



**D A M S T R A**

Update File Notes  
for Claim

Safety



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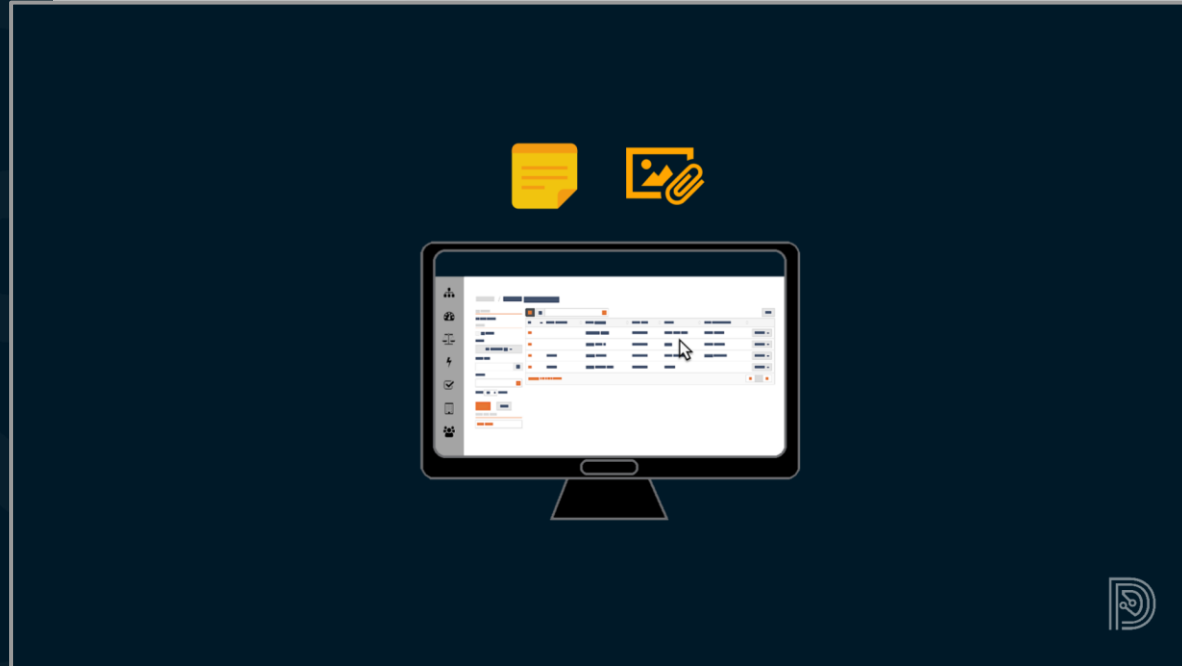
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# Update File Notes

## Introduction

Damstra Safety provides the ability to quickly and easily store Claim-related notes and files within the existing Claim Item, so that all the information you need is stored in one place.



# Update File Notes Claims Management Register

The procedure begins in the *Claims Management Register*.

This is found under *People* in the Menu Bar.

**Locate** the Claim involved and **click** 'Actions', then 'Edit'.

My Dashboard

All types of Corrective Actions can be exported to an Excel spreadsheet using "Export Corrective Action Data" button. Filter your reports using the "Select Sites" window and the existing reporting period function. (Start / End dates)

All Records 01/01/1970 - 31/12/2037 Export Corrective Action Data

Completed Underway Not Started

My Corrective Actions

People

Claims

- Claims Management
- Offers of Suitable Employment
- Return to Work
- Vault Contractor
- Contracted Workers
- Third Party/Visitor
- Training
- VQUAL
- Workers
- Volunteer Register
- Student Register

Claims Management

ID	Claim Number	Claim Subject	Claim Date	Status	RTW Co-ordinator	Actions
40		Summers, Lenny	27/05/2019	Claim Form Sent	Martin Daniels	View Edit Delete Print
40		Dink, Brian R	24/05/2019	Open	Laura Davison	View Edit Delete Print
39	17434	Foley, Michael	23/05/2019	Claim Form Sent	Lenny Summers	View Edit Delete Print
34	13735	Blake, Lawson Mark	20/03/2019	Entered		View Edit Delete Print

