

Mobile  
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Intelligent  
Solutions for  
Enterprises



# MECWISE<sup>®</sup> CLAIMS

**User Guide  
For  
Administrators**

***Developed & Published by***



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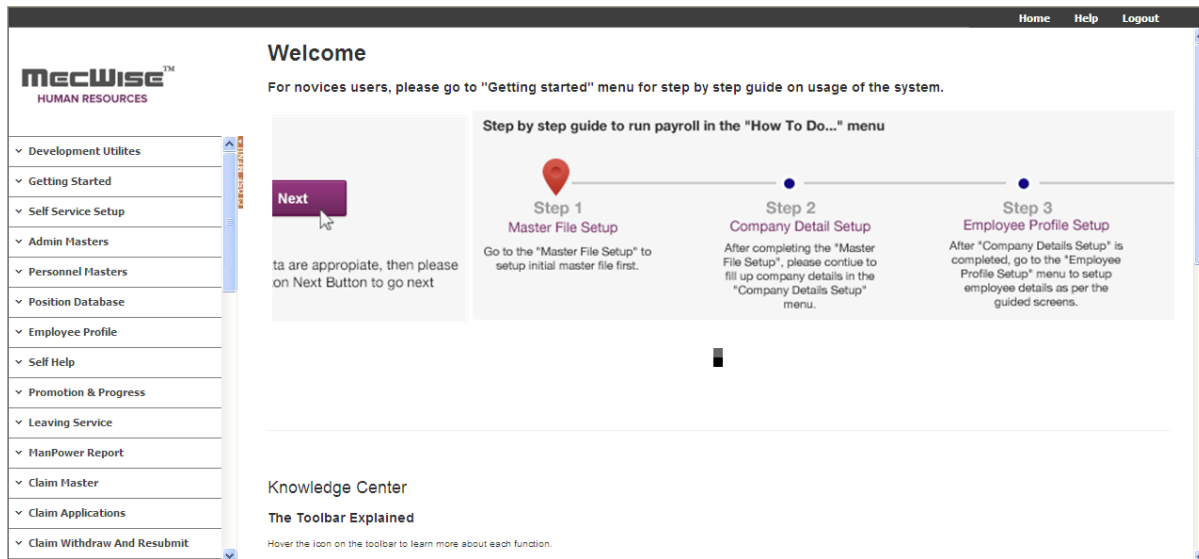
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# 1 Conventions Used

This section gives a detailed explanation of the conventions used in MecWise® Claims.

Upon login, the Welcome Screen will be displayed as below.



The left hand side of the Window contains the Menu.



When clicking on menu option, the option will expand to display sub-system's modules.

▲ **Claim Master**


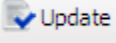

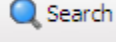
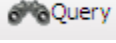

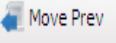
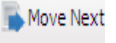

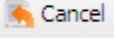

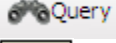
- Currency
- GL Code
- Claim Type
- Benefit Scheme
- Claim Entitlement
- Transport Fare
- Clinic Status
- Clinic Code
- Vehicle Master
- GST/VAT Code
- Project Master
- Fund Master

The Toolbar shows at the top of the screen when any of the modules are selected. It contains a row of icons for easy execution of commands.

Below is the explanation of some of the commonly used icons:



*Toolbar*

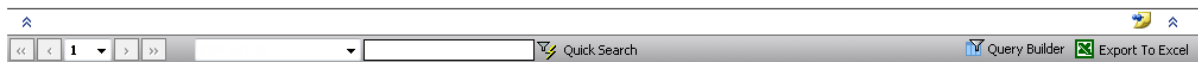
-  **Add**      Initiate a new record (Blank template).
-  **Update**      Update the existing information in the record.
-  **Delete**      Deletes the current record.
-  **Search**      Search for records using a Query Builder.
-  **Query**      Search records for records with fields similar to that displayed on screen. If no fields are entered, system will display all available records under that module.
-  **Print**      Print current record in report form (If available).
-  **Move Prev**     **Move Next**    Access the previous/next record without having to exit from the current screen.
-  **Save**      Save most recent data entered in the record.
-  **Cancel**      Cancel the current operation.
-  **Exit**      Return to header screen. This icon is usually displayed after the **Cancel** button is clicked on.
-  **Query**      If you have forgotten the functions any icon or come across an unfamiliar icon, place the mouse cursor over the icon for a few seconds. A description of the function will be displayed.

The Collapsible Panel is located under the Toolbar. It displays a browser listing the different records according to the user's specifications.

*Collapsible Panel*



(OR)





Add new detail Record



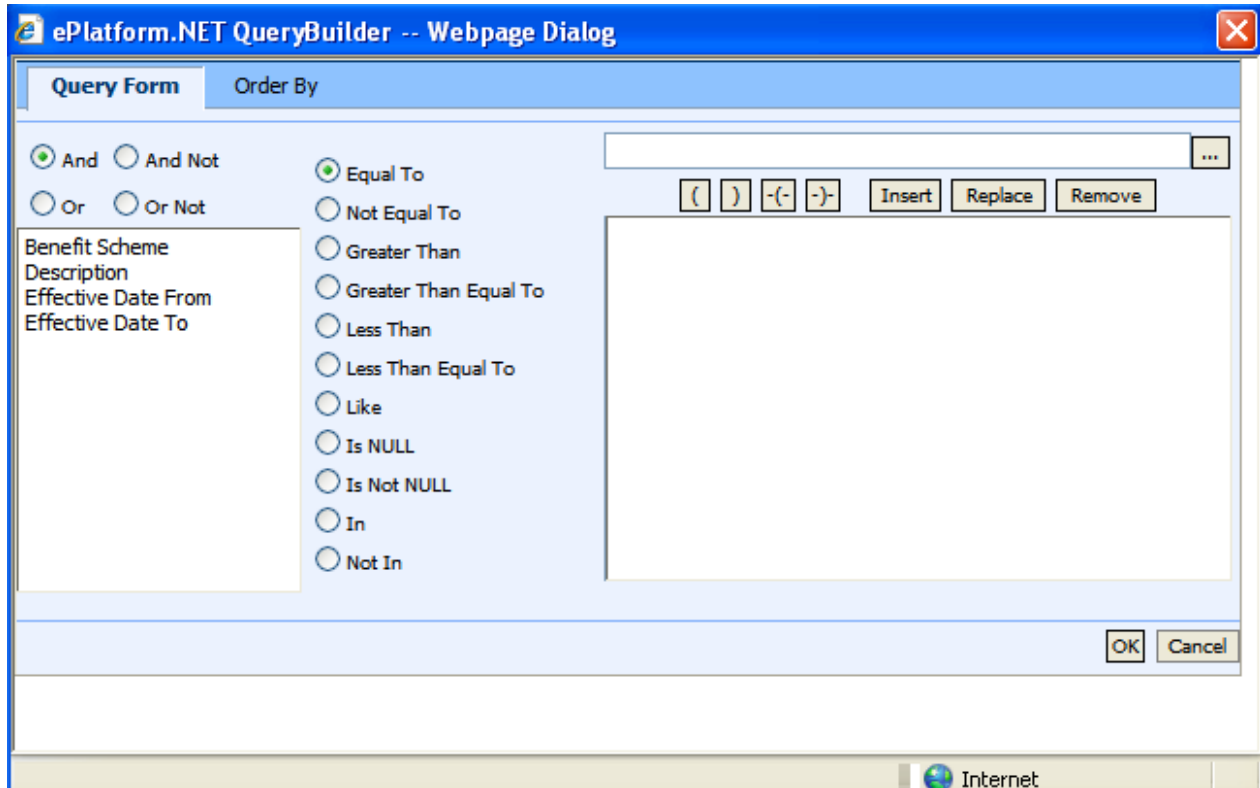
Query Builder to query, filter and sort records for display in the browser.



Export records from the browser to excel format.

## 2 Query Builder

The Query Form is for setting the criteria so as to display only a range of required records for viewing.



Query Form

These are some basic concepts and various signs used in the query form:

For Alphabetical Values:

$a < b < c < \dots < z$ .

For values that contain 2 or more alphabets, always start comparing the values from **left-to-right**.

Example 1:  $ad < ar$

Reason: d is less than r

Example 2:  $bd < d$

Reason: b is less than d

Example 3:  $bcd < bcf$

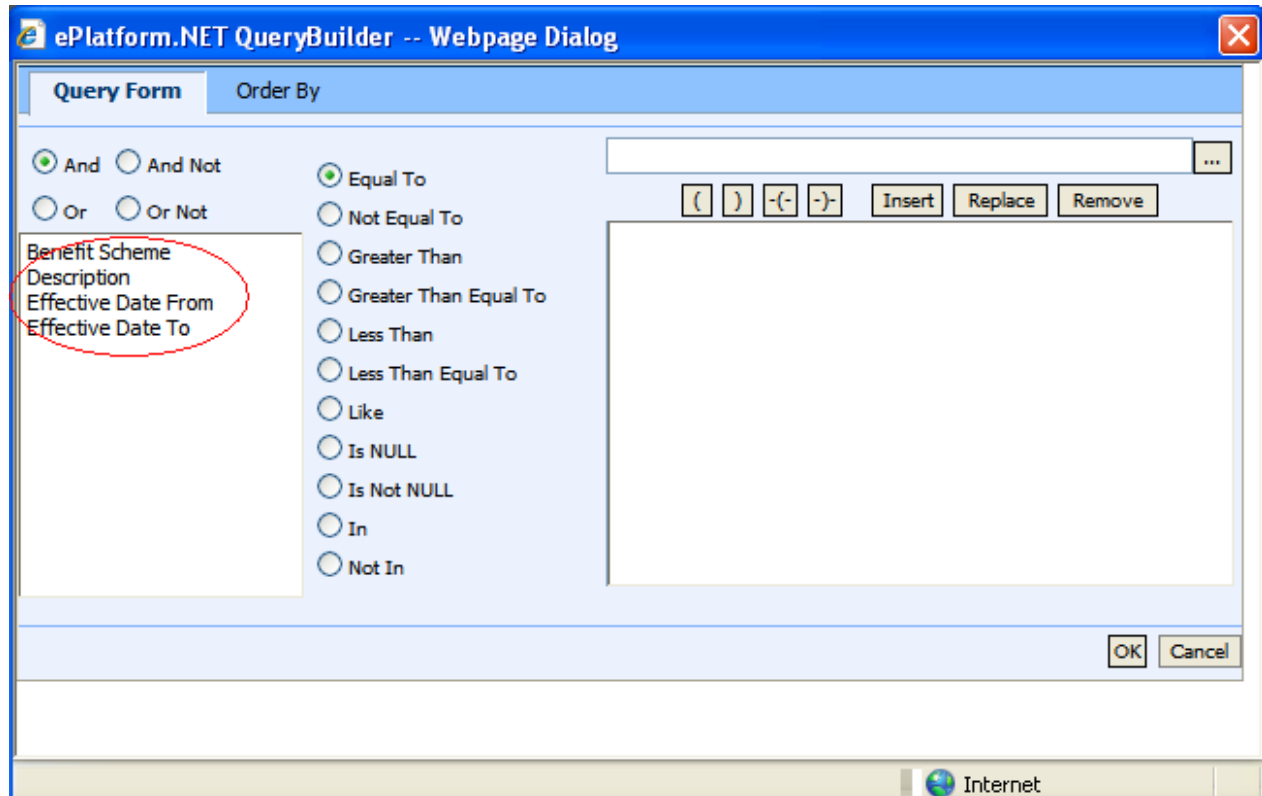
Reason: d is less than f.

For Numerical Values:



1 < 2 < 3 < ... ..

Using the Query form is essentially forming sentences specifying search criteria. Firstly select the subject criteria from the screen on the left.

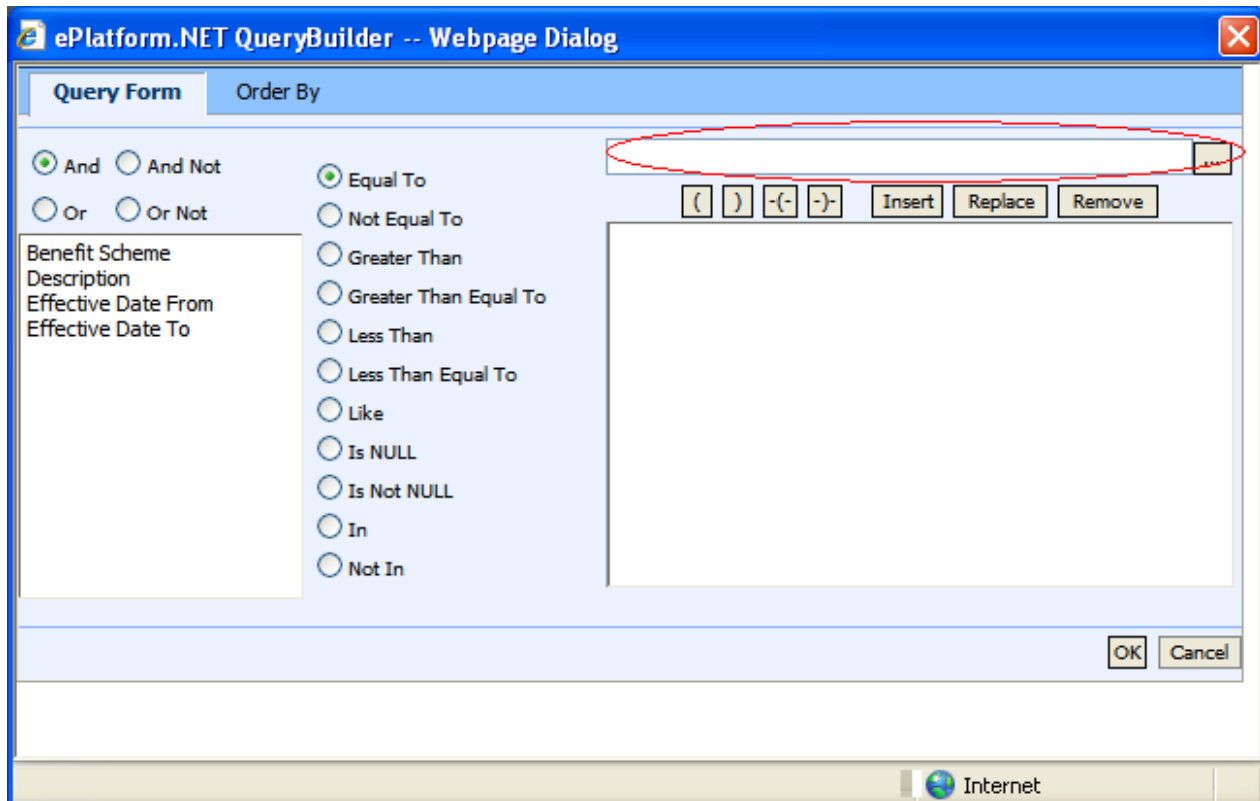


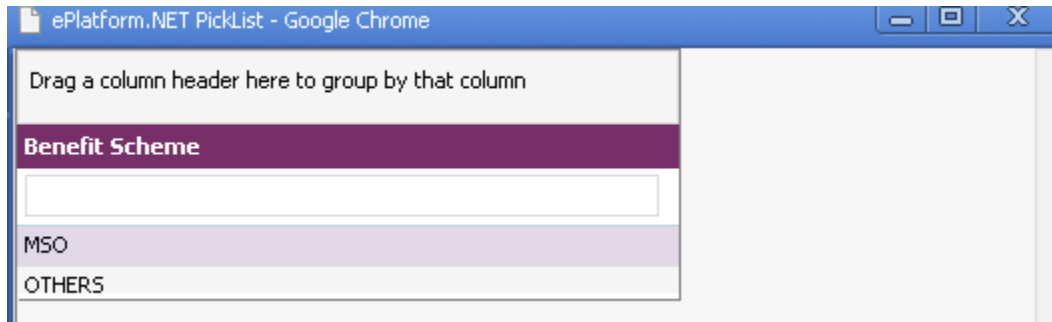
Select the desired condition from the column beside the subject screen.

### Meaning of Condition

<input type="radio"/> Equal To	_____	Is
<input type="radio"/> Not Equal To	_____	Is not
<input type="radio"/> Greater Than	_____	Value more than.
<input type="radio"/> Greater Than Equal To	_____	Value more than and equals to.
<input type="radio"/> Less Than	_____	Value less than.
<input type="radio"/> Less Than Equal To	_____	Value less than and equal to.
<input type="radio"/> Like	_____	Containing.
<input type="radio"/> Is NULL	_____	Have no values/Does not exist.
<input type="radio"/> Is Not NULL	_____	Has values/Exists,
<input type="radio"/> In	_____	Including.
<input type="radio"/> Not In	_____	Not including.

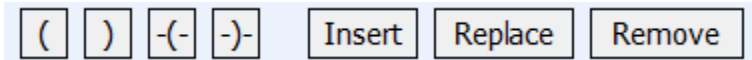
Next, enter the data in the field located in the top right hand of the **Query Form**. You can choose to enter the data manually or select from the pick list by clicking on the selection button beside the field.





Pick List

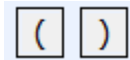
To select the desired object, simply click once on it.



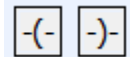
Query Form Icons

**Icons**

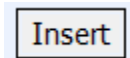
**Implication**



Open and Close Bracket.  
Used together in situations of multiple conditions.  
Conditions within brackets will be dealt with first.



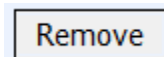
Used to remove the open and close bracket respectively.



Input conditions defined.



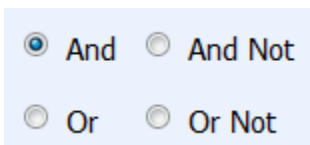
Replace any highlighted condition with another condition.



Remove the highlighted condition.

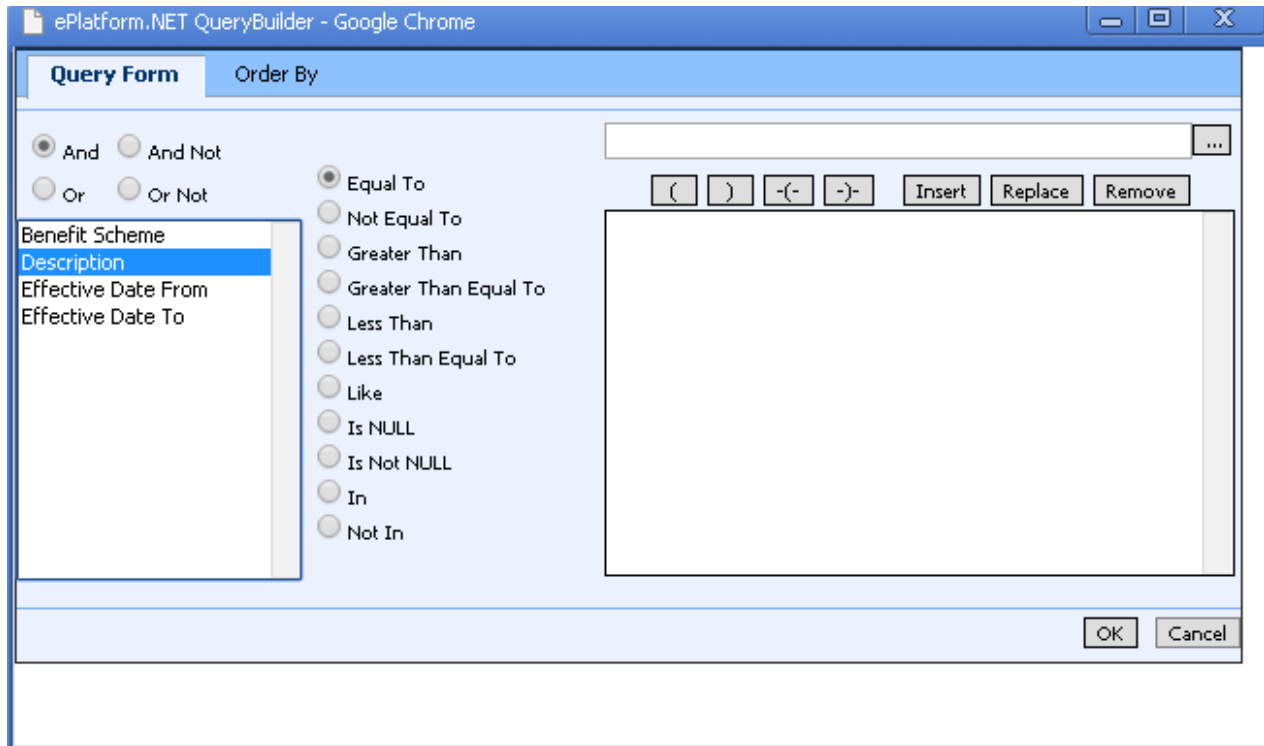
After entering a single condition, click on Insert to input the condition. This condition will be displayed in the screen.

To link 2 conditions together, make use of the selections located in the top left hand corner of the form after the 1st condition has been entered before entering the 2nd condition.



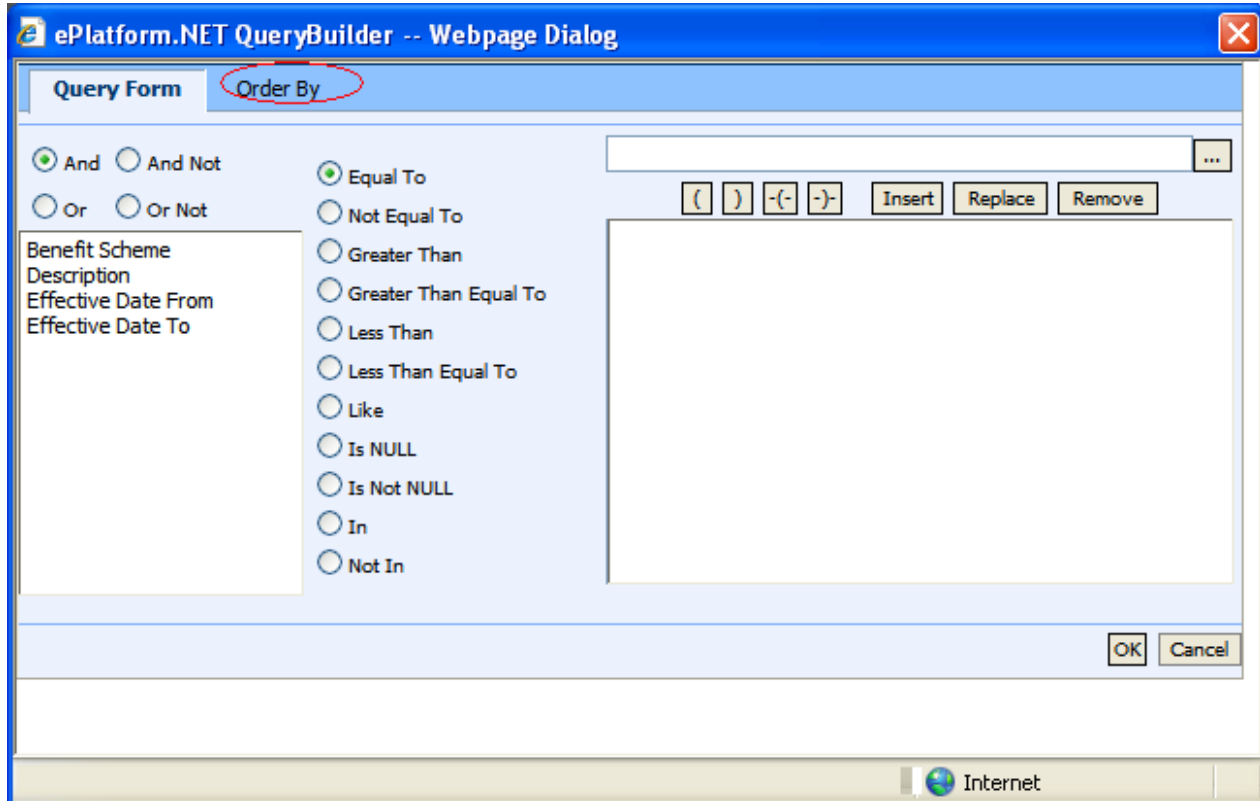
Icon	Implication
<input checked="" type="radio"/> And	System will filter only records satisfying both conditions.
<input type="radio"/> And Not	System will filter records satisfying the 1st condition and eliminate those that satisfy the 2nd condition.
<input type="radio"/> Or	System will filter records that satisfy either condition.
<input type="radio"/> Or Not	System will filter records that satisfy 1st condition or those that do not satisfy the 2nd condition.

At the bottom of the Query Form is another row of icons.





Icon	Implication
<input type="button" value="OK"/>	Confirm conditions set.
<input type="button" value="Cancel"/>	Exit Query Form.



By clicking on the **Order by** tab, the user can pre set the order in which the records filtered will be listed.



### Order by Tab

Click on the property (From left hand screen), which the listing will be done according to. Click on  to add the property to the screen on the right.

Conversely, to unselect a property, click on it and click on  to return it to the screen on the left.

  
 moves the property higher or lower in position/priority in the case of multiple properties selected.

Ascending Order: a, b, c, ....., z / 1, 2, 3...9

Descending Order: z, y, x, ..., a / 9, 8, 7...1

To start the filtering with conditions and order defined, click on **OK**. (Located at bottom of Order By tab)




The records, which fit the conditions laid down, will be listed in the Browser.

A typical browse screen constitutes of titled columns and rows of stored data. A sample of a browse screen is shown below.

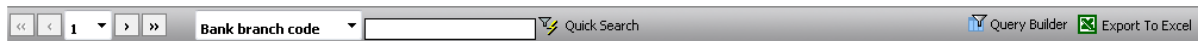
Bank branch code	Bank address	Bank contact number	Create date	Created by	Time log	User log
001	DBS Shenton Way		01/01/2001 00:00:00	eplatform	01/01/2001 12:00:00	eplatform
002	DBS Jurong		01/01/2001 00:00:00	eplatform	01/01/2001 12:00:00	eplatform
003	Shenton Way (03)		01/01/2001 00:00:00	eplatform	01/01/2001 12:00:00	eplatform
004	Parkway Parade (004)		01/01/2001 00:00:00	eplatform	01/01/2001 12:00:00	eplatform
005	DBS Toa Payoh		01/01/2001 00:00:00	eplatform	01/01/2001 12:00:00	eplatform
006	DBS Queenway		01/01/2001 00:00:00	eplatform	01/01/2001 12:00:00	eplatform

**Browser**

Below is the explanation of the icons on the collapsible panel:

-  Click this to expand the browser for viewing.
-  Click this to collapse/hide the browser.
-  To lock current browser status (Expanded/Hidden).

Within the browser, there are other icons to view, filter and export the information from the browser.



**Browser Icons**

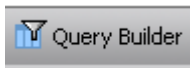


Navigator. To view next/previous screen of records.

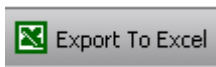


Search function. Select field from drop down list on the left and enter the data/keywords to search through records for a match.

Click on the button  to start search process.



Query Builder to query, filter and sort records for display in the browser.



Export records from the browser to excel format.

### 3 Introduction

MecWise® Claims is a fully automated HR claims processing solution that turns the laborious and document-heavy process into a streamlined process. It's a web-based paperless claims management system which enables employees to submit the claim on-line with supporting documents attached and managers to approve/reject the claim request via email.

Functions to be performed by the system:

- (a) Enables employees to submit their claim on-line.
- (b) Routes submissions to authorized verifier and the approver of claim application can Approve/Reject the claim request with sufficient details and supporting documents via email.
- (c) Calculates the Claim entitlement of all eligible employees every year
- (d) Enables employees to withdraw any claim applications prior to or after it has been approved; an approval of cancellation is sent to the approving officer.
- (e) Provides on-line enquiry facility to allow employees to check the status of their claim applications.
- (f) Interface with MecWise® Payroll allows posting the processed claim payment records to payroll and provide accurate results in payroll processing.
- (g) Generates relevant management and statistical reports.

