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# MECWISE® CLAIMS

**User Guide  
For  
End User**

***Developed & Published by***



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## System Features

MecWise® Claim Management System, part of the MecWise® Human Resource, is a fully integrated, Comprehensive claim management information /package which incorporates a complete range of business applications required in all areas of claim management . MecWise® Claim Management enables the processing of your claim Management efficiently, providing the built-in intelligence to assist managing claim functions

### **Consistency and Simplicity:**

It is easy and simple to operate as menus and windows, together with on-line help messages govern the entire system. In addition each module is designed with the same operational procedure. New users need only to learn and be familiar with one module, and soon be familiar with all of them. Hence even users with no computer experience will find it easy to operate.

### **Flexible:**

The system provides flexible master file maintenance for adding, modifying and deleting master file information respectively.

### **Popup windows/tables:**

With the prompt windows, searches through files are made simple and it allows users to obtain prompt and accurate access data.

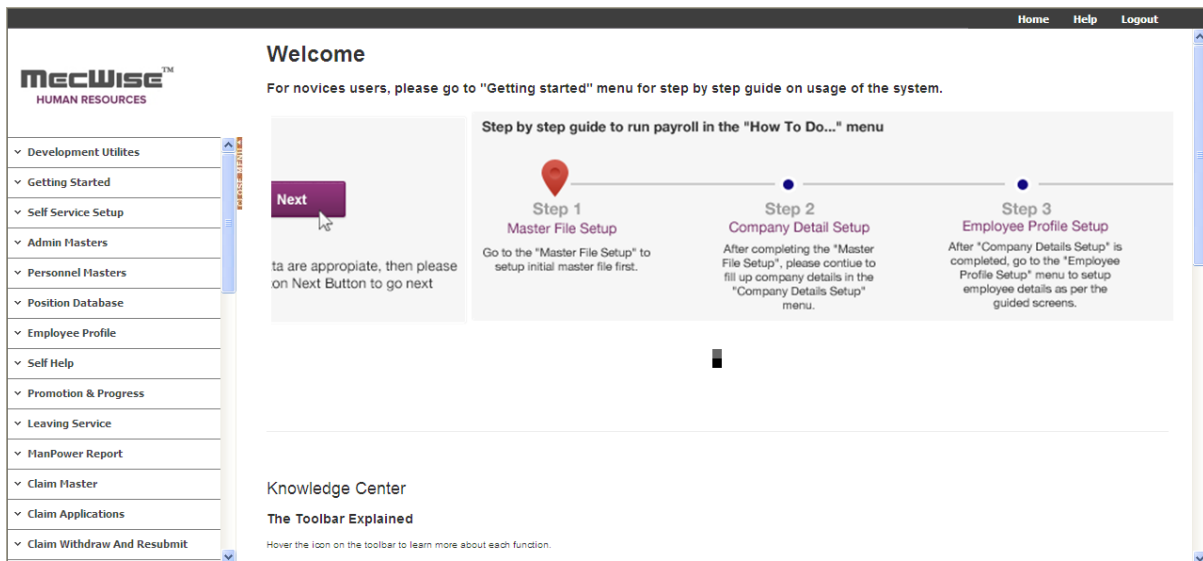
### **Reports provided:**

Listing and statistical reports are provided too marking checking and reporting purposes much more efficient and effective.

# 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*

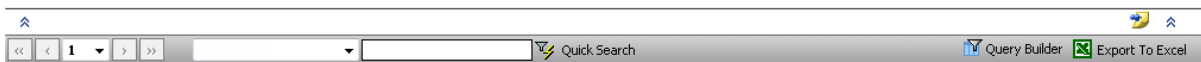
- Add**      Initiate a new record (Blank template).
- Update**      Update the existing information in the record.
- Delete**      Deletes the current record.
- Search**      Search for records using a Query Builder.
- Query**      Search records for records with fields similar to that displayed on 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*

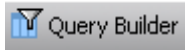


(OR)





Add new detail Record



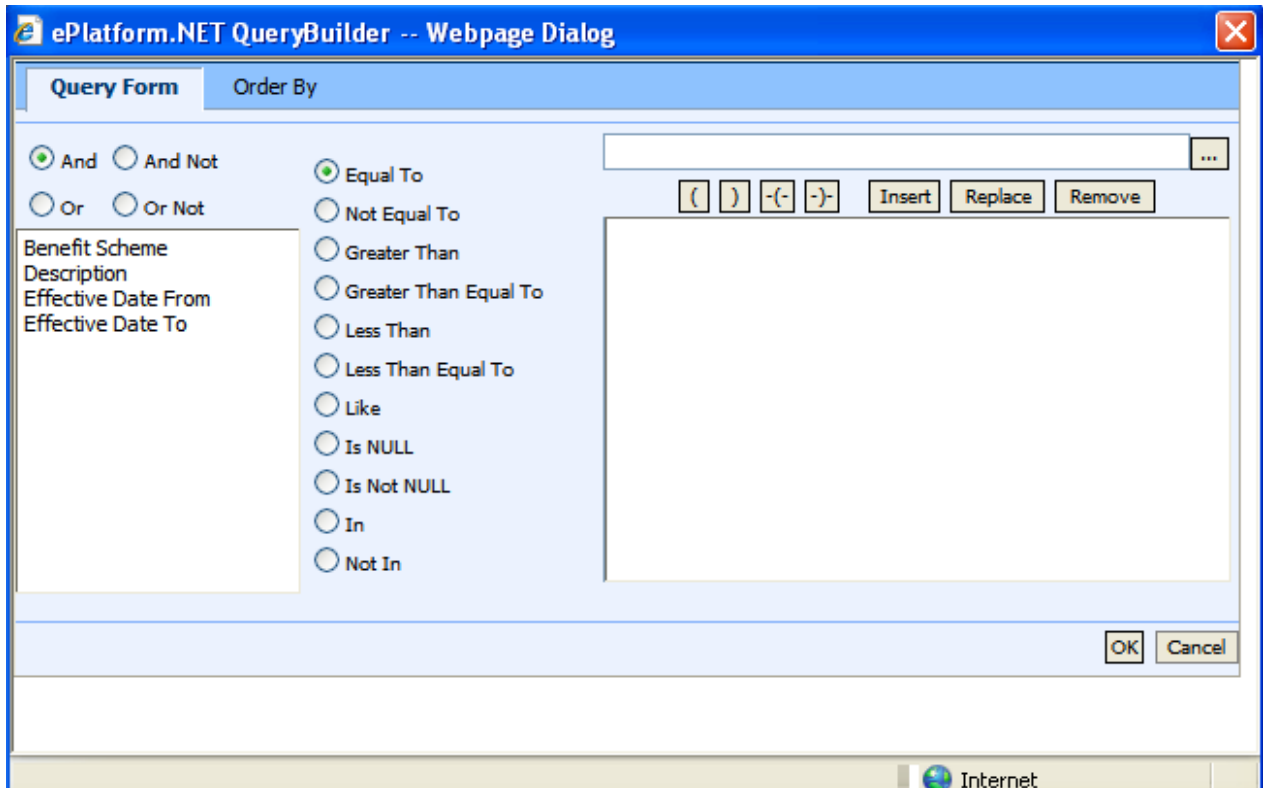
Query Builder to query, filter and sort records for display in the browser.



