

# **TIMES SOFTWARE**

## **TIMES PRO Claim**

User Guide for HR

Document Version: 1.0

Released Date: 1 January 2023



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## **RELATED GUIDES**

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Before proceeding this user guide, please read the following guides first.

**TIMES PRO Introductory Guide.**



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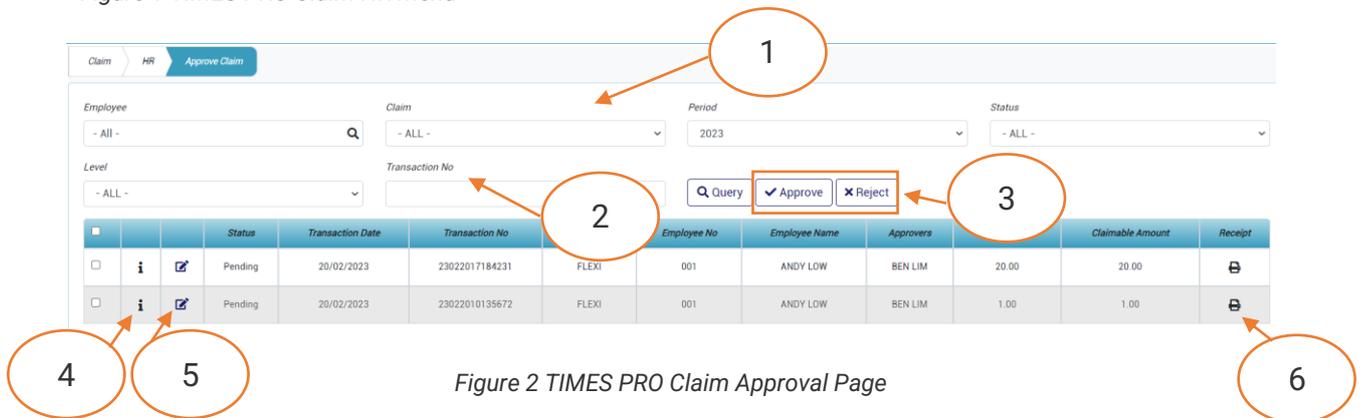
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## Approve Claim

To approve or reject employees' submitted Claim Forms without any restrictions at the **Approve Claim** menu.



Figure 1 TIMES PRO Claim HR menu



|   |  |
|---|--|
| 1 | Choose the <b>"Department"</b> , <b>"Employee"</b> , <b>"Claim Code"</b> , <b>"Period"</b> , <b>"Status"</b> and <b>"Level"</b> drop-down lists to filter the list of submitted Claim Forms.   |
| 2 | You can look for a specific Claim Form by entering the transaction number of the Claim Form at the <b>"Transaction No"</b> and clicking on the <input type="button" value="Query"/> button.  |
| 3 | To <b>approve</b> a Claim Form, tick on the Claim Form's <input type="checkbox"/> checkbox and select the <input type="button" value="Approve"/> button.<br>To <b>reject</b> a Claim Form, tick on the Claim Form's <input type="checkbox"/> checkbox and select the <input type="button" value="Reject"/> button. |

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|   |  |
|---|--|
| 4 | You can click on the <b>i</b> <b>Info</b> button to access the <b>Claim Details</b> pop-up window to view the breakdown information of daily claims that applied in a single claim application form. |
| 5 | Click on the  <b>Edit</b> button to access the claim application form to edit it.                                   |
| 6 | You can print the Claim Form by clicking on the  button.  |

## Submit On Behalf

To submit claim on behalf of employees, first access the claim application form via **Submit on Behalf** menu.

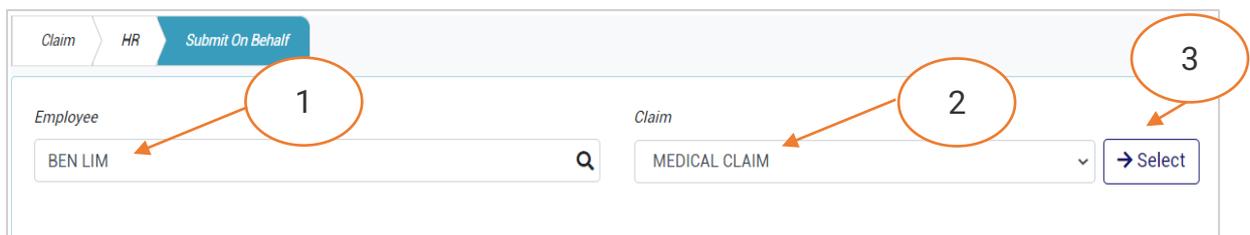
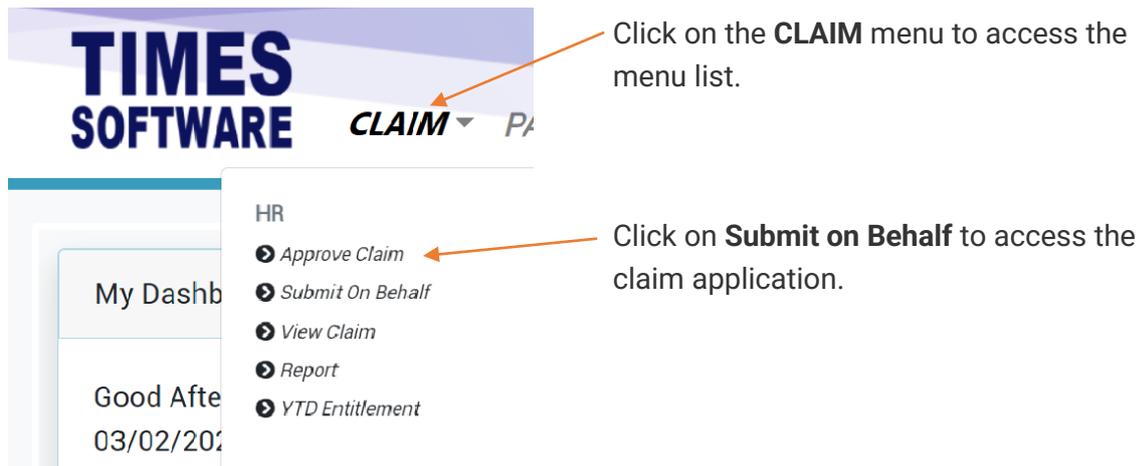