## 4 Master File Setup

The **Master File Setup** menu contains the following set of master data which are necessary for the Claim Management System. Go to Getting Started Guide → Master File Setup. The Master File Setup consists of 5 sub-modules:

- Cost Centre
- Segment for Organization Unit
- Organization Unit
- Salary Scale
- Job Family

### Master File Setup

- 1 **Cost Centre**
- 2 Segment for Organization Unit
- 3 Organization Unit
- 4 Salary Scale
- 5 Job Family

*Note: For more details on these modules refer to **User Manual for Employee Profile Management System**.*

The system comes with default setup data. If the setup data are appropriate, then please click **Next button** to view next setup screen.

After completing the **Master File Setup**, please continue to fill up company details in the **Company Details Setup** menu.



## 4.1 Cost Centre

This master file captures the different cost center of the employee.

**Cost Center**

Cost Centre Code

Description

Effective Date From  Effective Date To

Created By  Modified By

*Note: Effective Date From and Effective Date To fields are auto-generated by system and is used for information purposes.*

The **Cost Centre code** and **Description** can be expressed as a combination of alphabets and numbers i.e. alpha numeric. Payroll reports are available by Cost Center Code.

- Click the **Add button** to add a new record.

Cost Center	Cost Center DESC	CREA DATE	CREA BY	TIME LOG	USER LOG	COMP CODE
<a href="#">ADMIN</a>	Admin	<a href="#">28/02/2007 19:43:12</a>	<a href="#">eplatform</a>	<a href="#">23/10/2013 10:33:06</a>	<a href="#">eplatform</a>	<a href="#">SDA</a>
<a href="#">CEO</a>	Chief Executive Officer's Office	<a href="#">03/10/2013 13:39:40</a>	<a href="#">hr_user01</a>	<a href="#">23/10/2013 10:33:37</a>	<a href="#">eplatform</a>	<a href="#">SDA</a>

**Cost Center**

Cost Centre Code

Description

Effective Date From  Effective Date To

Created By  Modified By

- Click on the **Save button** to save the record.
- Then click on the **Cancel button**.

## 4.2 Segment for Organization Unit

This file allows entry of different segment code. The different segment code will help to form the organization unit code in the Organisation Unit Master file. Note that the organization unit code can accept max 40 characters only.

### Segment Code for Organization Unit

Segment Name

Segment Code

Description

Abbr Description

Modified By/On

- Click the **Add** button to add a new record.

Update Search Print Move Next Cancel

Segment Name	Quick Search
SEG 1	OTH Others 11/01/2007 18:53:00 dbo
SEG 2	FIN Finance 03/10/2013 13:54:46 hr user01
SEG 2	HR Human Resource 03/10/2013 13:54:29 hr user01
SEG 2	IT Information Technology 03/10/2013 13:55:08 hr user01
SEG 2	LOG Logistic 03/10/2013 13:58:42 hr user01
SEG 2	MAR Marketing 03/10/2013 13:57:37 hr user01
SEG 2	PRO Production 03/10/2013 13:57:57 hr user01

### Segment Code for Organization Unit

Segment Name

Segment Code

Description

Abbr Description

Modified By/On

- Enter **Segment Name**, **Segment Code** and **Description**.

### Segment Code

Segment Name

Segment Code

Description

Abbr Description

Modified By/On

- Click the **Save** button to save the record.

Add 
 Update 
 Delete 
 Search 
 Query 
 Print 
 Move Prev 
 Move Next 
 **Save**
 Cancel 
 Exit

<< < 1 > >> Segment Name  Quick Search

Segment Name	Segment Code	Description	Time Log	User Log
<a href="#">SEG_0</a>	<a href="#">CEO</a>	<a href="#">Chief Executive office</a>	23/10/2013 10:42:19	<a href="#">eplatform</a>
<a href="#">SEG_1</a>	<a href="#">ADMIN</a>	<a href="#">Corporate Administration</a>	03/10/2013 13:47:17	<a href="#">hr_user01</a>
<a href="#">SEG_1</a>	<a href="#">OPER</a>	<a href="#">Operation</a>	03/10/2013 14:00:12	<a href="#">hr_user01</a>
<a href="#">SEG_1</a>	<a href="#">OTH</a>	<a href="#">Others</a>	11/01/2007 18:53:00	<a href="#">dbo</a>
<a href="#">SEG_2</a>	<a href="#">FIN</a>	<a href="#">Finance</a>	03/10/2013 13:54:46	<a href="#">hr_user01</a>
<a href="#">SEG_2</a>	<a href="#">HR</a>	<a href="#">Human Resource</a>	03/10/2013 13:54:29	<a href="#">hr_user01</a>

### Segment Code for Organization Unit

Segment Name

Segment Code

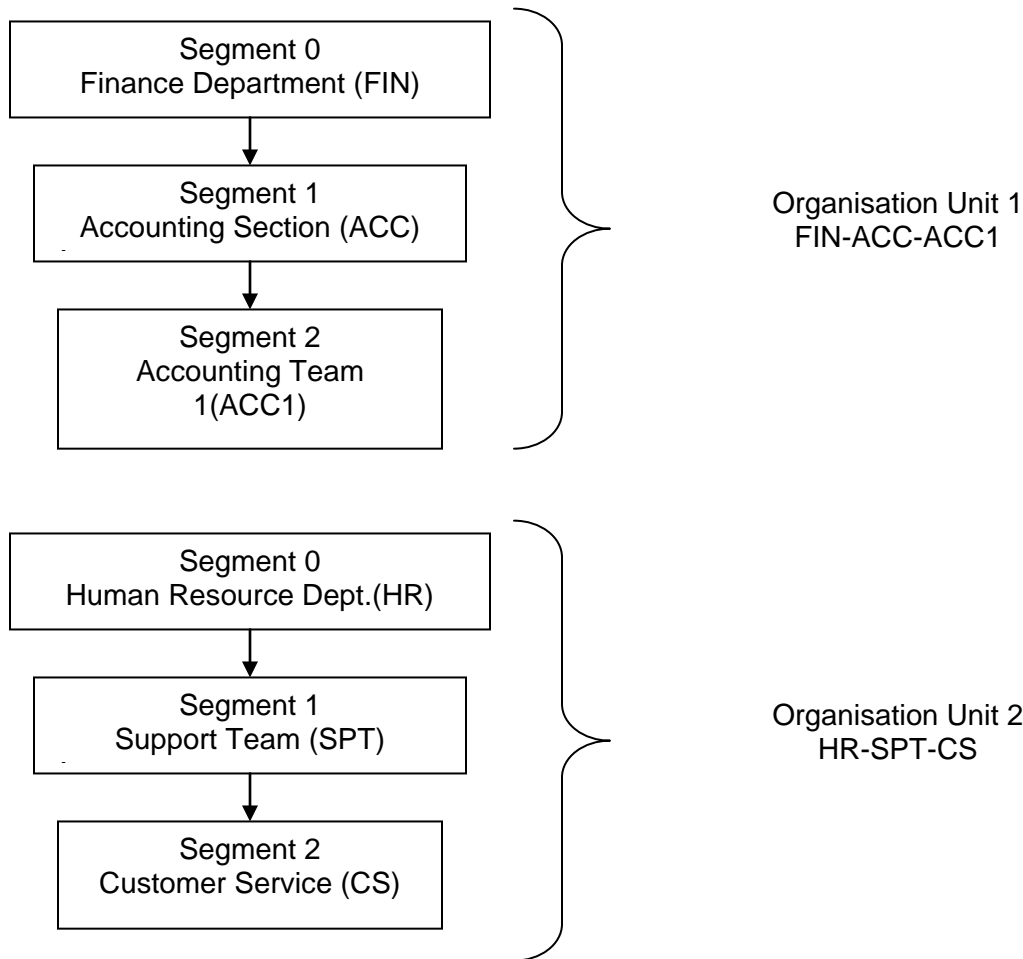
Description

Abbr Description

Modified By/On

- Then click on the **Cancel button**.
- This allows users to set the Segment Codes relevant to an Organization’s structure. Segment Codes form the levels that make up the Organisation units exists in an organization.

*Note: The Segment Name is not unique for each organization unit, i.e. multiple segment codes exist for a single segment name.*



### 4.3 Organization Unit

This module captures different organization units within the company. Reports are available for printing by **Organization Unit**.

**Organisation Unit**

---

Organisation Unit

Cost Centre

Segment 0  Segment 5

Segment 1  Segment 6

Segment 2  Segment 7

Segment 3  Segment 8

Segment 4  Segment 9

Description

Modified By/On

- Click the **Add** button to add a new record.

<< < 1 > >>
Organisation unit cod

Organisation unit code	Time log	User log
<a href="#">CEO</a>	<a href="#">03/10/2013 14:04:10</a>	<a href="#">hr_user01</a>
<a href="#">CEO-ADMIN-FIN</a>	<a href="#">03/10/2013 14:05:42</a>	<a href="#">hr_user01</a>
<a href="#">CEO-ADMIN-HR</a>	<a href="#">03/10/2013 14:05:09</a>	<a href="#">hr_user01</a>
<a href="#">CEO-ADMIN-IT</a>	<a href="#">03/10/2013 14:06:16</a>	<a href="#">hr_user01</a>
<a href="#">CEO-OPER-PRO</a>	<a href="#">03/10/2013 14:08:14</a>	<a href="#">hr_user01</a>

**Organisation Unit**

---

Organisation Unit

Cost Centre

Segment 0  Segment 5

Segment 1  Segment 6

Segment 2  Segment 7

Segment 3  Segment 8

Segment 4  Segment 9

Description

Modified By/On

- Enter **Cost Centre Code, Segment 0 Code, and Segment 1 Code** etc...

Organisation Unit

---

Organisation Unit

Cost Centre

Segment 0  Segment 5

Segment 1  Segment 6

Segment 2  Segment 7

Segment 3  Segment 8

Segment 4  Segment 9

Description

Modified By/On

- Click the **Save button** to save the record. Then click on the **Cancel button**.

Organisation Unit

---

Add 
 Update 
 Delete 
 Search 
 Query 
 Print 
 Move Prev 
 Move Next 
  Save
 Cancel 
 Exit

<< < 1 > >> 
 Organisation unit cod
 Quick Search

Organisation unit code	Time log	User log
<a href="#">CEO</a>	<a href="#">03/10/2013 14:04:10</a>	<a href="#">hr_user01</a>
<a href="#">CEO-ADMIN-FIN</a>	<a href="#">03/10/2013 14:05:42</a>	<a href="#">hr_user01</a>
<a href="#">CEO-ADMIN-HR</a>	<a href="#">03/10/2013 14:05:09</a>	<a href="#">hr_user01</a>
<a href="#">CEO-ADMIN-IT</a>	<a href="#">03/10/2013 14:06:16</a>	<a href="#">hr_user01</a>
<a href="#">CEO-OPER-PRO</a>	<a href="#">03/10/2013 14:08:14</a>	<a href="#">hr_user01</a>

Organisation Unit

---

Organisation Unit

Cost Centre

Segment 0  Segment 5

Segment 1  Segment 6

Segment 2  Segment 7

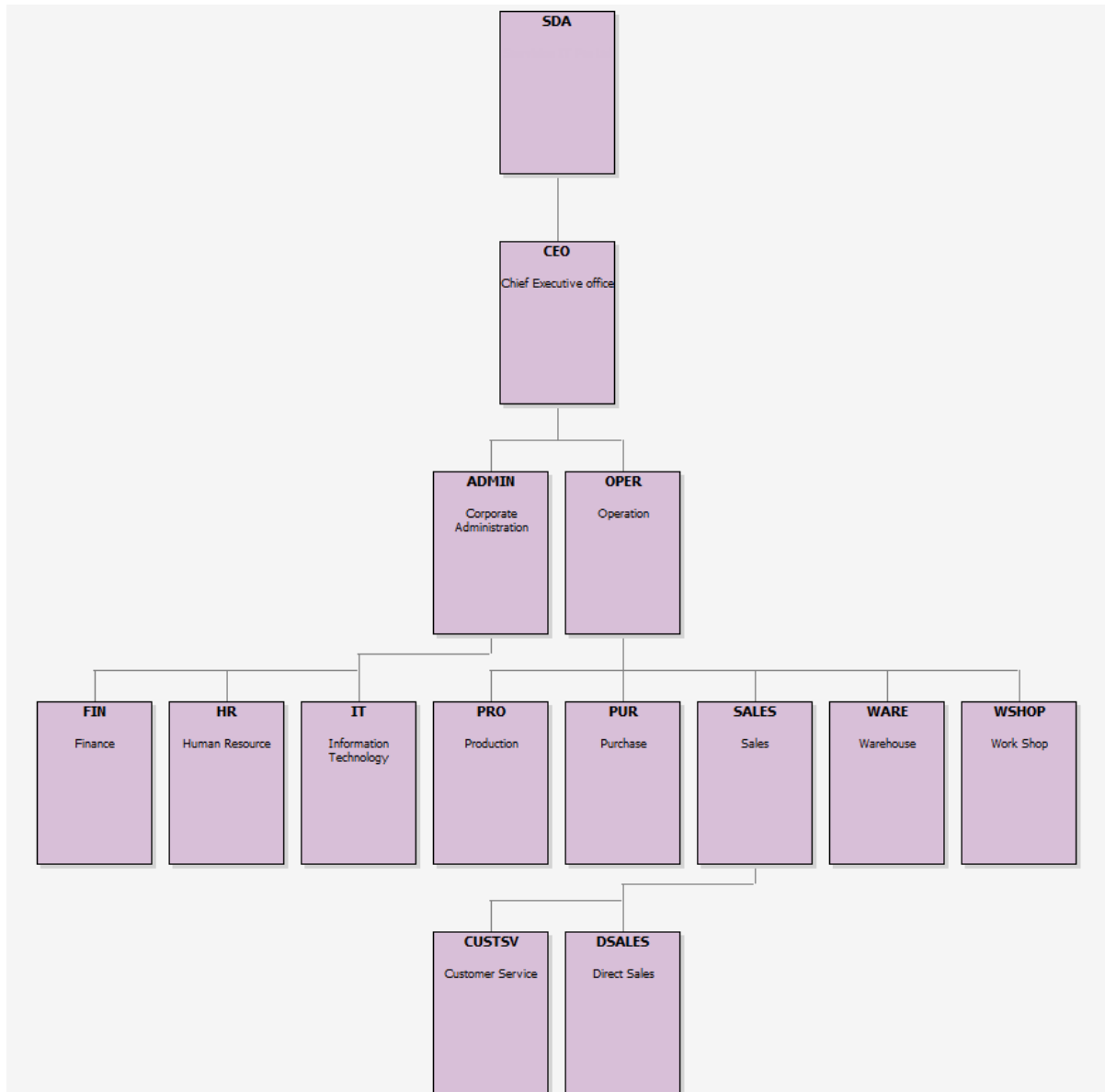
Segment 3  Segment 8

Segment 4  Segment 9

Description

Modified By/On

- The following is the default organization structure, which is set up in the system:



## 4.4 Salary Scale

This master file stores salary scale for each level of employee progression.

S/N	Basic salary	Basic 1	Basic 2	Monthly salary	Gross salary	Salary point	Create date	Created by	Time log
10	0.00	0.00	0.00	0.00	0.00	MIN	04/05/2005 14:47:43	dbo	08/09/2006 16:21:52
20	999999999.00	0.00	0.00	0.00	999999999.00	MAX	04/05/2005 14:47:52	dbo	08/09/2006 16:22:01

- Click the **Add button** to add a new record.

Salary Scale

Salary Code:

Salary Scale:

Salary Mode:

Effective Date From:  Effective Date To:

NWC Type:

Created By:  Modified By:



- Enter Information such as **Salary Code**, **Salary Scale**, **Salary Mode**, **Effective Date From**, **Effective Date To** and **NWC Type** fields.

**Salary Scale Master File**

---

Salary Code: GEN

Salary Scale: GENERAL

Salary Mode: R

Effective Date From: 01/01/2005 Effective Date To: 31/12/2099

NWC Type: 1

Created By: dbo 15/07/2005 Modified By: eplatform 02/11/2006

- To add the **Salary Scale details**, click on the **Add New** button.

**Salary Scale Master File**

---

Salary Code: GEN

Salary Scale: GENERAL

Salary Mode: R

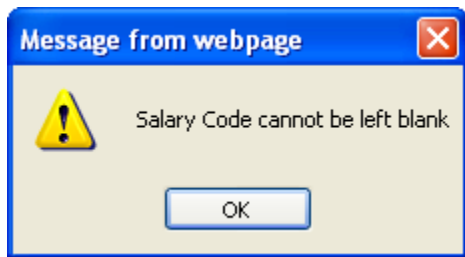
Effective Date From: 01/01/2005 Effective Date To: 31/12/2099

NWC Type: 1

Created By: dbo 15/07/2005 Modified By: eplatform 28/10/2013

Navigation: << < 1 > >> S/N Quick Search **Add New** Query Builder

- When the **Add New** button is clicked, the system checks if the required fields empty. If the field is empty, system will prompt message (shown below). Click on the **OK** button to close the message box and fill in the indicated field.



- Then click on the **Add New** button to add the Salary Scale details.

**Salary Scale Master File**

Salary Code:

Salary Scale:

Salary Mode:

Effective Date From:  Effective Date To:

NWC Type:

Created By:  15/07/2005 Modified By:  28/10/2013

Navigation: << < 1 > >> S/N < > Quick Search **Add New** Query Builder

System will show as follows:

**Salary Scale Master File**

Salary Code:

S/N:

Basic Salary:  Monthly Salary:

NPC Amt:  NPVP Amt:

Salary Point:

Created By:  Modified By:

**Refresh NWC**

Navigation: << < 1 > >> NWC Year < > Quick Search Query Builder Export To

NWC Year	NWC Rate	NWC Amount	NWC Value
----------	----------	------------	-----------

- Enter Information such as **Basic Salary**, **NPC Amt** and **Salary Point** fields.

**Salary Scale Master File**

Salary Code:

S/N:

Basic Salary:  Monthly Salary:

NPC Amt:  NPVP Amt:

Salary Point:  Gross Salary:

Created By:  Modified By:

- Click the **Save button** to save the detail record.

+ Add ↻ Update ✕ Delete 🔍 Search 🔗 Query 🖨 Print ⏪ Move Prev ⏩ Move Next 💾 Save 🚫 Cancel 🚪 Exit

Salary Scale Master File

Salary Code:   
 S/N:  ↻  
 Basic Salary:  Monthly Salary:   
 NPC Amt:  NPVP Amt:   
 Salary Point:  ↻ Gross Salary:   
 Created By:  📅 Modified By:  📅

- Click on the **Cancel button** and the **Exit button** to go back to its previous screen. If the information entered is correct, the record will be saved into the system.

Salary Scale Master File

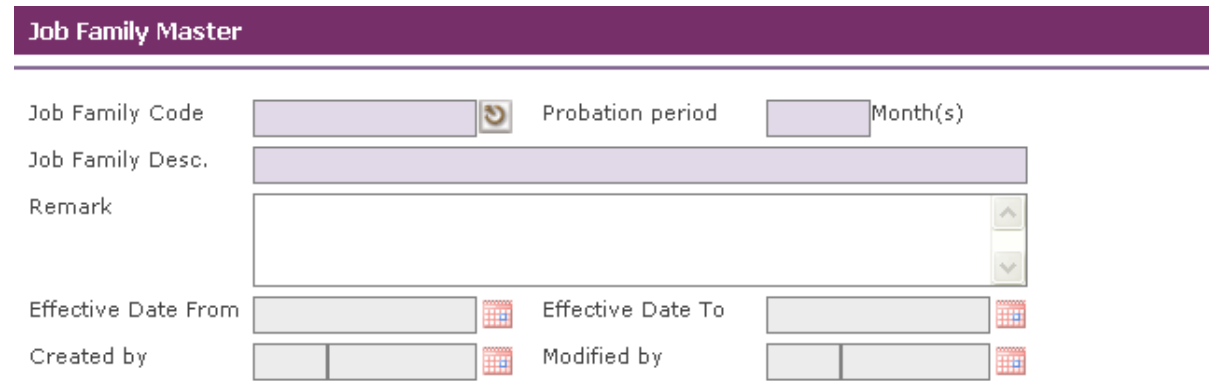
Salary Code:  ↻  
 Salary Scale:   
 Salary Mode:  ↻  
 Effective Date From:  📅 Effective Date To:  📅  
 NWC Type:  ↻  
 Created By:   📅 Modified By:   📅

⏪ < 1 > ⏩ S/N 🔍 Quick Search ➕ Add New 🔗 Query Builder


S/N	Basic salary	NPC Amt	Monthly salary	Gross salary	Salary point
10	80000.00	5000.00	85000.00	85000.00	MAX

## 4.5 Job Family

This master file is used to capture details about the Job Families that exist in the company. It stores different Appointments (Job designation) tagged to each job family.







**Job Family Master**

Job Family Code   Probation period  Month(s)

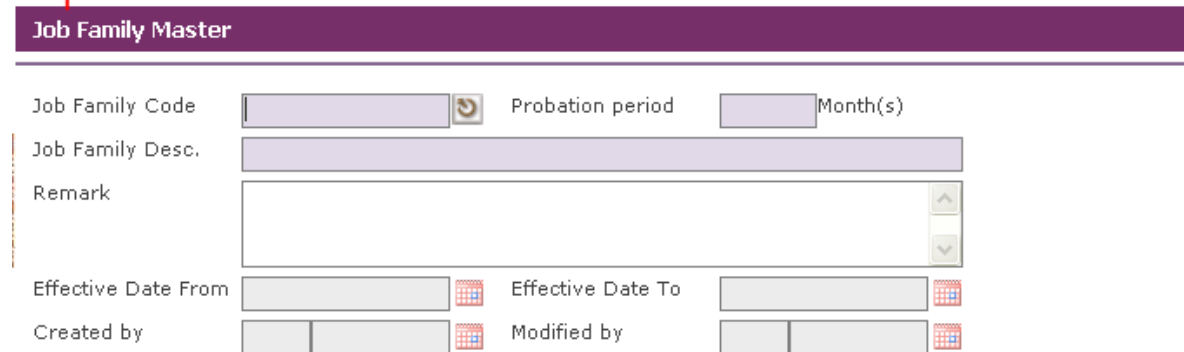
Job Family Desc.

Remark


Effective Date From   Effective Date To  

Created by   Modified by  

- Click the **Add button** to add a new record.







**Job Family Master**

Job Family Code   Probation period  Month(s)

Job Family Desc.

Remark

Effective Date From   Effective Date To  

Created by   Modified by  

- Enter the **Job Family Code, Probation Period, Job Family Description and Remark and Effective Dates Fields.**

**Job Family Master**

Job Family Code:  Probation period:  Month(s)

Job Family Desc.:

Remark:

Effective Date From:  Effective Date To:

Created by:   Modified by:

Navigation: << < 1 > >> Appointment code [ ] Quick Search

Appointment code	Appointment description	Appointment abbrev. desc.	Division Status	Create date	Created by
------------------	-------------------------	---------------------------	-----------------	-------------	------------

- Click the **Save** button to save the record.

Toolbar: + Add Update Delete Search Query Print Move Prev Move Next **Save** Cancel Exit

**Job Family Master**

Job Family Code:  Probation period:  Month(s)

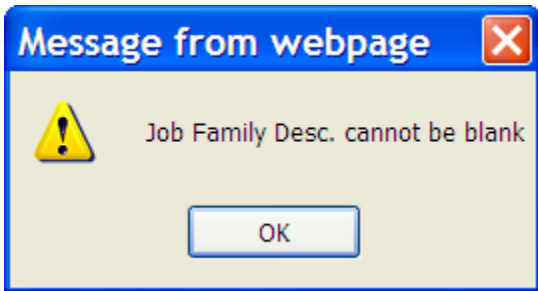
Job Family Desc.:

Remark:

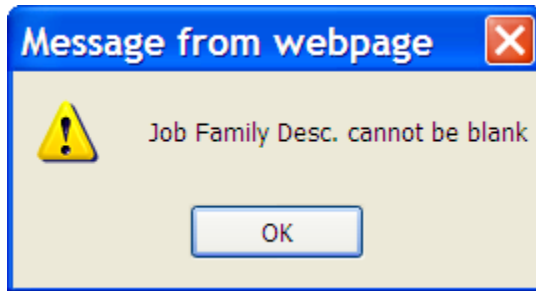
Effective Date From:  Effective Date To:

Created by:   Modified by:

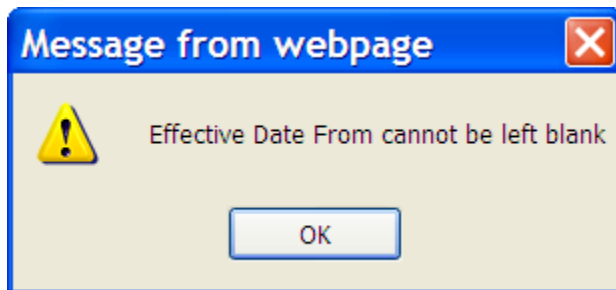
- Before the record is saved, the system checks if the required fields are empty. If these fields are empty, system will prompt the following messages:



Or



Or



- Click on the **OK button** to close the message box and fills the indicated fields.
- Then **Save** the record again. If the information entered is correct, the record will be saved into the system.

## 5 Company Details Setup

This is to set up the company information. It includes information like Bank account details and CPF Account. Go to Getting Started Guide → Company Details Setup. The following master files are available under this setup menu:

- **Company Master** – to store company information
- **CPF Account** – to setup CPF Account information

### Company Details Setup

1 **Company Master** 2 CPF Account

## 5.1 Company Master

This is to set up the company information. It includes information like Bank account details, Government Rates and Business Info.

- Click on the **Update** button to update the company details.

Company Code	Company Name	Building Number	Floor Number	Unit Number	Street Name	Country Code	Postal Code	Fax Number
SDA	Starvision Information Technology Pte Ltd	19	04	161/16	Kallang Ave	SGP	339410	

**Company Master**

Company Code:

Company Name:

Create date:   Modified By:

Company Info	Bank A/C	Govt Rates	Business Info
--------------	----------	------------	---------------

Building #:  Floor/Unit No.  -

Street Name:

Postal Code:  Country:

Telephone No.:  Fax #:

Email Address:

**Person In Charge**

Person Name:  Designation:

Telephone #:  Email Address:

*Company Master File—Company Info tab*



### **Bank A/C Tab**

This tab is to store details on Company/Employer's Bank account. Payment to employees in the form of GIRO Banking, Cheques and Cash are done through this account.

**Company Master**

Company Code:

Company Name:

Create date:

Company Info	<b>Bank A/C</b>	Govt Rates	Business Info
--------------	-----------------	------------	---------------

Bank A/C #:

Bank A/C Name:

Bank Code:

Bank Name:

*Company Master File–Company-Bank A/C tab*

### **Govt Rates Tab**

This tab captures contributions by employer such as SDF (Skill Development Fund) and MSO (Medisave-Cum-Subsidised Outpatient Scheme).

**Company Master**

Company Code:

Company Name:

Create date:

Company Info	Bank A/C	<b>Govt Rates</b>	Business Info
--------------	----------	-------------------	---------------

SDF contribution %:  CPF ind.:

SDF salary check:  MSO %:

*Company Master File–Company-Gov Rates Tab*

## **Business Info Tab**

The tab captures the details on Company business information.

**Company Master**

Company Code:

Company Name:

Create date:    Modified By:

Company Info	Bank A/C	Govt Rates	<b>Business Info</b>
--------------	----------	------------	----------------------

Nature of Business:

Company Ownership:

Country:

%Foreign:

Base Currency Code:

Foreign currency Code:

- Modify the necessary fields and click on **Save button** to save the changes.

## 5.2 CPF Account

This master file stores CPF A/C representing the type of CPF Account employees are covered by.

### CPF Account Master

CPF A/C #

Created By/On    Modified By/On   

- Click the **Add button** to add a new record.



