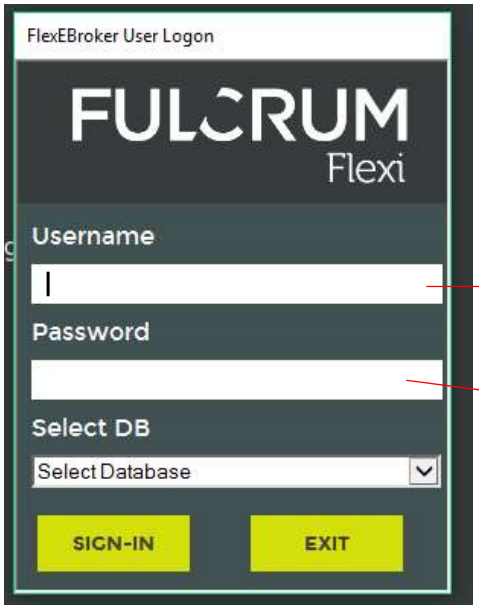
FLEXI

Step by step for claim registration on Flexi

1. Login on Flexi



Name and surname

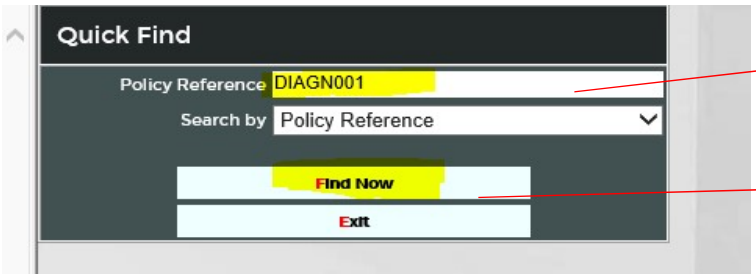
Password – this will be supplied

2. Select policy search

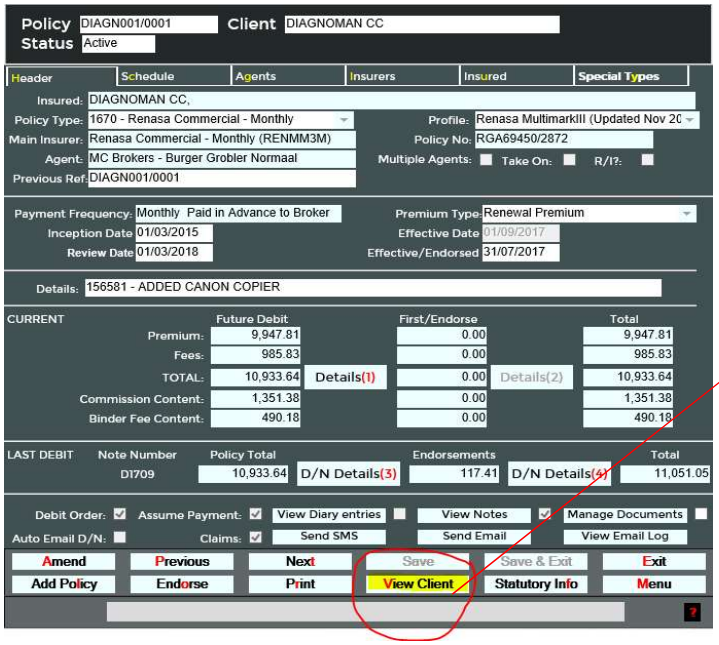
Click on the word policy search

3. Search for the policy – The reference is supplied by the broker or available on streamline

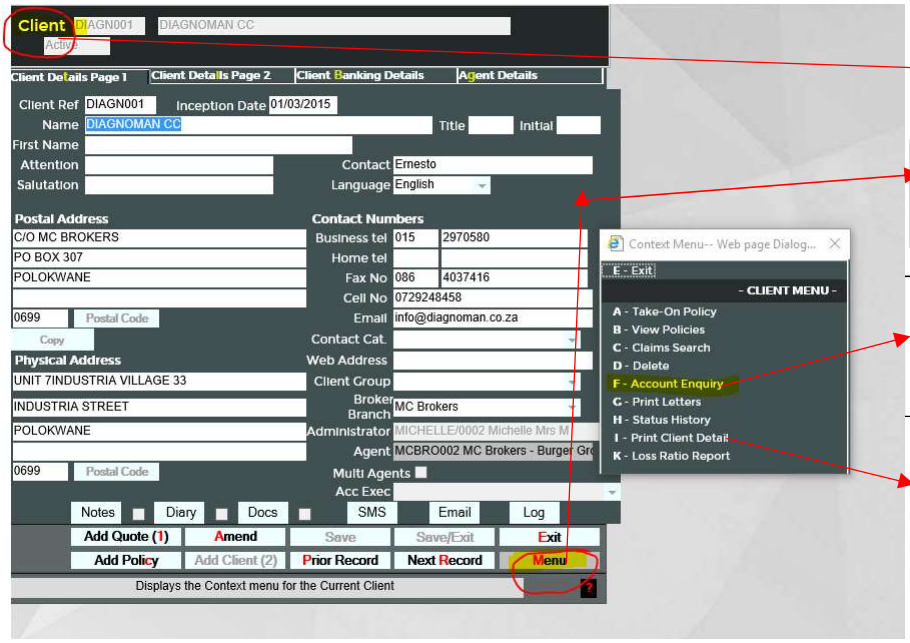
search this on Flexi



4. View client for premium confirmation



5. Premium confirmation page



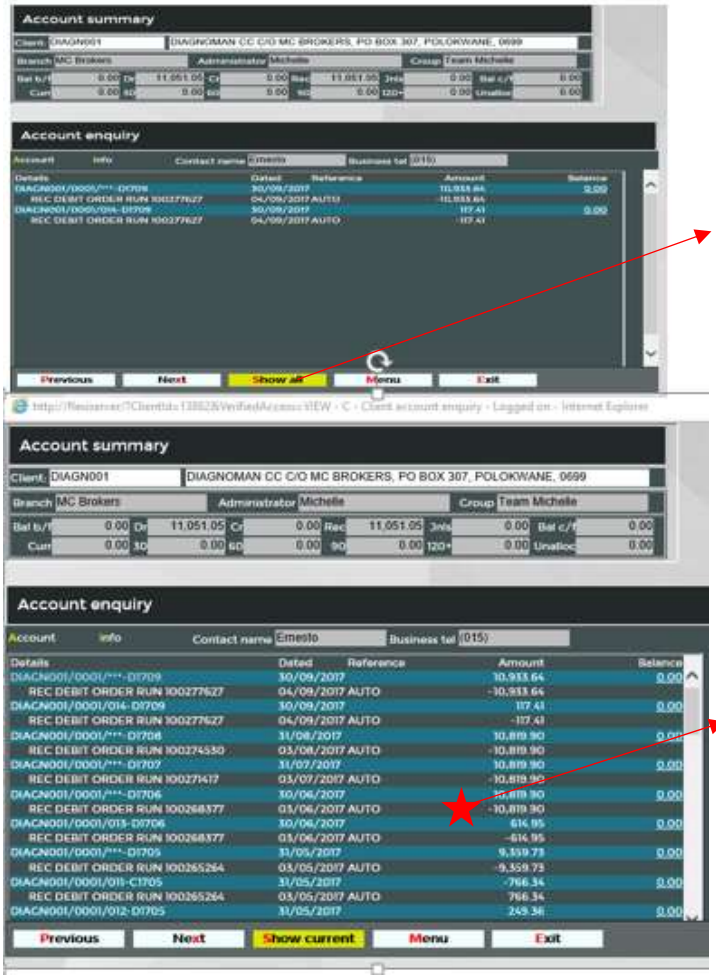
1. This is the client details page

2. Select menu on this page: it will open the client menu

3. Select option F – account enquiry
This will open the account page

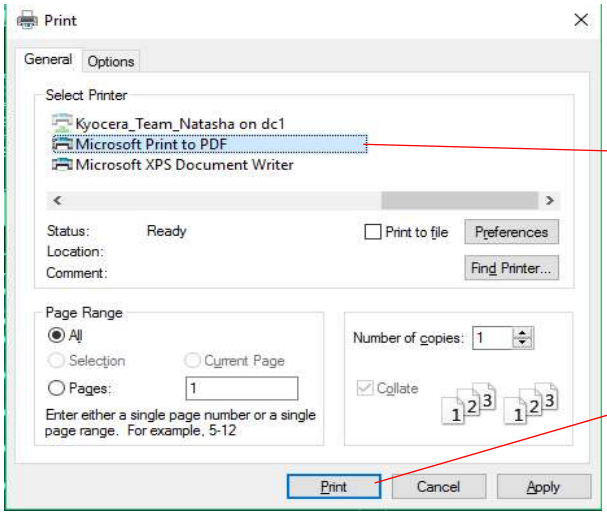
4. Select option I and save the client details on your desktop with the claim documents

6. Print premium confirmation



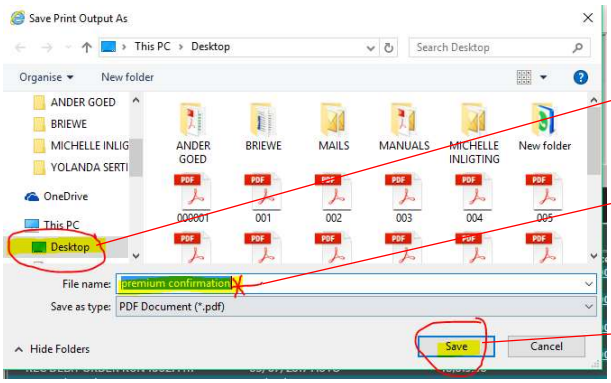
Click on the show all button to see all premiums – make sure the balance shows 0.00

Click with the mouse on the grey of the screen – do not click on anything just on the grey part and press the CTRL & P on the keyboard at the same time to print – the print screen will open