Showing 1 of 4 entries

Search

Print

Claims Management Register

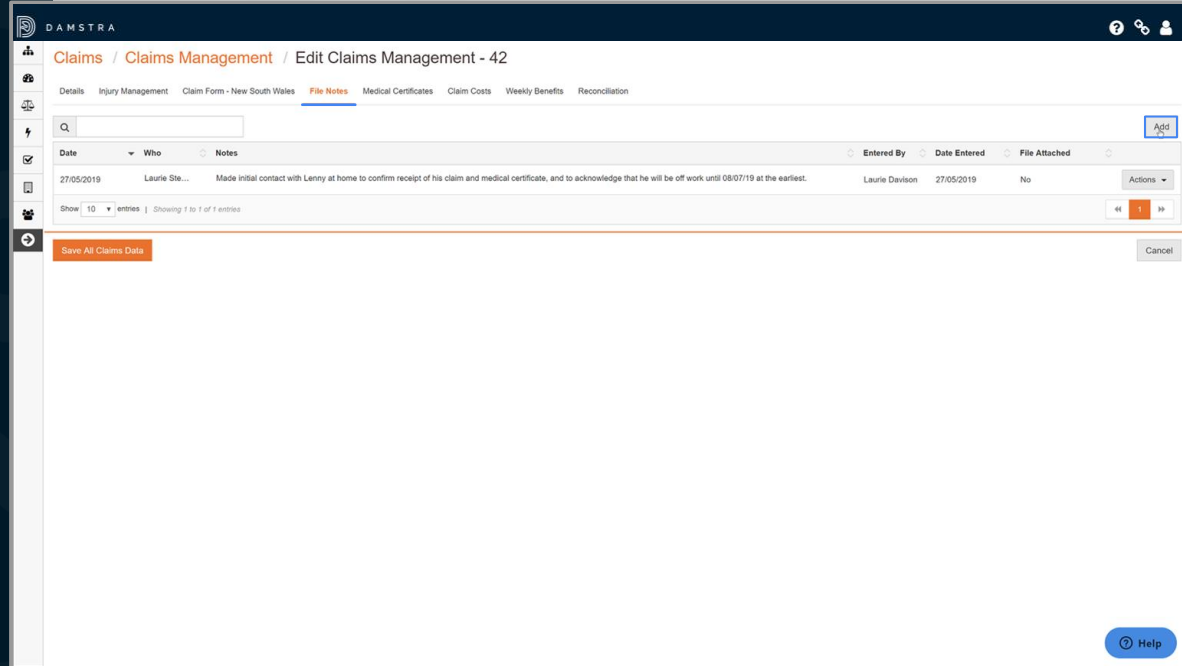
# Update File Notes

## Add File Note

**Click** on the *File Notes* tab.

The register shows the details of any existing file notes already saved to the Claim Item.

To add a new file note, **click** 'Add'.



The screenshot displays the DAMSTRA web application interface. The breadcrumb trail is 'Claims / Claims Management / Edit Claims Management - 42'. The 'File Notes' tab is selected and highlighted in blue. Below the breadcrumb trail, there is a search bar and an 'Add' button. A table lists existing file notes with columns for Date, Who, Notes, Entered By, Date Entered, and File Attached. The table contains one entry for 27/05/2019. At the bottom of the page, there is a 'Save All Claims Data' button and a 'Help' button.

Date	Who	Notes	Entered By	Date Entered	File Attached	Actions
27/05/2019	Laurie Ste...	Made initial contact with Lenny at home to confirm receipt of his claim and medical certificate, and to acknowledge that he will be off work until 08/07/19 at the earliest.	Laurie Davison	27/05/2019	No	Actions

# Update File Notes

## Note Details

### Enter:

- The date that the note is being added
- The name of the person adding it
- **Add** any notes to the free-text field
- **Attach** any related files by **clicking** 'Browse' and locating the file on your computer.

**Note** that a size limit of 15MB per file applies. A copy of the file will be added to the record.

Once all details have been entered, **click** 'Save Notes'.