### CPF Account Master

CPF A/C #

Created By/On    Modified By/On   

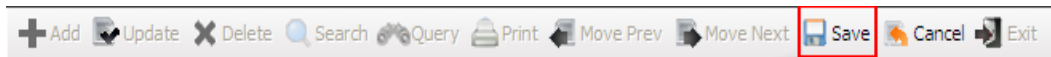
- Enter Information such as CPF A/C # field.

### CPF Account Master

CPF A/C #

Created By/On    Modified By/On   

- Click the **Save button** to save the record.



### CPF Account Master

CPF A/C #

Created By/On    Modified By/On   

## 6 Employee Profile Setup

Employee Profile Setup is to maintain employee's information, such as personal particulars, payroll details, personal details, bank details, career progression etc. Go to Getting Started Guide → Employee Profile Setup. The following files are available under this setup menu:

- **Employee Profile** – to store employee information
- **Bank Account** – to store employee's bank account information
- **Employee's new appointment** – to store employee's appointment information when employee first joins the organization
- **Employee's Resignation** - to store employee's resignation information when employee resigns from the organization

## 6.1 Employee Profile

This module captures and maintains employee’s information such as personal particulars, payroll details, and career progression. It allows creation, amendment or viewing of an employee’s record. Each employee is assigned with a unique identification number (Employee ID), which can later be used in timesheet entry as employee’s Card ID/Card No.

**Employee Profile**

Photo currently not available.

Employee Id

Name

Name	Address	Personal	Identification	Foreigner	NS	Payroll	Remark	Progression
Salutation	<input style="width: 100%;" type="text" value="Ms"/>							
Alias Name	<input style="width: 100%;" type="text"/>							
Chinese Name	<input style="width: 100%;" type="text"/>							
Created by	<input style="width: 40px;" type="text" value="dbo"/> <input style="width: 60px;" type="text" value="04/03/2013"/>		Modified By		<input style="width: 40px;" type="text" value="eplatform"/> <input style="width: 60px;" type="text" value="12/12/2013"/>			

### To update existing employee information

Click on the desired record to view pre-setup employee information. Then click on the **Update button** to update.

+ Add
Update
X Delete
🔍 Search
🔗 Query
🖨 Print
🏠 Move Prev
🏠 Move Next
💾 Save
🚫 Cancel
🚪 Exit

**Employee Profile**

Photo currently not available.

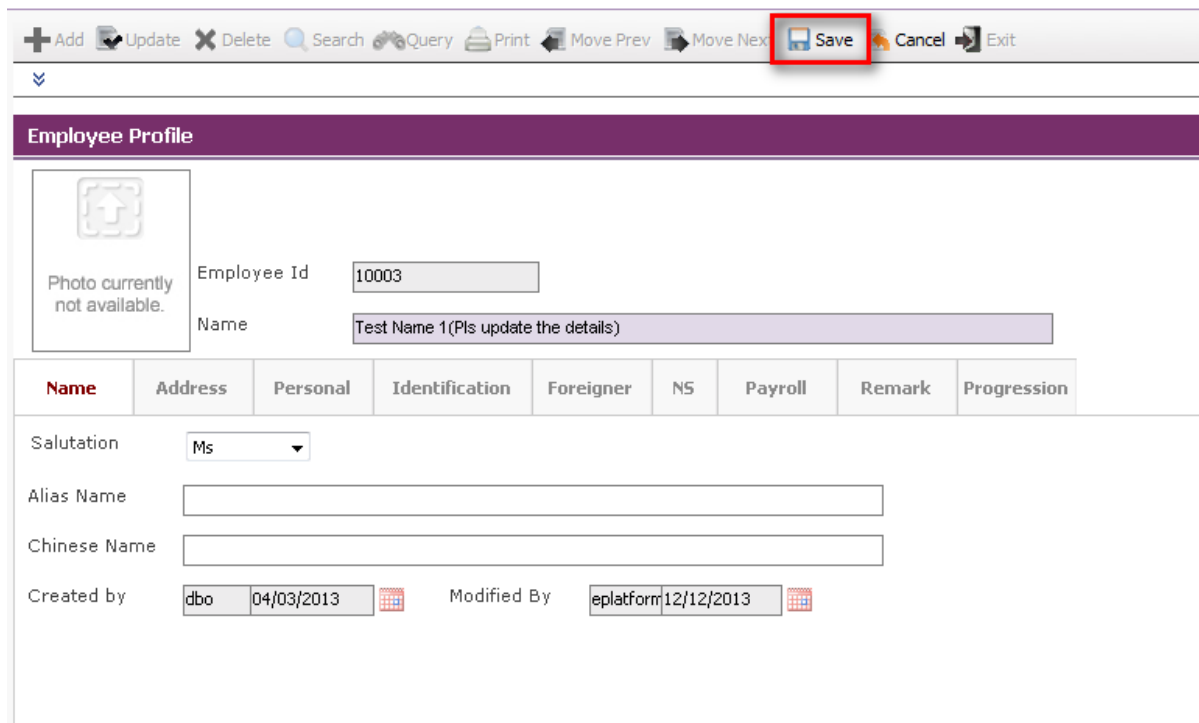
Employee Id

Name

Name	Address	Personal	Identification	Foreigner	NS	Payroll	Remark	Progression
Salutation	<input style="width: 100%;" type="text" value="Ms"/>							
Alias Name	<input style="width: 100%;" type="text"/>							
Chinese Name	<input style="width: 100%;" type="text"/>							
Created by	<input style="width: 40px;" type="text" value="dbo"/> <input style="width: 60px;" type="text" value="04/03/2013"/>		Modified By		<input style="width: 40px;" type="text" value="eplatform"/> <input style="width: 60px;" type="text" value="12/12/2013"/>			

**To add new employee information**


- Click on the **Update button** to update the employee profile details.
- Update employee information under **Name, Address, Personal, and Identification, Foreigner** (if the Employee is non-local), **NS, Payroll, Remark** tabs.
- Before you can save the whole record, you may need to fill up those highlighted fields, as they are the mandatory fields.
- System will prompt message box to notify user any missing. If such message prompts, click on the **OK button** to close the message box and fills the indicated fields.
- Then save the record again by clicking on **Save button**. If the information entered is correct, the record will be saved into the system.



+ Add Update X Delete Search Query Print Move Prev Move Next **Save** Cancel Exit

---

**Employee Profile**

  
 Photo currently not available.

Employee Id

Name

Name	Address	Personal	Identification	Foreigner	NS	Payroll	Remark	Progression
Salutation	<input type="text" value="Ms"/>							
Alias Name	<input type="text"/>							
Chinese Name	<input type="text"/>							
Created by	<input type="text" value="dbo"/>	<input type="text" value="04/03/2013"/>	<input type="text" value=""/>	Modified By	<input type="text" value="eplatform"/>	<input type="text" value="12/12/2013"/>	<input type="text" value=""/>	<input type="text" value=""/>

*Note: For more details on this module refer to User Manual for Employee Profile Management System.*

## 6.2 Bank Account

This module captures employee's Bank Account details.

The screenshot shows the 'Employee Bank' module interface. At the top, there is a toolbar with buttons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. Below the toolbar is a search bar with 'Employee ID' and a 'Quick Search' button. A table displays the following data:

Employee ID	S/N	Bank Code	Bank Branch	Bank Account	Bank Type	Payment Percent	Payment Amount	Payment S
10003		10 7171	081	096113005	A	100.00		
10004		10 7375	005	80808808		100.00		
10005		10 7117	802	5675757		100.00		
10007		10 7171	081	011040691		100.00		
10008		10 7171	003	79080080		100.00		

Below the table is a form titled 'Employee Bank' with the following fields:

- Employee ID/Name:
- Employee Account Name:
- S/N:
- Bank Code:
- Bank branch:
- Bank account:  Bank type:
- Payment percent:
- Created by:  Modified By:

- Click on the **Add** button to create a new record.

This screenshot is identical to the previous one, but with a red box highlighting the 'Add' button in the top toolbar and a red arrow pointing to it from the left. This indicates the first step in creating a new record.

- Enter the Employee ID, Account name, Bank code, Bank account etc.
- Click on the **Save** button.

+ Add Update X Delete Search Query Print Move Prev Move Next **Save** Cancel Exit Add

<< < 1 > >> **Employee ID**  Quick Search Query Builder Export To Excel

Employee ID	S/N	Bank Code	Bank Branch	Bank Account	Bank Type	Payment Percent	Payment Amount	Payment S
10003	10 7171	081	096113005	A	100.00			
10004	10 7375	005	80808808		100.00			
10005	10 7117	802	5675757		100.00			
10007	10 7171	081	011040691		100.00			
10008	10 7171	003	79080080		100.00			

---

**Employee Bank**

Employee ID/Name:

Employee Account Name:

S/N:

Bank Code:

Bank branch:

Bank account:  Bank type:

Payment percent:

Created by:  Modified By:



### 6.3 Employee's New Appointment

After updating/creating Employee profile, make sure you create a new appointment record for capturing employee(s) appointment details.

#### New Appointment Details

Employee	<input type="text"/>		<input type="text"/>
Action	<input type="text"/>	Transaction Date	<input type="text"/>

**Current**

Organisation Unit	<input type="text"/>		Grade	<input type="text"/>	
Job Family	<input type="text"/>		Appointment Code	<input type="text"/>	
Effective Date	<input type="text"/>		Joined Date	<input type="text"/>	
Confirm Date	<input type="text"/>		Appointment Date	<input type="text"/>	
			Next Incl Date	<input type="text"/>	

**Payroll:**

Payroll Mode	<input type="text"/>		Salary Code	<input type="text"/>	
Basic Salary	<input type="text"/>		Cost Centre Code	<input type="text"/>	
Basic 1	<input type="text"/>		NWC Amount	<input type="text"/>	
Basic 2	<input type="text"/>				
Monthly Salary	<input type="text" value="0.00"/>		Gross Salary	<input type="text"/>	

Reason Code	<input type="text"/>		Position Code	<input type="text"/>	
Essential Post	<input type="text"/>		Essential Category	<input type="text"/>	

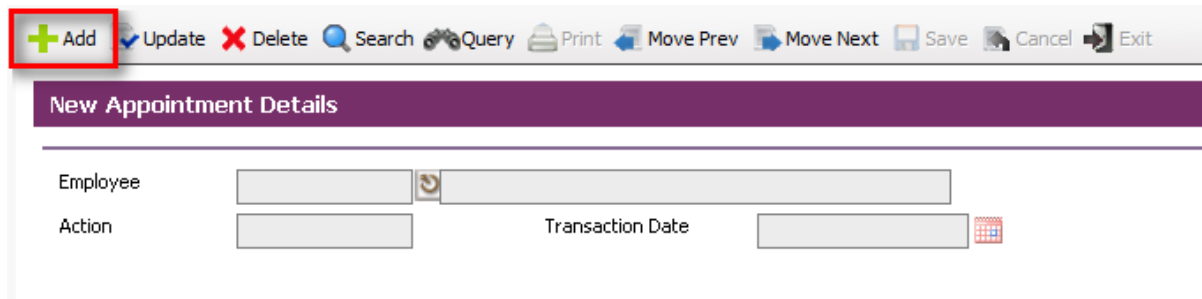
  


<b>Hold Against:</b>			<b>Designation:</b>		
Job Family	<input type="text"/>		Designation	<input type="text"/>	
Appointment	<input type="text"/>		Title	<input type="text"/>	


  

Progress Remark

- Click on the **Add button** to create a new record.



Employee  

Action  Transaction Date  

- Define all the fields highlighted in purple accordingly. These are the mandatory fields.

*Note: Those fields with pick-list are defined under the **Company Details Setup**. Add/amend the necessary details to suit your Organization needs.*

### New Appointment Details

Employee	<input type="text" value="131027"/>	<input type="text" value="David"/>
Action	<input type="text" value="NA"/>	Transaction Date <input type="text" value="15/10/2013"/>

### Current

Organisation Unit	<input type="text" value="CEO-ADMIN-HR"/>	Appointment Code	<input type="text" value="HR-STAFF"/>
Scheme of Service	<input type="text" value="HR"/>	Division Status	<input type="text" value="III"/>
Effective Date	<input type="text" value="01/10/2013"/>	Joined Date	<input type="text" value="01/10/2013"/>
Confirm Date	<input type="text" value="01/01/2014"/>	Appointment Date	<input type="text" value="01/10/2013"/>
		Next Inctl Date	<input type="text" value="01/10/2014"/>

### Payroll:

Payroll Mode	<input type="text" value="M"/>	Salary Code	<input type="text" value="GEN"/>
Basic Salary	<input type="text" value="0.00"/>	Cost Centre Code	<input type="text" value="ADMIN"/>
NPC Amount	<input type="text" value="0.00"/>	NPVP Amount	<input type="text" value="0.00"/>
Monthly Salary	<input type="text" value="0.00"/>	Gross Salary	<input type="text" value="0.00"/>

Reason Code	<input type="text"/>	Position Code	<input type="text" value="ACC01"/>
Essential Post	<input type="text"/>	Essential Category	<input type="text"/>

### Hold Against:

Scheme of Service	<input type="text"/>
Appointment	<input type="text"/>

### Designation:

Designation	<input type="text"/>
Title	<input type="text"/>

Progress Remark

- After completion, click on the **Save button**

---

**New Appointment Details**

---

Employee:

Action:  Transaction Date:

---

**Current**

---

Organisation Unit	<input type="text" value="FIN"/> <input type="button" value="Refresh"/>	Grade	<input type="text" value="II"/> <input type="button" value="Refresh"/>
Job Family	<input type="text" value="FIN"/> <input type="button" value="Refresh"/>	Appointment Code	<input type="text" value="ACC-II"/> <input type="button" value="Refresh"/>
Effective Date	<input type="text" value="19/09/2013"/> <input type="button" value="Calendar"/>	Joined Date	<input type="text" value="19/09/2013"/> <input type="button" value="Calendar"/>
Confirm Date	<input type="text" value="19/12/2013"/> <input type="button" value="Calendar"/>	Appointment Date	<input type="text" value="19/09/2013"/> <input type="button" value="Calendar"/>
		Next Inctl Date	<input type="text" value="19/09/2014"/> <input type="button" value="Calendar"/>

**Payroll:**

Payroll Mode	<input type="text" value="M"/> <input type="button" value="Refresh"/>	Salary Code	<input type="text" value="GEN"/> <input type="button" value="Refresh"/>
Basic Salary	<input type="text" value="3500.00"/> <input type="button" value="Refresh"/>	Cost Centre Code	<input type="text" value="FIN"/> <input type="button" value="Refresh"/>
Basic 1	<input type="text" value="0.00"/>	NWC Amount	<input type="text" value="0.00"/>
Basic 2	<input type="text" value="0.00"/>	Gross Salary	<input type="text" value="3500.00"/>
Monthly Salary	<input type="text" value="3500.00"/>	Position Code	<input type="text" value="ACCI01"/> <input type="button" value="Refresh"/>
Reason Code	<input type="text" value=""/> <input type="button" value="Refresh"/>	Essential Category	<input type="text" value=""/> <input type="button" value="Refresh"/>
Essential Post	<input type="text" value=""/> <input type="button" value="Refresh"/>		

## 6.4 Employee's Resignation

This module allows you to capture the information of the resigned staffs in the Organization.

**Resignation**

---

Progress No   Transaction Date

Action

---

Organisation Unit

Job Family  Grade

Appointment From  Appointment To

---

Progress Remark

Circulation Status

Created by/On  Modified By/On

Employee ID	Employee Name	Job Family	Appointment Code	Grade	Cost Centre Code	Organisation Unit	Appointment Date	Extension Period
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Employees</span> <span>Routing Officers</span> <span>Routing Status</span> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> <span>&lt;&lt; 1 &gt;&gt;</span> <span>Employee ID</span> <span>Quick Search</span> <span>Query Builder</span> <span>Export To Excel</span> </div>								

- Click on the **Add** button to create a new record.

**Resignation**

---

Progress No   Transaction Date

Action

---

Organisation Unit

Job Family  Grade

Appointment From  Appointment To

---

Progress Remark

Circulation Status

Created by/On  Modified By/On

Employee ID	Employee Name	Job Family	Appointment Code	Grade	Cost Centre Code	Organisation Unit	Appointment Date	Extension Period
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Employees</span> <span>Routing Officers</span> <span>Routing Status</span> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> <span>&lt;&lt; 1 &gt;&gt;</span> <span>Employee ID</span> <span>Quick Search</span> <span>Query Builder</span> <span>Export To Excel</span> </div>								

- Click on the List Employees **button** to view all Employees with their retirement dates and the filtering defined at the **Organisation Unit**, Job Family, Grade, Appointment From and Appointment To.
- Select Employee and click **Close button** to retire the service.

**HUMAN RESOURCES**      Resignation

Start Date: 17/10/2013

Drag a column header here to group by that column

#	Key Field	Salary Point	Employee ID	Name	Alias Name	Org Unit Code	Ap
<input checked="" type="checkbox"/>	5400	MIN	BA01N0005	Shugunayan Muthu		CEO-ADMIN-HR	HR
<input type="checkbox"/>	5406		BA01N0006	Amy Chan		CEO-OPER-SALES-CUSTSV	SAL
<input type="checkbox"/>	5407		BA01N0007	Hong Pao Pao		CEO-OPER-SALES-DSALES	SAL
<input type="checkbox"/>	5408	MIN	BA01N0008	Tan Leng Leng		CEO-OPER-PRO	PRC
<input type="checkbox"/>	5409	MIN	BA01N0009	Ong Ming Chuan		CEO-ADMIN-HR	HR
<input type="checkbox"/>	5410	MIN	BA01N0010	Tey Siu Moi		CEO-ADMIN-FIN	ACC

Buttons: Select All, Clear All, Clear Search, **Close**

Buttons: **List Employees**, Quick Search

- The selected Employee(s) are added automatically under the **Employees Tab**.

**Employees**      Routing Officers      Routing Status

Employee ID: BA01N0005      Quick Search      Query Builder      Export To Excel

Employee ID	Employee Name	Job Family	Appointment Code	Grade	Cost Centre Code	Organisation Unit	Appointment Date	Extension Period
BA01N0005	Shugunayan Muthu	HR	HR-ADMIN	I	ADMIN	CEO-ADMIN-HR	01/01/2010 00:00:00	

- Under the **Employees Tab**, click the Employee record link to set different retirement date for individual Employee.

- Then select the **New Tab** to update the **Notice Date, Last Day of Service** and **Effective Date**.

**Resignation Details**

---

Employee:  Tey Siu Moi

New Action:  Prev. Action:

---

Current **New**

Organisation Unit	<input type="text" value="CEO-ADMIN-FIN"/>	Grade	<input type="text" value="II"/>
Job Family	<input type="text" value="FIN"/>	Appointment Code	<input type="text" value="ACC-II"/>
Approval	<input type="text" value="A"/>	Absent Date	<input type="text" value="01/10/2013"/>
Period	<input type="text" value="0.00"/>	Last day of service	<input type="text" value="01/11/2013"/>
		Effective Date	<input type="text" value="23/11/2013"/>

---

Payroll Mode	<input type="text" value="M (Monthly)"/>	Salary Code	<input type="text" value="GEN"/>
Basic Salary	<input type="text" value="0.00"/>	Cost Centre Code	<input type="text" value="FIN"/>
Basic 1	<input type="text" value="0.00"/>	NWC Amount	<input type="text" value="0.00"/>
Basic 2	<input type="text" value="0.00"/>		
Monthly Salary	<input type="text" value="0.00"/>	Gross Salary	<input type="text" value="0.00"/>

- Click on the **Save button**.

**Resignation Details**

---

Employee:  Tey Siu Moi

New Action:  Prev. Action:

- Click on the **Exit button** to return to the previous page.

**Resignation Details**

Employee: BA01N0010 Tey Siu Moi  
 New Action: VO Prev. Action: CF

- Change **Circulation Status** to one of the following status to proceed:  
 '0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

**Resignation**

Progress No: PGR HR 1310000011 Transaction Date: 17/10/2013  
 Action: R5

Organisation Unit: %  
 Scheme of Service: % Division Status: %  
 Appointment From: 000000000000000000 Appointment To: ZZZZZZZZZZZZZZZZZZZZZ

Progress Remark:   
 Circulation Status: 0 (NEW)  
 Created by/On: dbo 17/10/2013 Modified

Code	Description
0	NEW
1	SUBMIT
3	APPROVED
4	REJECT

Employees Routing Officers Routing Status  
 1 Employee ID Quick Search

- If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).
- If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).
- Click on the **Add New button** in the **Routing Officers Tab**.



Circulation Status **1 (SUBMIT)**

Created by/On   Modified By/On

**List Employees**

Employees **Routing Officers** Routing Status

<< < 1 > >> Routing Sequence  Quick Search **Add New**

Routing Sequence	Recipient	Role
------------------	-----------	------

The System will show the following screen:

### Set/Edit Routing List

Application ID :

Role ID :

Recipient ID :

Recipient Name :

Recipient Email :

- After setting up the Routing list, click **Exit button** to go back to main page.
- Click on the **Save button**. The system will capture the details of the employee(s) resignation and their salary will be pro-rated according to their last day of service.

## 7 Claim Master

This sub-system contains the master files required to facilitate the processing of claims in the system.

There are total 12 master files in Claim Master:

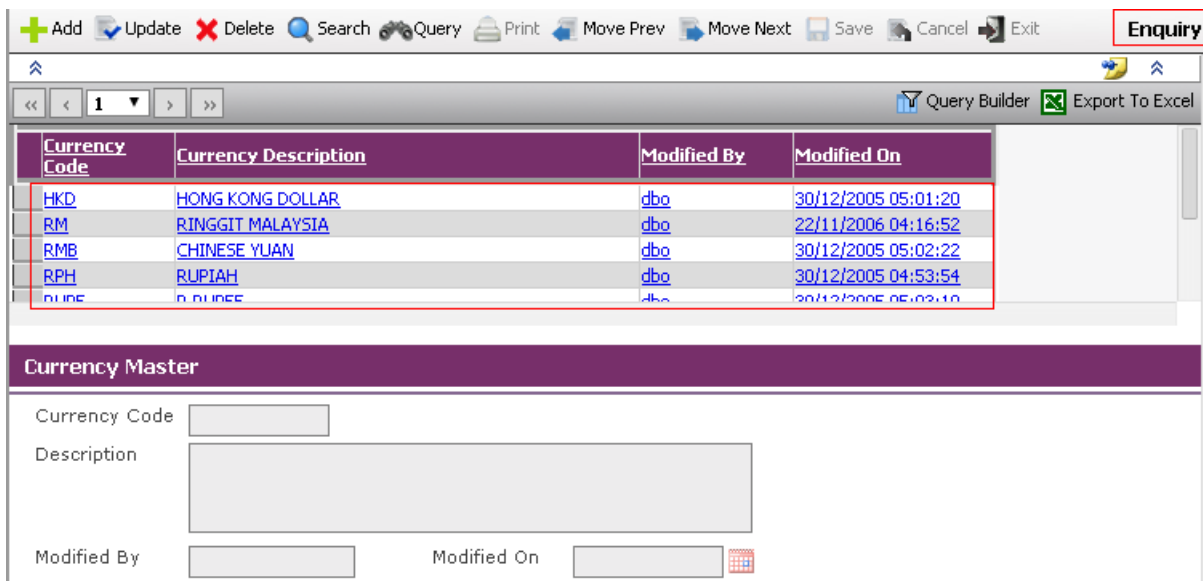
- ▲ Claim Master
  - Currency
  - GL Code
  - Claim Type
  - Benefit Scheme
  - Claim Entitlement
  - Transport Fare
  - Clinic Status
  - Clinic Code
  - Vehicle Master
  - GST/VAT Code
  - Project Master
  - Fund Master

Default codes and values already exist for the master files. However, the user can add or update the information in the master files by clicking on the **Add** icon or the **Update** icon when viewing a record respectively.

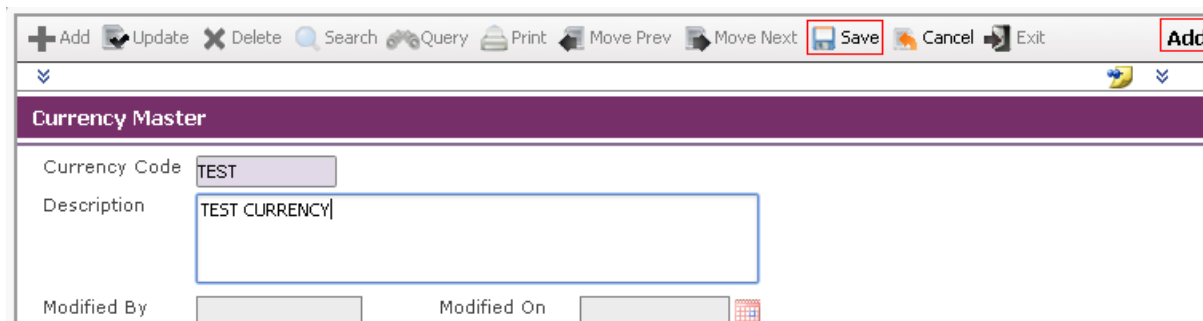
## 7.1 Currency

The purpose of this currency screen is to allow users to setup the different currency values which are used during claim transactions.

- Click on the **Currency** menu item to launch the Currency Master screen in Query mode.
- Click on **Query** button, the screen mode will change to enquiry and displays the records in the header grid of the screen as follows.



- Click on the **Add** button to load screen in Add mode, enter the values in currency code and description fields.
- Click on **Save** button to save the record as follows.



Fields	Description
Currency Code	Abbreviation for the Currency Code.
Description	Description of the Currency Code.

**To Add the Exchange Rate Details:**

- The purpose of this screen is to allow the users to setup the different exchange rates to the specific currency which is used in claim transactions.
- To add the exchange rate record to the Currency code, click on the record from header grid will display the record in the screen.
- Click on **Update button** to change the screen mode to update and click on **Add New button** to navigate the screen to Exchange rate screen in Add mode.
- Enter the values in the fields which are open for insert and click on **Save button** to save the exchange rate record.

Fields	Description
Currency Code	Set by the system.
Year/Month	Set the Year and Month of the Exchange Rate.

Date	Set the Date of the Exchange Rate.
Exchange Rate	Set the Ratio of the Exchange Rate.
Corporate Rate	Set the Ratio of the Exchange Rate of corporate use.
Spot Rate	Set the Ratio of the Exchange Rate of spot use.

**To Update, Delete the existing Currency record:**

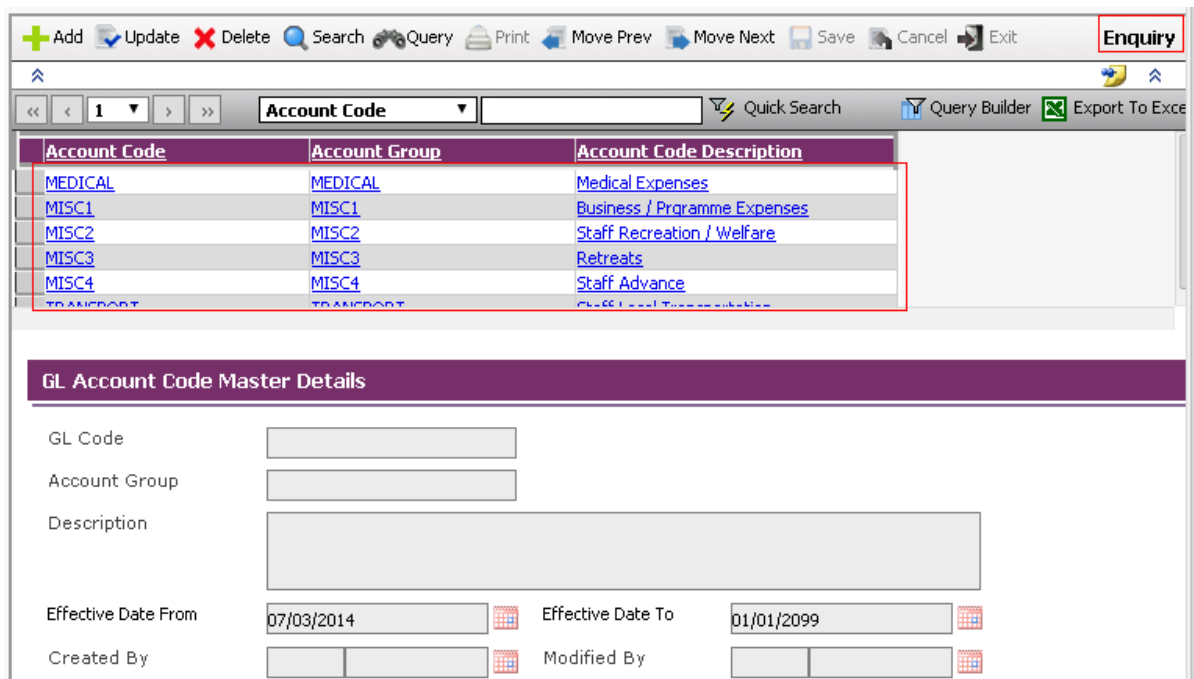
- To update the Currency details, select the record from Currency details and click on **Update button**. Modify the Description and click on the **Save button** to update the changes.
- To delete the currency record, select the record from currency details and click on Toolbar **Delete button** will deletes the selected currency record.
- To update the exchange rate record, select the record on Exchanges Rates Details grid will navigate to Exchange Rate screen. To update the Exchange Rate details click on the **Update button** and modify the fields and click on **Save button** will update the details.
- To delete the Exchange Rate details, select the record and click on **Delete button** will deletes the selected exchange rate record.