Always select the PDF printer.
Microsoft print to PDF

Select print for the document to be saved to PDF

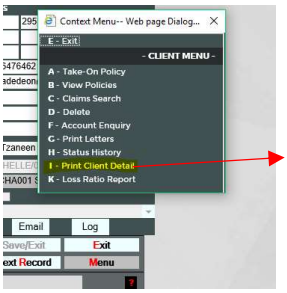


Make sure you save to the desktop or your folder that you created for the claim

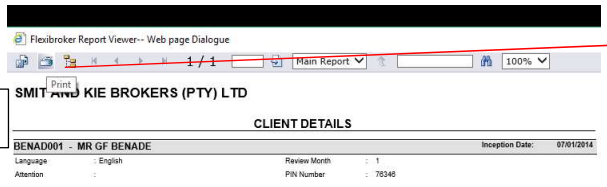
Name the document: premium confirmation

Select save for the document to be saved on the desktop

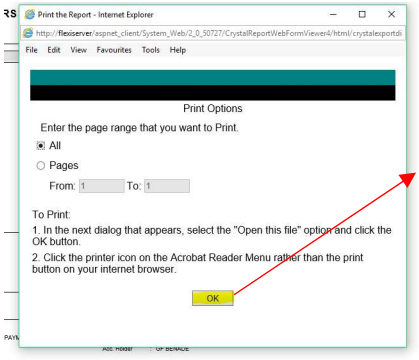
7. Print client details



1. Select option I



2. A new page will open, select print on this page

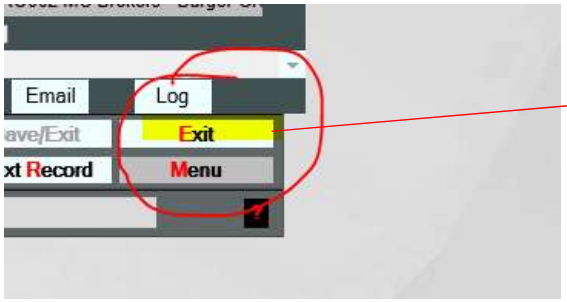


3. After you select print the print option screen will open – select OK

4. Select the save option to save a copy on the desktop

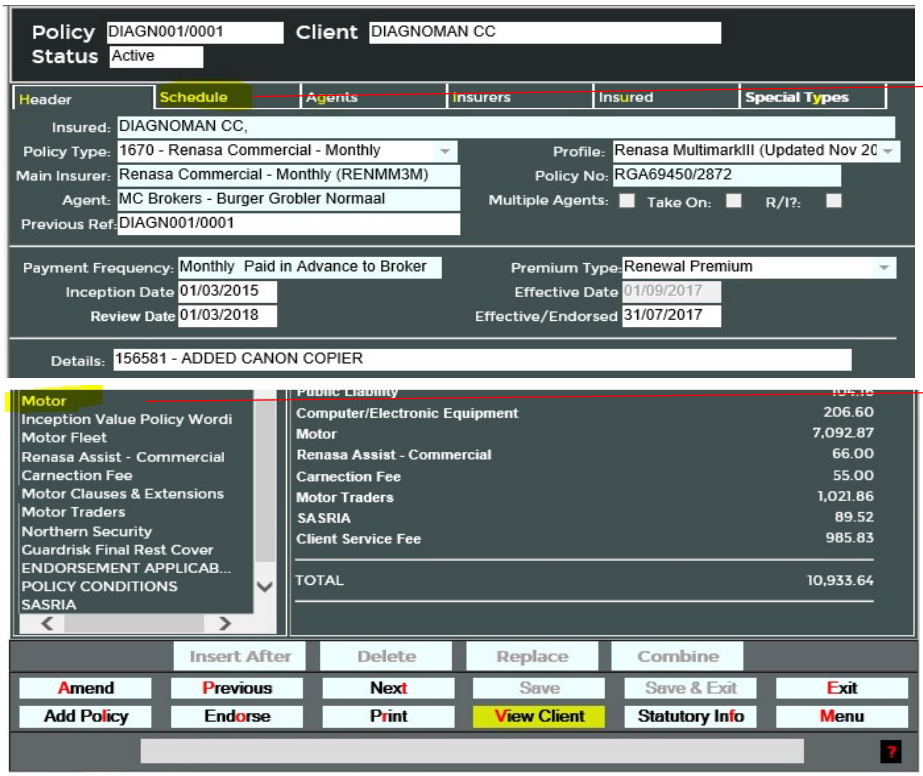
8. Go back to the policy screen

Press the exit button



Press the exit button

9. Checking the excess & the section you are claiming on

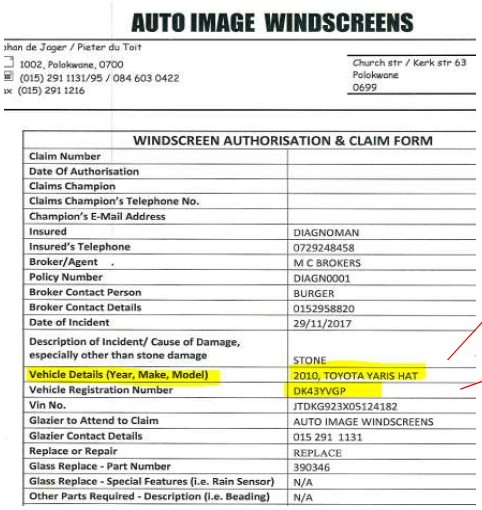


Select the schedule

Click on the word schedule for it to open

Select the section you are working on. For example, motor section
click on the word motor for the section to open

look at the claim form the claimed items details



AUTO IMAGE WINDSCREENS

han de Jager / Pieter du Toit
1002, Polokwane, 0700
(015) 291 1131/95 / 084 603 0422
(015) 291 1216

Church str / Kerk str 63
Polokwane
0699

WINDSCREEN AUTHORISATION & CLAIM FORM

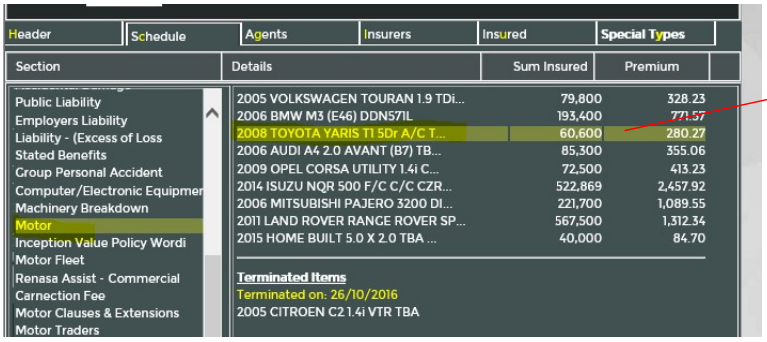
Claim Number	
Date Of Authorisation	
Claims Champion	
Claims Champion's Telephone No.	
Champion's E-Mail Address	
Insured	DIAGNOMAN
Insured's Telephone	0729248458
Broker/Agent	M C BROKERS
Policy Number	DIAGN0001
Broker Contact Person	BURGER
Broker Contact Details	0152958820
Date of Incident	29/11/2017
Description of Incident/ Cause of Damage, especially other than stone damage	STONE
Vehicle Details (Year, Make, Model)	2010, TOYOTA YARIS HAT
Vehicle Registration Number	DK43YVGP
Vin No.	JTDKG923X05124182
Glazier to Attend to Claim	AUTO IMAGE WINDSCREENS
Glazier Contact Details	015 291 1131
Replace or Repair	REPLACE
Glass Replace - Part Number	390346
Glass Replace - Special Features (i.e. Rain Sensor)	N/A
Other Parts Required - Description (i.e. Beading)	N/A

The claimed items details will be on the claim form – see windscreen claim form for example

Vehicle details will be on claim form

Make sure to check the section you are claiming on, if it is a Fridge or TV it will be most probably be contents, if it is a cell phone, check the all-risk section

make sure the item is on the policy



Header | Schedule | Agents | Insurers | Insured | Special Types

Section	Details	Sum Insured	Premium
Public Liability	2005 VOLKSWAGEN TOURAN 1.9 TDi...	79,800	328.23
Employers Liability	2006 BMW M3 (E46) DDN571L	193,400	771.57
Liability - (Excess of Loss	2008 TOYOTA YARIS T1 5Dr A/C T...	60,600	280.27
Stated Benefits	2006 AUDI A4 2.0 AVANT (B7) TB...	85,300	355.06
Group Personal Accident	2009 OPEL CORSA UTILITY 1.4i C...	72,500	413.23
Computer/Electronic Equipmer	2014 ISUZU NQR 500 F/C C/C CZR...	522,869	2,457.92
Machinery Breakdown	2006 MITSUBISHI PAJERO 3200 DI...	221,700	1,089.55
Motor	2011 LAND ROVER RANGE ROVER SP...	567,500	1,312.34
Inception Value Policy Wordi	2015 HOME BUILT 5.0 X 2.0 TBA ...	40,000	84.70
Motor Fleet			
Renasa Assist - Commercial	**Terminated Items**		
Carnection Fee	Terminated on: 26/10/2016		
Motor Clauses & Extensions	2005 CITROEN C2 1.4i VTR TBA		
Motor Traders			

If the item is on the policy go ahead and print the documents.

If you dubbel click on the vehicle the section will open with more information on the vehicle

*When it is something that belongs under the contents section / householders you need to make sure the section is on the policy, for example – if they claim for a TV and the TV is not specified, you need to make sure they have contents/householder on the policy for the claim to be registered *

householders – contents – inhoud
homeowners – buildings – geboue

When you print the policy schedule you need to check the excess page:

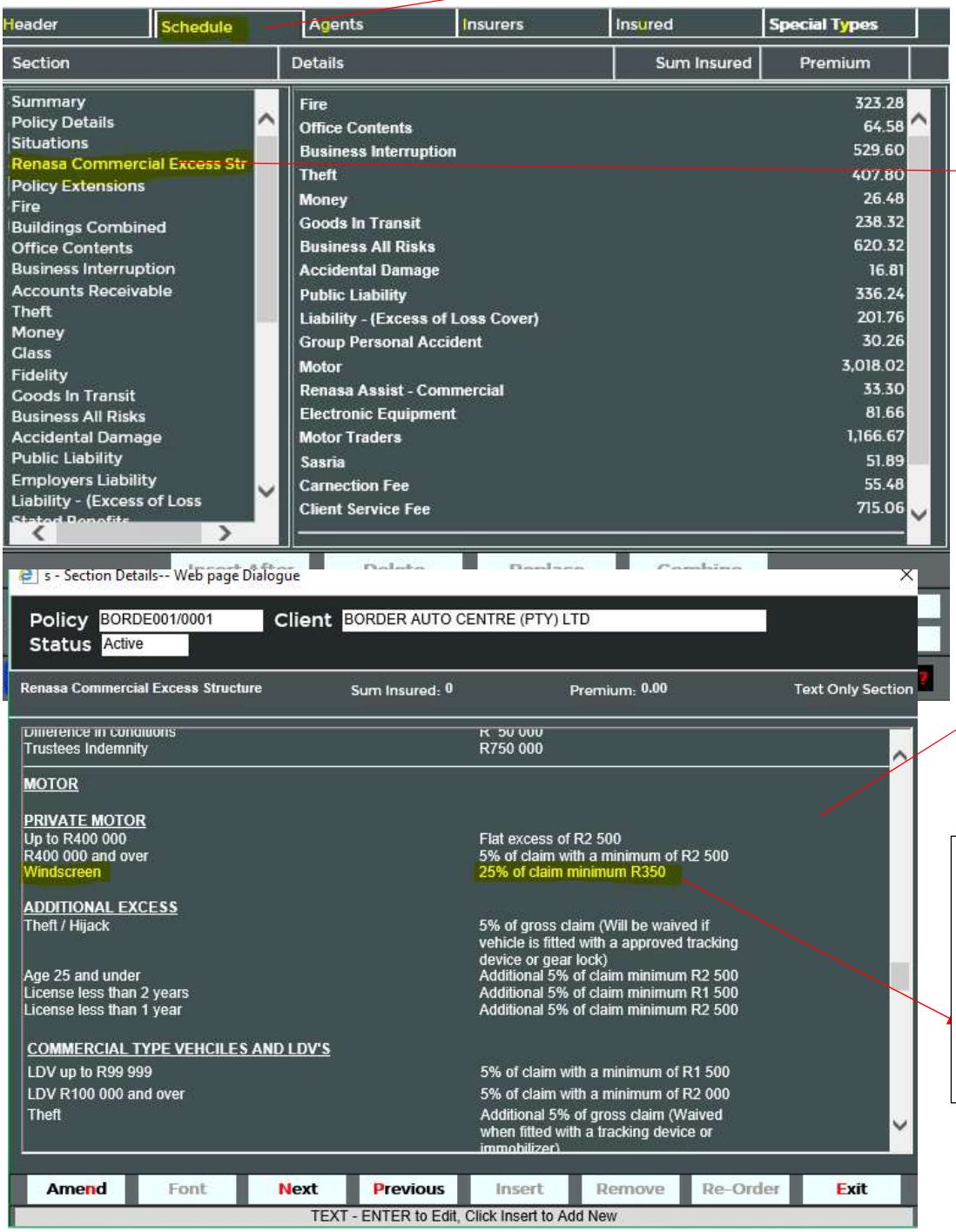
Make sure the excess on the policy is 25% min R350 – **some policies have a different excess**

If the excess on the policy is more – use the excess on the policy!

On flexi – before you print the schedule:

Dubbel click on the word excess page – this can be Renasa commercial excess page or domestic excess page or Xenturion excess page, the name will be different depending on the insurer

On Flexi – select the schedule page

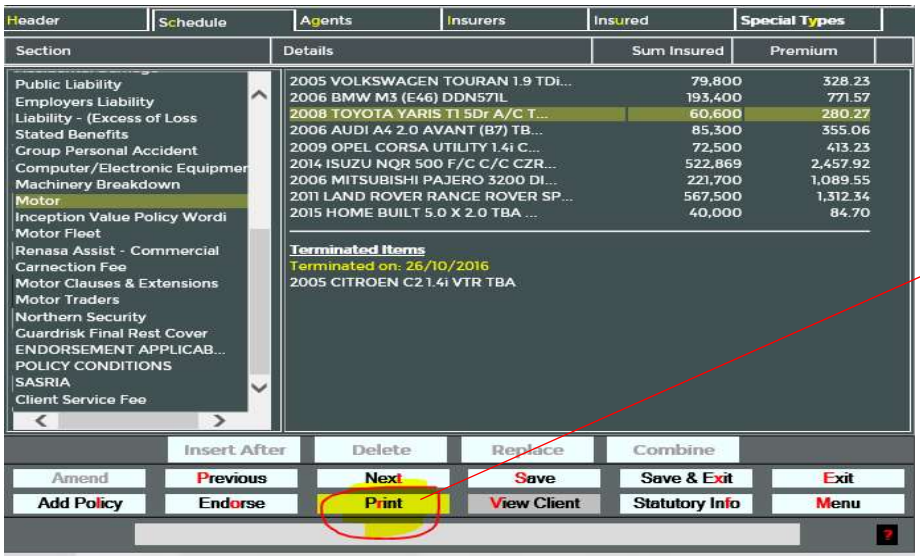


Dubbel click on the words excess page – you have to click 2 times with the mouse for the page to open

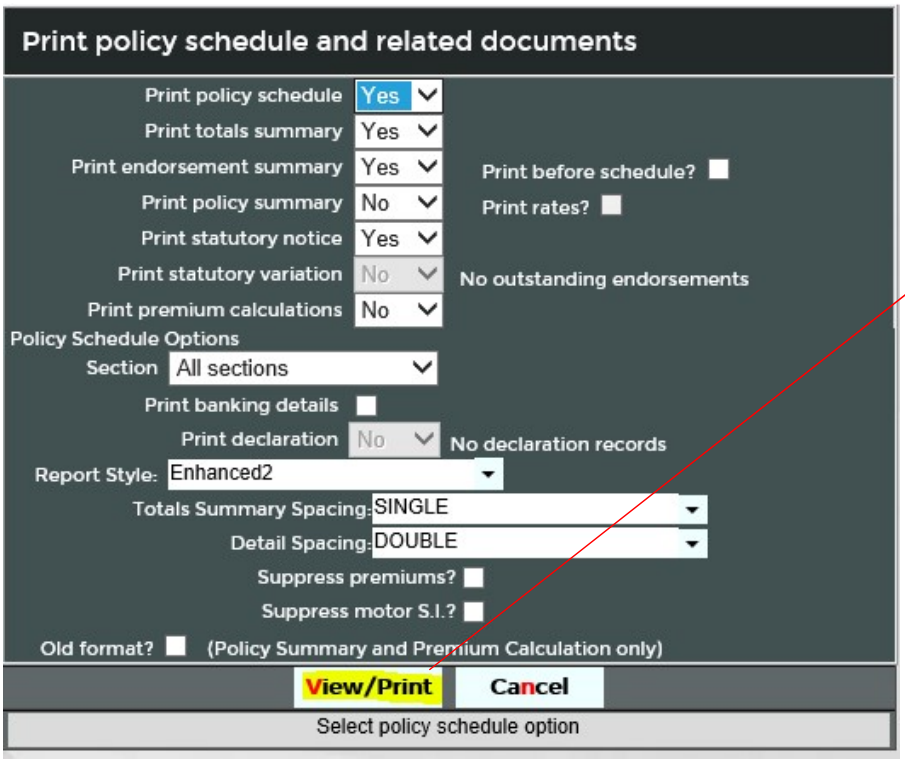
Move down on the page that opened until you find the section for your claim

Make sure under the section that you have the correct excess – look at the example marked with yellow.

10.Printing the policy schedule

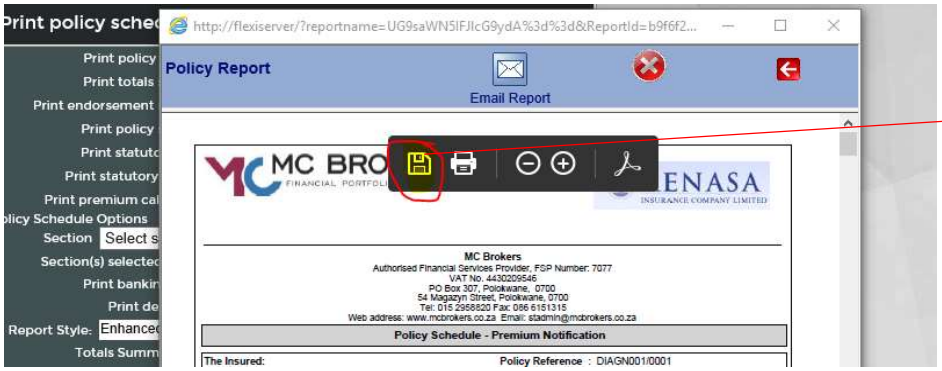


Select print on the policy screen

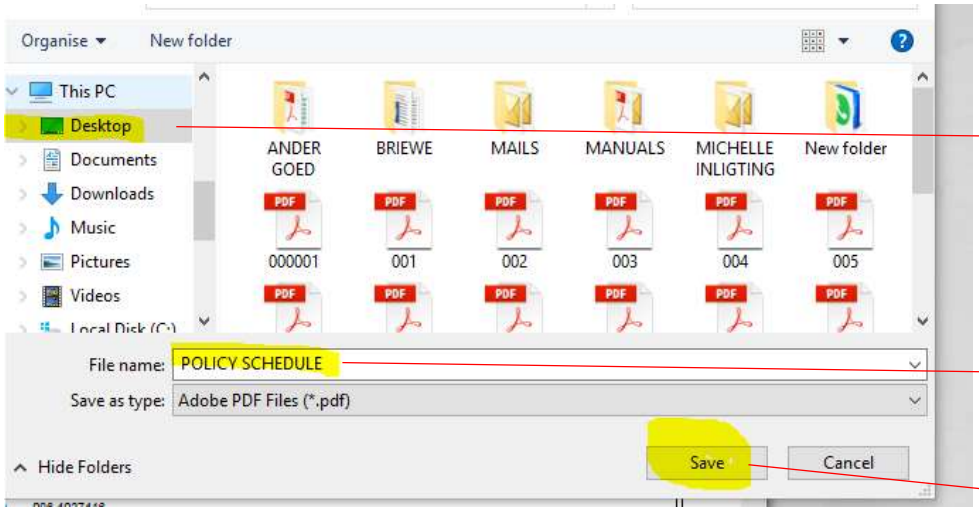


Select view / print – you do not have to select or change the options for claims to print the schedule

policy schedule will show once you select view/print



Select 'save' to save the policy schedule on the desktop



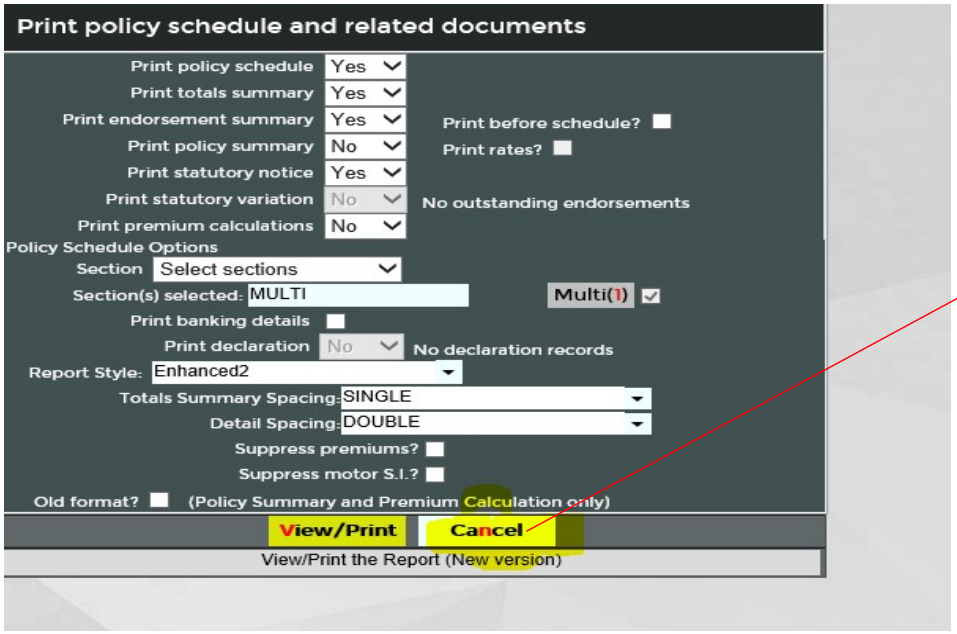
Make sure you save to the desktop or the folder you created