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:  $bcd < bcf$

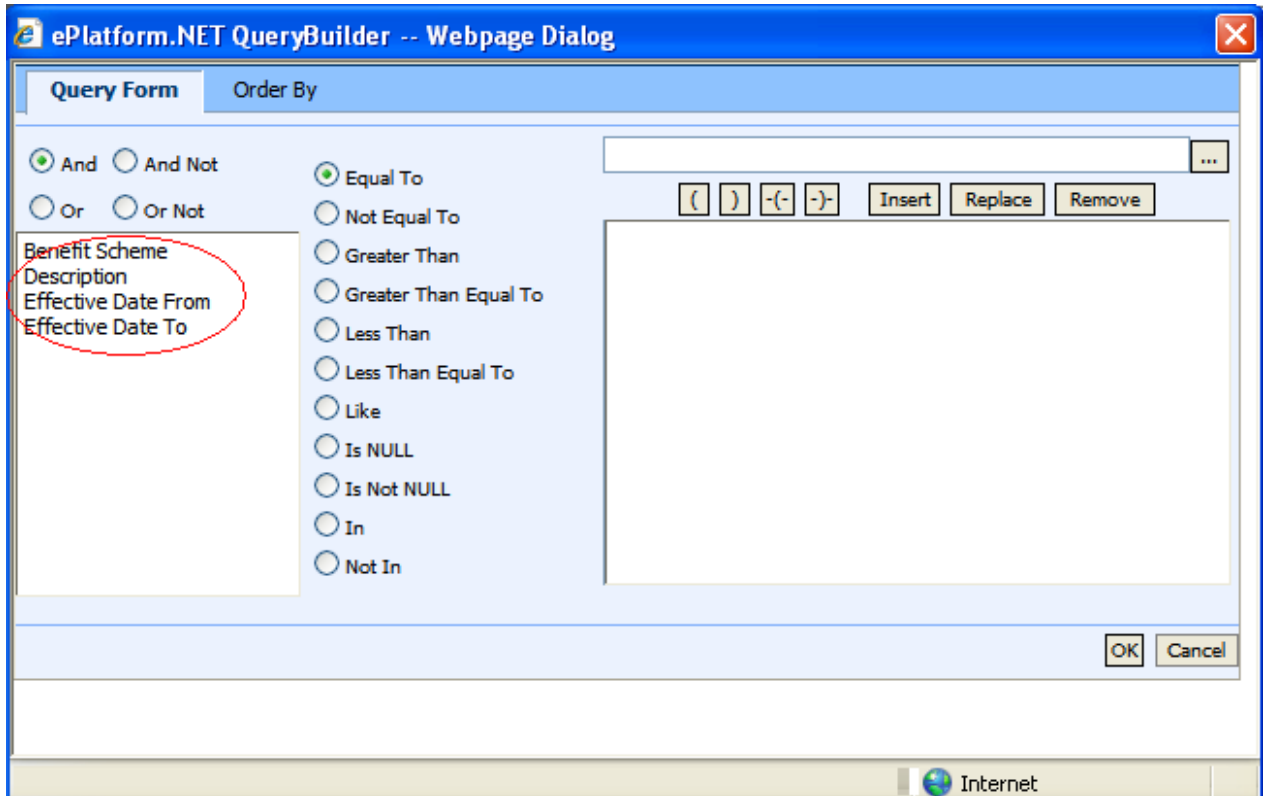
Reason: d is less than f.

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.

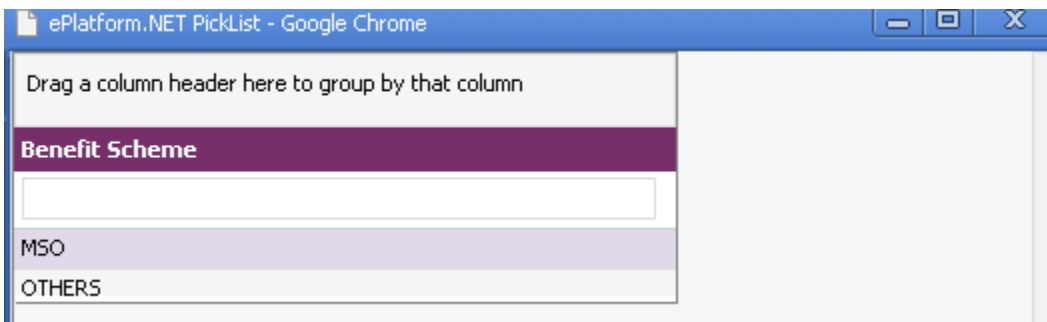
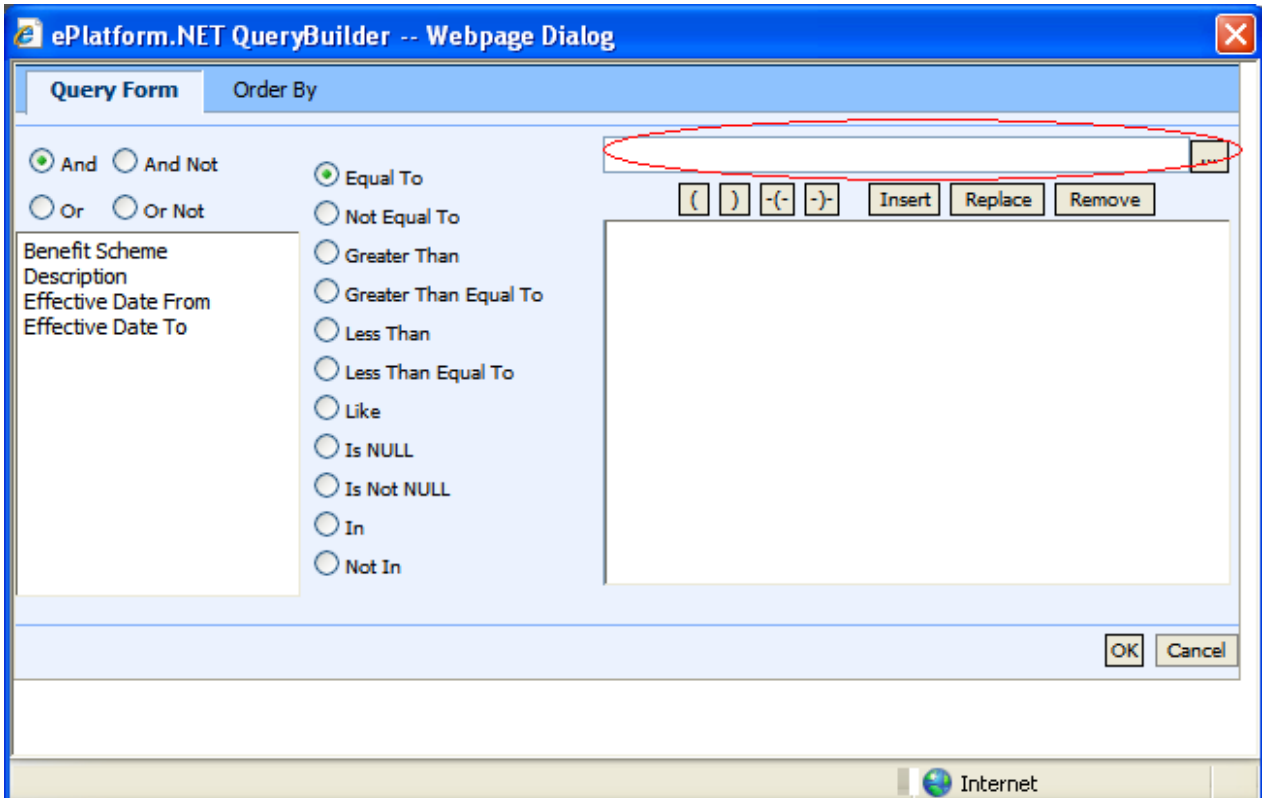