## 7.2 GL Code

This module allows user to set the various types of General Ledger Account Codes (GL Code) which are used for every claim type's creation and will be used in claim payment generation.

A general ledger (GL Code) contains user-defined account codes and related dimensional codes for recording various types of vouchers in financial statements.

- Click on **GL Code** menu item to launch the GL Code screen in enquiry mode and displays the existing GL codes in the header grid of the screen as follows.

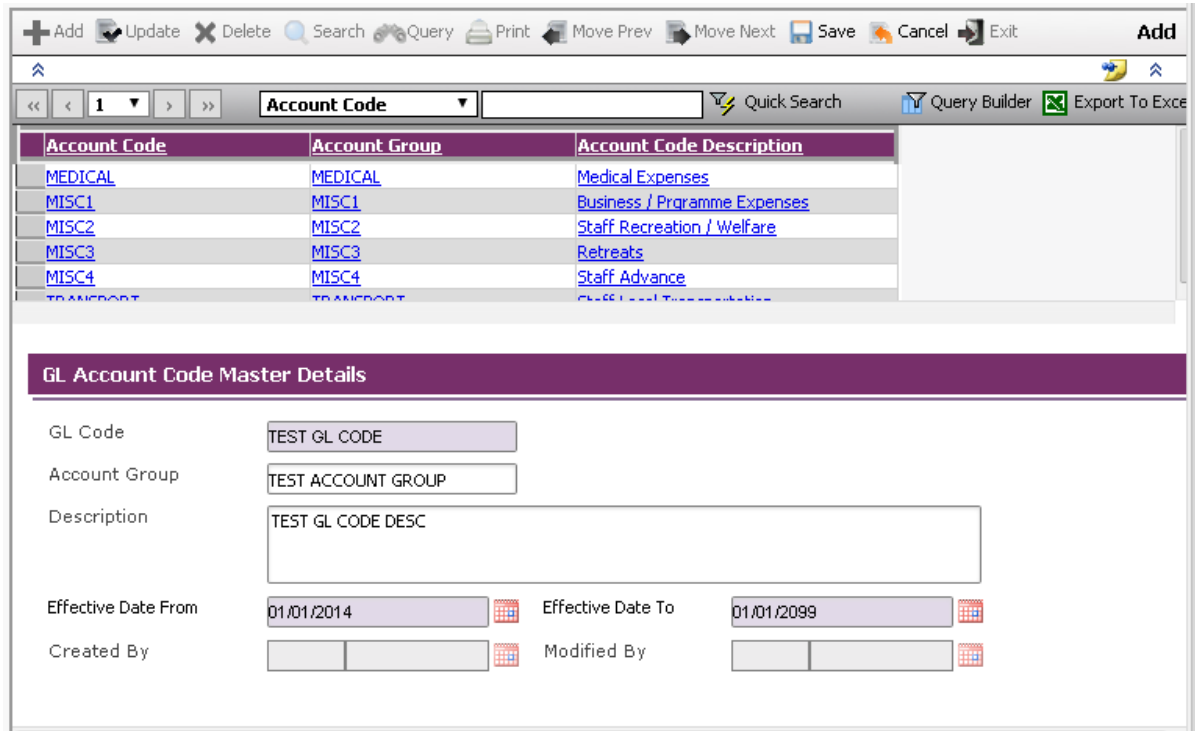


Account Code	Account Group	Account Code Description
MEDICAL	MEDICAL	Medical Expenses
MISC1	MISC1	Business / Programme Expenses
MISC2	MISC2	Staff Recreation / Welfare
MISC3	MISC3	Retreats
MISC4	MISC4	Staff Advance
TRANSPORT	TRANSPORT	Staff Travel Expenses

GL Account Code Master Details			
GL Code	<input type="text"/>		
Account Group	<input type="text"/>		
Description	<input type="text"/>		
Effective Date From	<input type="text" value="07/03/2014"/>	Effective Date To	<input type="text" value="01/01/2099"/>
Created By	<input type="text"/>	Modified By	<input type="text"/>

- To Add the GL Code click on the **Add button**, GL code screen load in Add mode.
- By default Effective date from and to fields are filled with the current date and 01/01/2099. Enter the values in the GL code, Account group and description fields.
- Select Values for Effective date from and to fields from date control if required and click on **Save button** to save the record.



Fields	Description
GL Code	GL code for the Claim Type. User has to enter the GL code.
Account Group	User to enter the Account Group for GL code
Description	User to enter the Description for GL Code
Effective Date From	User to select the Effective Date From
Effective Date To	User to select the Effective Date To

**To Update, Delete the existing GL Code record:**

- To update the GL code record, select the record in the grid, click on the Tool bar **Update button** and modify the fields and click on Toolbar **Save button** to save the changes.
- To delete the GL code record, select the record in the grid, click on **Delete button** to delete the selected GL code record from the screen.

### 7.3 Claim Type

This master file allows the administrator to set the different Claims Types according to the company needs. These Claims Types will be allocated to each employee to determine their claim rules.

*Note: The system comes with pre-set data for Claim type information but can be modified if needed.*

- Click on **Claim Type** menu item to launch the Claim Type screen in query mode.
- Click on **Query** button to display the existing claim type records in the header grid of the screen as follows.

The screenshot displays the 'Claim Type Master' screen in query mode. At the top, there is a toolbar with icons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. A search bar contains 'Claim Type'. Below the toolbar is a table with the following data:

Claim Type	Claim Category	Description
DENTAL	MEDICAL	Dental Claims
GOVT/POLY	MEDICAL	Govt / Poly
HOSPITAL	MEDICAL	Hospital
OTHER CLAIMS	MISC	Other Claims
PANEL	MEDICAL	Panel
PRIVATE	MEDICAL	Private
TPT_PRV	TPT	Private Transport Claim
TPT_PUB	TPT	Public Transport Claim

Below the table is the 'Claim Type Master' form with the following fields:

- Claim Type: [Text Field]
- Claim Category: [Text Field]
- Transaction Code: [Text Field]
- Payment Mode: [Dropdown Menu: Select Payment Mode]
- Description: [Text Field]
- Default GST/VAT Code: [Dropdown Menu: Select GST/VAT Code]
- GST/VAT Enable:
- Set Default Claim Type: [Dropdown Menu: No]
- Created By/On: [Text Field] [Calendar Icon]
- Modified By/On: [Text Field] [Calendar Icon]

At the bottom, there is a 'Claim Type Details' table with the following columns:

Account Code	Account Group	Account Code Description	Transaction Code	Help Message
[Text Field]	[Text Field]	[Text Field]	[Text Field]	[Text Field]



- To Add the Claim type click on the Tool bar **Add button**, Claim Type screen load in Add mode.
- Enter the values in the corresponding fields Claim Type, Claim Category, Transaction code, Payment mode etc. as follows.

**Claim Type Master**

---

Claim Type	<input type="text" value="TEST CLAIM"/>	Claim Category	<input type="text" value="TPT"/>
Transaction Code	<input type="text" value="CLM_TEST"/>	Payment Mode	<input type="text" value="ALL"/>
Description	<input type="text" value="TEST CLAIM TYPE1"/>		
Default GST/VAT Code	<input type="text" value="No GST"/>	GST/VAT Enable	<input checked="" type="checkbox"/>
Set Default Claim Type	<input type="text" value="No"/>		
Created By/On	<input type="text"/>	Modified By/On	<input type="text"/>

- Click on **Save button** to save the record.

Fields	Description
Claim Type	Abbreviation for the Claim Type.
Claim Category	Select the category of the Claim Type
Transaction Code	User to enter the Transaction Code of the claim to be used for Claims Posting to Payroll.
Payment Mode	User to select the Payment Mode for the Claim Type Like <ul style="list-style-type: none"> <li>PAYROLL</li> <li>GIRO</li> <li>CHEQUE</li> <li>ALL</li> </ul>
Description	Description of the Claim Type.
Default GST/VAT Code	User to select the Default GST/VAT Code for Claim Type Like <ul style="list-style-type: none"> <li>GST</li> <li>No GST</li> <li>Purchase: Disallowed</li> </ul>
Set Default Claim Type	User to set this claim type as default claim type.

**To Add Claim Type Details:**

- To add claim type details to the specified claim type, select the record from the header grid of the claim type screen will loads the screen with the selected record.
- Click on **Update button** to change the screen mode to update and click on **Add New button** at the detail grid of the claim type screen to add the claim type details as follows.
- Click on button to save the claim type details.

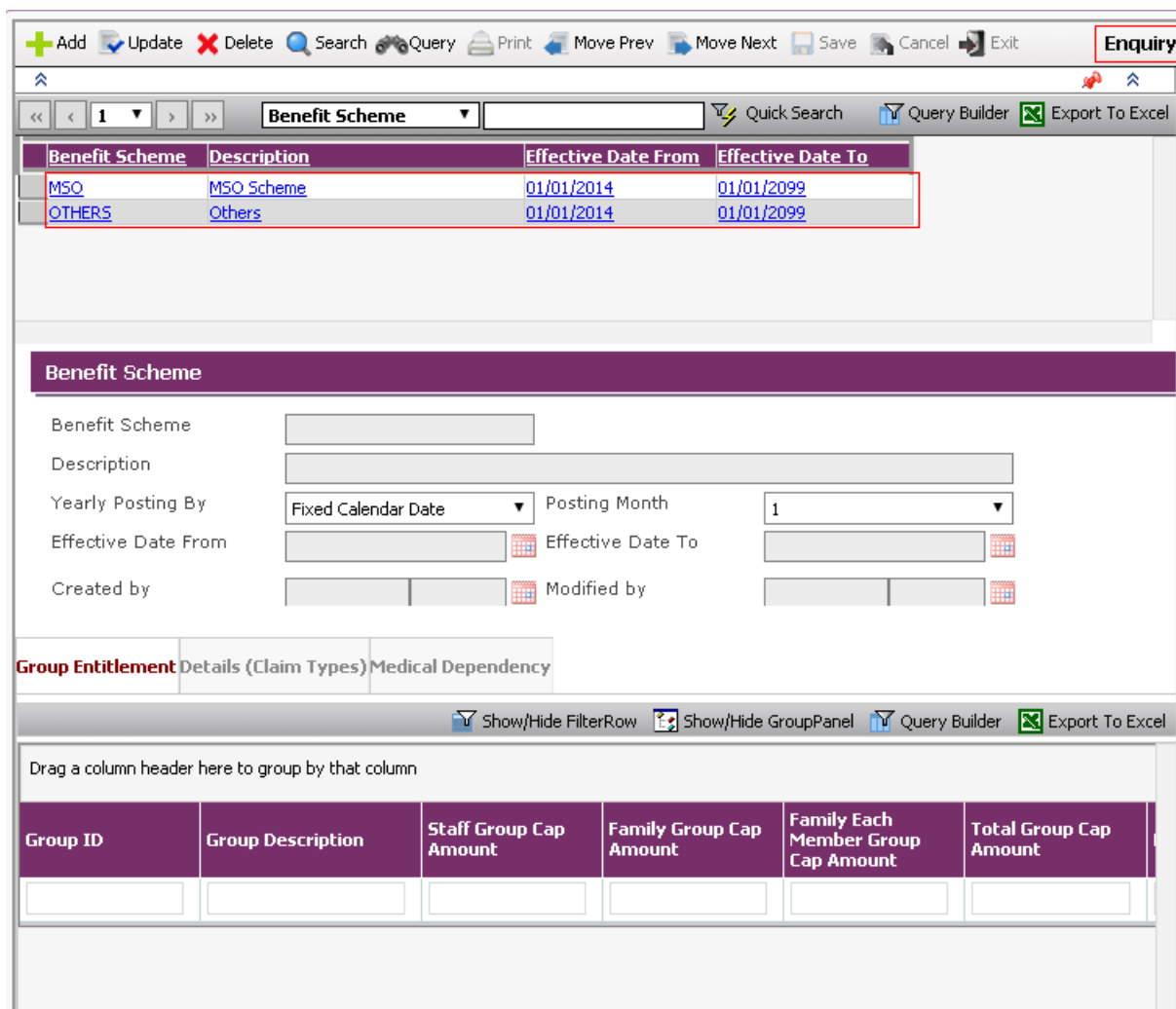
Fields	Description
Account Code	User to enter the Account code for the Claim Type
Account Group	User to enter the Account Group for the Claim Type
Transaction Code	Transaction Code of the claim to be used for Claims Posting to Payroll generated automatically from header.
Description	Description of the Claim Type.
Help message	Help message for Claim Type details.
Remarks	Remarks for Claim Type details.

## 7.4 Benefit Scheme

This master file stores information on the different claim/benefit scheme that exists in the company. Details on the entitlements for each Claim Type and corresponding conditions are also specified here.

*Note: The system comes with pre-set data for Benefit Scheme information but can be modified if needed.*

- Click on the **Benefit scheme** menu item under claim master menu page loads the benefit schemes in Query mode
- Click on **Query button** to display the existing benefit scheme records in the header grid of the screen as follows.



The screenshot displays the 'Benefit Scheme' application interface. At the top, there is a toolbar with icons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. A red box highlights the 'Enquiry' button. Below the toolbar is a navigation bar with a dropdown menu set to 'Benefit Scheme' and buttons for Quick Search, Query Builder, and Export To Excel. The main data grid shows the following records:

Benefit Scheme	Description	Effective Date From	Effective Date To
MSO	MSO Scheme	01/01/2014	01/01/2099
OTHERS	Others	01/01/2014	01/01/2099

Below the grid is a form titled 'Benefit Scheme' with the following fields:

- Benefit Scheme:
- Description:
- Yearly Posting By: Fixed Calendar Date (dropdown), Posting Month: 1 (dropdown)
- Effective Date From:  (calendar icon), Effective Date To:  (calendar icon)
- Created by:  (calendar icon), Modified by:  (calendar icon)

At the bottom, there are tabs for 'Group Entitlement', 'Details (Claim Types)', and 'Medical Dependency'. The 'Group Entitlement' tab is active, showing a grid with the following headers:

Group ID	Group Description	Staff Group Cap Amount	Family Group Cap Amount	Family Each Member Group Cap Amount	Total Group Cap Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Click on the **Add button** to add a new record.
- By default, Effective date from and to fields are filled with current date and 01/01/2099 respectively and posting month is 1.
- Enter the values in the corresponding fields Benefit Scheme, Description, Yearly Posting By etc.
- Click on **Save button** to save the benefit scheme record.

The screenshot shows a web form titled "Benefit Scheme". The fields are as follows:

- Benefit Scheme: TEST SCHM1
- Description: TEST SCHEME 1
- Yearly Posting By: Fixed Calendar Date (dropdown)
- Posting Month: 1 (dropdown)
- Effective Date From: 01/01/2014
- Effective Date To: 01/01/2099
- Created by: (empty)
- Modified by: (empty)

Fields	Description
Benefit Scheme	User defined text for this claim/benefit scheme.
Description	Description name of this claim/benefit scheme.
Yearly Posting By	Posting method for claim/benefit scheme.
Posting Month	User to enter the posting month.
Effective Date From/To	The date period where this claim/benefit scheme is effective.

**To add Group entitlement record:**

- To add the group entitlement to a specific benefit scheme, click on the record from the header grid of the benefit scheme will loads the screen with the selected benefit scheme.
- Click on **Update button** the screen mode will change to update mode.
- Select **Group entitlement tab** and click on **Add New button** at the detail grid.
- Enter the values in to the fields and click on **Save button** to save the group entitlement record for a benefit scheme as follows.

**Benefit Scheme by Group Entitlement**

Benefit Scheme: TEST SCHM1 Proration type: Effective Period

Group ID: TEST GROUP1

Description: TEST GROUP DESC1

Group Cap For: Staff and Total

Staff Group Cap Amount: 1000

Family Group Cap Amount: 0.00 Per Family Member Group Cap Amount: 0.00

Total Group Cap Amount: 1000

Remarks: TEST REMARKS

+ Add Update Delete Search Query Print Move Prev Move Next Save Cancel Exit Add

**Benefit Scheme by Group Entitlement**

Benefit Scheme: TEST Proration type: Effective Period

Group ID: TEST GROUP1

Description: TEST GROUP ENTITLEMENT

Group Cap For: Staff Family and Total

Staff Group Cap Amount: 1000

Family Group Cap Amount: 1000 Per Family Member Group Cap Amount: 0.00

Total Group Cap Amount: 1000

Remarks: Testing Group Entitlement

**Claim Types**

Add New Show/Hide FilterRow Show/Hide GroupPanel Query Builder Export To Excel

Drag a column header here to group by that column

Claim Type	Description	Entitlement Amount for Staff	Entitlement Amount for Staff and Family	Entitlement Amount for Family Member	Total Entitlement

Fields	Description
Group ID	User defined text (ID) for this Group Entitlement.
Description	Description name of this Group Entitlement.
Group Cap for	User to select the Group Cap for, based on the type the corresponding amount fields (Staff Group, Family Group, Per Family Member Group and Total Group) enabled.
Staff Group Cap Amount	User to enter the Staff Group Amount.
Family Group Cap Amount	User to enter the Family Group Amount.
Per Family Member Group Cap Amount	User to enter the Per Family Member Group Amount.
Total Group Cap Amount	User to enter the Total Group Amount.
Remarks	User to enter the Remarks for Entitlement.

### **To add Claim Types to the Benefit Scheme:**

- To add the claim types to a specific benefit scheme, click on the record from the header grid of the benefit scheme the screen loads the selected benefit scheme.
- Click on **Update button** the screen mode will change to update mode.
- Select **Details (Claim Types) tab** and click on **Add New button** at the detail grid of the screen.
- Enter the values in the fields and click on **Save button** to save the claim types to the benefit scheme as follows.

**Benefit Scheme Type**

Benefit Scheme	<input type="text" value="TEST SCHM1"/>	Proration type	<input type="text" value="Effective Period"/>
Claim Type	<input type="text" value="DENTAL"/>	Qualification Period	<input type="text" value="Calendar Year"/>
Claim Group	<input type="text"/>		
Check Group Cap Amount	<input type="text" value="No"/>		
Staff Entitled Amount	<input type="text" value="1000"/>		
Staff's Family Entitled Amount	<input type="text" value="0.00"/>	Per Family Member Entitled Amount	<input type="text" value="0.00"/>
Total Entitled Cap Amount	<input type="text" value="1000"/>		

**Per Claim Details**

	Co-payment (%)	<input type="text" value="15"/>	
	Dependant Co-Payment (%)	<input type="text" value="40"/>	
Minimum Amount Per Claim	<input type="text" value="0.00"/>	Co-payment Amount	<input type="text" value="0.00"/>
Maximum Amount Per Claim	<input type="text" value="1000"/>	Maximum Co-Payment	<input type="text" value="0.00"/>

Fields	Description
Benefit Scheme	Displays claim/benefit scheme entered by the user in Claim Scheme.
Claim Type	User to select the claim type.
Proration Type	User to select the Claim Entitlement Type Like <ul style="list-style-type: none"> <li>• Effective Period – Yearly Entitlement as per the Fixed Calendar Year</li> <li>• Calendar Month – Monthly Entitlement</li> <li>• Post Period – Yearly Entitlement as per the Service Year</li> <li>•</li> </ul>
Qualification Period	User to select Qualification Period like <ul style="list-style-type: none"> <li>• Calendar Year</li> <li>• Financial Year</li> <li>•</li> </ul>
Claim Group	User to select the Claim Group for Group Entitlement.
Check Group Cap Amount	User to select Group Cap amount check.
Staff Entitled Amount	User to enter the claim entitlement amount for staff.
Staff' Family Entitled Amount	User to enter the claim entitlement amount for staff's family.
Per Family Member Entitled Amount	User to enter the claim entitlement amount for each member of staff's family.
Total Entitlement Cap	User to enter the total entitlement cap amount.

Minimum Amount Per Claim	User to enter the minimum claim amount per claim.
Maximum Amount Per Claim	User to enter the maximum claim amount per claim.
Co-Payment (%)	User to enter the Co-Payment Percent.
Co-Payment Amount	User to enter the Co-Payment Amount.
Maximum Co-Payment	User to enter the Maximum Co-Payment Amount.

**To add Medical dependencies to the Benefit Scheme:**

- To add the medical dependencies to a specific benefit scheme, click on the record from the header grid of the benefit scheme the screen loads the selected benefit scheme record.
- Click on **Update button** the screen mode will change to update mode. Select **Medical Dependency tab** and click on **Add New button** at the detail grid of the screen.
- Select relation code from Pick list. Select claim type and click on **Save button** to save the medical dependency record as follows.

**Benefit Scheme**

Benefit Scheme: TEST SCHM1  
 Description: TEST SCHEME 1  
 Yearly Posting By: Fixed Calendar Date | Posting Month: 1  
 Effective Date From: 01/01/2014 | Effective Date To: 01/01/2099  
 Created by: eplatform | 07/03/2014 | Modified by: eplatform | 07/03/2014

---

Group Entitlement Details (Claim Types) **Medical Dependency**

Add New | 
 Show/Hide FilterRow | 
 Show/Hide GroupPanel | 
 Query Builder | 
 Export To Excel

	Benefit Scheme	Relation Code	Relation Des:	Show/Hide FilterRow	Type	Claim Type Description	Is Entitled
	TEST SCH	BRO	BROTHER		DENTAL	Dental Claims	Yes



Fields	Description
Benefit Scheme	Benefit Scheme to which Medical Dependent need to add (Not Editable).
Relation Code	User to Select the Relation code from the Pick List.
Relation Description	Relation Description is filled when user select Relation code from Pick List.
Claim Type	User to select the Claim Type from Pick List.
Claim Type Description	Claim Type Description filled when user select the Claim Type from Pick List.
Is Entitled	User to Select Is Entitled (Yes/No) from the dropdown list.
Remarks	User to enter the Remarks for Medical Dependency.

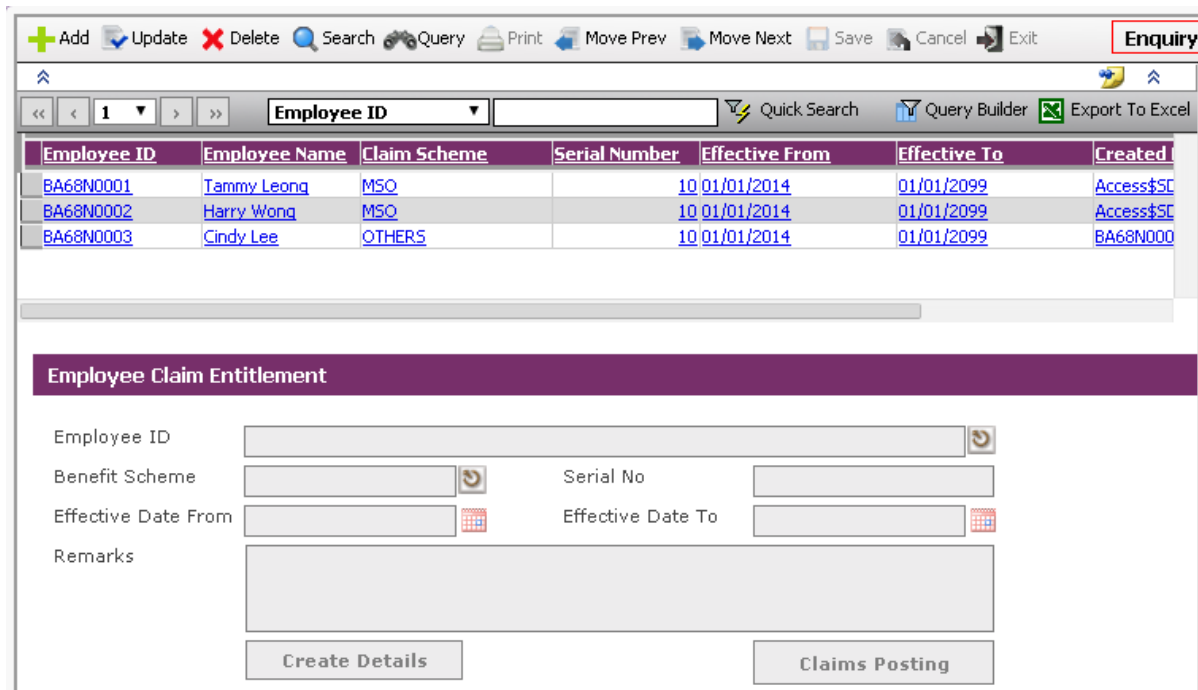
**To Update, Delete the existing Benefit Scheme record:**

- To update the Benefit Scheme select the record from the grid.
- Click on the **Update button** the Benefit scheme screen load in Update mode and modify the fields and click on **Save button** to update the changes.
- To delete the record, select the record from the grid and click the **Delete button** to delete the Benefit scheme.

## 7.5 Claim Entitlement

This master file allows the user to create claim entitlements for each employee, details on entitlements for each claim type and adjustment of entitlements for each claim type.

- Click on the **Claim Entitlement** to launch the Claim Entitlement screen in query mode.
- Click on **Query button** to display the existing entitlement records in the header grid of the screen as follows.



Employee ID	Employee Name	Claim Scheme	Serial Number	Effective From	Effective To	Created
BA68N0001	Tammy Leong	MSO		10 01/01/2014	01/01/2099	Access\$SC
BA68N0002	Harry Wong	MSO		10 01/01/2014	01/01/2099	Access\$SC
BA68N0003	Cindy Lee	OTHERS		10 01/01/2014	01/01/2099	BA68N000

**Employee Claim Entitlement**

Employee ID:


Benefit Scheme:  Serial No:


Effective Date From:  Effective Date To:



Remarks:

- Click on the **Add button** then the screen will load in add mode and enter the values in the fields.
- Click on **Create Details button** to create the entitlement records for that employee as follows.

**Employee Claim Entitlement**

Employee ID: BA68N0001 (Tammy Leong) 

Benefit Scheme: TEST SCHM1  Serial No:

Effective Date From: 01/01/2014  Effective Date To: 01/01/2099 

Remarks: TEST REMARKS

**Create Details**

Fields	Description
Employee ID	User to select the Employee ID for claim entitlement.
Benefit Scheme	User to select the claim/benefit scheme for the employee.
Effective Date From	Select the effective date from of claim entitlement.
Effective Date To	Select the effective date to of claim entitlement.
Remarks	User to enter the remarks if any for the claim entitlement.
Create Details	Button to create/save the claim entitlement for the employee.
Claims Posting	Button to update/post the claim details like Claim Used and Balance of the employee.