File name is policy schedule

Select save for the file to save on the desktop

* exit the page back to the policy screen*

Click on the X to close the policy report

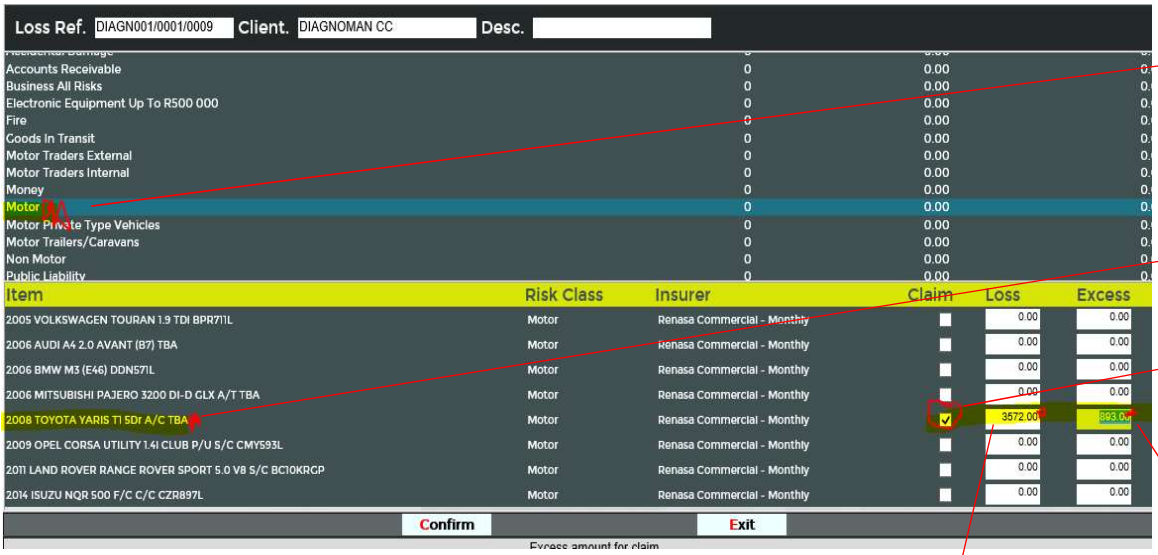


Select cancel to close this screen

10. Registering a claim

1 Select menu on the policy screen

2 select option D for new claim



Select motor on the top part of the screen

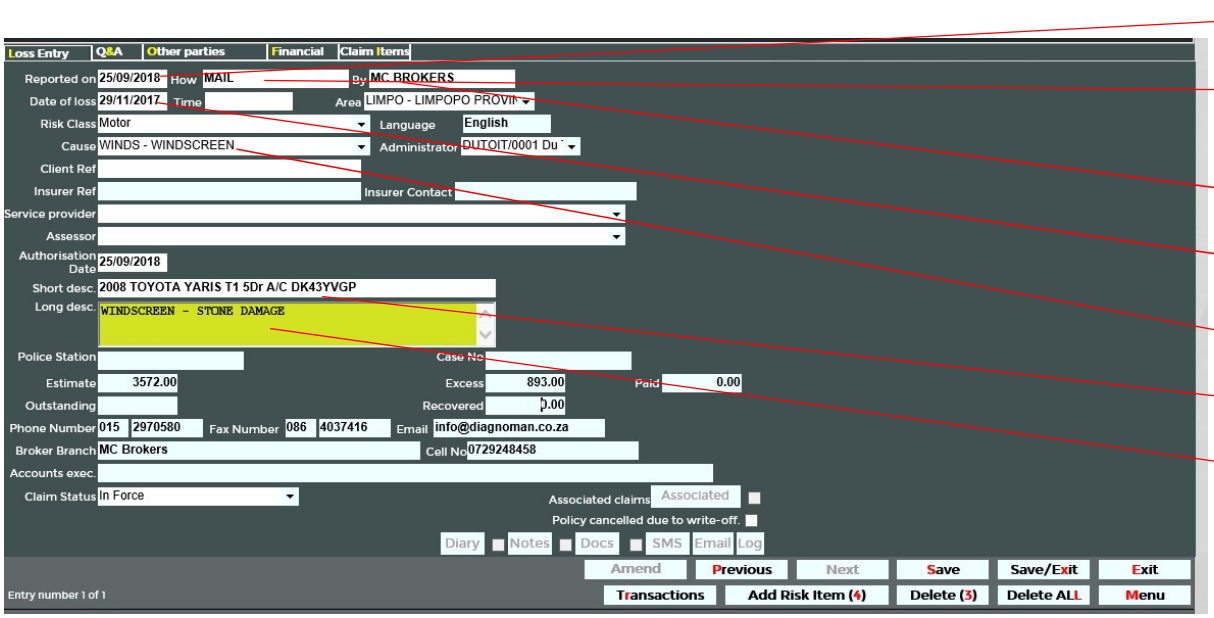
Select the motor you need to register the claim on

Make sure you Tick the box for the vehicle you selected

1* Use the amount on the claim form that says *total incl vat* for the loss amount and add it on the column that says 'loss'

Work out the excess using your loss amount.
Enter the loss amount on the calculator and times (X) by 25 % this amount is for the column that says excess

We use the amount that says total incl on the quotation



1
2
3
4
5
6
7

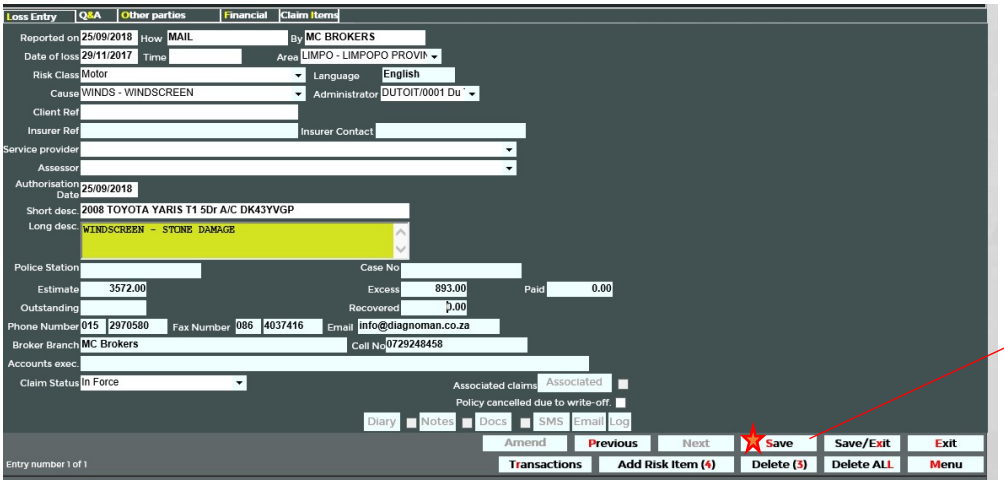
1.The date we register the claim on
2.The task number on streamline
3.The broker for the client – not just broker
4.The date of loss/incident date on the claim form
5.Select from the list – lost/damaged/lightning
6.Item claimed details completed on the short description
7.Claim form description for the long description

Broker Contact Person	BURGER
Broker Contact Details	0152958820
Date of Incident	29/11/2017
Description of Incident/ Cause of Damage, especially other than stone damage	STONE
Vehicle Details (Year, Make, Model)	2010, TOYOTA YARIS HAT
Vehicle Registration Number	DK43YVGP
Vin No.	JTDKG923X05124182
Glazier to Attend to Claim	AUTO IMAGE WINDSCREENS
Glazier Contact Details	015 291 1131

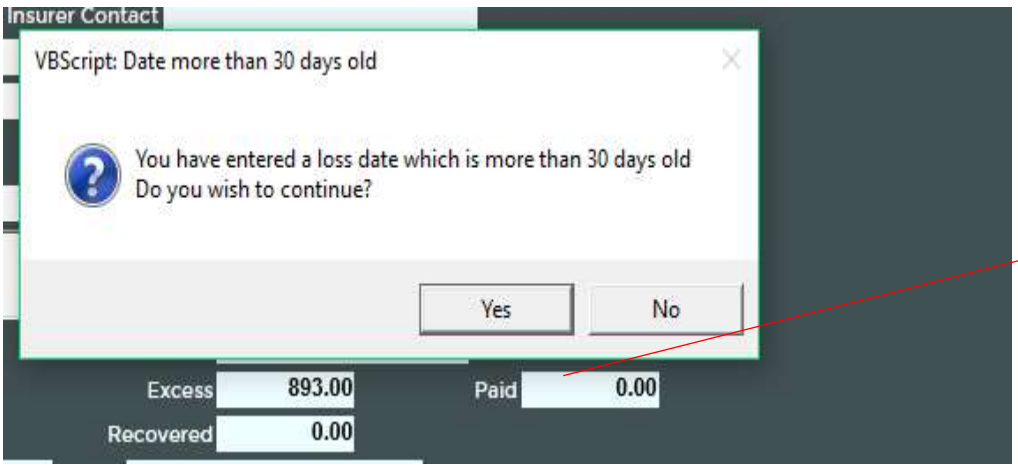
Date of loss / incident date

Description of loss

<u>*the date of loss and description will be on the claim form, if this is not on the claim form you cannot register the claim*</u>

