

Managing Claims in EcoClaim TRAX™

- Declining claims
- Cancelling Claims
- Adding notes to claims
- Closing claims

Demo Contractor 1 [change](#)

ADD NEW + **Import +**

CLAIMS/PROJECTS

Filters: **All (15)** Open (12) Need to Accept (2) Pending (8) Closed (3) 🔍

Details	Status	Date	Type	Address	
➤	Open	2025-08-13	Water	164 Chaparral Ridge Cir SE, Calgary, AB	Details →
➤	Open	2025-03-20	Fire	1240 Eglinton Ave W, Mississauga, ON	Details →
➤	Open	2025-03-03	Construction	123 fake street, Red Deer, AB	Details →
➤	Open	2025-01-07	Water	654 Evermeadow Rd SW, Calgary, AB	Details →
➤	Open	2025-01-04	Fire	11500 35 St SE, Calgary, AB	Details →

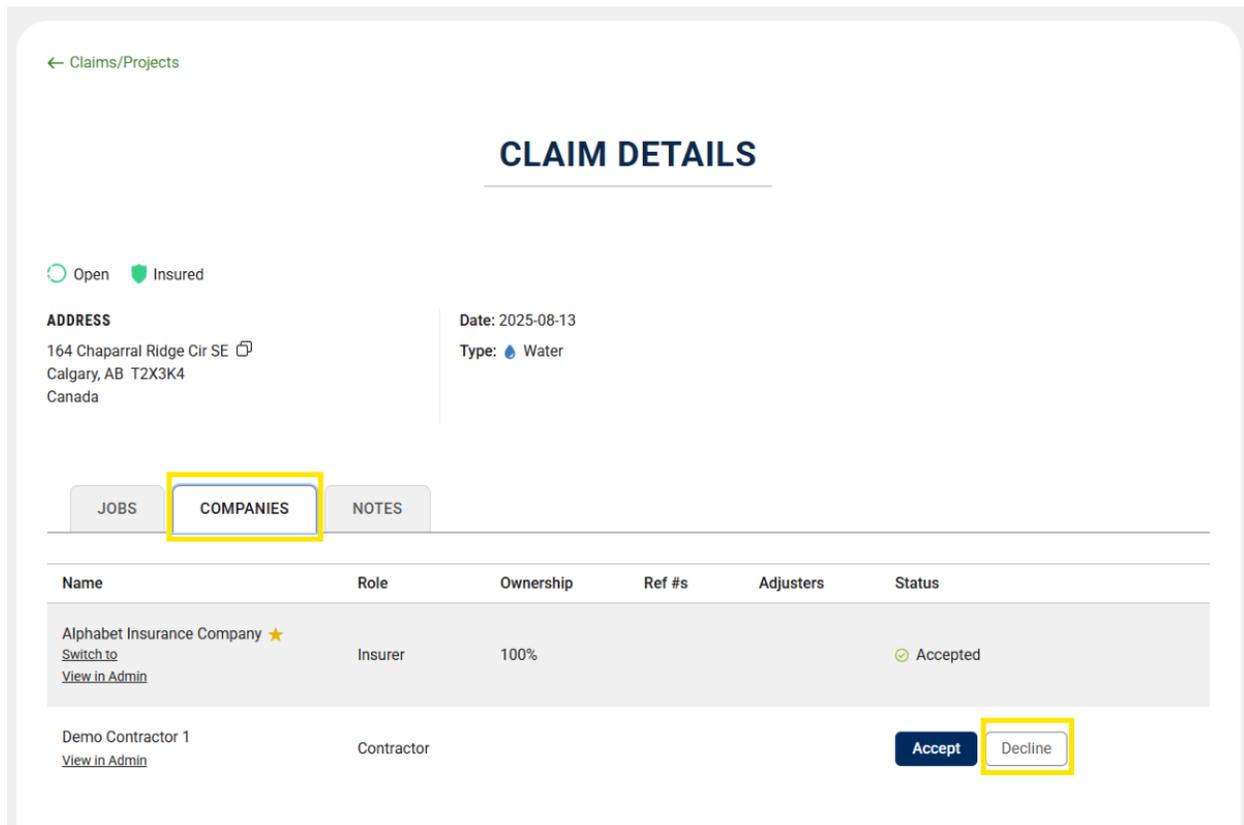
Declining Claims

How to Decline a claim:

- find the claim in your list
- click on the Details button
- click on the Companies tab
- click the decline button

When to Decline a claim:

- A claim should be declined when there is no work that happened on site or a job did not move forward. This could be when it was an estimate only, or when a claim was withdrawn