Select the desired condition from the column beside the subject screen.

**Meaning of Condition**

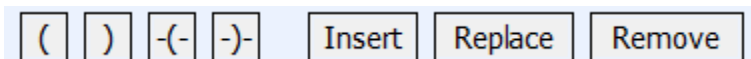
<input checked="" type="radio"/> Equal To	_____ Is
<input type="radio"/> Not Equal To	_____ Is not
<input type="radio"/> Greater Than	_____ Value more than.
<input type="radio"/> Greater Than <b>Equal To</b>	_____ Value more than and equals to.
<input type="radio"/> Less Than	_____ Value less than.
<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*

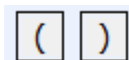
To select the desired object, simply click once on it.



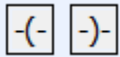
*Query Form Icons*

**Icons**

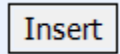
**Implication**



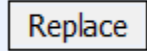
Open and Close Bracket.  
 Used together in situations of multiple conditions.  
 Conditions within brackets will be dealt with first.



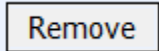
Used to remove the open and close bracket respectively.



Input conditions defined.



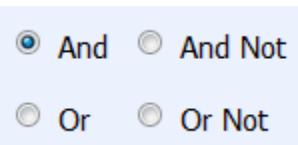
Replace any highlighted condition with another condition.



Remove the highlighted condition.

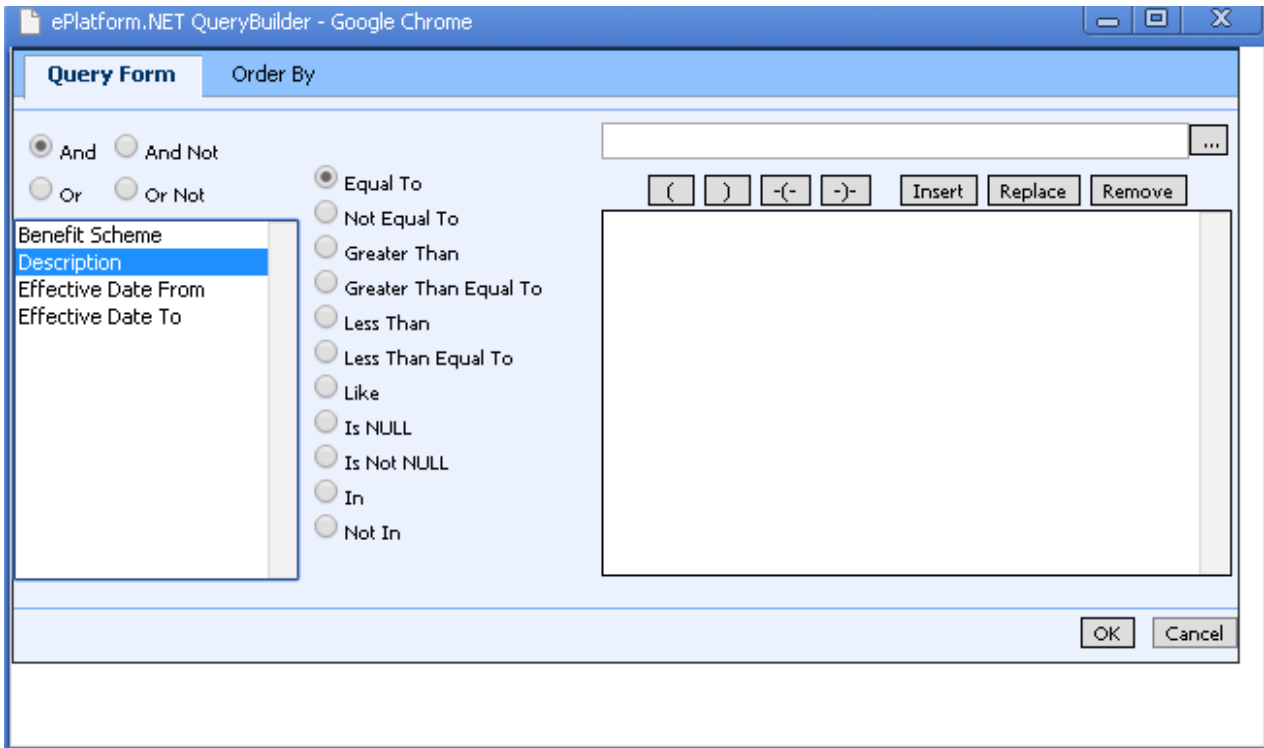
After entering a single condition, click on Insert to input the condition. This condition will be displayed in the screen.