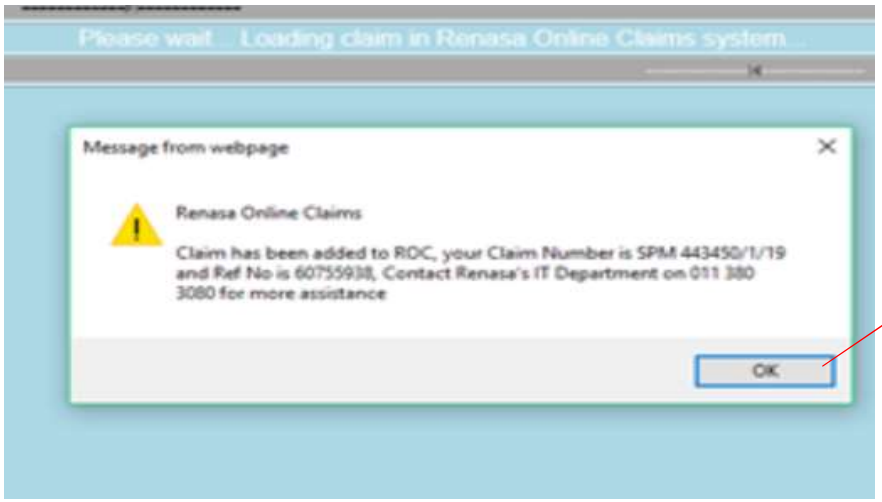


Select save once all the information has been completed

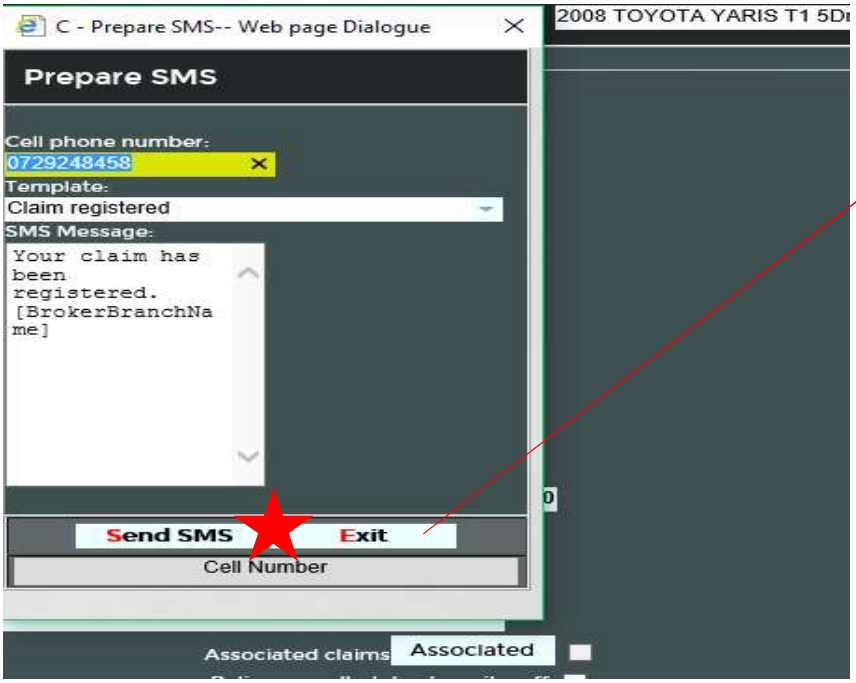


If you have this message about 30 days you select yes and ask the broker for late notification reason

you will not receive this message if the claim is registered within 30 days



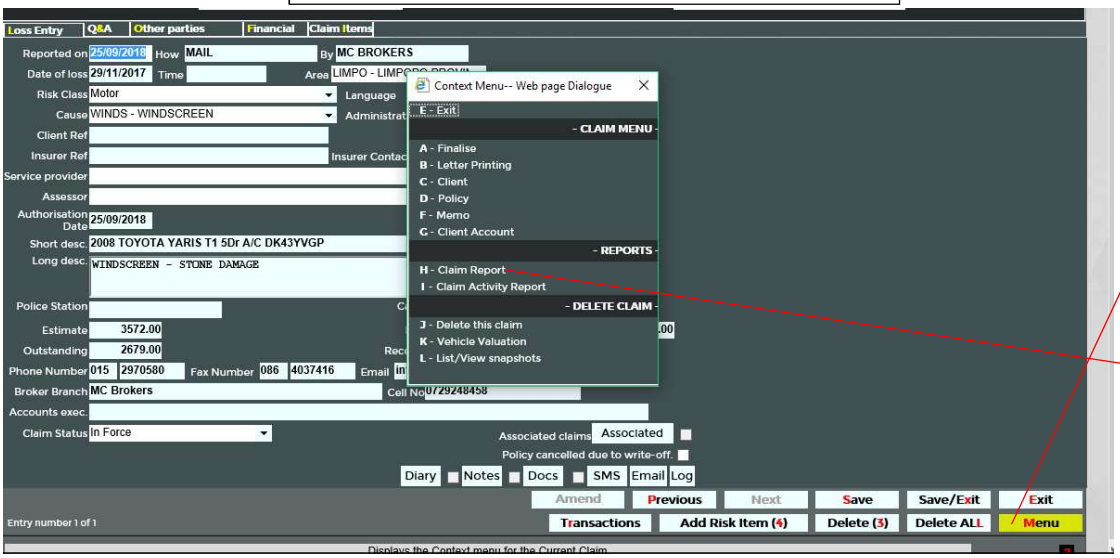
Select ok to continue.
Renasa & Xenturion claims will give this message with a claim number. Other claims will not have this messages



We do not sms from the system.
Select exit on this screen

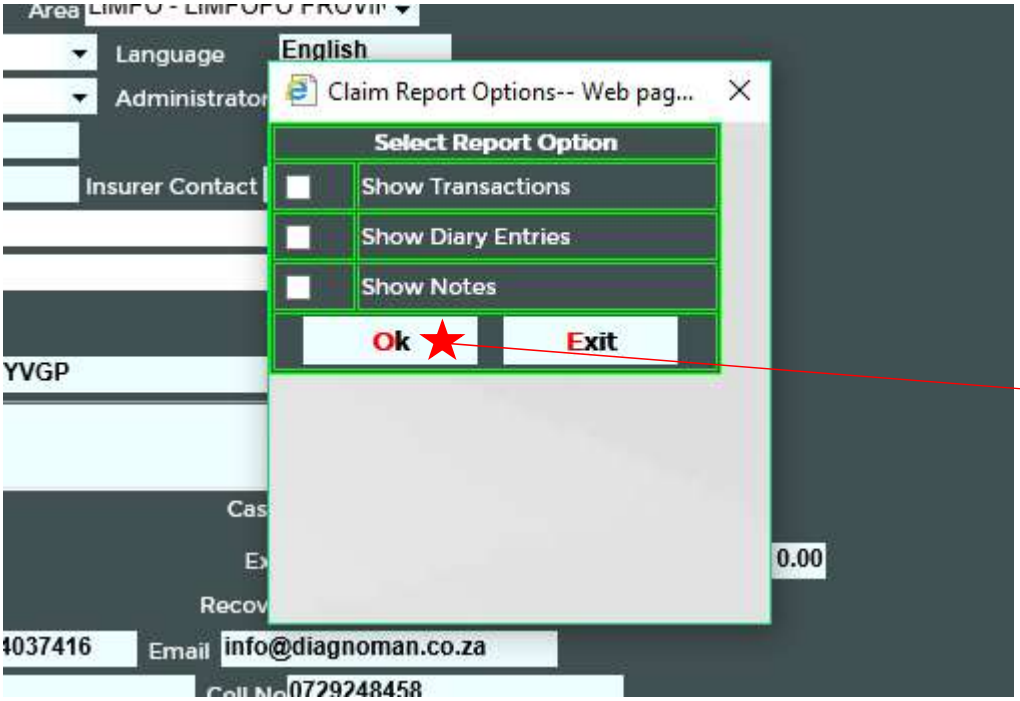
your claim is now registered and you need to print the claim record