**To Add the Entitlement Adjustment Detail:**

- To add the Entitlement Adjustment Detail to an employee, select the record from the header grid of the Claim entitlement screen and system displays the record with the selected record.
- Click on record to update from the detail grid of the Claim Entitlement screen will navigates to the Employee Claim Entitlement details screen by displaying the selected claim type record of the employee.
- Click on **Update button** to change the screen mode to update mode.
- Click on **Add New button** will navigates to the Employee Claim Entitlement Adjustment details screen in Add mode.
- Update the fields which are open for update and click on **Save button** to save the changes.

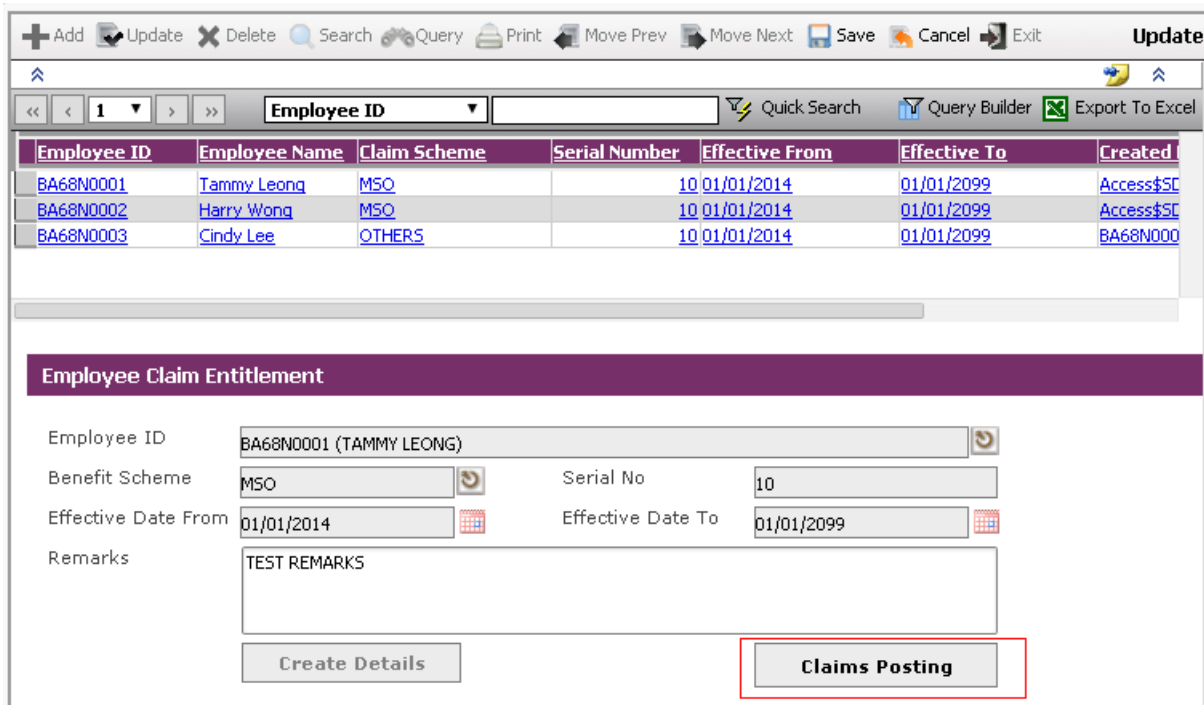
Employee Claim Entitlement Adjustment Details			
Employee ID	BA68N0001 (Tammy Leong)	Serial No	10
Benefit Scheme	MSO	Line No	70
Claim Type	TPT_PRIV	Adjustment No	
Staff Entitled Amount	9999.00		
Staff's Family Entitled Amount	9999.00	Entitled Amount Per Family Member	0.00
Total Entitled Cap Amount	99999.00		
Staff Group Cap Amount	0.00		
Family Group Cap Amount	0.00	Per Family Member Group Cap Amount	0.00
Total Group Cap Amount	0.00		
		Co-payment (%)	0.00
		Dependant Co-Payment (%)	0.00
Minimum Amount Per Claim	0.00	Co-payment Amount	0.00
Maximum Amount Per Claim	9000.00	Maximum Co-Payment Amount	0.00
Remarks	TEST REMARKS		
Car Park Entitlement	0.00	Car Park Rebate	0.00

Fields	Description
--------	-------------

Employee ID	Displays employee id (not editable).
Benefit Scheme	Displays claim/benefit scheme entered by the user in Claim/Benefit Scheme (not editable).
Claim Type	User to select the claim type.
Serial No	Displays the Serial No (not editable).
Line No	Displays the Line No (not editable).
Staff Entitled Amount	Displays the claim entitlement amount for staff (editable).
Staff' Family Entitled Amount	Displays the claim entitlement amount for staff's family (editable).
Per Family Member Entitled Amount	Displays the claim entitlement amount for each member of staff's family (editable).
Total Entitlement Cap	Displays the total entitlement cap amount (editable).
Minimum Amount Per Claim	Displays the minimum claim amount per claim (editable).
Maximum Amount Per Claim	Displays the maximum claim amount per claim (editable).
Co-Payment (%)	Displays the Co-Payment Percent (editable).
Co-Payment Amount	Displays the Co-Payment Amount (editable).
Maximum Co-Payment Amount	Displays the Maximum Co-Payment Amount (editable).
Remarks	Displays remarks if any (editable).
Car Park Entitlement	Displays the Car Park Entitlement (editable).
Car Park Rebate	Displays the Car Park Rebate (editable).

**To Delete or Change the existing Claim Entitlement record:**

- To delete the claim entitlement, select the record from Claim Entitlement Grid and click on the **Delete button**.
- To change the claim scheme for an employee, click on **Add button** in Claim Entitlement screen. Select Employee Id, Benefit Scheme and Effective date from and click on **'Create Details'** button.
- To process claim posting for an employee, select the record from Claim Entitlement header Grid and click on the **Update button** and click on **'Claim posting'** button.



Employee ID	Employee Name	Claim Scheme	Serial Number	Effective From	Effective To	Created
BA68N0001	Tammy Leong	MSO	10	01/01/2014	01/01/2099	Access\$SE
BA68N0002	Harry Wong	MSO	10	01/01/2014	01/01/2099	Access\$SE
BA68N0003	Cindy Lee	OTHERS	10	01/01/2014	01/01/2099	BA68N000

**Employee Claim Entitlement**

Employee ID: BA68N0001 (TAMMY LEONG)

Benefit Scheme: MSO      Serial No: 10

Effective Date From: 01/01/2014      Effective Date To: 01/01/2099

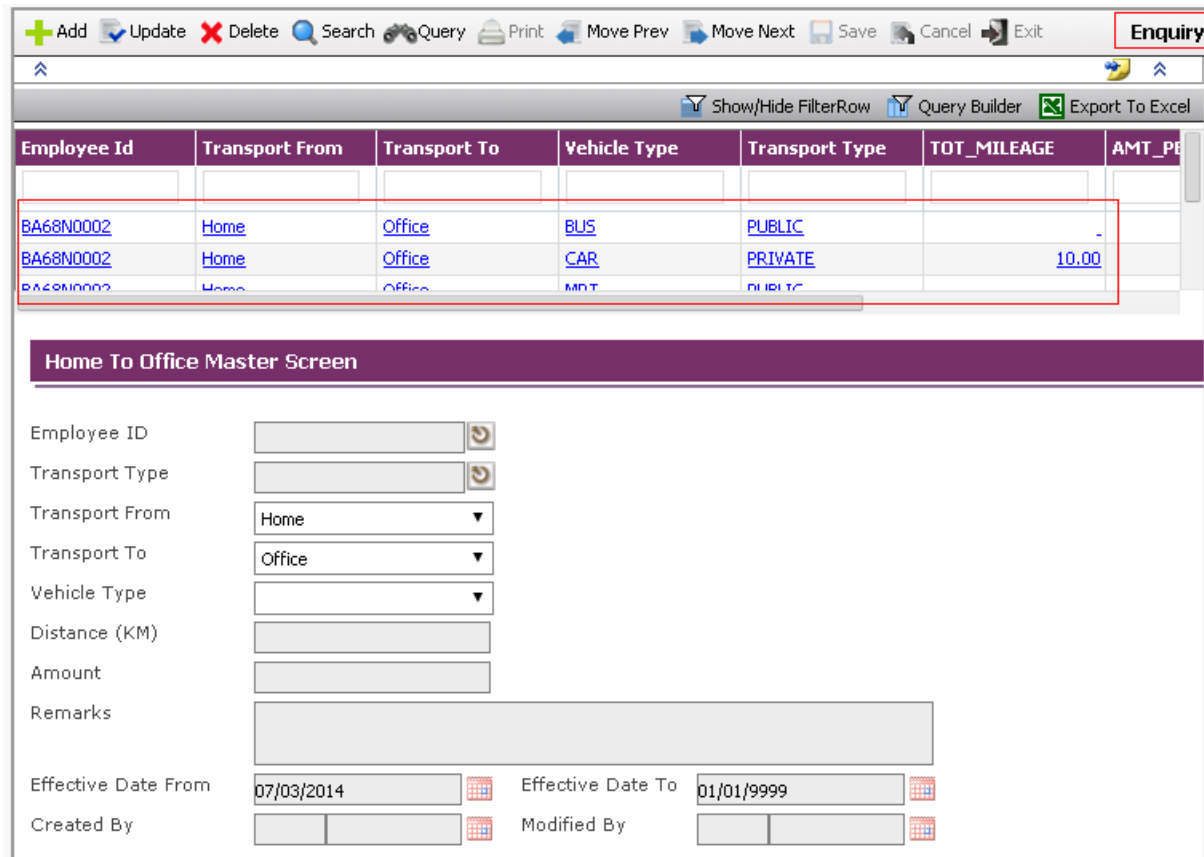
Remarks: TEST REMARKS

Buttons:

## 7.6 Transport Fare

The purpose of this screen is to allow users to setup the Home to Office transport fares which are used during transport claim transactions.

- Click on the **Transport Fare** menu item to launch the screen in query mode.
- Click on **Query button** to display the existing transport fare records in the header grid of the screen as follows.



The screenshot displays the 'Home To Office Master Screen' interface. At the top, there is a toolbar with buttons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. Below the toolbar is a header grid with columns: Employee Id, Transport From, Transport To, Vehicle Type, Transport Type, TOT\_MILEAGE, and AMT\_P. The grid contains three rows of data, with the second row highlighted in blue. Below the grid is a form titled 'Home To Office Master Screen' with the following fields:

Employee Id	Transport From	Transport To	Vehicle Type	Transport Type	TOT_MILEAGE	AMT_P
BA68N0002	Home	Office	BUS	PUBLIC		-
BA68N0002	Home	Office	CAR	PRIVATE		10.00
BA68N0002	Home	Office	MT	PUBLIC		

Form Fields:

- Employee ID:
- Transport Type:
- Transport From:
- Transport To:
- Vehicle Type:
- Distance (KM):
- Amount:
- Remarks:
- Effective Date From:  Effective Date To:
- Created By:  Modified By:

- Click on **Add button** to add a new record.
- Enter the values in the fields and click on **Save button** to save the transport fare record as follows.

+ Add ↻ Update ✕ Delete 🔍 Search 🎮 Query 🖨 Print ⏪ Move Prev ⏩ Move Next 💾 Save 🚫 Cancel 🚪 Exit Add

Show/Hide FilterRow Query Builder Export To Excel

Employee Id	Transport From	Transport To	Vehicle Type	Transport Type	TOT_MILEAGE	AMT_PE
BA68N0002	Home	Office	BUS	PUBLIC		-
BA68N0002	Home	Office	CAR	PRIVATE	10.00	
BA68N0002	Home	Office	MDT	PUBLIC		

**Home To Office Master Screen**

Employee ID:  🔄  
 Transport Type:  🔄  
 Transport From:  ▼  
 Transport To:  ▼  
 Vehicle Type:  ▼  
 Distance (KM):   
 Amount:   
 Remarks:   
 Effective Date From:  📅 Effective Date To:  📅  
 Created By:  📅 Modified By:  📅

Fields	Description
Employee ID	User to select the Employee ID to create Transport Fare.
Transport Type	User to select the Transport Type to create the Transport Fare.
Transport From	User to select the Transport From.
Transport To	User to select the Transport To.
Vehicle Type	User to select the Vehicle Type.
Distance (KM)	User to enter the distance.
Amount	User to enter the Amount.
Remarks	User to enter the Remarks.
Effective Date From/To	Time period within which this Transport Fare is applicable to the system.



**To Update, Delete the existing Transport fare record:**

- To update the transport fare record details, click on the record in the grid which needs to modify and click on **Update button**, modify the fields and click on **Save button** to save the changes.
- To delete the transport fare record, click on the record in the grid which needs to delete and click on **Delete button**.

## 7.7 Clinic Status

The purpose of this screen is to allow users to setup the different types of clinic status for clinic which are used during medical claim transactions.

- Click on Clinic Status menu item to launch the screen in query mode.
- Click on **Query button** to displays the existing clinic status codes in the header grid of the screen as follows.

Clinic Status Code	Clinic Status Description	Effective Date From	Effective Date To	Created On	Created By	Modified On	Modified By
COMPANY	Company Panel of Doctors	01/01/2005 00:00:00	31/12/2099 00:00:00	19/10/2005 13:47:30	dbo	19/10/2005 13:47:30	dbo
GOVT	Governant Panel of Doctor	01/01/2005 00:00:00	31/12/3000 00:00:00	19/10/2005 13:52:26	dbo	24/11/2006 11:21:02	dbo
PRIVATE	Private Doctors	01/01/2005	31/12/3000	19/10/2005	dbo	07/11/2006	dbo

**Clinic Status**

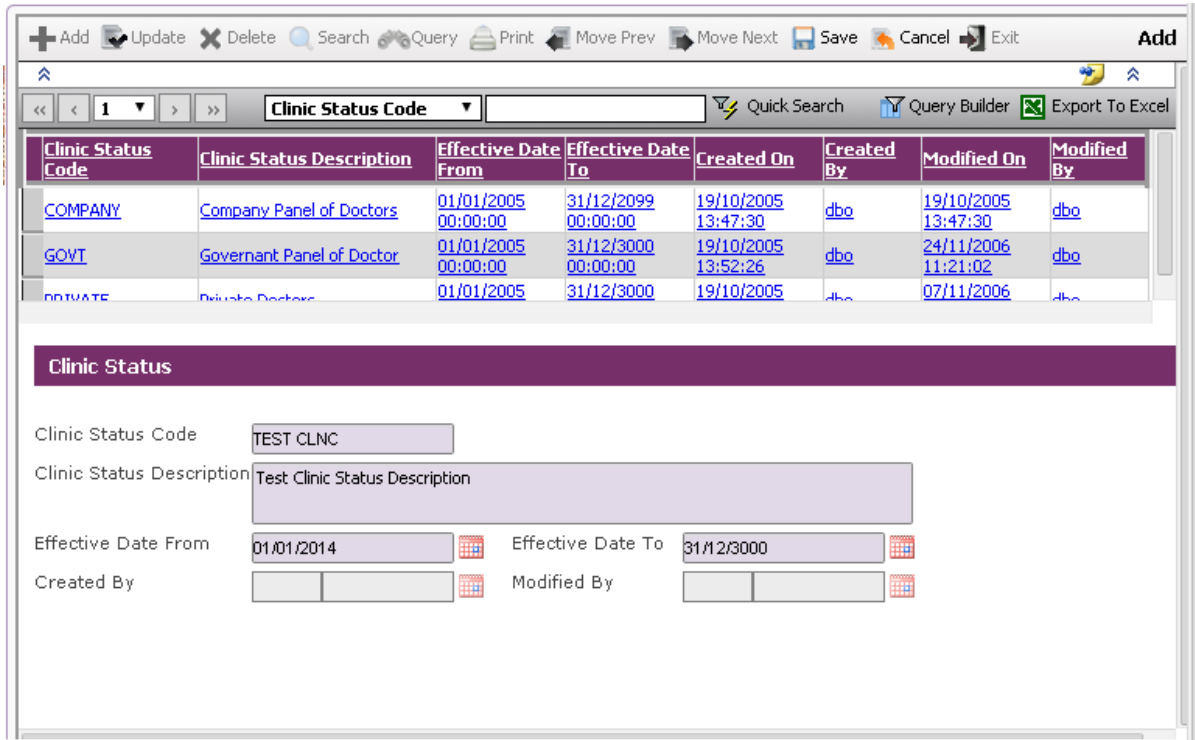
Clinic Status Code:

Clinic Status Description:

Effective Date From:  Effective Date To:

Created By:  Modified By:

- Click on **Add button** to add new record.
- Enter the values in the corresponding fields Clinic Status Code, Clinic Status Description etc.
- Click on **Save button** to save the clinic status record as follows.



Fields	Description
Clinic Status Code	User defined abbreviation representing the Clinic Status.
Clinic Status Description	Description name of this Clinic Status description.
Effective Date From/To	Time period within which this indicator code is applicable to the system.

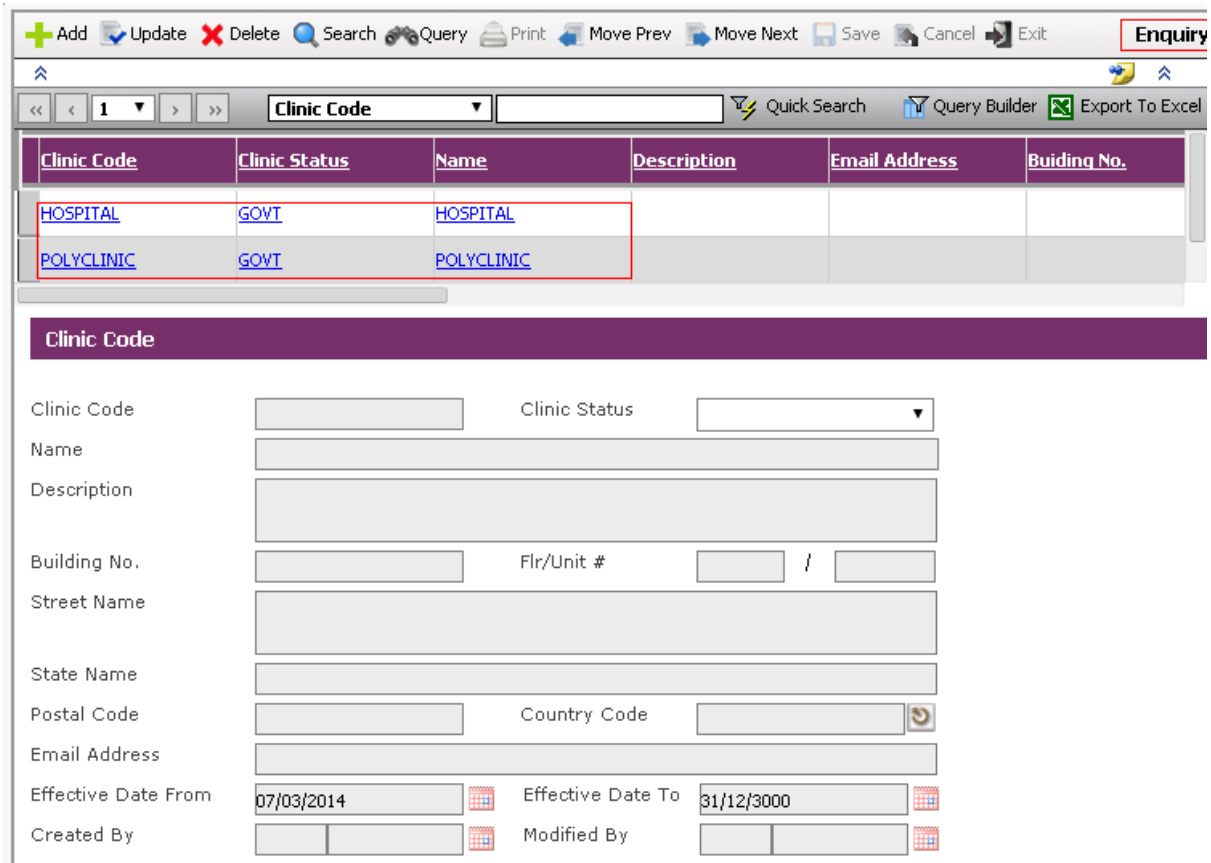
**To Update, Delete the existing Clinic status record:**

- To update the clinic status record details, click on the record in the grid which needs to modify, click on **Update button**, modify the fields and click on **Save button** will save the changes.
- To delete the clinic status record, click on the record in the grid which needs to be delete and click on **Delete button**.

## 7.8 Clinic Code

The purpose of this module is to allow users to setup the different types of clinics which are used during medical claim transactions. It captures the clinic name, address and contact details.

- Click on the **Clinic Code** menu item to launch the screen in query mode
- Click on **Query button** to display the existing clinic codes in the header grid of the screen as follows.



Clinic Code	Clinic Status	Name	Description	Email Address	Building No.
HOSPITAL	GOVT	HOSPITAL			
POLYCLINIC	GOVT	POLYCLINIC			

**Clinic Code**

Clinic Code:  Clinic Status:

Name:

Description:

Building No.:  Flr/Unit #:  /

Street Name:

State Name:

Postal Code:  Country Code:





Email Address:

Effective Date From:  Effective Date To:

Created By:  Modified By:

- Click on **Add button** the screen mode will change to add mode
- Enter the values in the corresponding fields Clinic Code, Clinic Status, Name, Description, etc. accordingly.
- Click on **Save button** to save the clinic code record as follows.

**Clinic Code**

Clinic Code	<input type="text" value="TEST CLNC"/>	Clinic Status	<input type="text" value="Company Panel of Doctor: ▼"/>
Name	<input type="text" value="TEST NAME"/>		
Description	<input type="text" value="TEST DESC"/>		
Building No.	<input type="text" value="1"/>	Flr/Unit #	<input type="text"/> / <input type="text"/>
Street Name	<input type="text" value="TEST"/>		
State Name	<input type="text" value="TEST STATE"/>		
Postal Code	<input type="text" value="100"/>	Country Code	<input type="text" value="SGP"/> 
Email Address	<input type="text" value="TEST"/>		
Effective Date From	<input type="text" value="01/01/2014"/> 	Effective Date To	<input type="text" value="31/12/3000"/> 
Created By	<input type="text"/>	Modified By	<input type="text"/> 

Fields	Description
Clinic Code	User defined abbreviation representing the clinic.
Name	Name of the Clinic.
Clinic Status	Select relevant Clinic Status (Defined in Clinic Status Master File) from drop down list.
Description	Further description of the clinic (If any).
Building No.	Location Address of the Clinic.
Flr/Unit:	
Street Name	
State Name	
Postal Code	
Country Code	
Email Address	Email address of the clinic.
Effective Date From/To	Time period within which this clinic code is applicable to the system.

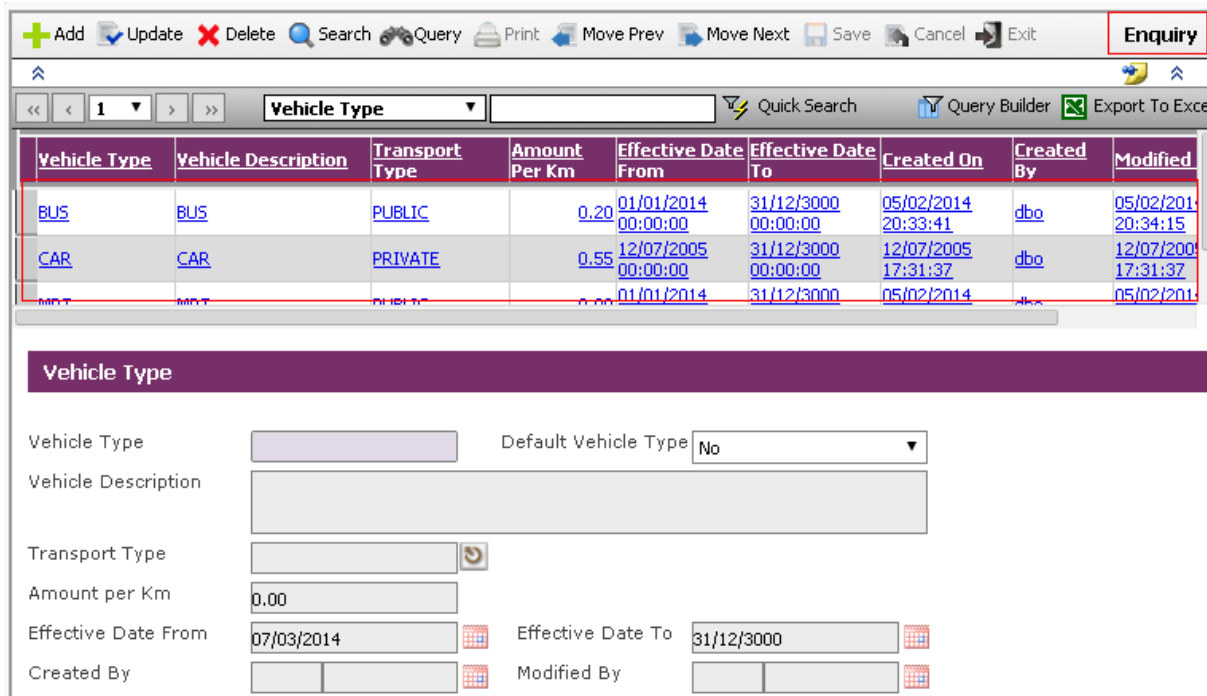
**To Update, Delete the existing Clinic Code record:**

- To update the clinic code record details, click on the record in the grid which needs to modify and click on **Update button**, modify the fields and click on **Save button** to save the changes.
- To delete the clinic code record details, click on the record in the grid which needs to delete and click on **Delete button**.

## 7.9 Vehicle Master

The purpose of this module is to allow users to setup the different type of vehicle types which are used during transport claim transactions.

- Click on **Vehicle Master** menu item to launch the screen in query mode
- Click on **Query** button to display the existing vehicle master records in the header grid of the screen as follows.



The screenshot shows the 'Vehicle Master' application interface. At the top, there is a toolbar with buttons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. A red box highlights the 'Enquiry' button. Below the toolbar is a header grid with columns: Vehicle Type, Vehicle Description, Transport Type, Amount Per Km, Effective Date From, Effective Date To, Created On, Created By, and Modified. The grid contains three rows: BUS (PUBLIC, 0.20, 01/01/2014, 31/12/3000, 05/02/2014, dbo), CAR (PRIVATE, 0.55, 12/07/2005, 31/12/3000, 12/07/2005, dbo), and MPT (PUBLIC, 0.00, 01/01/2014, 31/12/3000, 05/02/2014, dbo). Below the grid is a form titled 'Vehicle Type' with fields for Vehicle Type, Vehicle Description, Transport Type, Amount per Km, Effective Date From, Effective Date To, Created By, and Modified By. A 'Default Vehicle Type' dropdown is set to 'No'.

- Click on **Add** button to add new record.
- By default Effective date from and to fields are filled with the current date and 01/01/2099 and amount per Km field values is filled with 0.00.
- Enter the values in the corresponding fields, select Values for Effective date from and to fields from date control if needed.
- Click on **Save** button to save the record and record is displayed in the header grid of the screen.

Add

---

Vehicle Type	Vehicle Description	Transport Type	Amount Per Km	Effective Date From	Effective Date To	Created On	Created By	Modified
BUS	BUS	PUBLIC	0.20	01/01/2014 00:00:00	31/12/3000 00:00:00	05/02/2014 20:33:41	dbo	05/02/2014 20:34:15
CAR	CAR	PRIVATE	0.55	12/07/2005 00:00:00	31/12/3000 00:00:00	12/07/2005 17:31:37	dbo	12/07/2005 17:31:37
MDT	MDT	PUBLIC	0.00	01/01/2014	31/12/3000	05/02/2014	dbo	05/02/2014

---

**Vehicle Type**

Vehicle Type: 
 Default Vehicle Type:

Vehicle Description:

Transport Type:

Amount per Km:

Effective Date From: 
 Effective Date To:

Created By: 
 Modified By:

Fields	Description
Vehicle Type:	Abbreviation representing the type of vehicle.
Default Vehicle Type	User to set vehicle type as default vehicle type for Transport Type.
Vehicle Description:	Description name of Vehicle Type.
Transport Type:	PRIVATE – Private vehicle PUBLIC – Public vehicle
Amount per Km:	Amount (\$) claimable per kilometer travelled.
Effective Date From/To:	Time period within which this record is applicable to the system.
Email Address	Email address of the clinic.
Effective Date From/To	Time period within which this clinic code is applicable to the system.