← Claims/Projects

CLAIM DETAILS

Open Insured

ADDRESS
164 Chaparral Ridge Cir SE
Calgary, AB T2X3K4
Canada

Date: 2025-08-13
Type: Water

JOBS **COMPANIES** NOTES

Name	Role	Ownership	Ref #s	Adjusters	Status
Alphabet Insurance Company ★ Switch to View in Admin	Insurer	100%			Accepted
Demo Contractor 1 View in Admin	Contractor				Accept Decline

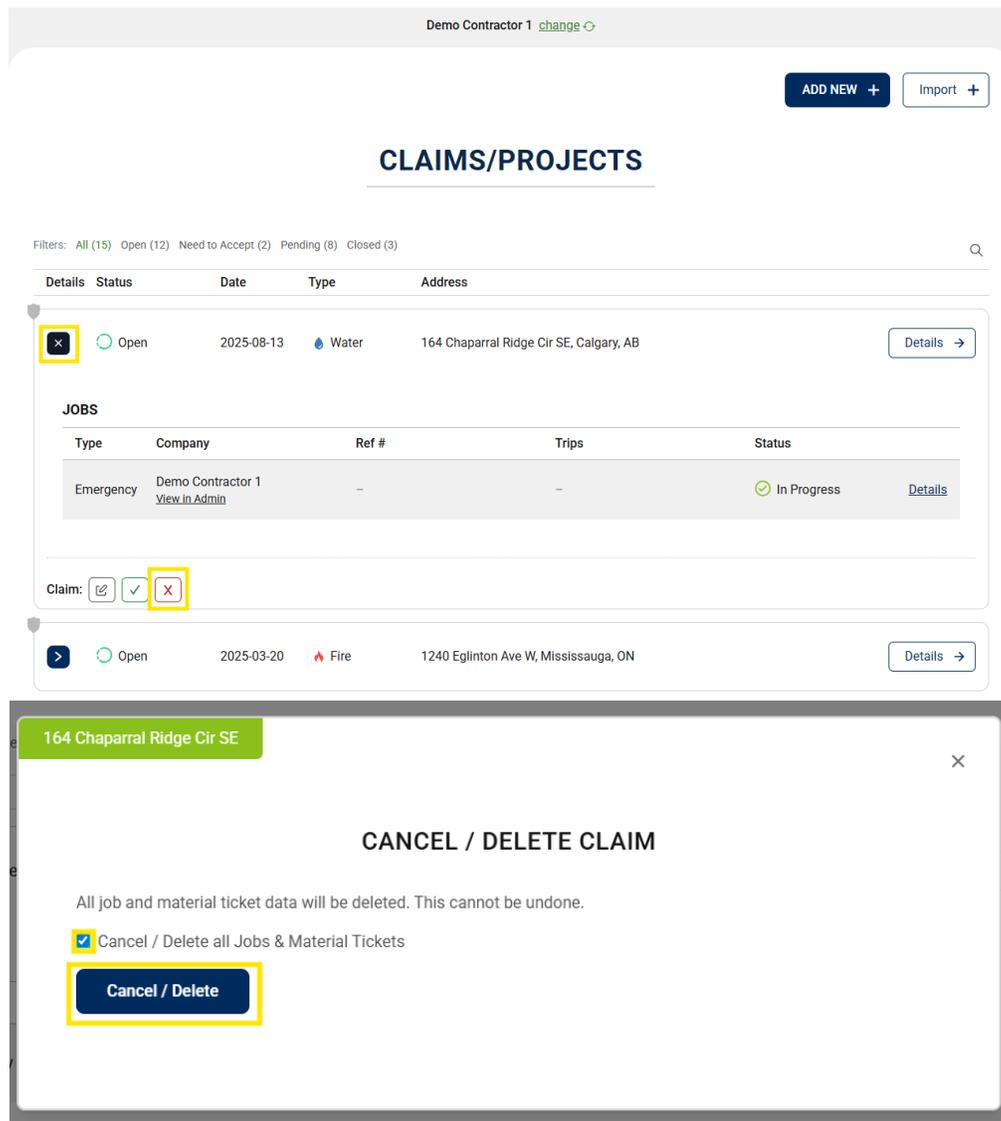
Cancelling claims

How to Cancel a claim:

- Click on the arrow beside the claim
- Click the red X to cancel the claim
- Tick the box and then click the Cancel / Delete button on the confirmation popup

When to Cancel a claim:

- A claim was already accepted, but no work happened on site
- A claim was cancelled or withdrawn