11. Printing the claim record

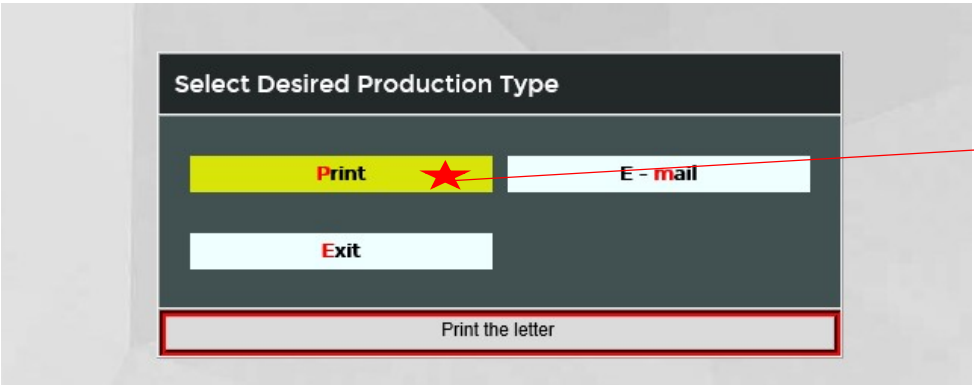


1 Select menu for the claim menu to pop up

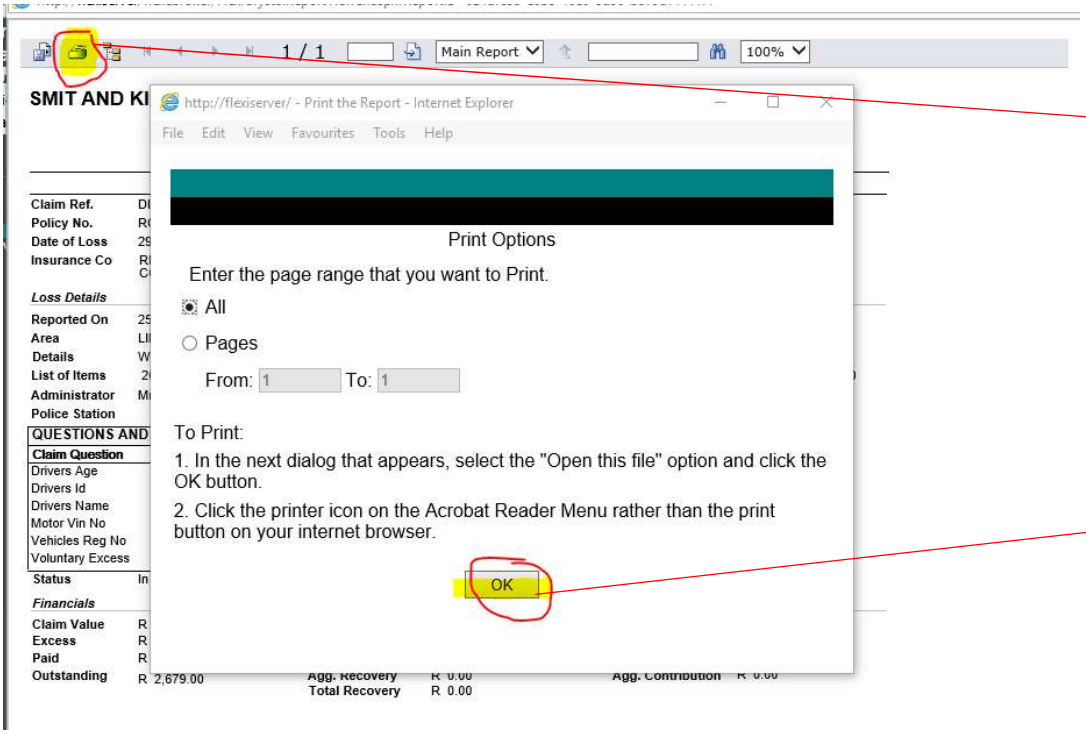
2 select option H – claim report



Do not tick any of the boxes just select the OK button

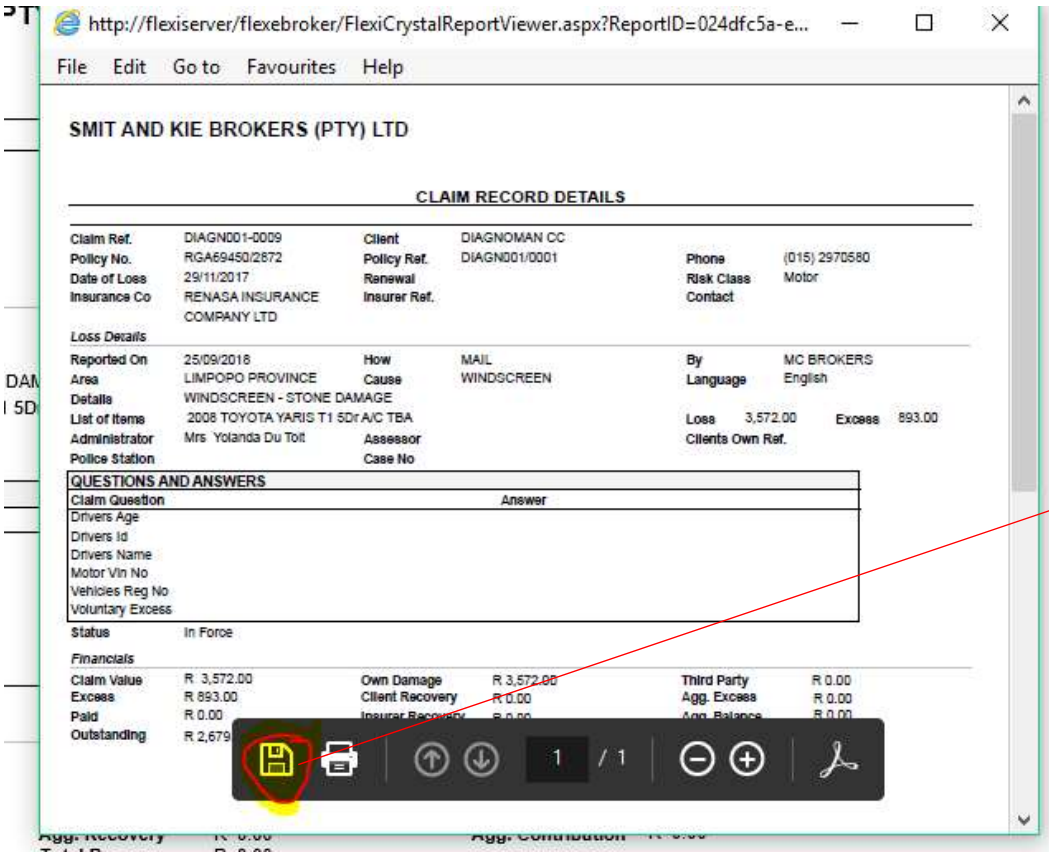


Select print

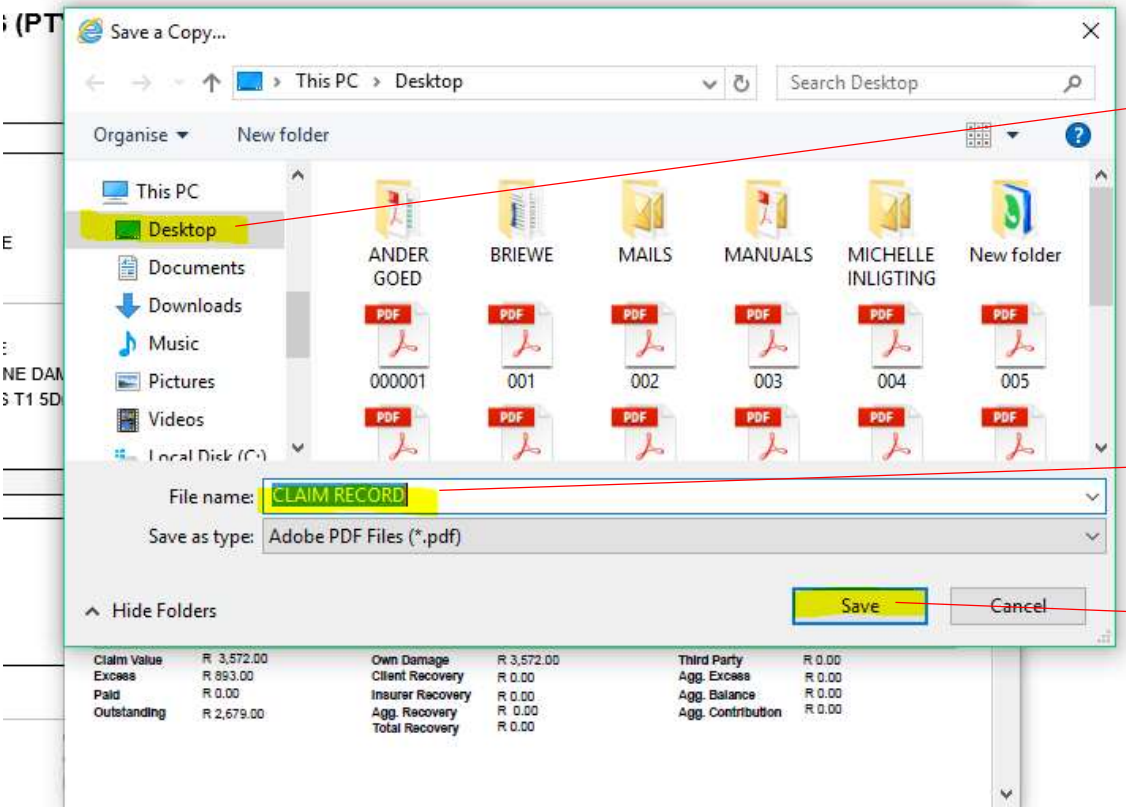


Select the print button

Press the 'OK' button



Select the save button for the claim record to be saved on the desktop/folder you created

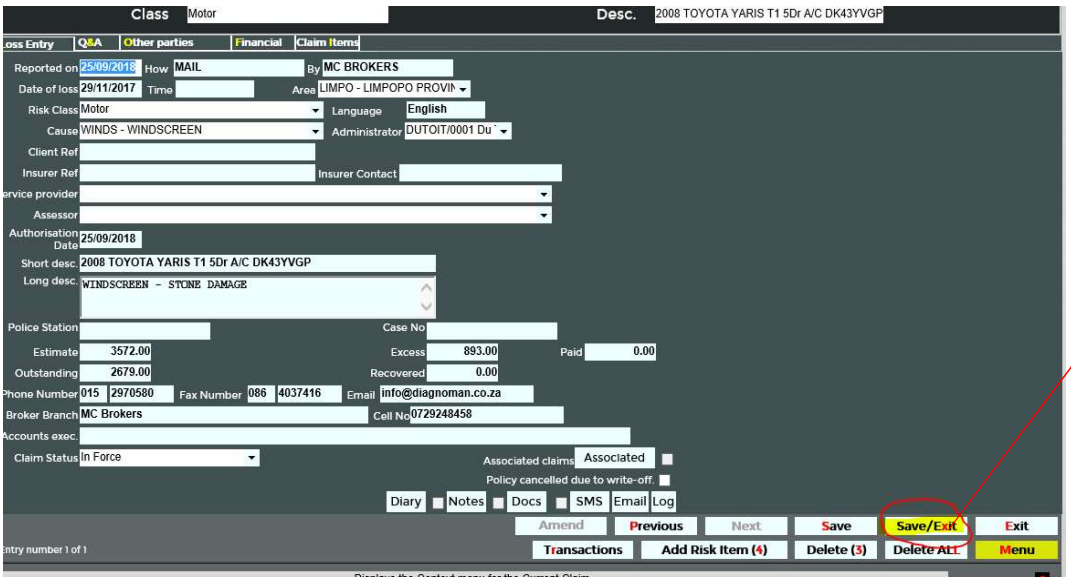


Make sure you select desktop or your folder you craeted to save the document

File name is claim

Select the save button to save the document

Close the page on the X



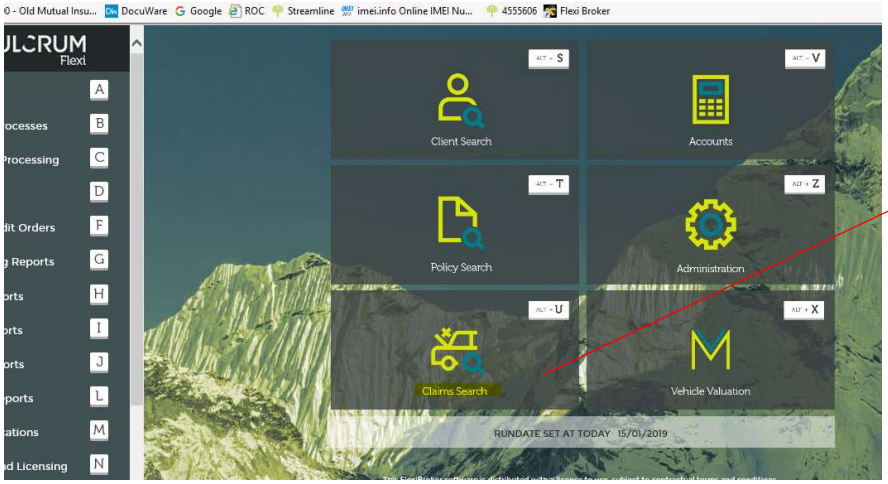
Select save/exit.