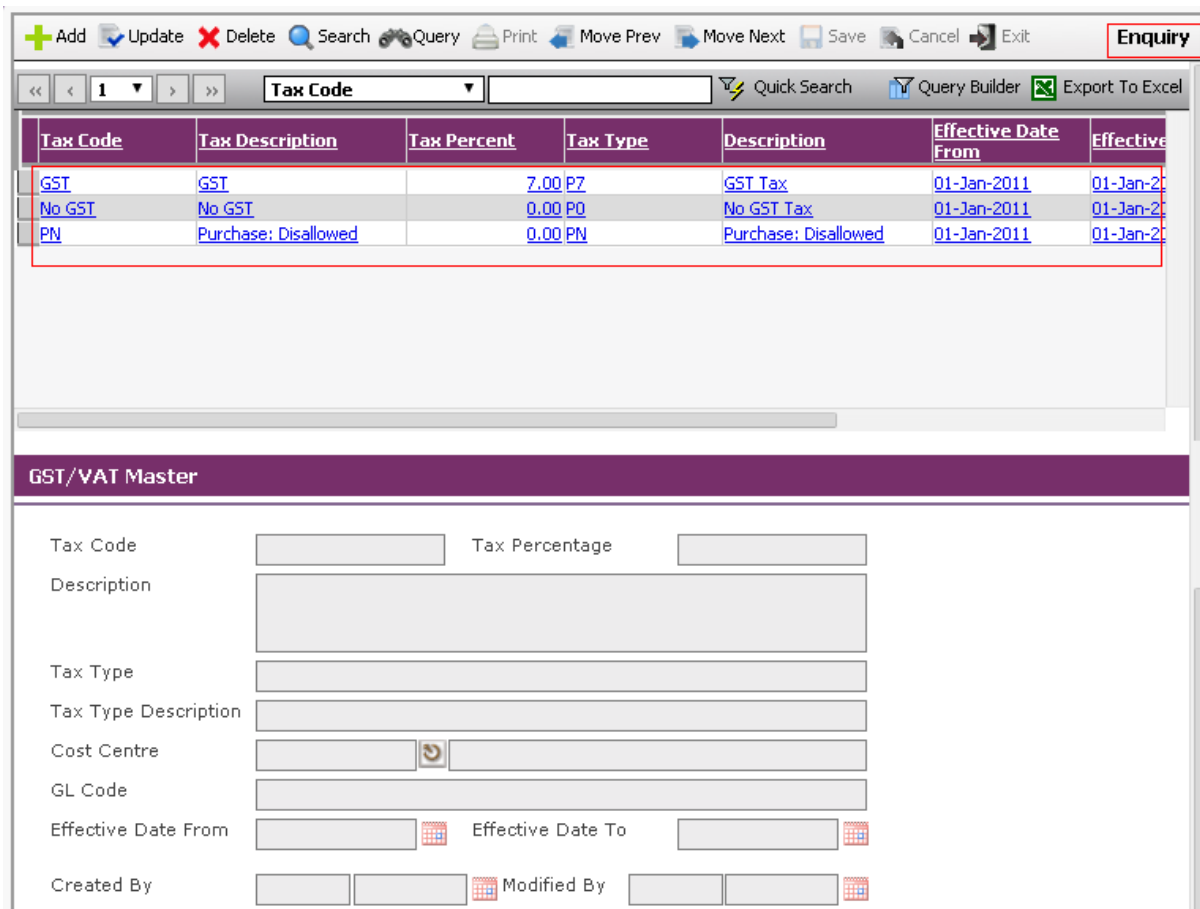
**To Update, Delete the existing Vehicle master record:**

- To update the vehicle master record details, click on the record in the grid which needs to modify and click on **Update button**, modify the fields and click on **Save button** will save the changes.
- To delete the vehicle master record, click on the record in the grid which needs to be deleted and click on **Delete button**.

## 7.10 GST/VAT Code

The purpose of this module is to allow users to setup the different type GST/VAT values which are used during claim transactions.

- Click on **GST/VAT Code** menu item to launch the screen in Query mode
- Click on **Query button** to display the existing GST/VAT codes in the header grid of the screen as follows.



The screenshot shows the 'GST/VAT Master' screen. At the top, there is a toolbar with buttons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. Below the toolbar is a header grid with columns: Tax Code, Tax Description, Tax Percent, Tax Type, Description, Effective Date From, and Effective Date To. The grid contains three rows: GST (7.00 P7), No GST (0.00 P0), and PN (0.00 PN). Below the grid is a form for adding a new record with fields for Tax Code, Tax Percentage, Description, Tax Type, Tax Type Description, Cost Centre, GL Code, Effective Date From, Effective Date To, Created By, and Modified By.

Tax Code	Tax Description	Tax Percent	Tax Type	Description	Effective Date From	Effective Date To
GST	GST	7.00	P7	GST Tax	01-Jan-2011	01-Jan-2011
No GST	No GST	0.00	P0	No GST Tax	01-Jan-2011	01-Jan-2011
PN	Purchase: Disallowed	0.00	PN	Purchase: Disallowed	01-Jan-2011	01-Jan-2011

- Click on **Add button** to add a new record.
- Enter the values in to the fields and click on **Save button** to save the GST/VAT Code details as follows.

Add

Tax Code	Tax Description	Tax Percent	Tax Type	Description	Effective Date From	Effective
<a href="#">GST</a>	<a href="#">GST</a>	<a href="#">7.00</a>	<a href="#">P7</a>	<a href="#">GST Tax</a>	<a href="#">01-Jan-2011</a>	<a href="#">01-Jan-20</a>
<a href="#">No GST</a>	<a href="#">No GST</a>	<a href="#">0.00</a>	<a href="#">P0</a>	<a href="#">No GST Tax</a>	<a href="#">01-Jan-2011</a>	<a href="#">01-Jan-20</a>
<a href="#">PN</a>	<a href="#">Purchase: Disallowed</a>	<a href="#">0.00</a>	<a href="#">PN</a>	<a href="#">Purchase: Disallowed</a>	<a href="#">01-Jan-2011</a>	<a href="#">01-Jan-20</a>

**GST/VAT Master**

Tax Code:  Tax Percentage:   
 Description:   
 Tax Type:   
 Tax Type Description:   
 Cost Centre:    
 GL Code:   
 Effective Date From:   
 Created By:

Fields	Description
Tax Code	User to enter the Tax Code.
Tax Percentage	User to enter the Tax Percentage.
Description	User to enter the Tax Description.
Tax Type	User to enter the Tax Type.
Tax Type Description	User to enter the Tax Type Description.
Cost Centre	User to select the Cost Centre to which cost centre the tax is going to chargeable.
Account Code	User to enter the Account Code for the Tax Code.

**To Update, Delete the existing Vehicle master record:**

- To update the GST/VAT code record details, click on the record in the grid which needs to modify and click on **Update button** modify the fields and click on **Save button** will save the changes.
- To delete the GST/VAT code record, click on the record in the grid which needs to delete and click on **Delete button** will deletes the selected record from the screen.

## 7.11 Project Master

The purpose of this module is to allow users to setup the various projects. The fund allocated to the particular project is specified by the source of fund. The project numbers are used during claim transactions and claim payments.

- Click on the Project Master Menu item to launch the Project Master screen.
- Click on **Query** button to display the existing Project master records in the header grid of the screen as follows.

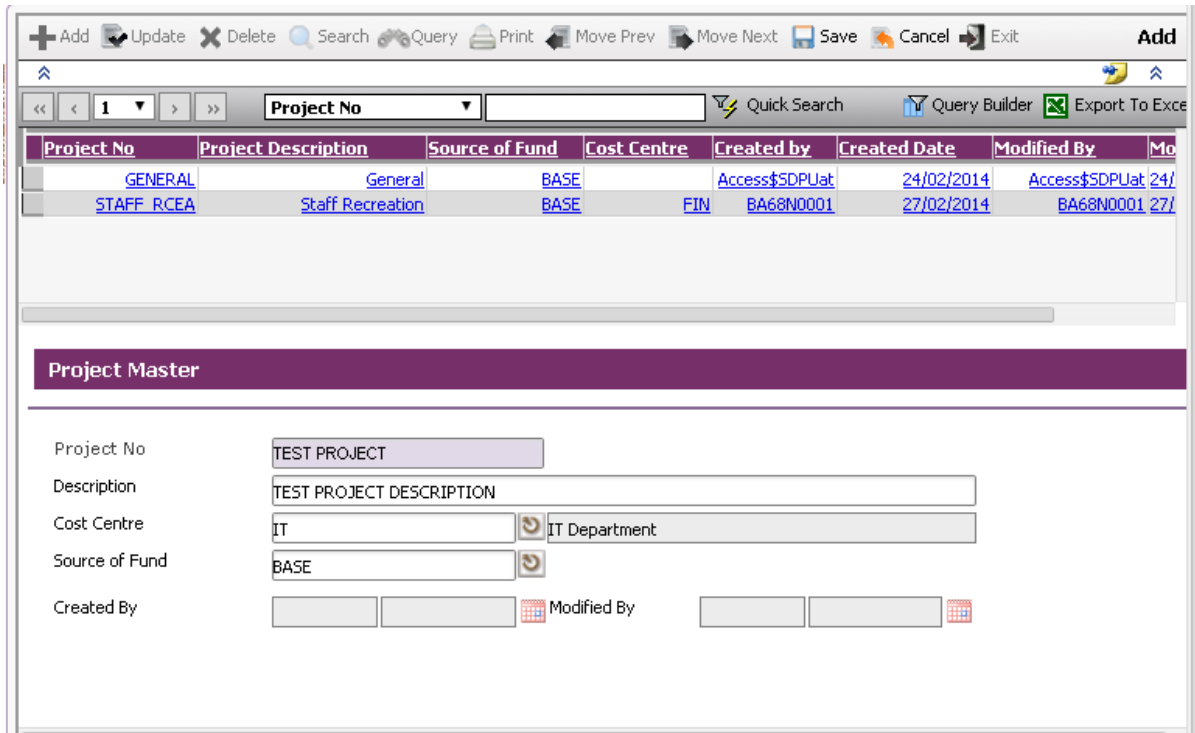
The screenshot shows the Project Master interface. At the top, there is a toolbar with buttons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. The 'Enquiry' button is highlighted with a red box. Below the toolbar is a header grid with columns: Project No, Project Description, Source of Fund, Cost Centre, Created by, Created Date, Modified By, and Mo. The grid contains two rows of data:

Project No	Project Description	Source of Fund	Cost Centre	Created by	Created Date	Modified By	Mo
GENERAL	General	BASE		Access\$SDPUat	24/02/2014	Access\$SDPUat	24/
STAFF_RCEA	Staff Recreation	BASE	FIN	BA68N0001	27/02/2014	BA68N0001	27/

Below the grid is a form titled 'Project Master' with the following fields:

- Project No:
- Description:
- Cost Centre:
- Source of Fund:
- Created By:    Modified By:

- Click on **Add** button to change the screen mode to add mode.
- Enter the values in the corresponding fields Project No., Description, Cost Centre, Source of Fund.
- Click on **Save** button to save the record.



Fields	Description
Project No	User to enter the Project No
Description	User to enter the Project Description.
Cost Centre	User have to select from the Picklist
Source of Fund	User have to select from the Picklist

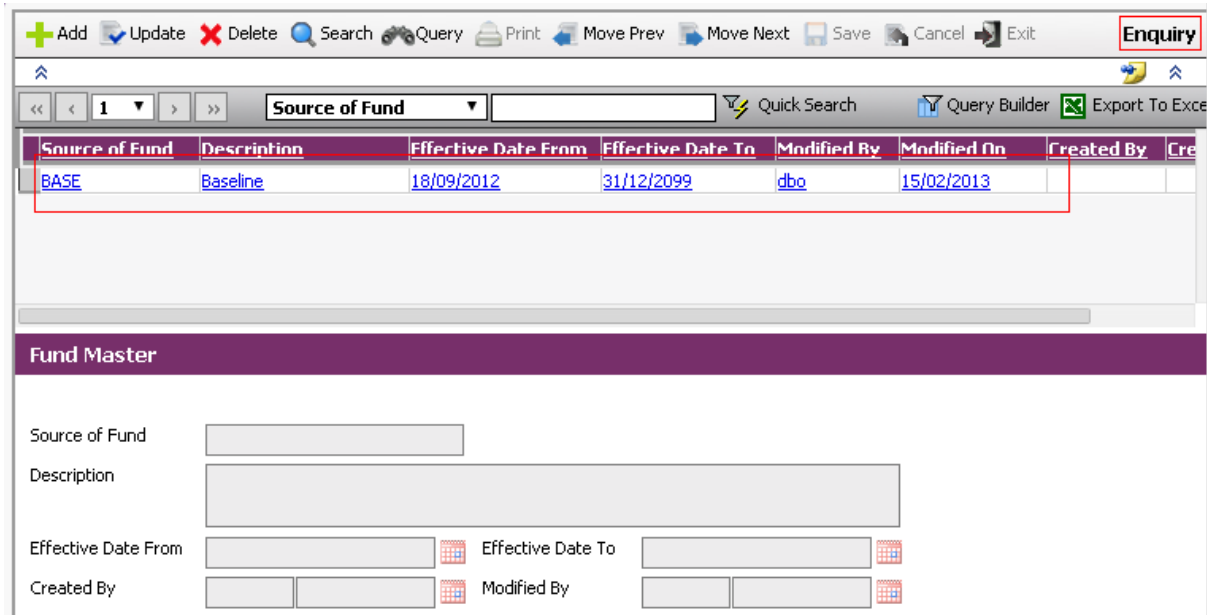
**To Update, Delete the existing Project master record:**

- To update the project master record details, click on the record in the grid which needs to modify and click on **Update button**, modify the fields and click on **Save button** will save the changes.
- To delete the project master record, click on the record in the grid which needs to delete and click on **Delete button** will deletes the selected project master record from the screen.

## 7.12 Fund Master

The purpose of this module is to allow users to setup the various types of Fund for claims. The fund is an accounting entity used for recording claim expenditures which are used during claim transactions and claim payments.





- Click on the **Fund Master** menu item to launch the fund master screen in enquiry mode and displays the existing fund codes in the header grid of the screen as follows.



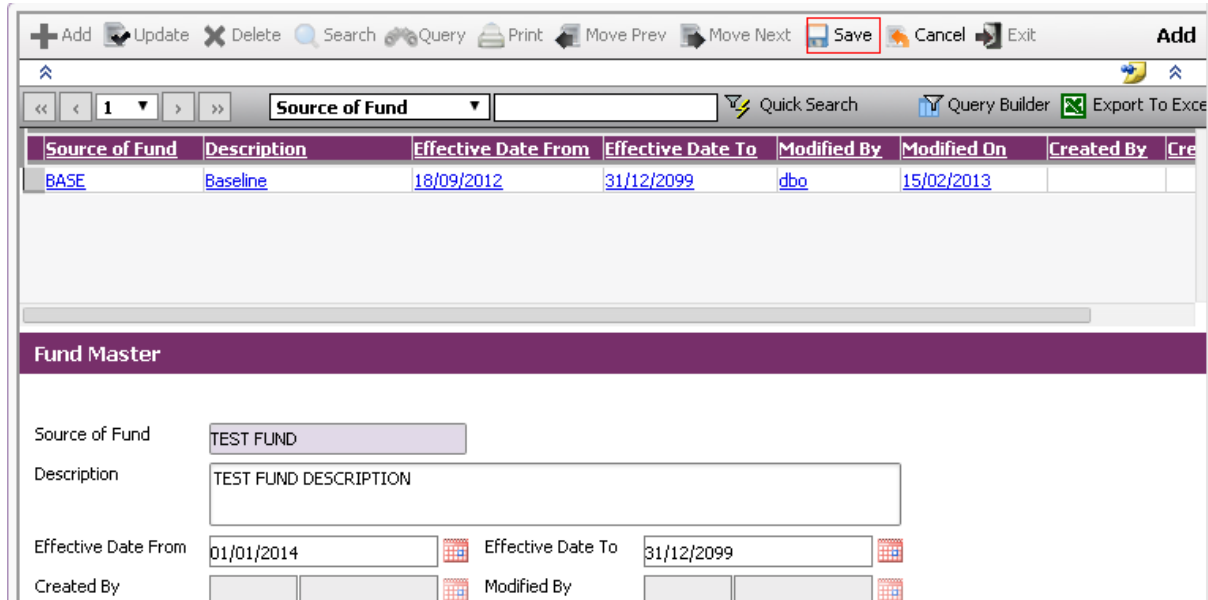
The screenshot shows the 'Fund Master' enquiry screen. At the top, there is a toolbar with buttons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. A red box highlights the 'Enquiry' button. Below the toolbar is a navigation bar with a 'Source of Fund' dropdown menu and a 'Quick Search' field. The main area contains a table with the following data:

Source of Fund	Description	Effective Date From	Effective Date To	Modified By	Modified On	Created By	Cre
BASE	Baseline	18/09/2012	31/12/2099	dbo	15/02/2013		

Below the table is a form titled 'Fund Master' with the following fields:

- Source of Fund:
- Description:
- Effective Date From:   Effective Date To:  
- Created By:   Modified By:  

- Click on **Add button** to add a new record.
- By default Effective date from and to fields are filled with the current date and 01/01/2099. Enter the values in the corresponding fields Source of Fund, Description, etc.
- Enter the values in the fields and click on **Save button** to save the record.



Fields	Description
Fund Code	User to enter the Fund Code.
Description	User to enter the Fund Code Description.
Effective Date From/To	Time period within which this Fund code is applicable to the system.

**To Update, Delete the existing Fund master record:**

- To update the fund master record details, click on the record in the grid which needs to modify and click on **Update button** modify the fields and click on **Save button** will save the changes.
- To delete the fund master record, click on the record in the grid which needs to delete and click on **Delete button**.



## 8 Claim Applications

### 8.1 All Claims

This module allows the user to create/update/delete the claim application records and to submit their claim applications.

- Go to Claim Applications → All Claims will displays the claim application screen in enquiry mode and displays the existing records in the header grid of the screen as follows.

Transaction Date	Run No	Employee Id	Employee Name	Actual Claim Amount	Claim S
25/02/2014	1402000018	BA68N0002	Harry Wong		0.00 NEW
25/02/2014	1402000003	BA68N0002	Harry Wong		711.00 NEW

**Claim Transactions**

Employee Id: BA68N0002 Harry Wong  
 Org Unit: Information Technology Department  
 Benefit Scheme: MSO **View / Upload File(s)**

**Information**

Claim Status: NEW  
 Actual Claim Amount: 0.00  
 Claim Remarks:

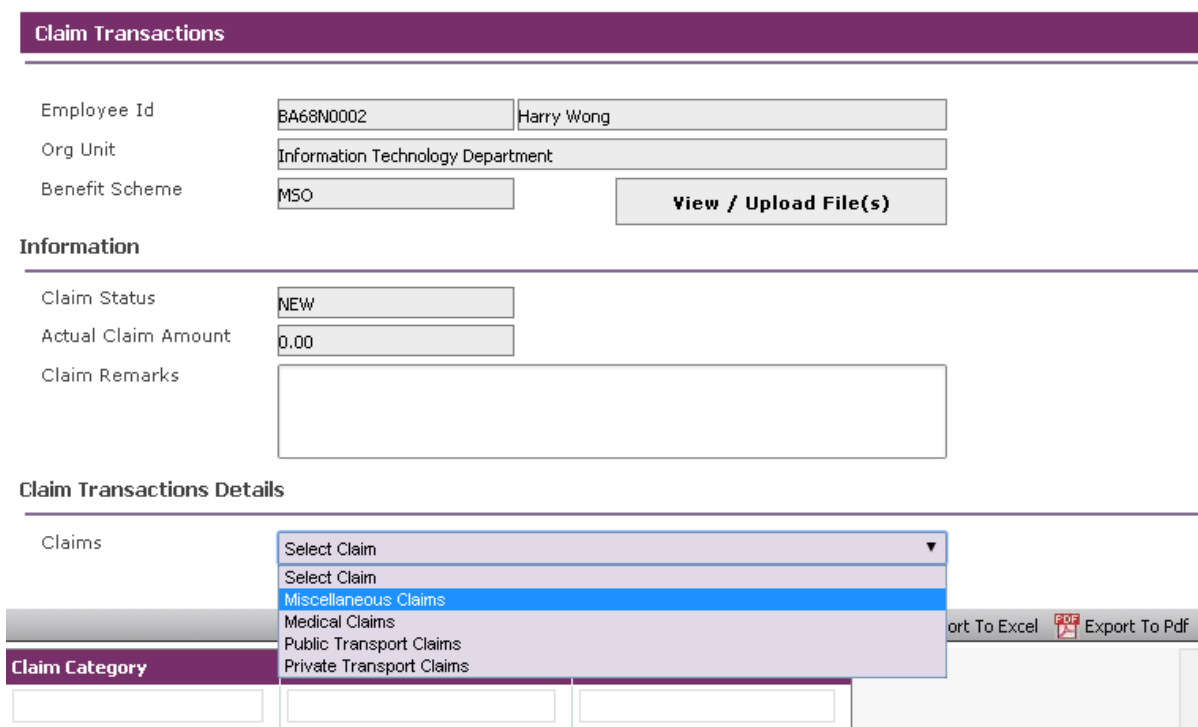
**Claim Transactions Details**

Claims: Select Claim

- Click on **Add button** to add a new record.
- Select the Claim type from the dropdown list, the corresponding detail screen will launch in a popup window.

### 8.1.1 Apply for Miscellaneous Claims

- To Add Miscellaneous Claims, select Miscellaneous Claims from dropdown list as follows.



The screenshot displays the 'Claim Transactions' form. At the top, there is a purple header bar with the text 'Claim Transactions'. Below this, the form is divided into several sections:

- Employee Information:** Fields for 'Employee Id' (BA68N0002), 'Name' (Harry Wong), 'Org Unit' (Information Technology Department), and 'Benefit Scheme' (MSO). A 'View / Upload File(s)' button is located to the right of the Benefit Scheme field.
- Information:** Fields for 'Claim Status' (NEW), 'Actual Claim Amount' (0.00), and 'Claim Remarks' (a large empty text area).
- Claim Transactions Details:** A section containing a 'Claims' dropdown menu. The dropdown is open, showing options: 'Select Claim', 'Miscellaneous Claims' (highlighted in blue), 'Medical Claims', 'Public Transport Claims', and 'Private Transport Claims'. To the right of the dropdown are buttons for 'Export To Excel' and 'Export To Pdf'.
- Claim Category:** A purple header bar above a table with three empty columns.

- System navigates to load the Miscellaneous Claims details screen as follows.

**Miscellaneous Claims**

Claim Type	<input type="text" value="OTHER_CLAIMS"/>		<input type="text" value="Other Claims"/>
GL Code	<input type="text"/>		<input type="text"/>
Date Of Receipt	<input type="text"/>		

---

**Charge To**

Employee Cost Centre	<input type="text" value="IT"/>		<input type="text" value="IT Department"/>
Source of Fund	<input type="text" value="BASE"/>		
Project No	<input type="text"/>		<input type="text"/>

---

**Claim Details**

Currency Code	<input type="text" value="SGD"/>		Exchange Rate	<input type="text" value="1.0000000"/>	
Claim + GST Amount	<input type="text" value="0.00"/>				
GST Code	<input type="text" value="No GST"/>		GST Percentage	<input type="text" value="0.00"/>	
GST Amount	<input type="text" value="0.00"/>				
Actual Claim Amount (Inclusive Of GST Amount)	<input type="text" value="0.00"/>		(SGD)		

---

**Information**

Description	<input type="text"/>
Remarks	<input type="text"/>

- Select the Claim type and GL Code from pick list.
- Select the Calendar Icon to popup calendar and select date and click **Close button** for entering the Date of Receipt.

**Miscellaneous Claims**

Claim Type: OTHER\_CLAIMS Other Claims

GL Code: [Field]

Date Of Receipt: [Calendar Icon] → Launch Calendar

---

**Charge To**

Employee Cost Centre: [Field]

Source of Fund: [Field]

Project No: [Field]

Double Click on Date or Select Date and click on Close for Select Date

To Select Year and Month From the Dropdown list

**Claim Details**

Currency Code: Clear Close Rate: 1.0000000

Claim + GST Amount: 0.00 → Click on Close After Selecting the date

GST Code: No GST GST Percentage: 0.00

GST Amount: 0.00

Actual Claim Amount: 0.00 (SGD)

---

**Information**

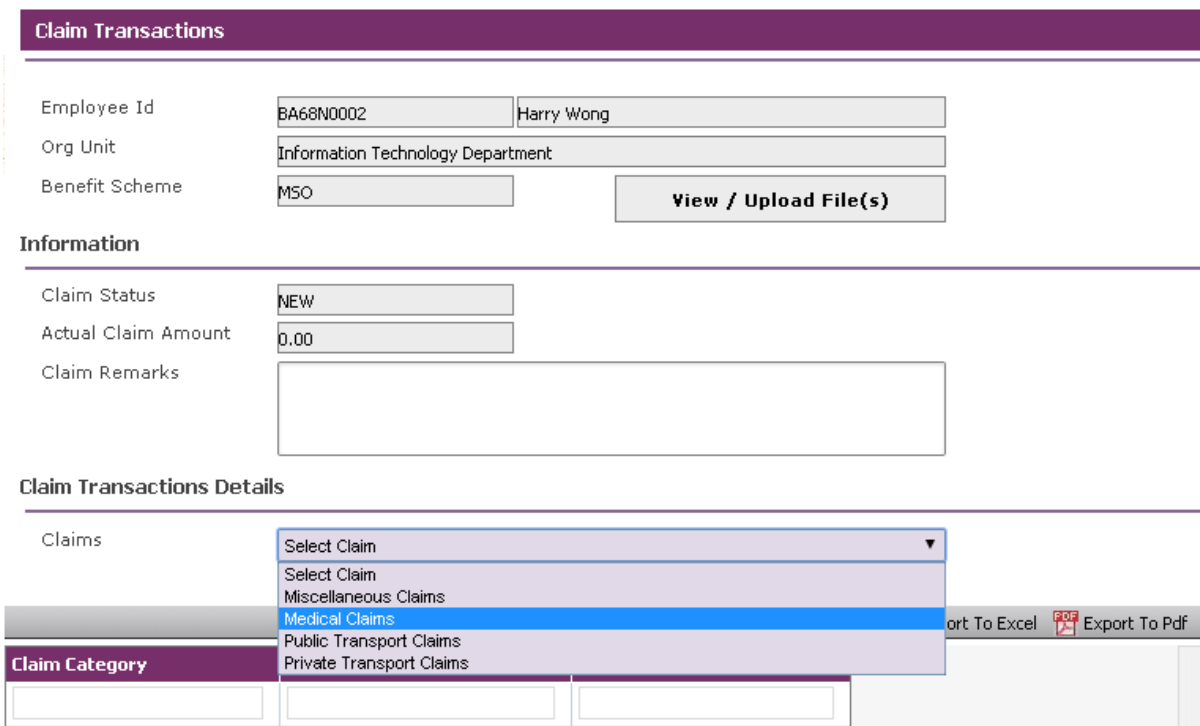
Description: [Field]

Remarks: [Field]

- Select the Employee Cost Centre, Source of Fund and Project No from pick list.
- Select the Currency Code and Exchange Rate from pick list.
- Enter the Claim + GST Amount and select GST Code from dropdown, then the GST Amount and Actual Claim Amount calculated.
- Enter Description and Remarks and click on the **Save button**.
- Close the popup window (detail screen) to navigate to parent screen to add another claim record save.
- To update the miscellaneous claim record details, select the record in the grid and click on the **Update button**, modify the fields and click on **Save button** to save the changes.
- To delete the record, select the record in the grid and click on the **Delete button** to delete the claim transaction details.