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.

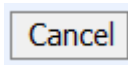


**Icon**

**Implication**

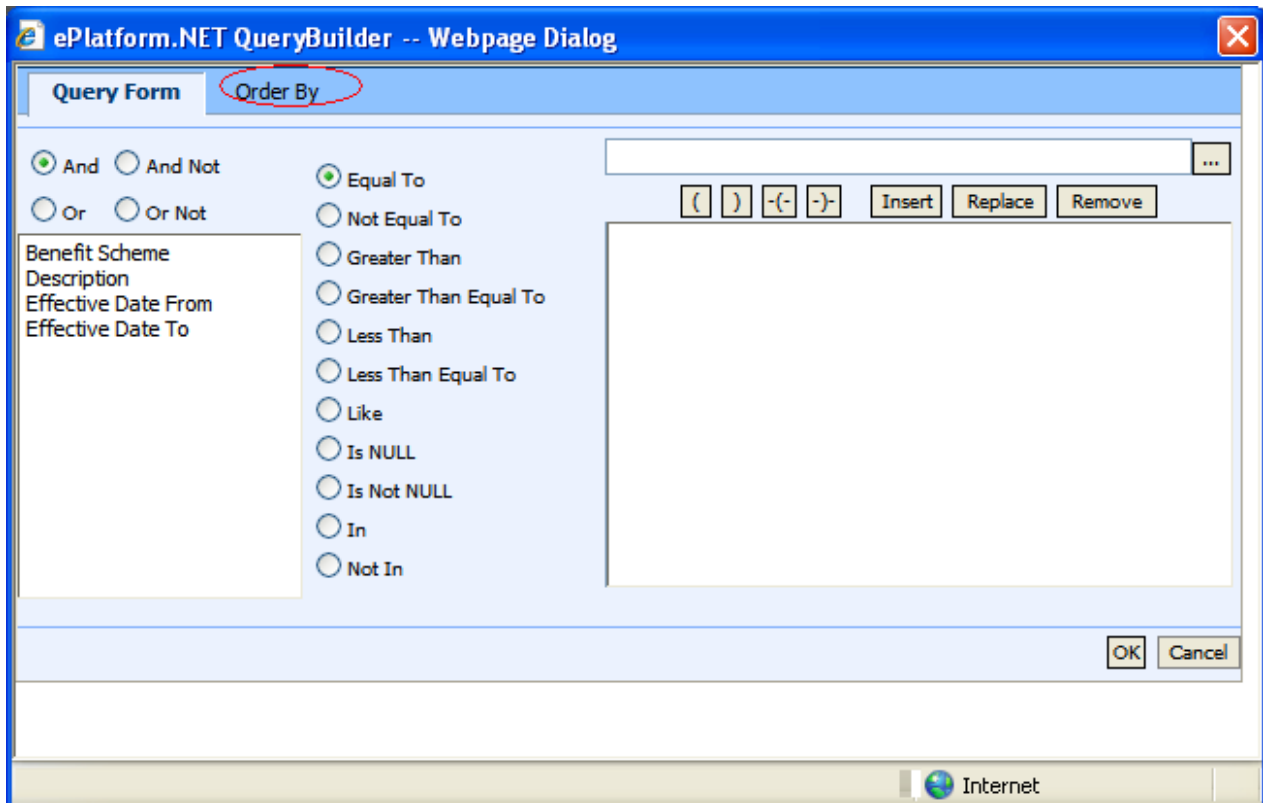


Confirm conditions set.



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.

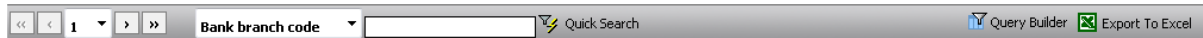


Click this to collapse/hide the browser.



To lock current browser status (Expanded/Hidden).

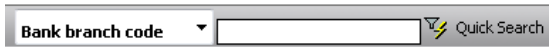
Within the browser, there are other icons to view, filter and export the information from the browser.



**Browser Icons**

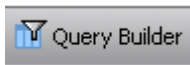


Navigator. To view next/previous screen of records.



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 Claim Applications

### 4.1 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.

The screenshot shows the 'All Claims' 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. Below the toolbar is a header grid with columns: Transaction Date, Run No, Employee Id, Employee Name, Actual Claim Amount, and Claim S. Two records are displayed:

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

Below the table is a section titled 'Claim Transactions' with a form for entering details:

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

Below this is an 'Information' section:

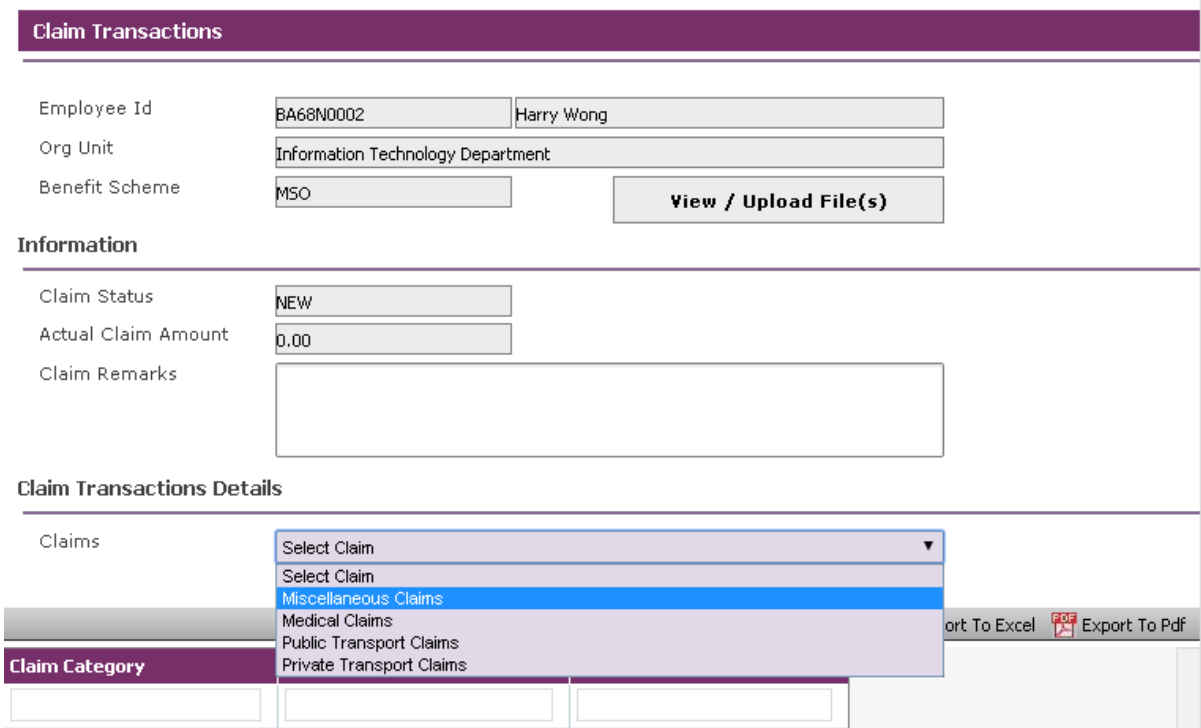
- Claim Status: NEW
- Actual Claim Amount: 0.00
- Claim Remarks: (Empty text area)