The screenshot displays the 'CLAIMS/PROJECTS' section of the EcoClaim Trax interface. At the top, there are buttons for 'ADD NEW +' and 'Import +'. Below the title, there are filter counts: 'All (15) Open (12) Need to Accept (2) Pending (8) Closed (3)'. A table lists claims with columns for 'Details', 'Status', 'Date', 'Type', and 'Address'. The first claim is highlighted with a yellow box around its 'Details' arrow and a red 'X' icon. Below the table, there are icons for 'Claim: [edit] [check] [X]'. A second claim is visible below it. A confirmation popup is overlaid on the screen, titled '164 Chaparral Ridge Cir SE' and 'CANCEL / DELETE CLAIM'. The popup contains the text: 'All job and material ticket data will be deleted. This cannot be undone.' Below this, there is a checked checkbox for 'Cancel / Delete all Jobs & Material Tickets' and a prominent 'Cancel / Delete' button highlighted with a yellow box.

Details	Status	Date	Type	Address
 	Open	2025-08-13	Water	164 Chaparral Ridge Cir SE, Calgary, AB

Type	Company	Ref #	Trips	Status
Emergency	Demo Contractor 1 View In Admin	-	-	 In Progress

Claim:   

Details	Status	Date	Type	Address
 	Open	2025-03-20	Fire	1240 Eglinton Ave W, Mississauga, ON

164 Chaparral Ridge Cir SE

CANCEL / DELETE CLAIM

All job and material ticket data will be deleted. This cannot be undone.

Cancel / Delete all Jobs & Material Tickets

Cancel / Delete

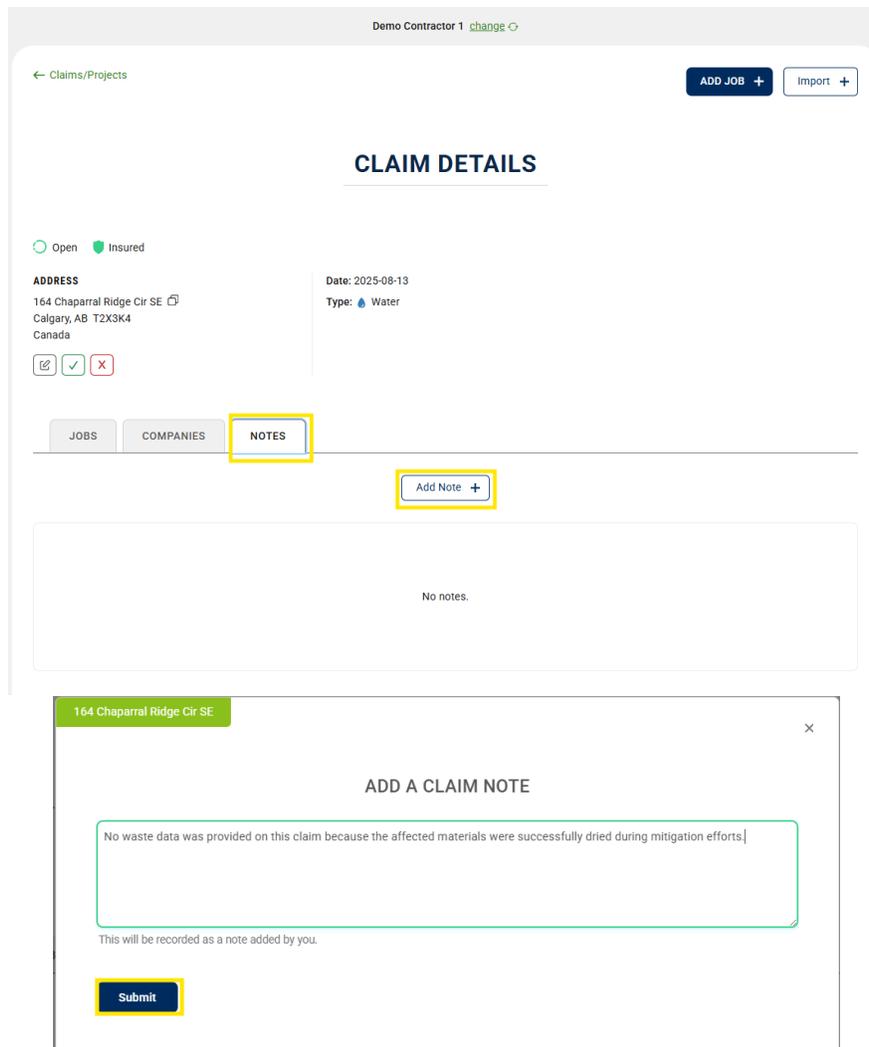
Add a note to a claim

How to add a note:

- Click the details button on the claim
- Click the Notes tab
- Click add note
- Enter the note in the popup window then click Submit

When to add a note:

- When work happened on a claim but no waste data was collected
- Any other unusual circumstances



The screenshot displays the 'CLAIM DETAILS' page in the EcoClaim Trax system. The page title is 'CLAIM DETAILS' and it shows the claim status as 'Open' and 'Insured'. The address is '164 Chaparral Ridge Cir SE, Calgary, AB T2X3K4, Canada'. The date is '2025-08-13' and the type is 'Water'. The 'NOTES' tab is selected, and an 'Add Note +' button is visible. A popup window titled 'ADD A CLAIM NOTE' is open, showing a text area with the note: 'No waste data was provided on this claim because the affected materials were successfully dried during mitigation efforts.' The 'Submit' button is highlighted.