You are now done with the claim on Flexi

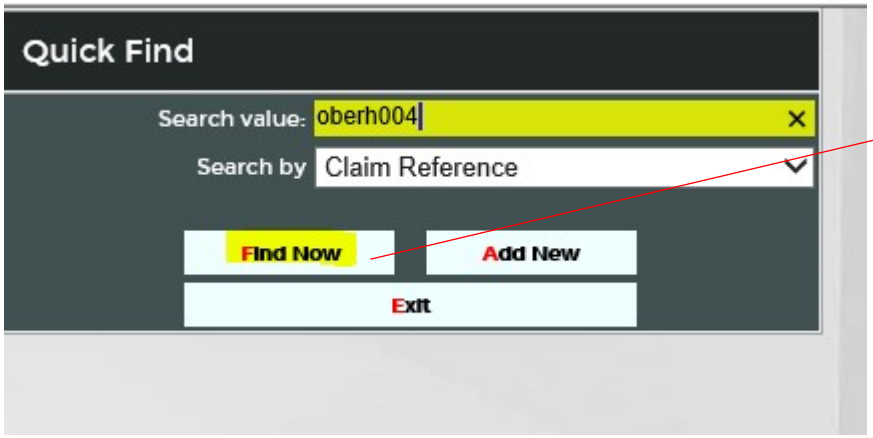
Finalizing a claim on Flexi

If the payment has not pulled through from ROC

1. Search your claim on Flexi

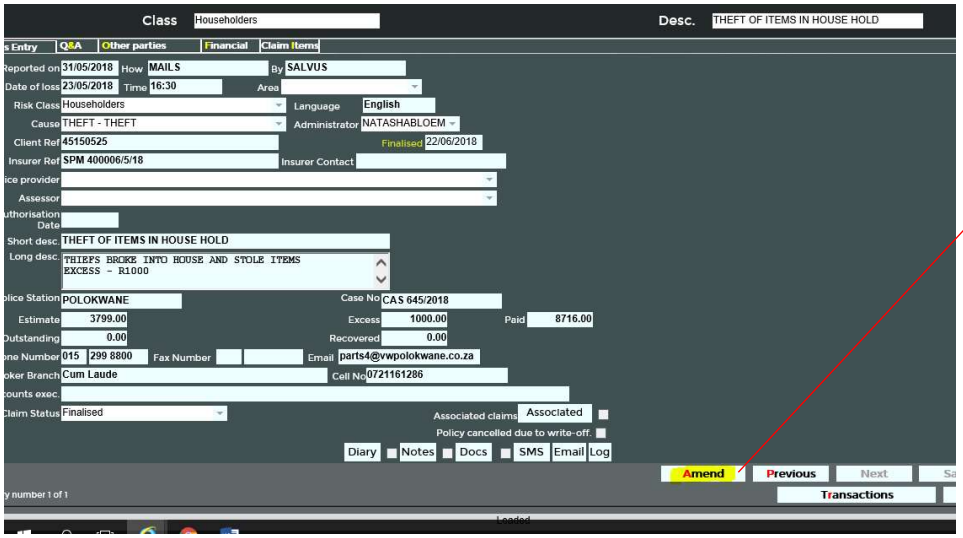


Select claim search

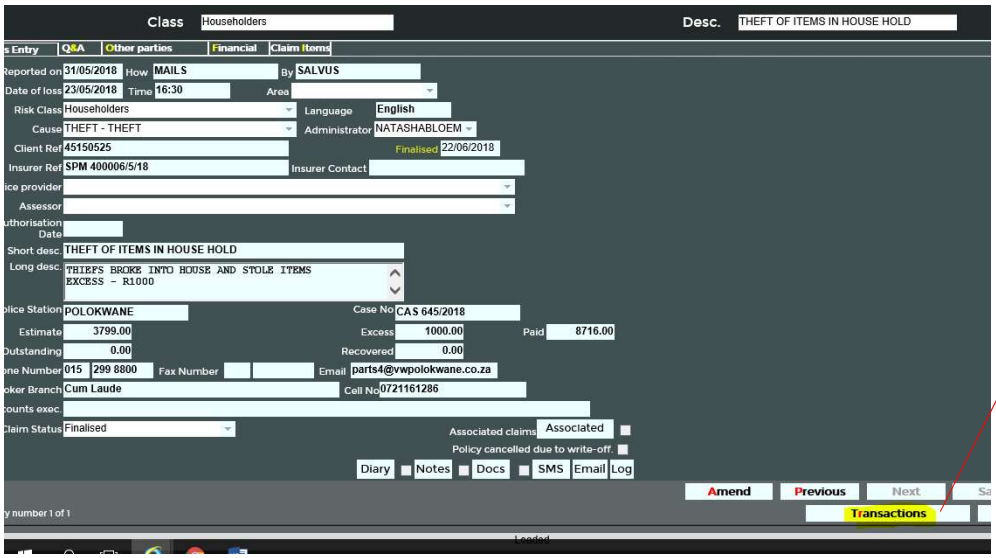


Type in the claim reference you need to search and select find

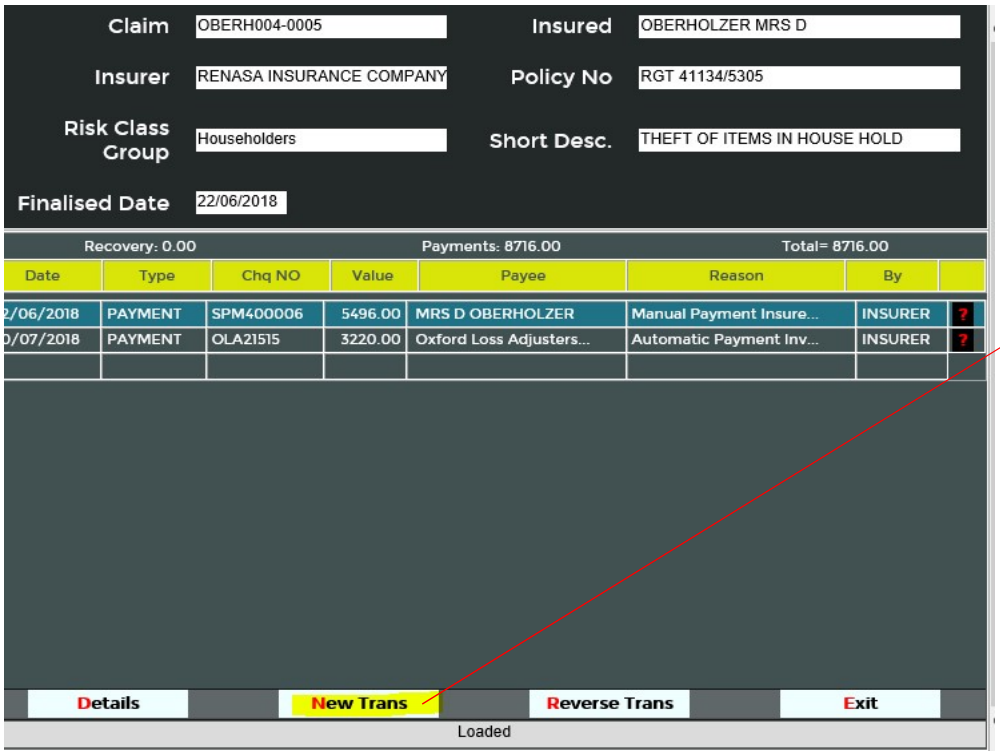
Click on the claim you need to work on



Select amend to work on the claim

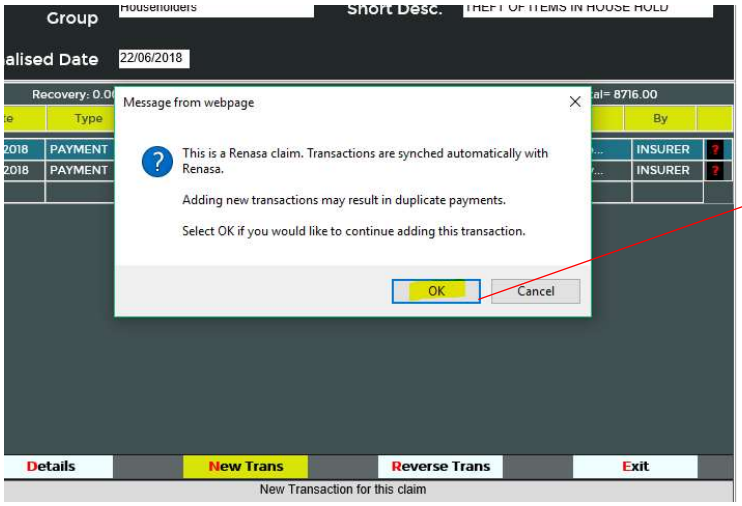


Click on the transaction button to open the screen for the payments



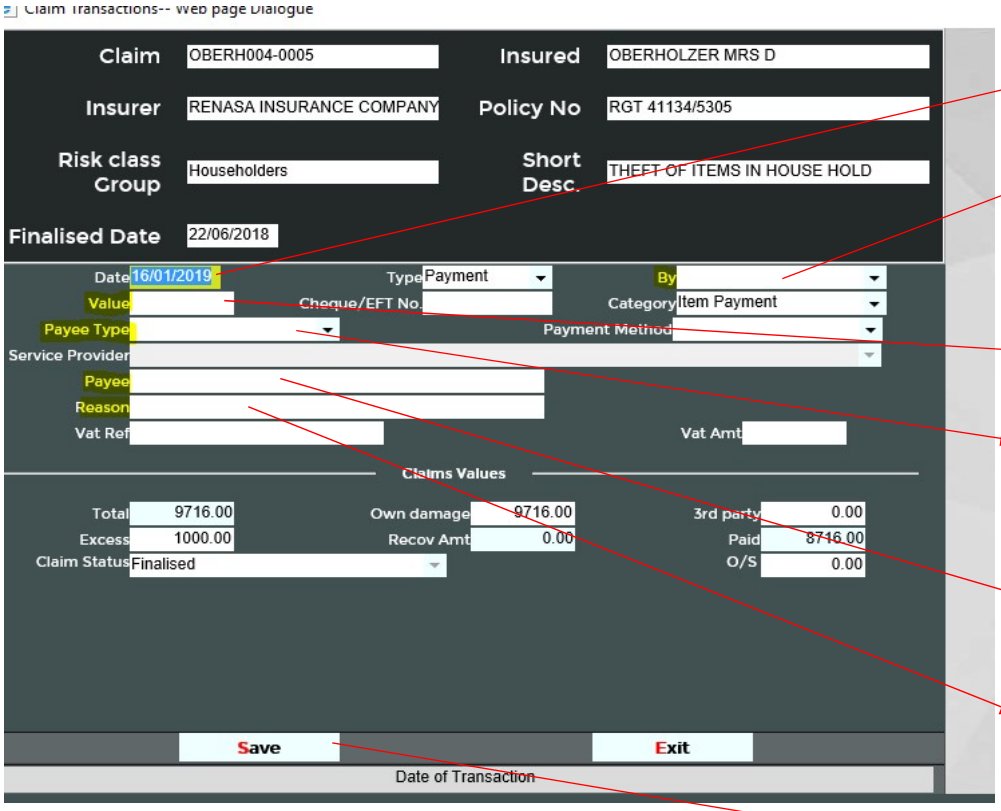
Select new Trans to load the payment manually