At the bottom is a 'Claim Transactions Details' section with a dropdown menu for 'Claims' set to '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.

### 4.1.1 Apply for Miscellaneous Claims

- To Add Miscellaneous Claims, select Miscellaneous Claims from dropdown list 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, **Miscellaneous Claims**, Medical Claims, Public Transport Claims, Private Transport Claims

Export To Excel PDF Export To Pdf

**Claim Category**

- 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	<input type="text" value="0.00"/>		(SGD)		
<small>(Inclusive Of GST Amount)</small>					

---

**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: [ ]

Date Of Receipt: [ ] **Launch Calendar**

---

**Charge To**

Employee Cost Centre: [ ] Department: [ ]

Source of Fund: [ ] **To Select Year and Month From the Dropdown list**

Project No: [ ]

**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: [ ]

Remarks: [ ]

- 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.

### 4.1.2 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:

Org Unit:

Benefit Scheme:

---

**Information**

Claim Status:

Actual Claim Amount:

Claim Remarks:

---

**Claim Transactions Details**

Claims	<div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px;">                 Select Claim ▼             </div> <div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px;">                 Select Claim             </div> <div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px;">                 Miscellaneous Claims             </div> <div style="border: 1px solid #ccc; background-color: #007bff; color: white; padding: 2px;">                 Medical Claims             </div> <div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px;">                 Public Transport Claims             </div> <div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px;">                 Private Transport Claims             </div>	<input type="text"/>
<b>Claim Category</b>	<input type="text"/>	<input type="text"/>

- 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" value=""/>		
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.

### 4.1.3 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	<input type="text" value="BA68N0002"/>	<input type="text" value="Harry Wong"/>	
Org Unit	<input type="text" value="Information Technology Department"/>		
Benefit Scheme	<input type="text" value="MSO"/>	<b>View / Upload File(s)</b>	

---

**Information**

Claim Status	<input type="text" value="NEW"/>
Actual Claim Amount	<input type="text" value="0.00"/>
Claim Remarks	<div style="border: 1px solid #ccc; height: 40px;"></div>

---

**Claim Transactions Details**

Claims	<div style="border: 1px solid #ccc; padding: 2px;">                 Select Claim ▼                  Select Claim                  Miscellaneous Claims                  Medical Claims  <b>Public Transport Claims</b>                  Private Transport Claims             </div>	<a href="#">Export To Excel</a> <a href="#">Export To Pdf</a>			
<b>Claim Category</b>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; border: 1px solid #ccc;"><input type="text"/></td> <td style="width: 33%; border: 1px solid #ccc;"><input type="text"/></td> <td style="width: 33%; border: 1px solid #ccc;"><input type="text"/></td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>			

- 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.  

$$\text{Actual Claim Amount} = (\text{'Amount Of Fares Paid'} - \text{'Travel Expenses Btw. Home and Office'})$$



- 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.

#### 4.1.4 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"/>		<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.

#### 4.1.5 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.

#### 4.1.6 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

Routing Officers      Routing Status

Routing Sequence	Recipient ID	Recipient Name	Recipient Role	Role Description

- 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.

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

Set/Edit Routing List

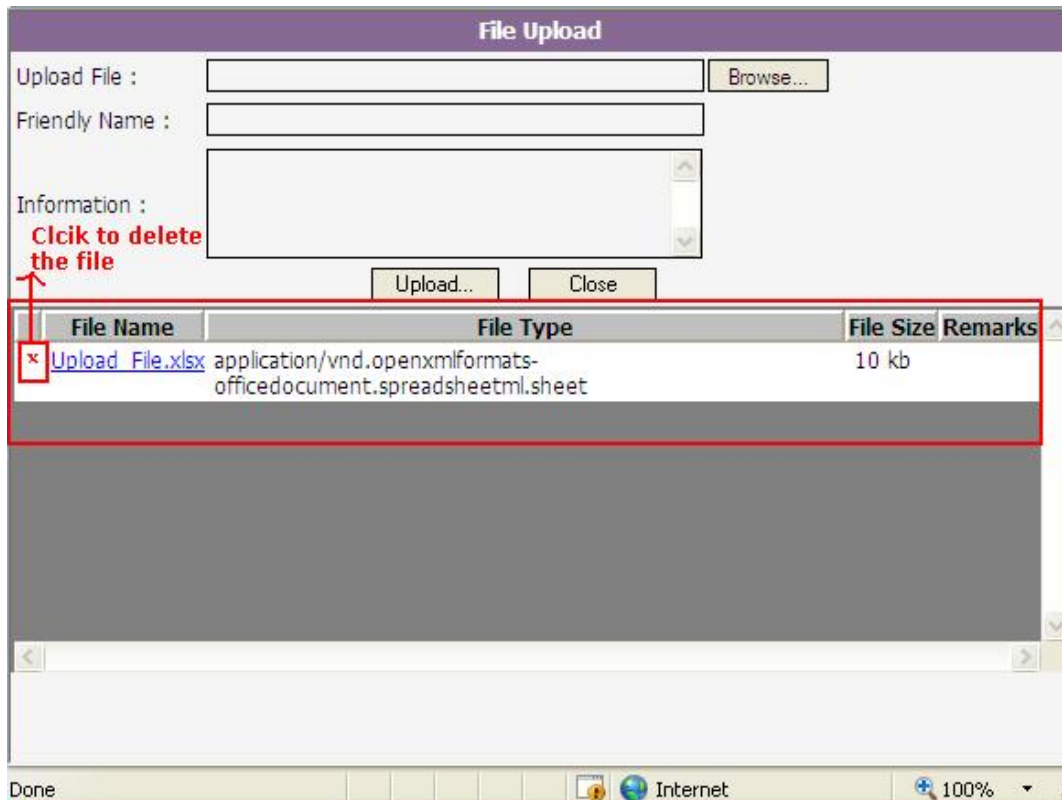
Application ID :   
 Role ID :    
 Recipient ID :    
 Recipient Name :   
 Recipient Email :