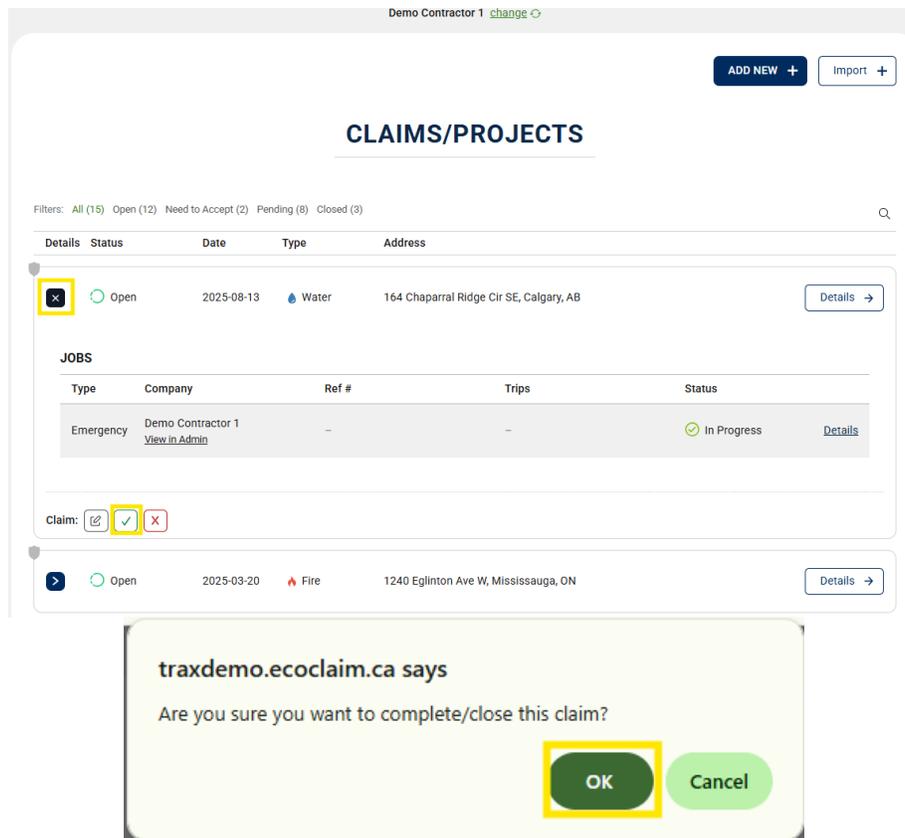
Closing a claim

How to Close a claim:

- Click the arrow beside the claim in the claims list
- Click the green check
- Click OK on the popup window

When to Close a claim:

- When there is no more waste data to provide on a claim where work happened
- After the last material ticket is entered
- If there is no waste data to enter, then a note can be entered prior to closing the claim



The screenshot displays the 'CLAIMS/PROJECTS' interface. At the top right, there are 'ADD NEW +' and 'Import +' buttons. Below the title, filters show 'All (15)', 'Open (12)', 'Need to Accept (2)', 'Pending (8)', and 'Closed (3)'. A search icon is on the right. The main table has columns: Details, Status, Date, Type, and Address. The first row shows a claim with a green checkmark icon highlighted in a yellow box, status 'Open', date '2025-08-13', type 'Water', and address '164 Chaparral Ridge Cir SE, Calgary, AB'. Below this is a 'JOBS' section with columns: Type, Company, Ref #, Trips, and Status. A job is listed with type 'Emergency', company 'Demo Contractor 1', and status 'In Progress'. At the bottom of the claim list, there are icons for edit, checkmark (highlighted in yellow), and close. A second claim is partially visible below with status 'Open', date '2025-03-20', type 'Fire', and address '1240 Eglinton Ave W, Mississauga, ON'. A confirmation popup is overlaid at the bottom, titled 'traxdemo.ecoclaim.ca says' with the question 'Are you sure you want to complete/close this claim?'. It features two buttons: 'OK' (highlighted in yellow) and 'Cancel'.