### 8.1.2 Apply for Medical Claims

- To add medical claims records to all claims screen, select the Medical Claims from the dropdown as follows.



**Claim Transactions**

Employee Id: BA68N0002 Harry Wong  
Org Unit: Information Technology Department  
Benefit Scheme: MSO **View / Upload File(s)**

**Information**

Claim Status: NEW  
Actual Claim Amount: 0.00  
Claim Remarks:

**Claim Transactions Details**

Claims: **Select Claim** (dropdown menu)  
Miscellaneous Claims  
**Medical Claims** (highlighted)  
Public Transport Claims  
Private Transport Claims

Export To Excel PDF Export To Pdf

**Claim Category**

- System navigates to load the Medical Claims details screen as below.

Medical Claims Details

Treatment Type	<input type="text" value="Select Treatment"/>		
GL Code	<input type="text"/>		
Treatment Date	<input type="text"/>		
Patient	<input type="text" value="Harry Wong"/>		
Relationship	<input type="text" value="SELF"/>		

---

**Charge To**

Employee Cost Centre	<input type="text" value="IT"/>		<input type="text" value="IT Department"/>
Source of Fund	<input type="text" value="BASE"/>		<input type="text"/>
Project No	<input type="text"/>		<input type="text"/>
Clinic Code	<input type="text"/>		<input type="text"/>
Clinic Status	<input type="text"/>		
Clinic Name	<input type="text"/>		
Receipt No	<input type="text"/>		
Remarks	<input type="text"/>		

---

**Entitlement And Balance**

	Staff	Family	Total
Entitlement	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Claimed Amount	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Pending	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Current Application Claim Amount	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Balance	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

---

**Expenses/Reimbursement**

Medical Expenses(\$)	<input type="text" value="0.00"/>		
Claimable Amount(\$)	<input type="text" value="0.00"/>		
Actual Claim Amount(\$)	<input type="text" value="0.00"/>	Co-Payment Amount(\$)	<input type="text" value="0.00"/>

- Select the Treatment Type from dropdown. By default GL Code is filled based on Treatment Type.
- Select the patient from Patient dropdown. By default Relationship is filled based on patient.
- Select the Employee Cost Centre, Source of Fund, and Project No from pick list.
- Select the Clinic Code form pick list. Enter clinic Name, Receipt No and Remarks.
- Enter the amount in Medical Expense (\$) field, by default Claimable Amount (\$), Actual Claim Amount (\$) and Co-Payment Amount (\$) fields are filled are calculated.
- Click on **Save button** to save the claim.

- To add more claims, click on the **Add button** and repeat the same process and close the detail screen to navigate to parent screen.

### 8.1.3 Apply for Public Transport Claims

- To add public transport claim records to all claims, select the Public Transport Claims from the dropdown list as shown below.

**Claim Transactions**

---

Employee Id

Org Unit

Benefit Scheme

**View / Upload File(s)**

---

**Information**

Claim Status

Actual Claim Amount

Claim Remarks

---

**Claim Transactions Details**

Claims 

- Select Claim
- Miscellaneous Claims
- Medical Claims
- Public Transport Claims
- Private Transport Claims

Export To Excel Export To Pdf

---

**Claim Category**

--	--	--

- System will navigates to load the Public Transport Claims details screen as follows.

**Public Transport Claim Details**

---

Employee Cost Centre	<input type="text" value="IT"/>		<input type="text" value="IT Department"/>
Source of Fund	<input type="text" value="BASE"/>		
Project No	<input type="text"/>		<input type="text"/>
GL Code	<input type="text" value="TRANSPORT"/>		<input type="text" value="Staff Local Transportation"/>

**Information**

---

Start Date	<input type="text"/>		Start Time	<input type="text"/>	
Transport Type	<input type="text"/>				
Payment Type	<input type="text" value="Personal"/>				
Transport From	<input type="text" value="Select Transport From"/>				
Pls. Specify Places Travelled From	<input type="text"/>				
Transport To	<input type="text" value="Select Transport To"/>				
Pls. Specify Places Travelled To	<input type="text"/>				
Purpose Of Trips	<input type="text"/>				
Amount Of Fares Paid	<input type="text" value="0.00"/>				
Travel Expenses Btw. Home and Office	<input type="text" value="0.00"/>				
Actual Claim Amount	<input type="text" value="0.00"/>				
Remarks	<input type="text"/>				

- Select the Employee Cost Centre, Source of Fund, and Project No from corresponding pick lists. By default GL Code field is filled.
- Enter all mandatory field information into fields. By default 'Travel Expenses Btw. Home and Office' field is setup based on start date selection (system will get the 'Travel Expenses Btw. Home and Office' from the Claim Master Setup->Transport Fare).
- Select the 'Transport From' and 'Transport To' from dropdowns. By default 'Pls. Specify Places Travelled from' and 'Pls. Specify Places Travelled To' are filled, when select the Transport From and Transport To as 'Others', write into multiline textboxes.
- System checks the 'Transport From' and 'Transport To' cannot be same. System checks, the 'Travel Expenses Btw. Home and Office' and calculate the actual claim amount, if either 'Transport From' or 'Transport To' is selected as 'Home'.
- Enter 'Amount Of Fares Paid'. By default Actual Claim Amount calculated.  
Actual Claim Amount = ('Amount Of Fares Paid' - 'Travel Expenses Btw. Home and Office')
- Click on **Save button** to save the claim, to add more claims repeat the same process.



- Close the popup window (detail screen) to navigate to parent screen to add another claim/save/submit the application.

### 8.1.4 Apply for Private Transport Claims

- To add private transport claim records to all claims, select the Private Transport Claims from the dropdown list.
- System will navigates to load the Private Transport Claims details screen as below.

**Private Transport Claim Details**

---

Employee Cost Centre	<input type="text" value="IT"/>	<input type="text" value="IT Department"/>	
Source of Fund	<input type="text" value="BASE"/>		
Project No	<input type="text"/>		
GL Code	<input type="text" value="TRANSPORT"/>	<input type="text" value="Staff Local Transportation"/>	

**Information**

---

Vehicle Type	<input type="text" value="Car"/>		
Amount Per KM	<input type="text" value="0.55"/>		
Start Date	<input type="text"/>	Start Time	<input type="text"/>
Payment Type	<input type="text" value="Personal"/>		
Transport From	<input type="text" value="Select Transport From"/>		
Pls. Specify Places Travelled From	<input type="text"/>		
Transport To	<input type="text" value="Select Transport To"/>		
Pls. Specify Places Travelled To	<input type="text"/>		
Purpose Of Trips	<input type="text"/>		

**Amount Incurred**

---

Mileage (KM)	<input type="text" value="0.00"/>
Distance Btw. Home And Office (KM)	<input type="text" value="0.00"/>
Claimable Amount	<input type="text" value="0.00"/>
Carpark Charges	<input type="text" value="0.00"/>
ERP/Toll Amount	<input type="text" value="0.00"/>
Actual Claim Amount	<input type="text"/>
Remarks	<input type="text"/>

- Select the Employee Cost Centre, Source of Fund, and Project No from pick list.
- By default GL Code field is filled.
- Select Vehicle Type from pick list. By default Amount per KM filled based on master setup.

- Select Start Date and Start Time from Calendar Icon and Payment Type from dropdown.
- Select the 'Transport From' and 'Transport To' from dropdowns. By default 'Pls. Specify Places Travelled from' and 'Pls. Specify Places Travelled To' are filled when user select the Transport From and Transport To as Home.
- System checks the 'Transport From' and 'Transport To' cannot be same.
- System checks, the 'Travel Expenses Btw. Home and Office' and calculate the actual claim amount, if either 'Transport From' or 'Transport To' is selected as 'Home'.
- System calculates the actual claim amount based on the Mileage – Distance Btw. Home and Office (KM) \* Amount Per KM + ERP/Toll Amount + Car park Charges.
- Click on **Save button** to save the claim, to add more claims repeat the same process.
- Close the popup window (detail screen) to navigate to parent screen to add another claim/save/submit the application.

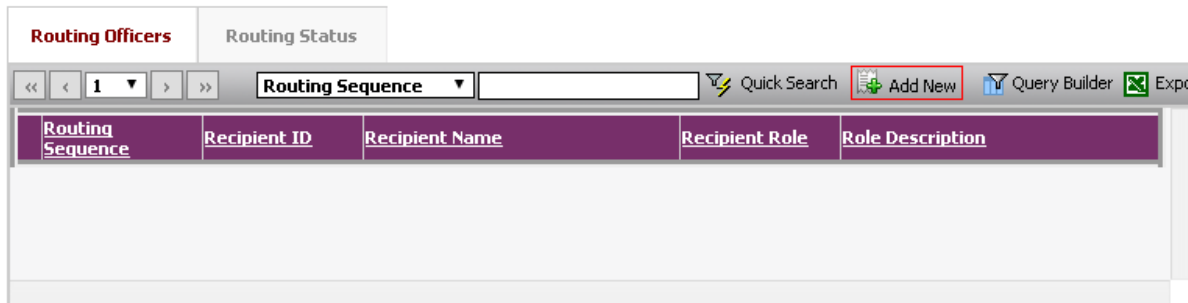
### 8.1.5 How to update/delete Claim Transaction Details

- To update the claim transaction details, select the record in the details grid to open the details screen in popup window. Select the record in the grid and click on **Update button** change the screen mode to update mode. Modify the fields which open for update and click on **Save button** to save the changes.
- To delete the claim transaction details, select the record in the details grid to open the details screen in popup window. Select the record in the grid and click on **Delete button** to delete the selected record.

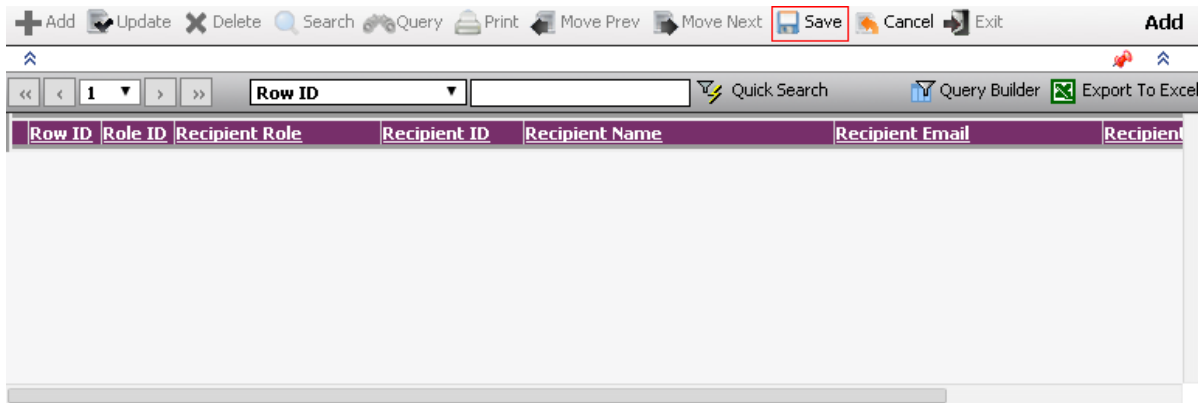
### 8.1.6 How to add/update/delete the Routing list

- We can add/update/delete the routing list from all claims screen.
- To add the routing list, select the record from all claims header grid will displays the selected record in the screen. Click on **Update button** to change the screen mode to update mode and click on **Add New button** as follows.

Routing List



- System will navigate the screen to routing list details screen. By default Application Id filled.
- Select the Role id, Recipient Id from pick list and click on **Save button** as follows.



Set/Edit Routing List

Application ID :

Role ID :

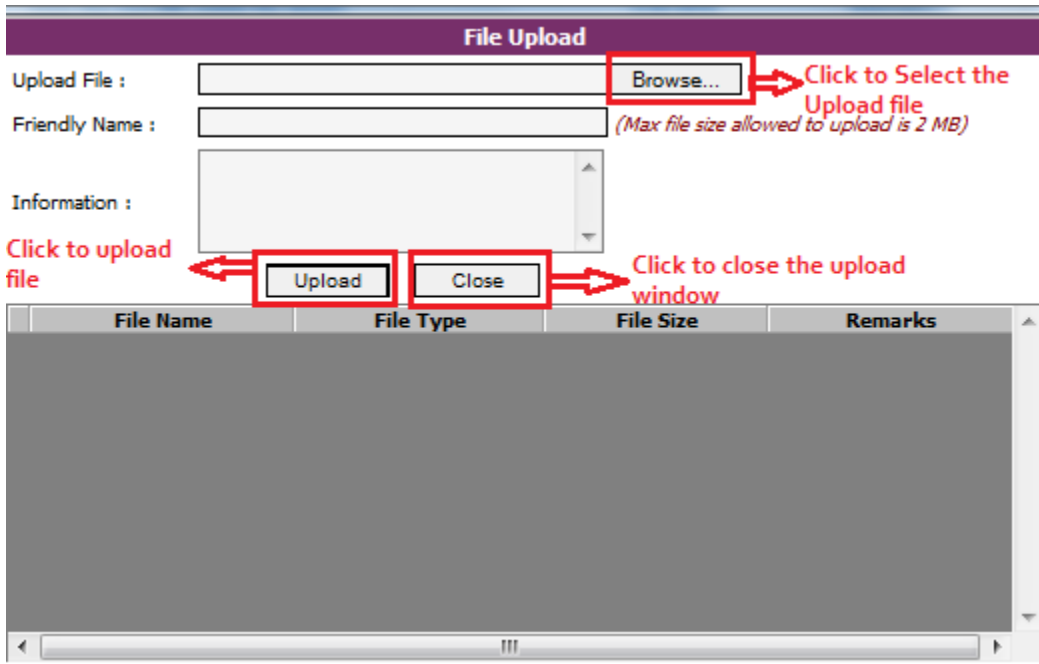
Recipient ID :

Recipient Name :

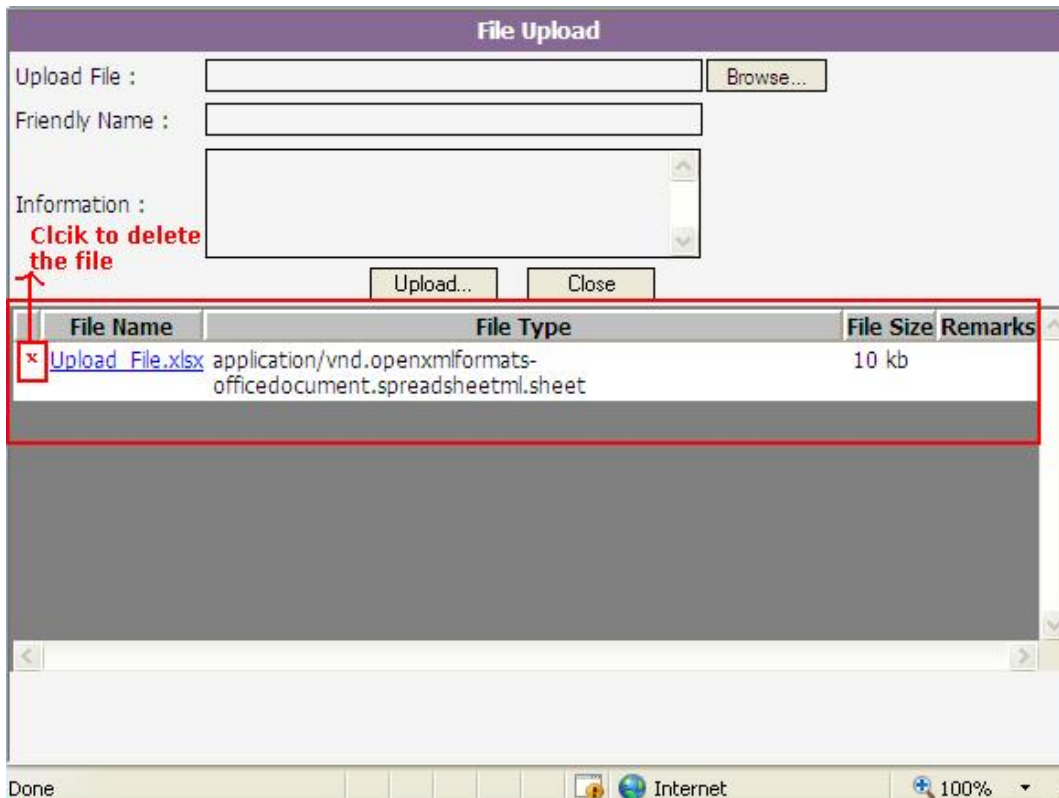
Recipient Email :

8.1.7 How to upload files in Claims Application

- To add the receipts/upload files to the claim application record,select the record from the header grid of the all claims screen will displays the selected record in the screen.
- Click on **Update button** to change the screen mode to update mode and click on **View/Upload Files button** will open a new window as follows.



- Click on **Browse button** to select the upload file.
- Click on **Upload button** to upload the selected file. After uploading, the uploaded file is showing in the grid, as shown in the below.



- To delete the uploaded document, click on **Delete button** to delete uploaded file.

### **8.1.8 How to submit Claim Application**

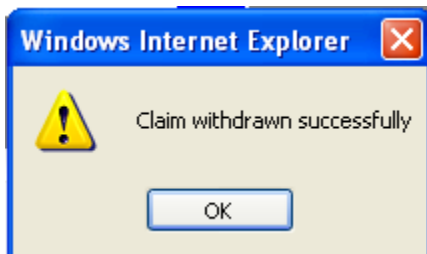
- Click on **Submit button** in the bottom of the screen to complete the Application Process.
- Your approver will receive an email notification of the Submit Application.
- System will return a message with the document number generated for reference.

## 9 Claim Withdraw and Resubmit

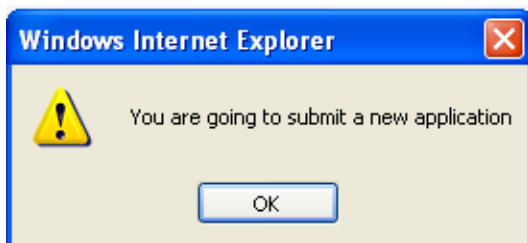
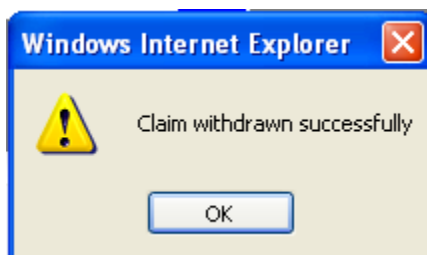
### 9.1 All Claims

This module allows the user to withdraw the claim application and resubmit Claim application. If your claims applications are still pending for approval, user can Withdraw it from Claim Withdraw and Resubmit module.

- To withdraw your claim application, go to Claim Withdraw and Resubmit Menu → All Claims, the records are displayed in the header grid of the screen.
- Select the record from the header grid. Based on the claim status of the selected record then **Withdraw/Withdraw and Resubmit/Print Preview buttons** are enabled/ disabled.
- Select Pending for Approval Record from grid and click on **Withdraw Button** at the bottom to withdraw your application.
- When click on the **Withdraw** button one message box will appear as shown in below. Click on '**OK**' button and the withdraw process will be completed. Your approver will receive an email notification also.



- If the user wants to withdraw and do a re-submission at the same time select the record from grid and click **Withdraw and Resubmit** button. System will pop out two message boxes. Click on '**OK**' button.

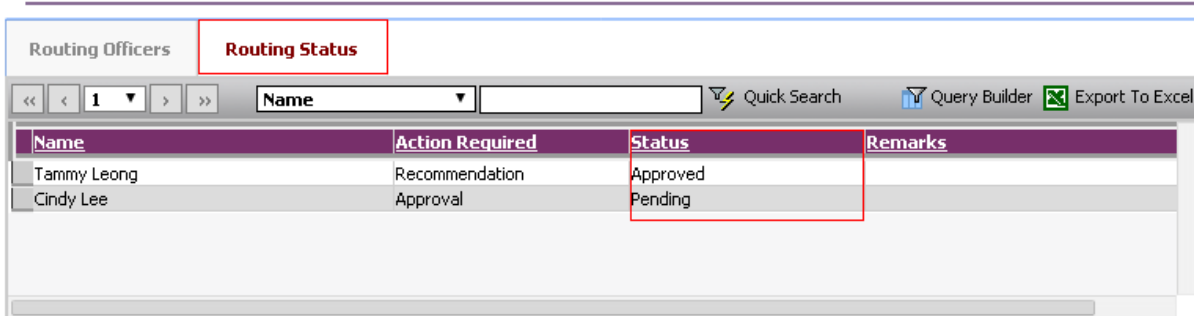


- Your screen will be changed to update mode and you may update and click on the submit button to complete the resubmission process.
- Your approval will receive an email notification on the withdrawal and resubmission. System will return a message with the document number generated for reference.

### 9.1.1 How to check Claim Approval Status

- To know the claim approval status, select the record from all claims screen will displays the selected record in the screen.
- Select the **Routing Status tab** to check the claim approval status of the selected record.

#### Routing List

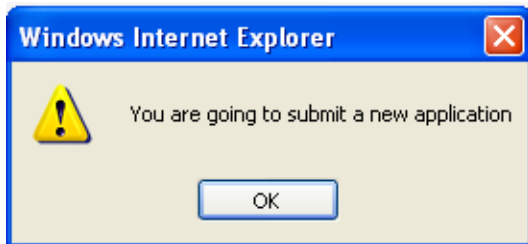
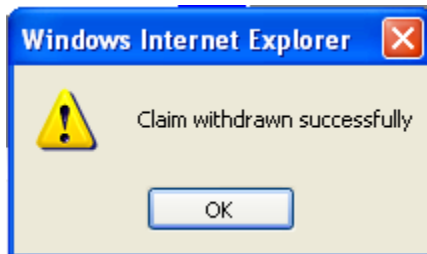


Name	Action Required	Status	Remarks
Tammy Leong	Recommendation	Approved	
Cindy Lee	Approval	Pending	

### 9.1.2 How to re-submit the Rejected Claim

- To resubmit the rejected claim status record, select the rejected claim status record from the all claims screen will displays the selected record in the screen.

- **Print Preview, Withdraw and Resubmit buttons** will be enabled based on claim status of the selected record.
- Click on **Withdraw and Resubmit button** to resubmit the claims. System will pop out two message boxes.
- Go to Claim application → All Claims to select the record from the grid, modify the changes and click **Submit button** to re-submit.



## 10 Claim History

### 10.1 All Claims



This module allows the users to view the history of the submitted claim application records.

- Go to **Claims History → All Claims** screen will displays the records in the screen. Select the record from the header grid of the screen and the selected record displayed in the screen. To view the details, select the record from the detail grid as follows.

The screenshot displays the 'Claims History' application interface. At the top, there is a navigation bar with a 'Transaction Date' dropdown menu and buttons for 'Quick Search', 'Query Builder', and 'Export To Excel'. Below this is a table of claim transactions with the following data:

Transaction Date	Run No	Employee Id	Employee Name	Actual Claim Amount	Claim Status
27/02/2014	1402000020	BA68N0002	Harry Wong	132.00	PAID
25/02/2014	1402000011	BA68N0002	Harry Wong	20.00	REJECT
25/02/2014	1402000008	BA68N0002	Harry Wong	15.00	REJECT
24/02/2014	1402000007	BA68N0002	Harry Wong	50.00	PENDING APP
24/02/2014	1402000006	BA68N0002	Harry Wong	10.00	REJECT

Below the table is a section titled 'Claim Transactions' which contains a form for the selected record (Employee Id: BA68N0002, Harry Wong, Org Unit: Information Technology Department, Benefit Scheme: MSO). A 'View / Upload File(s)' button is present. The 'Information' section shows 'Claim Status: PENDING APPROVAL', 'Actual Claim Amount: 50.00', and 'Claim Remarks: test'. The 'Claim Transactions Details' section has a 'Claims' dropdown menu set to 'Select Claim'. At the bottom, there is another table with the following data:

Claim Category	Claim Type Description	Actual Claim Amount
Transport	Public Transport Claim	50.00

- System will navigate to the corresponding claim type details screen with the existing records in the header grid.
- User can select the record and view the record as follows.

Start Date	Start Time	Transport Type	From	To	Purpose of Trips	Amount of Fares Paid	Expense btw Home & Office	Actual Claim Amount
05/02/2014	16:49	TAXI	Office	test	test upd rec for rejected rec from withdraw resubmit	20.00	10.00	20.00
20/02/2014	16:53	TAXI	Office	Home	added rec for rejected rec from withdraw resubmit screen	40.00	10.00	30.00

**Public Transport Claim Details**

Employee Cost Centre:  IT Department

Source of Fund:

Project No:  General

GL Code:  Staff Local Transportation

**Information**

Start Date:  Start Time:

Transport Type:

Payment Type:

Transport From:

Pls. Specify Places Travelled From:

Transport To:

Pls. Specify Places Travelled To:

Purpose Of Trips:

Amount Of Fares Paid:

Travel Expenses Btw. Home and Office:

Actual Claim Amount:

Remarks:

## 11 Claim Administration

The purpose of this module is to allow the admin to post the claims under specific scheme /all employees. It also allows to process claim payment and to do payroll posting.

There are total 4 screens in Claim Administration menu page.



## 11.1 Claim Entitlement Re-Posting

This module allows HR user to perform Claim Posting for all the employees or by Claim Scheme.

- Select the **Claim entitlement Re-Posting** under **Claim administration** menu.
- Select the specific scheme from the Claim scheme to post dropdown and click on **Post button** to process the Claim posting for the employees under the selected specific benefit scheme and entitlement amounts are updated for that employees and the claim posting log record is inserted in the detail grid of the screen.
- If the admin selects “**All**” from the dropdown and click on Post button to process the Claim posting for all employees and entitlement amounts are updated for all the employees.

Time Log	Session ID	Event	Operation	Message
07/03/2014 17:57:53	1400000049	CLM-POSTING	END	Employee claim record(s) processed: 1
07/03/2014 17:57:46	1400000049	CLM-POSTING	START	Post Date: 07-Mar-2014 for Claim Scheme 'MSO' [Version: 4.2.0.48]
07/03/2014 13:28:12	1400000048	CLM-POSTING	END	Employee claim record(s) processed: 1
07/03/2014 13:28:05	1400000048	CLM-POSTING	START	Post Date: 07-Mar-2014 for Claim Scheme 'MSO' [Version: 4.2.0.48]

- Every Claim Posting run is logged into the log table and users can view the results from the above screen.
- Click the **Refresh button** to refresh the results table.

## 11.2 Claim Payment

This module allows the user to generate GIRO forms and make payments/reimburse for all approved claim applications within a time period specified by the user.

- Click on the **Claim Payment** under Claim Administrator menu page will loads the screen in query mode.
- Click on **Add button** to change the screen mode to add mode.
- After key-in the required details click on the **Generate Payment button** to generate the transactions based on the criteria key-in.

**Claim Payment Generation**

Batch Number	CCG	PY	1403010000	Transaction Date	11/03/2014
Bank Code	7302				
Bank Br. Code	504				
Bank Account	12345678				

**Selection**

---

Value Date	11/03/2014	Payment Mode	ALL
Claim Category	ALL	Process status	NEW
Claim Type	ALL	Modified By	
Approved Claim Date As At	11/03/2014		
Created by			

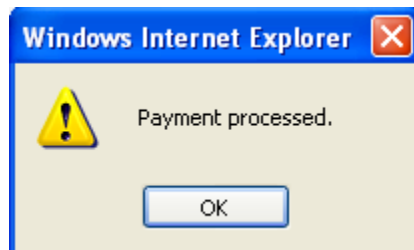
Generate Payment

Export

Fields	Description
Batch Number	System generated number for this payment process.
Transaction Date	Current Date.
Bank Code	Details of Bank Account from which GIRO payments will be made from. These fields are auto filled in by the system. (Employer's Bank Account)
Bank Br. Code	
Bank Account	
Value Date	Date to make the payment.
Payment Mode	Select the Payment Mode, GIRO/Cheque.