#### 4.1.7 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.

The screenshot shows a 'File Upload' dialog box. At the top, there's a purple header with the text 'File Upload'. Below the header, there are three input fields: 'Upload File :', 'Friendly Name :', and 'Information :'. The 'Upload File' field has a 'Browse...' button next to it. Below the 'Friendly Name' field, there is a note: '(Max file size allowed to upload is 2 MB)'. At the bottom of the dialog, there are two buttons: 'Upload' and 'Close'. Below the buttons is a table grid with the following columns: 'File Name', 'File Type', 'File Size', and 'Remarks'. The grid is currently empty. Red annotations with arrows point to the 'Browse...' button, the 'Upload' button, and the 'Close' button, providing instructions on how to use them.

- 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.

#### 4.1.8 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.

## 5 Claim Withdraw and Resubmit

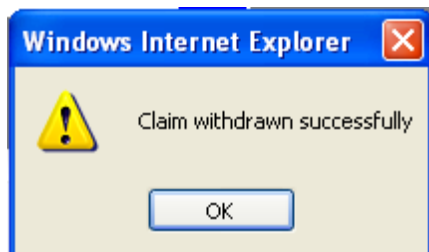
### 5.1 All Claims

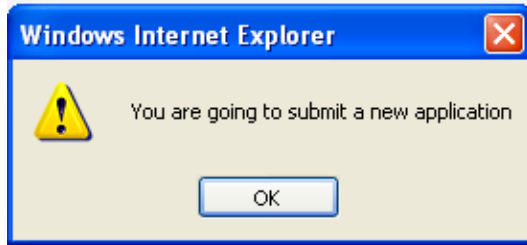
This module allows the user to withdraw the claim application and resubmit Claim application. If your claims applications are still pending for approval, user can Withdraw it from Claim Withdraw and Resubmit module.

- 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.

### 5.1.1 How to check Claim Approval Status

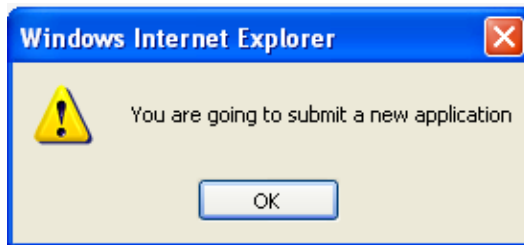
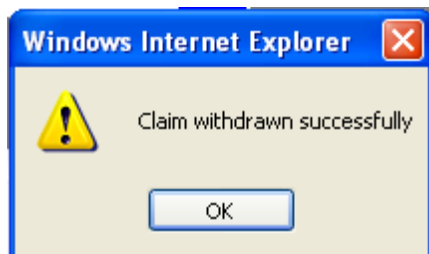
- To know the claim approval status, select the record from all claims screen will displays the selected record in the screen.
- Select the **Routing Status tab** to check the claim approval status of the selected record.

#### Routing List

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

### 5.1.2 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.





## 6 Claim History

### 6.1 All Claims

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

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

The screenshot displays the 'All Claims' interface. At the top, there is a navigation bar with a 'Transaction Date' dropdown and search options. Below this is a table of claim transactions. The selected record (Transaction Date: 24/02/2014, Run No: 1402000007, Employee Id: BA68N0002, Employee Name: Harry Wong, Actual Claim Amount: 50.00, Claim Status: PENDING APP) is highlighted with a red border. Below the table, the 'Claim Transactions' section shows details for Employee Id (BA68N0002, Harry Wong), Org Unit (Information Technology Department), and Benefit Scheme (MSO). 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, a detailed grid shows the selected claim type: 'Transport' with a 'Public Transport Claim' description and an 'Actual Claim Amount' of 50.00.

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

Employee Id	BA68N0002	Harry Wong
Org Unit	Information Technology Department	
Benefit Scheme	MSO	<a href="#">View / Upload File(s)</a>

Claim Status	PENDING APPROVAL
Actual Claim Amount	50.00
Claim Remarks	test

Claims	Select Claim
--------	--------------

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 will displays the selected record in the screen and user is able to 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: BASE

