	Ainslie Parklands Prima...	02/10/2023	Closed-Cancelled	Actions
24-00803	Property	Actual	Testing	Claims Portf...	What is the loss ...	Ainslie Parklands Prima...	25/09/2023	Closed	Actions
24-03053	Property		Testing		Test	Ainslie Parklands Prima...	01/05/2024	Open	Actions
24-03004	Property		Testing		Broken window	Ainslie Parklands Prima...	03/04/2024	Open	Actions
24-02711	Property		Testing		tet	Ainslie Parklands Prima...	23/04/2024	Open	Actions
24-02484	Property		Testing		Test	Ainslie Parklands Prima...	15/04/2024	Open	Actions
24-02012	Property		Testing		godzilla knocked ...	Ainslie Parklands Prima...	02/01/2024	Open	Actions
24-01518	Property	Actual	Testing	Claims Offc...	funny	Ainslie Parklands Prima...	29/11/2023	Open	Actions
24-01516	Property		Testing		nothing	Ainslie Parklands Prima...	29/11/2023	Closed-Cancelled	Actions
Type of loss/damage: Public and Product Liability Total 1									
24-02563	Public and Product Liabil...		Testing		Testing	Ainslie Parklands Prima...	16/04/2024	Open	Actions
Type of loss/damage: Travel Insurance Total 1									
24-01933	Travel Insurance		Testing		Wayanad trip is ...	Ainslie Parklands Prima...	31/01/2024	Closed-Cancelled	Actions

How do I filter 'My claims' and save different 'My claims' views?

This section steps through how to filter claims by 'Fields'. When filtering by 'Fields', you can select the columns you wish to show/hide on your 'My claims' view.



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

Step 2. Deselect the fields you wish to hide and select the fields you wish to show on your 'My claims' view.

Example of deselecting four fields to remove them from 'My claims' view.

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

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

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

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Show subsidiary claims

Group Fields Density
Default view ∨

Step 4. To revert to the default view, click the 'Refresh' button in the top right corner.