Renasa & Xenturion claims will give you this message



If the payment did not pull through from ROC you can click OK to load the payment manually

Make sure you use the correct amount when loading the payment



Date payment was made

Dropdown gives you option for Insurer, Broker, other. Normally the insurer does the payment

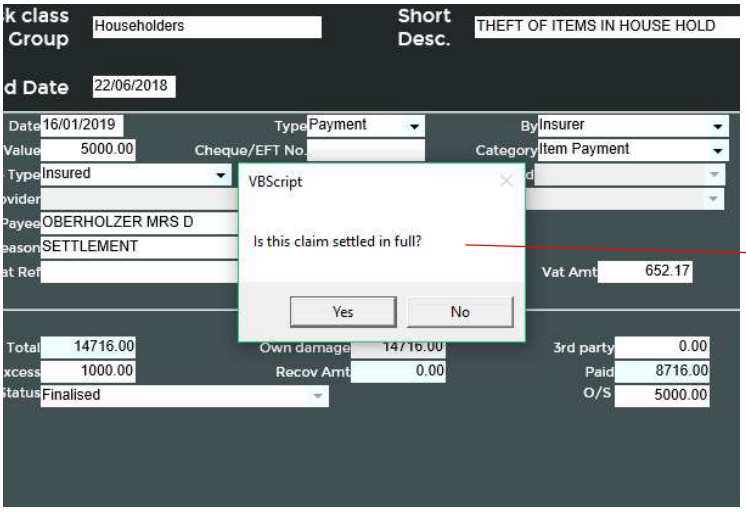
The amount that was paid after excess was deducted

Option to pay insured, service provider, Third party or other. Select the option you paid

Payee – the name of the person that was paid

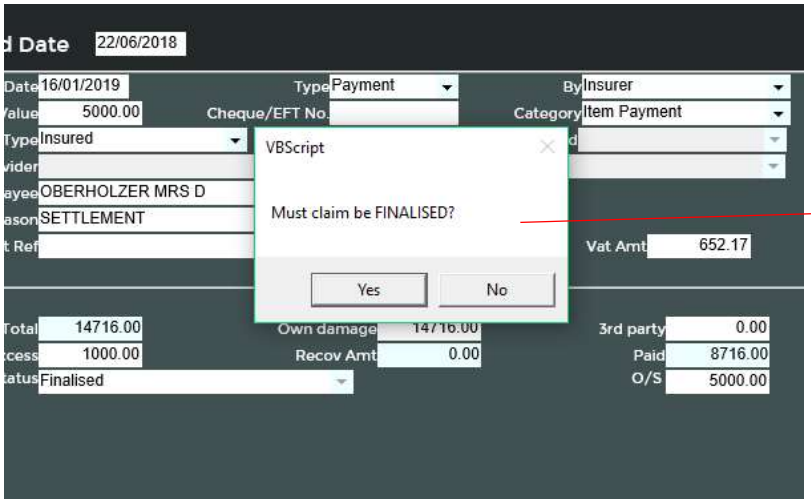
Short reason for payment – settlement to insured / TP or BP invoice paid

Click on the save button



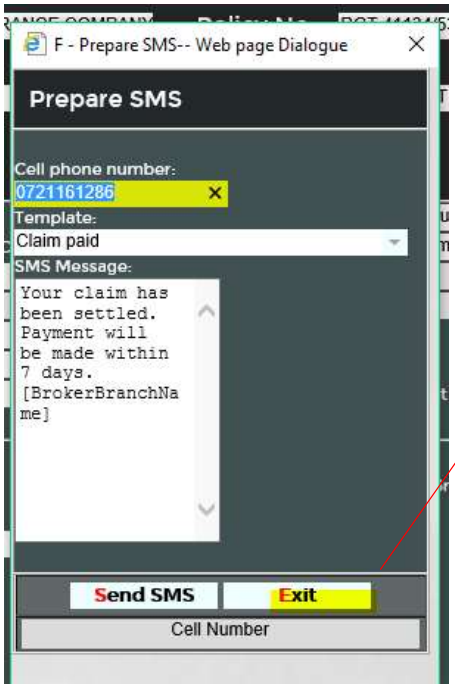
If this is the only payment that needs to be loaded and the claim can be finalised you select YES, if you have more payments to load – select NO and load the other payments.

If you have all the payments loaded for the claim you can select Yes and the next screen will open

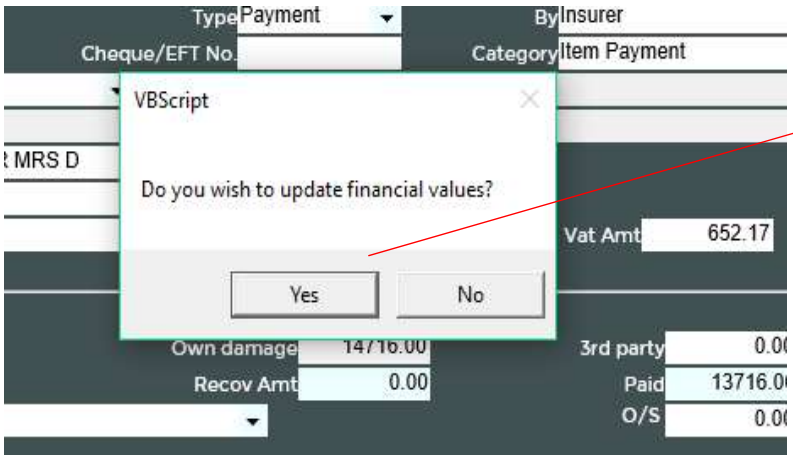


If all the payments has been loaded you can select Yes for the claim to be finalised on Flexi

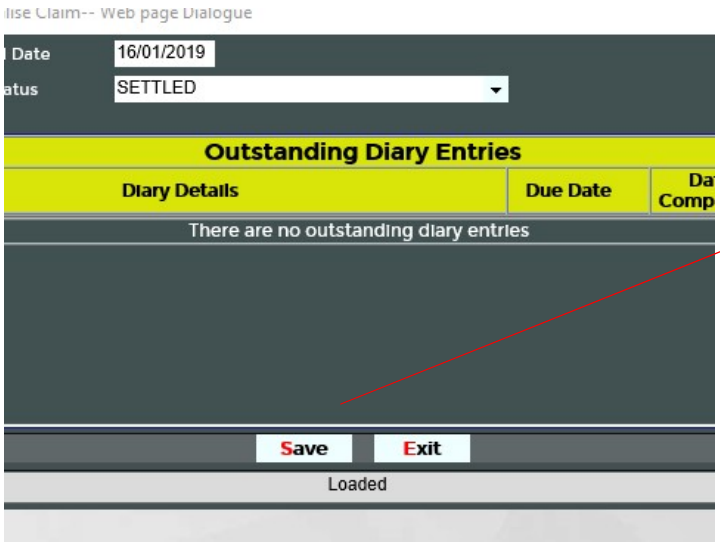
If you select No, it will not finalise the claim automatically



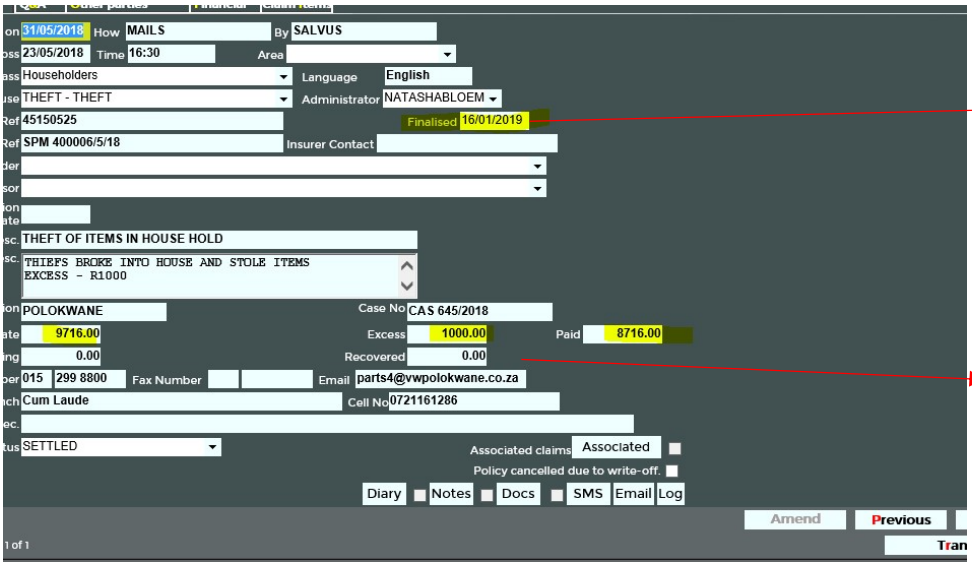
Exit – we do not send SMS from Flexi system



If the estimate of the claim was not updated before the payment was loaded you can say Yes to update it, if you updated the estimate before loading the payment and all amounts agree with the payments made you can select NO to finalise claim.
All the payments made including your excess must add up to your estimate.



Click save for the claim to finalise



Claim will show finalised

The estimate needs to be the total of the claim paid including your excess, if the estimate is more or less than your claim payments, you need to update the estimates. The amounts paid by the insurers needs to be the same on Flexi – you need to make sure this is update because it does have an effect on the Loss ratio for the client

Follow step 11 to print the claim record again for proof that the Flexi claim was updated and finalised, this will be attached on the system