Project No: GENERAL

GL Code: TRANSPORT Staff Local Transportation

**Information**

Start Date: 05/02/2014 Start Time: 16:49

Transport Type: TAXI

Payment Type: Personal

Transport From: Office

Pls. Specify Places Travelled From: Office

Transport To: Others

Pls. Specify Places Travelled To: test

Purpose Of Trips: test upd rec for rejected rec from withdraw resubmit

Amount Of Fares Paid: 20.00

Travel Expenses Btw. Home and Office: 10.00

Actual Claim Amount: 20.00

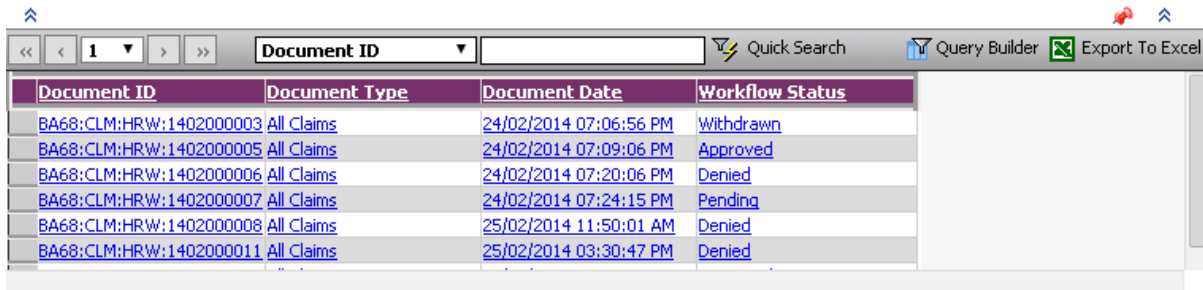
Remarks: test

## 7 Inbox

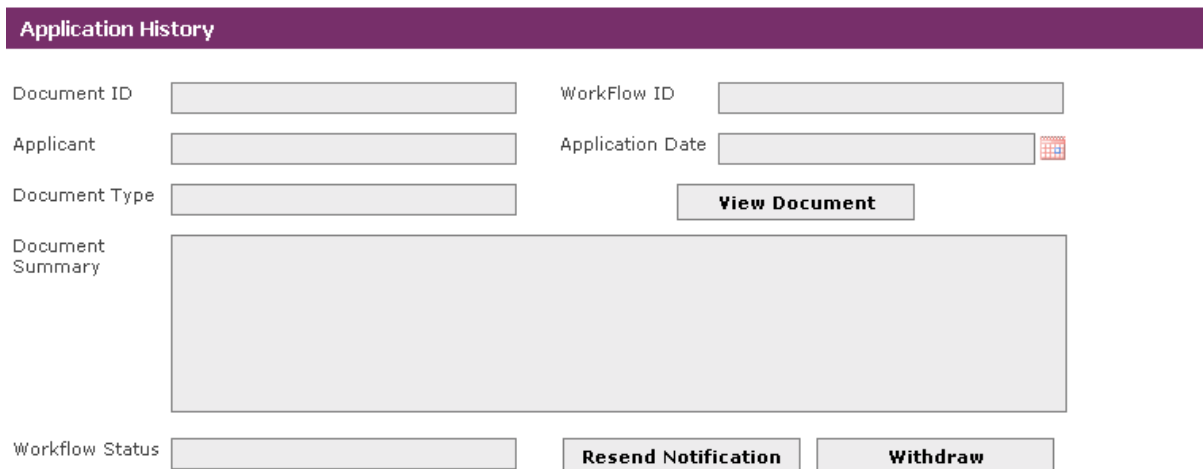
### 7.1 Application History

This module allows the user to view his submitted application records status and their details.

- Click on **Application history** under **Inbox menu** page will loads the application history screen by displaying the records in the header grid of the screen.



Document ID	Document Type	Document Date	Workflow Status
<a href="#">BA68:CLM:HRW:1402000003</a>	<a href="#">All Claims</a>	24/02/2014 07:06:56 PM	<a href="#">Withdrawn</a>
<a href="#">BA68:CLM:HRW:1402000005</a>	<a href="#">All Claims</a>	24/02/2014 07:09:06 PM	<a href="#">Approved</a>
<a href="#">BA68:CLM:HRW:1402000006</a>	<a href="#">All Claims</a>	24/02/2014 07:20:06 PM	<a href="#">Denied</a>
<a href="#">BA68:CLM:HRW:1402000007</a>	<a href="#">All Claims</a>	24/02/2014 07:24:15 PM	<a href="#">Pending</a>
<a href="#">BA68:CLM:HRW:1402000008</a>	<a href="#">All Claims</a>	25/02/2014 11:50:01 AM	<a href="#">Denied</a>
<a href="#">BA68:CLM:HRW:1402000011</a>	<a href="#">All Claims</a>	25/02/2014 03:30:47 PM	<a href="#">Denied</a>



**Application History**

Document ID  WorkFlow ID

Applicant  Application Date

Document Type

Document Summary

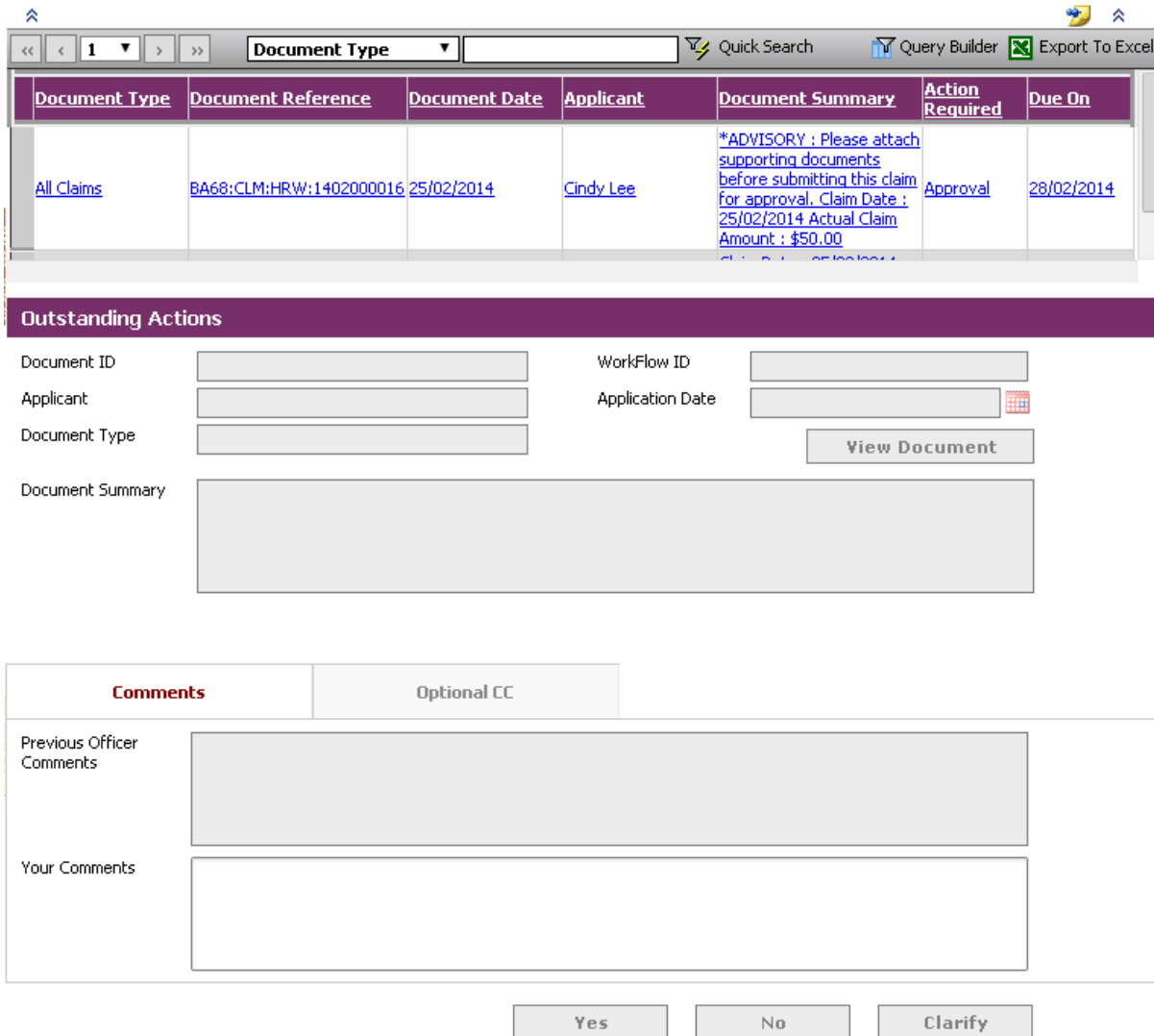
Workflow Status

- Select the record from the header grid will displays the selected record with the details in the screen.
- Click on **Withdraw button** to withdraw the selected claim application if the claim status is pending for approval.
- Click on **Resend notification button** will resend the notification email to the current approver.