Claim Category	Select the claim category to process.
Claim Type	Select the type of claims to process.  ALL – All Claims MED – Medical and Dental Claims Only MISC – Miscellaneous Claims Only TRVL – Travel Claims Only TPT – Transport Claims Only
Approved Claim Date As At	All approved claims within this time period set will be processed.
Process status	NEW – Not submitted for payment yet. PROCESSED – Already submitted for payment.

- Then one message box will appear as shown below. Click on '**Ok**' to Process the Payment.



- User can export the claim details to file (format defined for GIRO).
- Select Bank and Output Format from drop down list and click on **Export button** to the generate file.

### Payment Export

**GIRO Export**

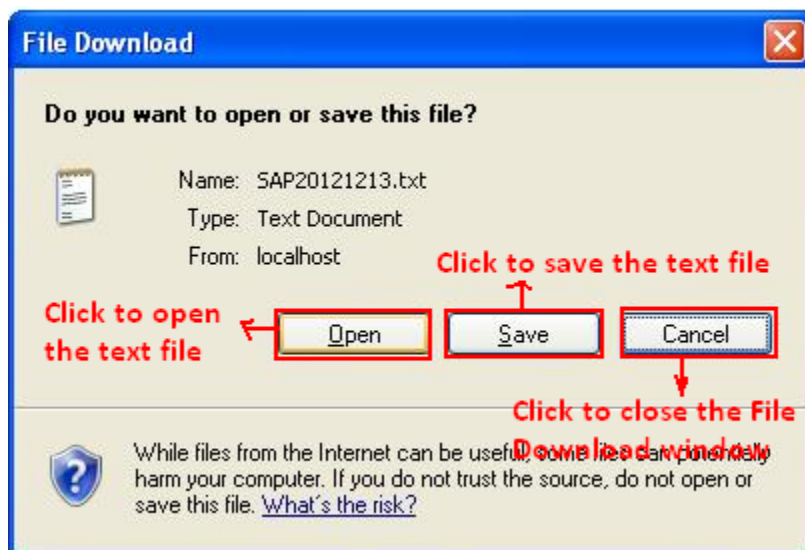
Bank Format:

Output Format:

### Messages



- A Save dialog message box is displayed as shown below.



### 11.3 Claim Payroll Posting

This module is used to Post the Claims to Payroll One time transactions.

- Click on **Claim Payroll Posting** under Claim Administration menu page, the payroll posting screen loads in Enquiry mode and displays the existing records in the header grid of the screen as follows

Enquiry

 Add Update Delete Search Query Print Move Prev Move Next Save Cancel Exit

<< < 1 > >>
 

 Document Type 
 Quick Search Query Builder Export To Excel

Document Type	Department Code	Run No	Post Date	Claim Date	Claim Type	Status	Pay Yea
CCG	PY	1402240000	27/02/2014	28/02/2014	ALL	Generated	2

#### Claim Payroll Posting

Document No.

Post Date

---

**Selection**

Claim Category

Claim Type

Approved Claim Date As At

---

**Pay Period**

Pay Year  Month  Period  Payroll Mode

---

Posting Remark

Created By   Modified By

---

Payment
One Time

<< < 1 > >>
 

 S/No 
 Quick Search Query Builder Export To Excel

S/No	Empe ID	Name	Reference Company Code	Reference Document Type	Reference Department Code	Reference Run No
------	---------	------	------------------------	-------------------------	---------------------------	------------------



- Click on **Add button** to change the screen mode to add mode. Document number, posting date and status fields are automatically filled.
- After key-in the required details click on the **Generate Payment** button to process the payment.
- Records that are processed are listed under the Payment tab.
- When the records are correct, click on the **Post to One Time** button to post the claims to payroll One Time Transactions. The user will be able to proceed to run payroll for the month with these claims to be paid out to the employees.

## 11.4 Claim Enquiry

This module allows the admin to view history of past and current records of All Claims made by employees in the company.

- Click on **Claim Enquiry** menu item under Claim administration menu page will loads the screen enquiry mode.
- To view the details for a claim, click on the relevant record and admin can make any changes or edit any of the fields when viewing the application.

The screenshot displays the 'Claim Enquiry' application interface. At the top, there is a toolbar with icons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. Below the toolbar is a navigation bar with a 'Transaction Date' dropdown menu, a 'Quick Search' field, and buttons for 'Query Builder' and 'Export To Excel'. The main area contains a table with the following data:

Transaction Date	Run No	Employee Id	Employee Name	Actual Claim Amount	Claim
27/02/2014	1402000020	BA68N0002	Harry Wong	132.00	PAID
25/02/2014	1402000017	BA68N0003	Cindy Lee	70.00	PEND APPR
25/02/2014	1402000016	BA68N0003	Cindy Lee	50.00	PEND APPR
25/02/2014	1402000014	BA68N0003	Cindy Lee	40.00	REFU

Below the table is a section titled 'Claim Transactions' with a purple header. It contains several input fields: 'Employee Id' (with value BA68N0001), 'Org Unit', and 'Benefit Scheme'. A 'View / Upload File(s)' button is positioned to the right of the 'Benefit Scheme' field. Below this is an 'Information' section with a 'Claim Status' dropdown menu, an 'Actual Claim Amount' input field, and a 'Claim Remarks' text area. The 'Claim Transactions Details' section features a 'Claims' dropdown menu with the value 'Select Claim'. At the bottom, there is another toolbar with 'Show/Hide FilterRow', 'Query Builder', 'Export To Excel', and 'Export To Pdf' buttons. The final part of the interface shows a table with three columns: 'Claim Category', 'Claim Type Description', and 'Actual Claim Amount', which is currently empty.

- To view the record, select the record from the header grid of the screen will loads the screen.
- To update the record click on the record from the detail grid will loads the corresponding detail screen in update mode.
- Update the fields which are open for update and click on **Save button** to save the changes.
- To add the record click on add button will change the screen mode to add mode, input all the fields and click on **Save button** to save the record.

## 12 Claim Reports

This sub-system allows the user to view/print Claim Reports of employees.

There are 6 reports in this sub-system:

- ▲ Claim Report
  - Claim Entitlement Summary
  - Medical Claim Details Report By Organisation Unit
  - Medical Claim Summary Report By Organisation Unit
  - Medical YTD Claim Summary Report By Organisation Unit
  - Claims Detail Report
  - Employee All Claims Report

When the user clicks on Claim Entitlement Summary, the following screen will show.

### Claim Entitlement Summary

**Record Selection :**

Print All Records [v]      Select Criteria

Print the Report (Batch Job)      Click Here

**Report Output**

Select Report Type      PDF Document [v]

**Report Parameters**

Entitlement As At	<input type="text"/>	
Claim Scheme	%	
Group By	ORG_UNIT	
Sort By	EMPE_ID	

- This screen is similar to the screen seen for all claim reports. However, the **Report Parameters** section will differ depending on the report.
- The user just needs to select the desired object under **Report Parameters**, the rest of the steps are similar to that for printing of Claim Reports.
- Similarly, the below screen will show when a report has been submitted successfully for printing.

### Claim Entitlement Summary

#### Report Status

Your request was sent to the server.

The reference of your request is	:	<b>1402000019</b>
Status of the report	:	<b>Please note: In Progress.</b>

[This page refreshes every 5 seconds.](#)

[Please note: To check the status of all your requests, click on this link.](#)

Last Updated : 04/02/2014 18:28:31

A preview of the report will be displayed as shown below shortly after this screen shows.

Demo Company1 (Pls update the details) Print Date: 04/02/2014  
Page: 1 Of 8

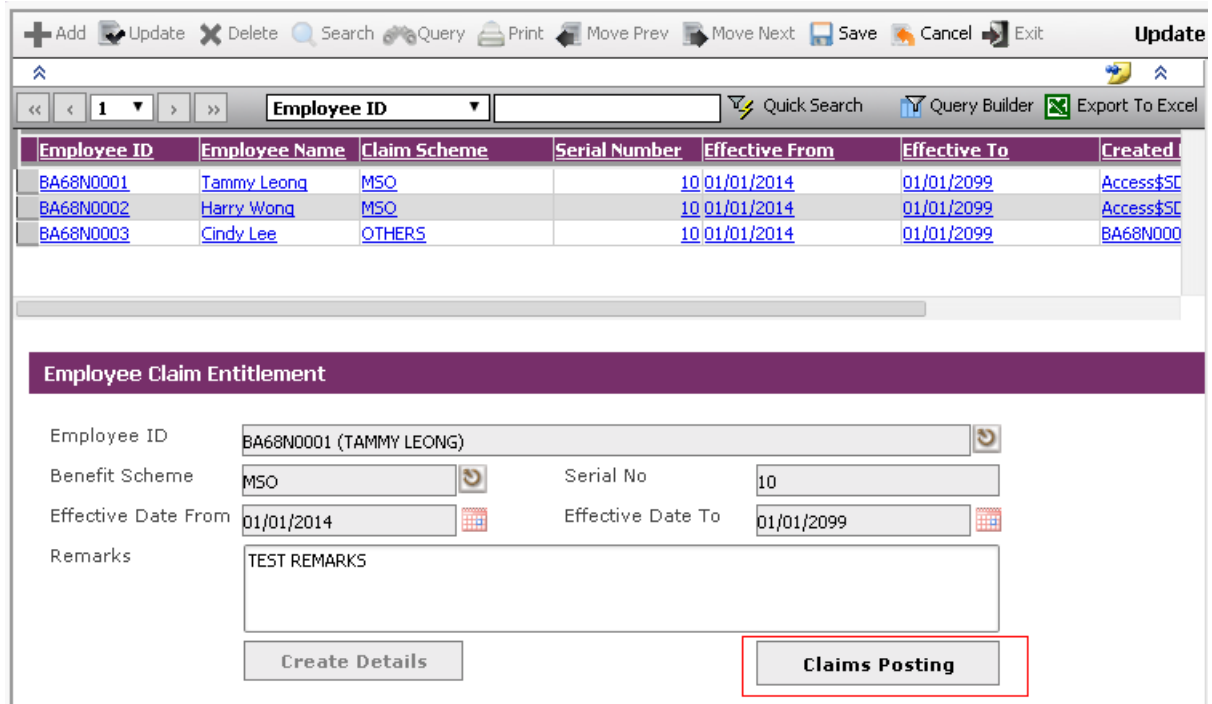
**CLAIM ENTITLEMENT SUMMARY**  
AS AT 4-Feb-2014

Employee ID	Employee Name	Claim Scheme	Claim Type	Entitlement			Claimed		Balance		Pending		Post Year		
				Staff	Family	Per Member	Staff	Family	Staff	Family	Staff	Family	From	To	
BA01N0001	Tammy Leong (Pls update the details)	MSO	CLM_TEST1	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14	
			GOVT/POLY	500.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			HOSPITAL	500.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			OTHER_CLAIMS	9,999.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			PANEL	500.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			PRIVATE	500.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			RECREAT/WE LFARE	9,999.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			RETREATS	9,999.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			STAFF ADVANCES	9,999.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14
			TPT_PRIV	9,999.00	9,999.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14
TPT_PUB	9,999.00	9,999.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14		
BA01N0002	Harry Wong (Pls update the details)	MSO	CLM_TEST1	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/01/14	31/12/14	

## 13 How To...

### 13.1 How to Process Claim Posting for an Employee

- To Process Claim Posting for an employee, click on Claim entitlement menu item from the Claim Master Menu page will loads the screen in query mode.
- Click on **Query button** to display the existing claim entitlement records in the header grid of the screen.
- Select the record from Claim Entitlement header grid and click on the **Update button** will change the screen mode to **Update mode**.
- Click on **'Claim posting'** button will process the claim posting for the selected employee and entitlement amounts and balances are updated for that employee.



System gives the below message.



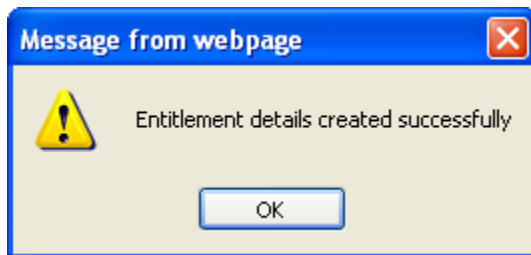
### 13.2 How to change Employee’s Claims Scheme

- To change the employee claims scheme, select the Claim entitlement menu item under claim master menu page will loads the screen in query mode.
- Click on **Query** button will displays the existing claim entitlement records in the header grid of the screen.
- Click on Add button to change the screen mode to add mode.
- Select the same employee from the employee id Picklist for which the employee already having entitlement, select another benefit scheme and click on **Create details** button to create the entitlement record as follows.

**Employee Claim Entitlement**

Employee ID	BA68N0001 (Tammy Leong)		
Benefit Scheme	OTHERS	Serial No	
Effective Date From	13/03/2014	Effective Date To	01/01/2099
Remarks	test		

**Create Details**      **Claims Posting**



- System will set the old employee claim entitlement record to inactive. The old record of the Employee claim entitlement is inactive, the effective to is updated from the new record effective from (minus 1 day). The details in the employee claim entitlement details are blank as follows.



+ Add ↻ Update ✖ Delete 🔍 Search 🔗 Query 🖨 Print ⏪ Move Prev ⏩ Move Next 💾 Save 🚫 Cancel 🚪 Exit 🔍 Enquire

⏪ ⏩ **1** ⏪ ⏩ **Employee ID**  ⚡ Quick Search 🔗 Query Builder 📄 Export To Excel

Employee ID	Employee Name	Claim Scheme	Serial Number	Effective From	Effective To	Created By
BA68N0001	Tammy Leong	MSO		10 01/01/2014	01/01/2099	Access\$SDP
BA68N0002	Harry Wong	MSO		10 01/01/2014	01/01/2099	Access\$SDP
BA68N0003	Cindy Lee	OTHERS		10 01/01/2014	01/01/2099	BA68N0001
BA68N0001	Tammy Leong	OTHERS		20 13/03/2014	01/01/2099	Access\$SDP

### Employee Claim Entitlement

Employee ID: BA68N0001 (Tammy Leong)

Benefit Scheme: **MSO** Serial No: 10

Effective Date From: 01/01/2014 Effective Date To: **12/03/2014**

Remarks: TEST REMARKS

### Employee Entitlement Details

Show Active Records

⏪ ⏩ **1** ⏪ ⏩ **Claim Type**  ⚡ Quick Search 🔗 Query Builder 📄 Export To Excel

Claim Type	Description	Staff Entitled Amount	Staff's Family Entitled Amount	Staff's Per Family Member Entitled Amount	Total Entitled Cap Amount	Staff Claimed Amount	Staff Claim Balance	Staff's Claimed Amount

### 13.3 How to Add / Update Routing list for Claims as an Administrator

- To Add the Routing list for an employee to a specific Application id, select Routing officer admin menu item under Workflow Administrator menu page will loads the screen in update mode.
- Select the Employee from Employee Picklist and based on employee selection from the picklist then name is automatically displayed.
- Select the Application id from dropdown and click on **Add New button** from the detail grid of the screen as follows.

**Routing List Setup**

Employee


Application ID

+ Add New
Show/Hide FilterRow
Query Builder
Export To Excel

Row ID	Role ID	Recipient Role	Recipient ID	Recipient Name	Recipient Email



- System will navigates to Routing list detail screen in add mode. Application id is automatically filled based on the application id of the header screen.
- Select Role id, Recipient id from their corresponding Picklist and based on the Recipient id selection then recipient name and email fields are automatically filled.
- Click on **Save button** to save the record.

### Set/Edit Routing List

Application ID :	<input type="text" value="CLM_APLN"/>
Role ID :	<input type="text" value="RA (Approval)"/> 
Recipient ID :	<input type="text" value="BA68N0003"/> 
Recipient Name :	<input type="text" value="Cindy Lee"/>
Recipient Email :	<input type="text" value="arun@starvisionit.comx"/>

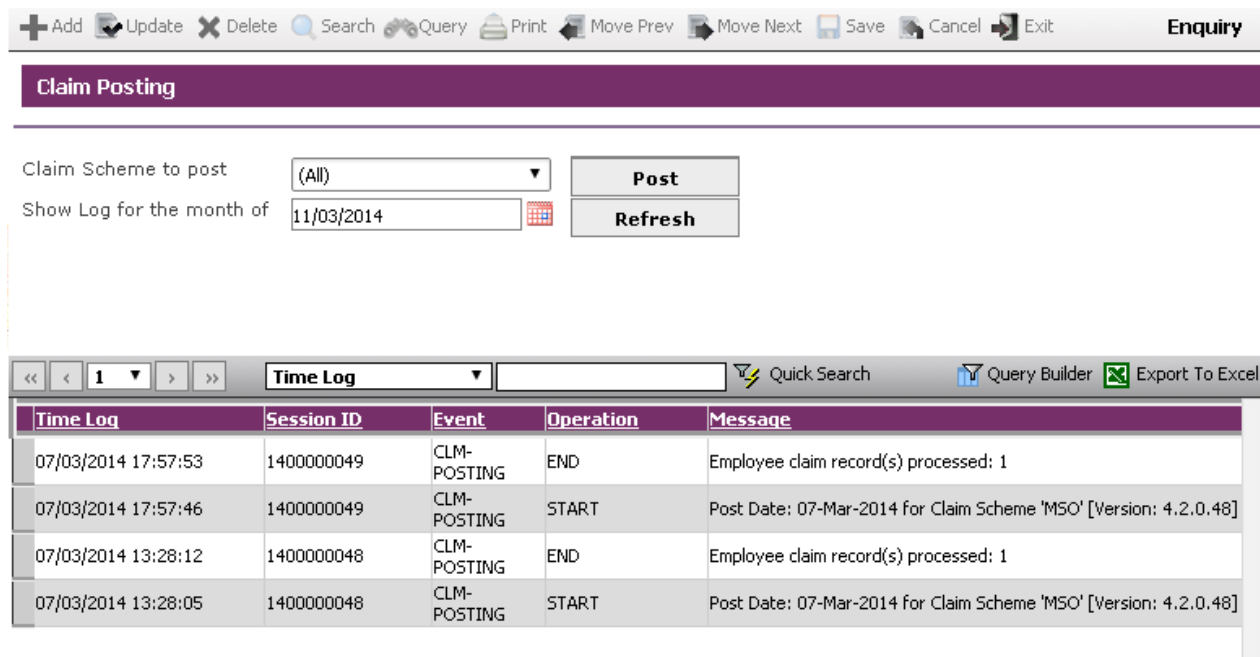
- Select employee id from Employee Id Pick list. Select Application from Application ID dropdown and click on **Add New** icon in detail grid to Navigate to the detail screen to add/update routing officers.
- Select Role ID, Recipient ID from picklist and click on Toolbar save icon to save the details.
- Select the routing officer from list box and click on **Move Up** and **Move Down** buttons to change the routing officers order. Click on **Save button** to save the routing officer order.

### Set/Edit Routing List Order

<input type="text" value="RA (Cindy Lee)"/>	
<input type="text" value="RN (Harry Wong)"/>	
	
	

### 13.4 How to Process Claim Posting for Employees under specific scheme /All Employees

- Click on **Claim entitlement Re-Posting** menu item under Claim Administrator menu page will loads the screen in Enquiry mode.
- Select the specific scheme from the Claim scheme to post dropdown and click on **Post button** will process the Claim posting for the employees under the selected specific benefit scheme and entitlement amounts are updated for that employees and the claim posting log record in inserted in the detail grid of the screen .
- If the admin selects “All” from the dropdown and click on **Post button** to process the Claim posting for all employees and entitlement amounts are updated for all the employees.



The screenshot displays the 'Claim Posting' interface. At the top is a toolbar with icons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. Below the toolbar is a purple header bar labeled 'Claim Posting'. The main area contains two form fields: 'Claim Scheme to post' with a dropdown menu set to '(All)', and 'Show Log for the month of' with a date input field set to '11/03/2014'. To the right of these fields are two buttons: 'Post' and 'Refresh'. Below the form fields is a 'Time Log' table with the following data:

Time Log	Session ID	Event	Operation	Message
07/03/2014 17:57:53	1400000049	CLM-POSTING	END	Employee claim record(s) processed: 1
07/03/2014 17:57:46	1400000049	CLM-POSTING	START	Post Date: 07-Mar-2014 for Claim Scheme 'MSO' [Version: 4.2.0.48]
07/03/2014 13:28:12	1400000048	CLM-POSTING	END	Employee claim record(s) processed: 1
07/03/2014 13:28:05	1400000048	CLM-POSTING	START	Post Date: 07-Mar-2014 for Claim Scheme 'MSO' [Version: 4.2.0.48]

- Every Claim Posting run is logged into the log table and users can view the results from the above screen. Click on **Post** to start the Claim Posting or click the **Refresh** button to refresh the results table.

### 13.5 How to process claim payment and export transactions in to a file

- To process claim payment, click on the **Claim Payment** menu item under Claim Administrator menu page will loads the screen in query mode.
- Click on **Add button** to change the screen mode to add mode.
- After key-in the required details click on the “**Generate Payment**” button to generate the transactions based on the criteria key-in and system also allow to delete the payment if required.

Claim Payment Generation

Batch Number	CCG	PY	1403010000	Transaction Date	11/03/2014
Bank Code	7302				
Bank Br. Code	504				
Bank Account	12345678				

**Selection**

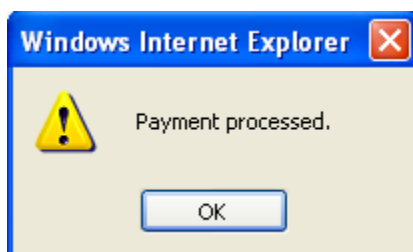
---

Value Date	11/03/2014	Payment Mode	ALL
Claim Category	ALL	Process status	NEW
Claim Type	ALL	Modified By	
Approved Claim Date As At	11/03/2014		
Created by			

Generate Payment

Export

- Once the fields are completed, click on the **Generate Payment** button, then one message box will appear as shown below.



- Click on ‘**Ok**’ to Process the Payment.
- User can export the claim details to file (format defined for GIRO). Select Bank and Output Format from drop down list and click on **Export button** to the generate file.

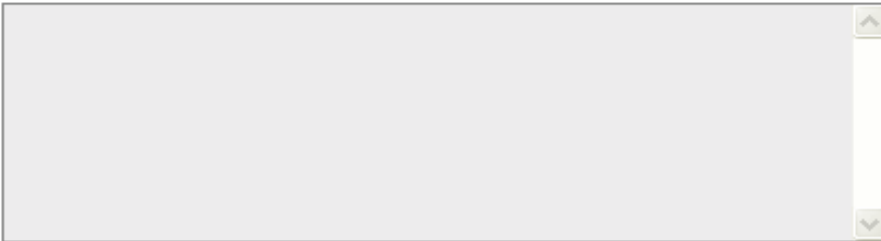
### Payment Export

**GIRO Export**

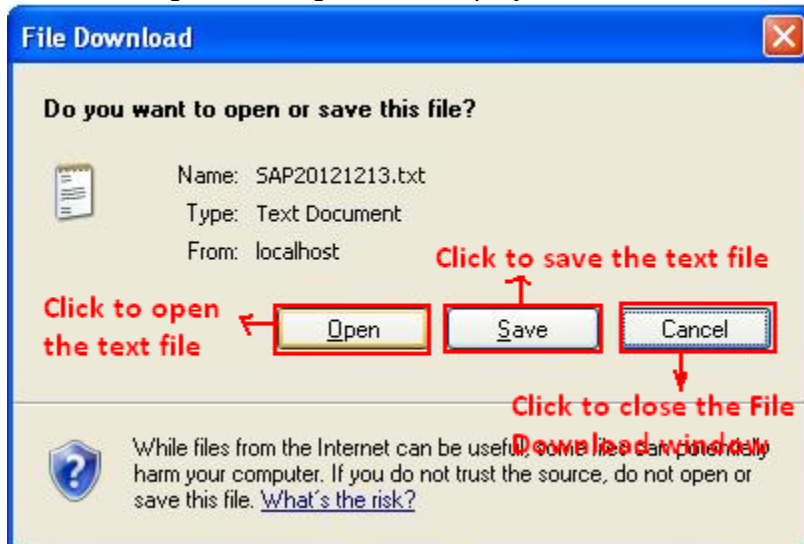
Bank Format:

Output Format:

### Messages



- A Save dialogue message box is displayed as shown below.



### 13.6 How to View and modify the record details of Claims

- Click on **Claim Enquiry** menu item under Claim administration menu page will loads the screen in enquiry mode.
- To view the details for a claim, click on the relevant record and admin can make any changes or edit any of the fields when viewing the application.

The screenshot displays the 'Claim Enquiry' application interface. At the top, there is a toolbar with icons for Add, Update, Delete, Search, Query, Print, Move Prev, Move Next, Save, Cancel, and Exit. Below the toolbar is a navigation bar with a dropdown menu set to 'Transaction Date' and a search field. The main area contains a table with the following data:

Transaction Date	Run No	Employee Id	Employee Name	Actual Claim Amount	Claim
27/02/2014	1402000020	BA68N0002	Harry Wong	132.00	PAID
25/02/2014	1402000017	BA68N0003	Cindy Lee	70.00	PEND APPR
25/02/2014	1402000016	BA68N0003	Cindy Lee	50.00	PEND APPR
25/02/2014	1402000014	BA68N0003	Cindy Lee	40.00	RF TC

Below the table is a section titled 'Claim Transactions' with a form for searching and viewing details. The form includes fields for Employee Id (BA68N0001), Org Unit, and Benefit Scheme, along with a 'View / Upload File(s)' button. Below this is an 'Information' section with fields for Claim Status, Actual Claim Amount, and Claim Remarks. At the bottom, there is a 'Claim Transactions Details' section with a 'Claims' dropdown menu set to 'Select Claim'. The interface also features a bottom toolbar with icons for Show/Hide FilterRow, Query Builder, Export To Excel, and Export To Pdf.

- To view the record, select the record from the header grid of the screen will loads the screen.

- To update the record click on the record from the detail grid will loads the corresponding detail screen in update mode. Update the fields which are open for update and click on **Save button** to save the changes.
- To add the record click on **Add button**, input all the fields and click on **Save button** to save the record.

### 13.7 How to Generate Claim Payment and Payroll Posting

- Click on **Claim Payroll Posting** screen under Claim Administration menu page will loads the payroll posting screen in Enquiry mode and displays the existing records in the header grid of the screen as follows



Enquiry

 Add Update Delete Search Query Print Move Prev Move Next Save Cancel Exit

<< < 1 > >>
 

 Document Type 
 Quick Search Query Builder Export To Excel

Document Type	Department Code	Run No	Post Date	Claim Date	Claim Type	Status	Pay Yea
CCG	PY	1402240000	27/02/2014	28/02/2014	ALL	Generated	2

**Claim Payroll Posting**

Document No.

Post Date

---

**Selection**

Claim Category  Payment Mode

Claim Type

Approved Claim Date As At

---

**Pay Period**

Pay Year  Month  Period  Payroll Mode

---

Posting Remark

Created By  Modified By

---

Payment
One Time

<< < 1 > >>
 

 S/No 
 Quick Search Query Builder Export To Excel

S/No	Empe ID	Name	Reference Company Code	Reference Document Type	Reference Department Code	Reference Run No
------	---------	------	------------------------	-------------------------	---------------------------	------------------

- Click on **Add button** to change the screen mode to add mode .Document number, posting date and status fields are automatically filled.
- After key-in the required details click on the **Generate Payment** button to process the claim payment. Records that are processed are listed under the Payment tab. When the records are correct, click on the **Post to One Time** button to post the claims to payroll One Time Transactions.

- The user will be able to proceed to run payroll for the month with these claims to be paid out to the employees.