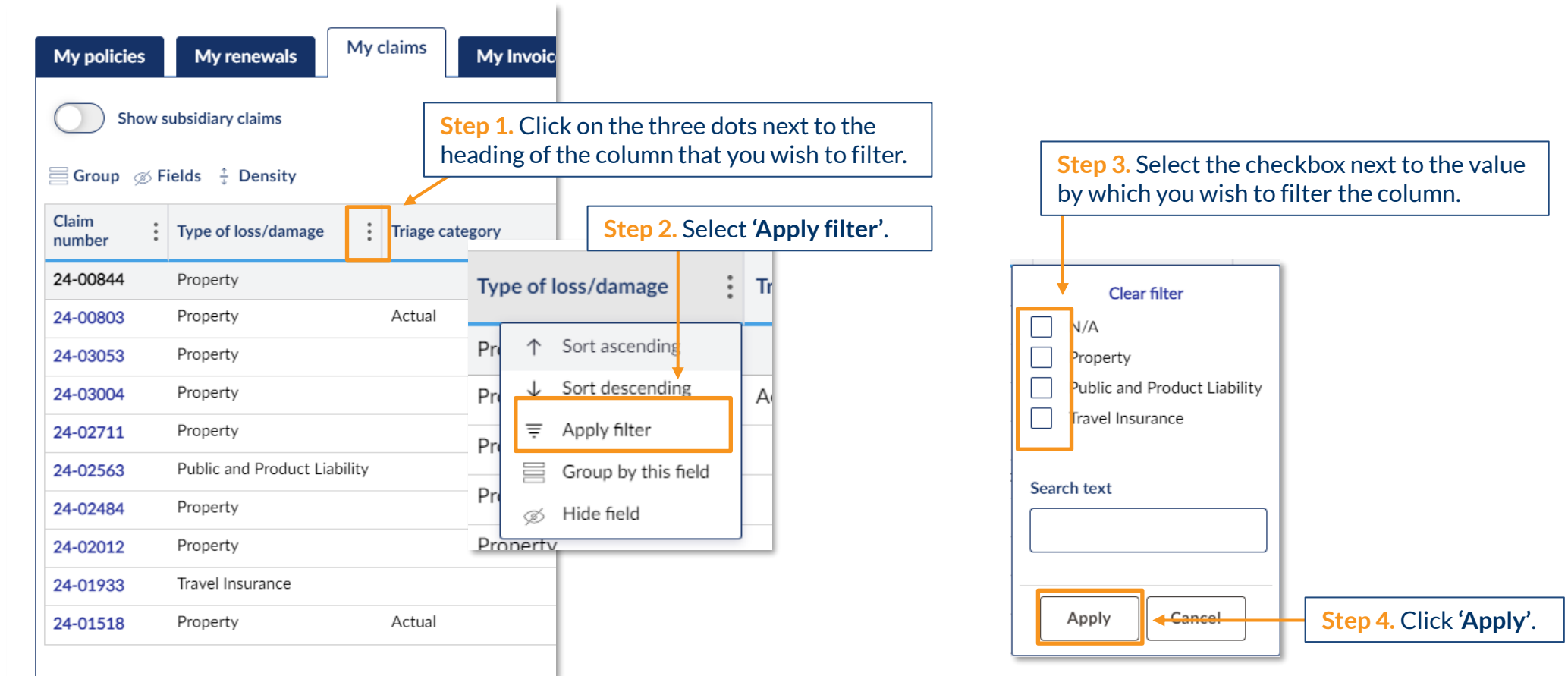
Export Refresh

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 do I filter 'My claims' and save different 'My claims' views?

This section steps through how to filter claims by an **individual column** using the three dot next to the column heading.



Step 1. Click on the three dots next to the heading of the column that you wish to filter.

Step 2. Select 'Apply filter'.

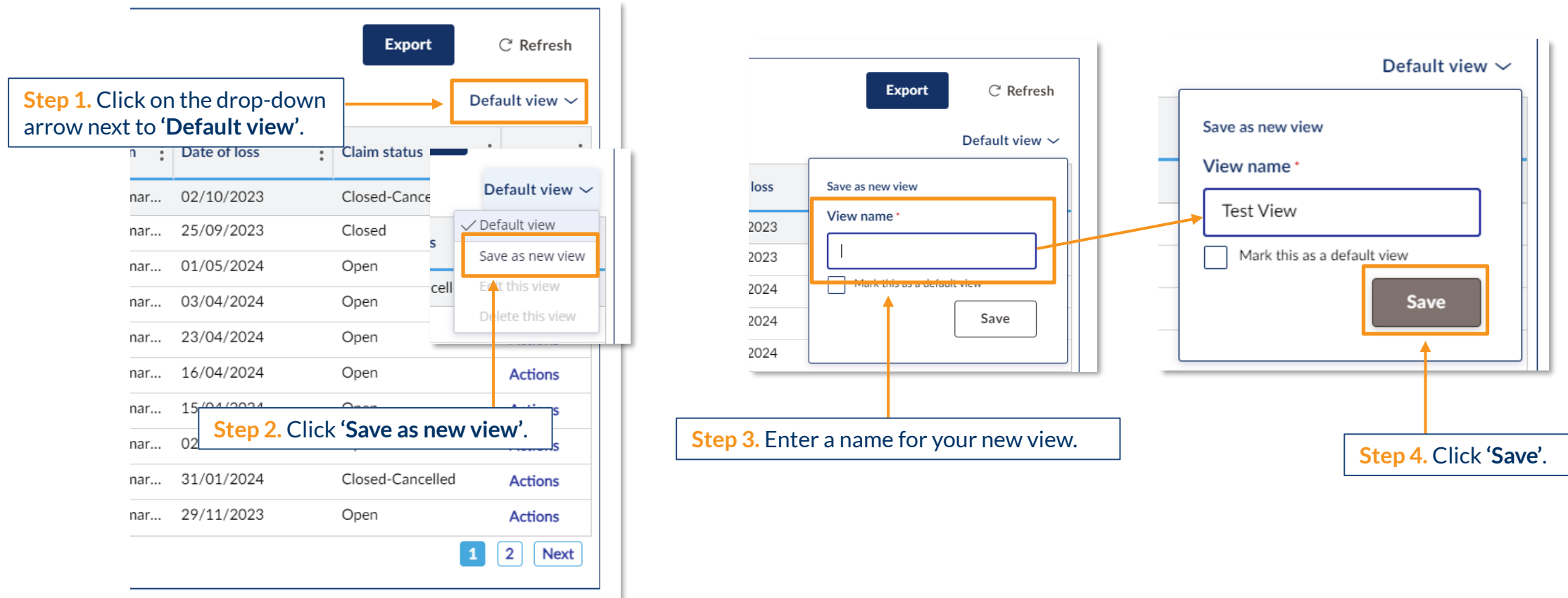
Step 3. Select the checkbox next to the value by which you wish to filter the column.

Step 4. Click 'Apply'.

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

How do I filter 'My claims' and save different 'My claims' views?

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 'Save as new view'.

Step 3. Enter a name for your new view.

Step 4. Click 'Save'.

n	Date of loss	Claim status	
nar...	02/10/2023	Closed-Cance	
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...	02/04/2024	Open	
nar...	31/01/2024	Closed-Cancelled	
nar...	29/11/2023	Open	

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Show subsidiary claims

Group Fields Density

Export Refresh

Step 5. You can switch between your views, edit your saved views, delete your views etc. by clicking the drop-down arrow beside the view name.

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	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