## 7.2 Outstanding for Action

This module allows the users to Recommend/Deny OR Approve/Deny the submitted claim applications records.

- Go to **Inbox Menu → Outstanding for Action menu** item will loads the Outstanding for action screen by displaying the pending status application records in the header grid of the screen.



Document Type	Document Reference	Document Date	Applicant	Document Summary	Action Required	Due On
<a href="#">All Claims</a>	<a href="#">BA68:CLM:HRW:1402000016</a>	<a href="#">25/02/2014</a>	<a href="#">Cindy Lee</a>	*ADVISORY : Please attach supporting documents before submitting this claim for approval. Claim Date : 25/02/2014 Actual Claim Amount : \$50.00	<a href="#">Approval</a>	<a href="#">28/02/2014</a>

**Outstanding Actions**

Document ID:  WorkFlow ID:

Applicant:  Application Date:

Document Type:

Document Summary:

---

Comments	Optional CC
Previous Officer Comments	<input type="text"/>
Your Comments	<input type="text"/>

- Select the record will displays the selected record in the screen. **Recommend/Approve buttons** will be enabled based on the Approver role.

- Click on the **View document button** to check the claim details. Click on **Recommend/Approve button** to recommend/approve the claims.
- Click on **Deny button** to reject the claims.

Document Type	Document Reference	Document Date	Applicant	Document Summary	Action Required	Due On
<a href="#">All Claims</a>	<a href="#">BA68:CLM:HRW:1402000016</a>	<a href="#">25/02/2014</a>	<a href="#">Cindy Lee</a>	<a href="#">*ADVISORY : Please attach supporting documents before submitting this claim for approval. Claim Date : 25/02/2014 Actual Claim Amount : \$50.00</a>	<a href="#">Approval</a>	<a href="#">28/02/2014</a>

**Outstanding Actions**

Document ID	<input type="text" value="BA68:CLM:HRW:1402000016"/>	WorkFlow ID	<input type="text" value="1402000028"/>
Applicant	<input type="text" value="Cindy Lee"/>	Application Date	<input type="text" value="25/02/2014"/>
Document Type	<input type="text" value="All Claims"/>	<input type="button" value="View Document"/>	
Document Summary	<input type="text" value="*ADVISORY : Please attach supporting documents before submitting this claim for approval. Claim Date : 25/02/2014 Actual Claim Amount : \$50.00"/>		

Comments	Optional CC
Previous Officer Comments	<input type="text" value="There is no remark to display."/>
Your Comments	<input type="text"/>

### 7.3 Multiple Approval for Action

This module allows the user to approve/deny the multiple application records.

- Click on **Multiple approvals for action** screen under **Inbox menu page** will load the screen by displaying the pending for approval records in the header grid of the screen as follows.

Multiple Action Form						
Document Type	Document Reference	Document Date	Applicant	Document Summary	Action Required	Due On
All Claims	BA68:CLM:HRW:1402000016	25/02/2014	Cindy Lee	*ADVISORY : Please attach supporting documents before submitting this claim for approval. Claim Date : 25/02/2014 Actual Claim Amount : \$50.00	Approval	28/02/2014
All Claims	BA68:CLM:HRW:1402000017	25/02/2014	Cindy Lee	Claim Date : 25/02/2014 Actual Claim Amount : \$70.00	Approval	28/02/2014

Selected Applications for Multiple Action

**Select Application**

Put your Comments here :

- Click on **Select application button** which will loads the multi Picklist showing the pending for approval records.

Drag a column header here to group by that column

#	Document Type	Document Reference	Document Date	Applicant	Document Summary	Action Required	D
<input type="checkbox"/>	All Claims	BA68:CLM:HRW:1402000016	25/02/2014	Cindy Lee	*ADVISORY : Please attach supporting documents before submitting this claim for approval. Claim Date : 25/02/2014 Actual Claim Amount : \$50.00	Approval	28
<input type="checkbox"/>	All Claims	BA68:CLM:HRW:1402000017	25/02/2014	Cindy Lee	Claim Date : 25/02/2014 Actual Claim Amount : \$70.00	Approval	28

- Check the check boxes and click on **Close button** will displays the selected records in the screen.
- Enter the comments in the comments fields and click on **Ok button** to approve the selected application records to approver and click on **NO button** to deny the selected application records to reject.

Multiple Action Form						
Document Type	Document Reference	Document Date	Applicant	Document Summary	Action Required	Due On
<a href="#">All Claims</a>	<a href="#">BA68:CLM:HRW:1402000016</a>	<a href="#">25/02/2014</a>	<a href="#">Cindy Lee</a>	*ADVISORY : Please attach supporting documents before submitting this claim for approval. Claim Date : 25/02/2014 Actual Claim Amount : \$50.00	<a href="#">Approval</a>	<a href="#">28/02/2014</a>

Selected Applications for Multiple Action

BA68:CLM:HRW:1402000016  
BA68:CLM:HRW:1402000017

Put your Comments here :

Test Multiple approval

## 7.4 Delegation

This module allows the user to assign delegations to employees for Claim application and approvals only.

- Go to **Inbox Menu page** → **Delegation menu item**.
- Click on **Delegation menu** item will displays the screen in add mode. Select the Application Type from the drop down.
- Select the Delegate To from pick list to set the covering officer. Select the Delegation Type to set the officer to apply/approve on behalf.
- Select the Delegation Role if the Delegation Type is Approval. Select the Effective Start Date and End Dates to set a time period for the delegation to apply/approve. Click on the Toolbar **Save button** to save details.



### Workflow Delegation Setup

Employee ID:	BA68N0002		Harry Wong
Application Type:	All Claims ▼		
Delegate To:	BA68N0003		Cindy Lee
Delegation Type:	Application ▼		
Delegaton Role:	APPLY (APPLY)		
Effective Start Date:	01/01/2014		
Effective End Date:	31/12/2099		

- To update the delegation record details, select the record in the grid, click on the **Update button** and modify the fields and click on **Save button** to save the changes.
- To delete the delegation record, select the record in the grid, click on the **Delete button** to delete the selected record from the screen.