The screenshot displays the 'Edit Claims Management - 42' interface in the DAMSTRA system. The 'File Notes' tab is active, showing a form with the following fields and controls:

- Date \***: 05/06/2019 (with a calendar icon)
- Who \***: Martin Daniels
- Notes**: Chased Insurance Company for acknowledgement of claim form. Nothing heard since 27/05.
- Attach File**: Email to InsureCo.pdf (with a 'Browse' button and a note: 'Maximum file upload size allowed is 15MB')

At the bottom of the form, there are two buttons: 'Save Notes' and 'Save All Claims Data'. A 'Cancel' button is also present on the right side of the form. A 'Help' button is located in the bottom right corner of the interface.

# Update File Notes

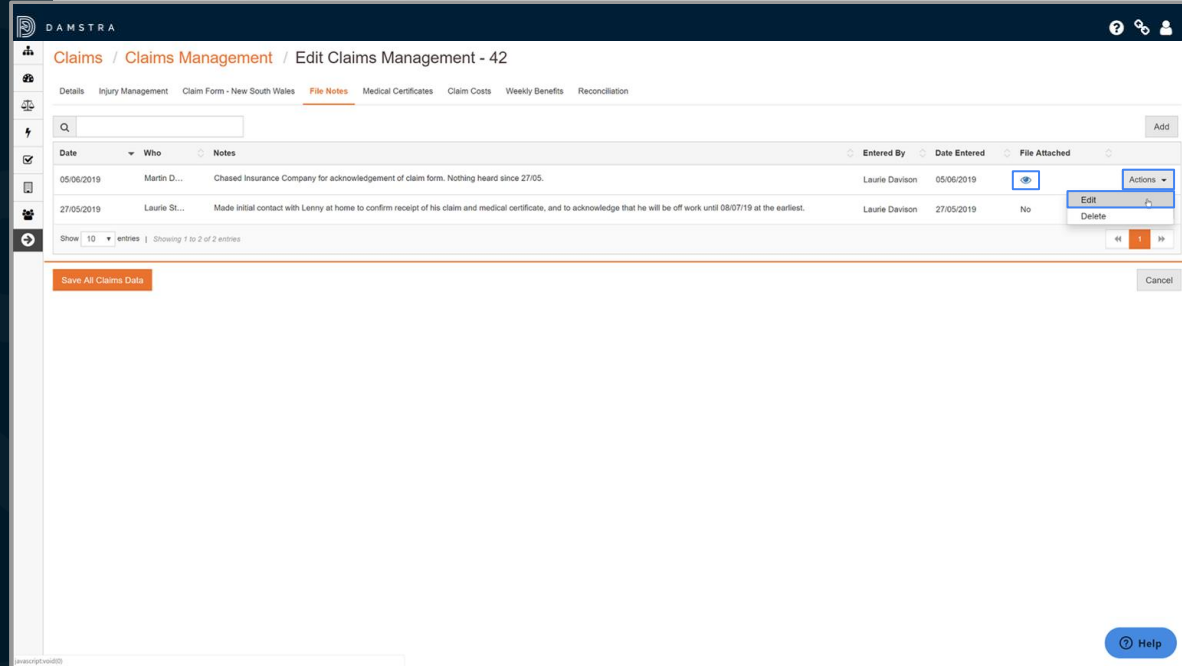
## Note Saved

The note is now saved and is visible in the register.

To view a copy of an attached file, **click** the 'eye' icon.

To edit the details or delete the file, **click** 'Actions' followed by the appropriate option.

Once all activity is complete, **click** 'Save All Claims Data' to return to the Claims Management Register.



The screenshot displays the DAMSTRA web application interface. The breadcrumb trail is 'Claims / Claims Management / Edit Claims Management - 42'. The 'File Notes' tab is active. A table lists two entries:

Date	Who	Notes	Entered By	Date Entered	File Attached	Actions
05/06/2019	Martin D...	Chased Insurance Company for acknowledgement of claim form. Nothing heard since 27/05.	Laurie Davison	05/06/2019		
27/05/2019	Laurie St...	Made initial contact with Lenny at home to confirm receipt of his claim and medical certificate, and to acknowledge that he will be off work until 08/07/19 at the earliest.	Laurie Davison	27/05/2019	No	

At the bottom of the table, there is a 'Save All Claims Data' button and a 'Cancel' button. A 'Help' button is located in the bottom right corner of the interface.