Figure 3 TIMES PRO Claim Application Form

|   |   |
|---|---|
| 1 | Choose the <b>Department</b> and <b>Employee</b> to select an employee.   |
| 2 | Choose the type of <b>Claim</b> that you want to submit.  |
| 3 | Click on  <b>Select</b> button to proceed. |

The screenshot shows a 'Medical Claim' form. At the top, there are navigation tabs for 'Claim' and 'HR', and a 'Submit On Behalf' button. The form includes an 'Employee' field with 'BEN LIM' and a 'Claim' dropdown set to 'MEDICAL CLAIM'. Below this, there are status indicators for 'ENTITLEMENT', 'TAKEN 0.00', 'BALANCE 0.00', and 'PENDING 0.00'. A 'Transaction No' field contains '23022111274618' and an 'Approver' field is set to '[Auto Approved]'. The main part of the form is a table with columns: Receipt Date, Receipt No, Sub Claim, Remark, Illness, Attachment, GST Amount, Receipt Amount, and Claimable Amount. A single row is visible with '21/02/2023' in the Receipt Date column, '20' in Receipt No, and '123' in Remark. Below the table are buttons for 'Add', 'Remove', 'Save', 'Cancel', and 'Submit'. Callouts 4 through 8 are placed over these various elements.

Figure 4 Medical claim sample page<sup>1</sup>

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|   |  |
|---|--|
| 4 | This section shows the employee’s claim balances depending on the <b>Employee</b> that you had selected and the type of claim that you have selected in <b>Claim Type</b> .  |
| 5 | Choose the <b>Sub Claim</b> for the specific type of claim you want to submit on behalf of employees and fill in the details in the remaining fields.  |
| 6 | Some claims may require you to upload your receipt into the claim form. Click on the <b>Attachment</b> field to select your receipt.   |
| 7 | Some fields such as <b>GST/VAT/Tax Amount</b> typically have pre-defined formula setup which can auto-calculate the amount. You do not need to enter any figures in these fields.  |
| 8 | <p>Click the  <b>Add</b> button to add another row if you have more receipts to submit on behalf for this claim.</p> <p>Click the  <b>Remove</b> button to clear all the rows.</p> <p>Click the  <b>Save</b> button to save the transactions as a <b>Draft</b> copy. You can access the draft copy at any time at <b>View Claim</b> page to continue your transactions.</p> <p>Click on the  <b>Submit</b> button to submit the claim (please note that the claim submitted by HR is <b>Auto Approved</b>) or click on  <b>Cancel</b> button to make further changes to the Claim Form.</p> |

<sup>1</sup> Your actual claim form may differ from the sample screenshot. Each claim type can have different form design depending on your company’s claim requirements and policies.

## View Claim

**View Claim** page shows the claim applications that have submitted to approver for review and the approval status of these applications.

You can also edit the **Pending** claim applications to make changes to them, as well as to **Withdraw** the pending claim and **Cancel** the approved claim.

Click on the **CLAIM** menu to access the menu list.

Click on **View Claim** to access the claim application.

|                          | Status   | Transaction Date | Transaction No | Claim Code | Employee No | Employee Name | Approvers | Total Amount | Claimable Amount | Receipt |
|--------------------------|----------|------------------|----------------|------------|-------------|---------------|-----------|--------------|------------------|---------|
| <input type="checkbox"/> | Pending  | 20/02/2023       | 23022017184231 | FLEXI      | 001         | ANDY LOW      | BEN LIM   | 20.00        | 20.00            |         |
| <input type="checkbox"/> | Draft    | 20/02/2023       | 23022016585917 | FLEXI      | 001         | ANDY LOW      |           | 11,111.00    | 11,111.00        |         |
| <input type="checkbox"/> | Pending  | 20/02/2023       | 23022010135672 | FLEXI      | 001         | ANDY LOW      | BEN LIM   | 1.00         | 1.00             |         |
| <input type="checkbox"/> | Approved | 17/02/2023       | 23021718055080 | MEDICAL    | 001         | ANDY LOW      | BEN LIM   | 111.00       | 111.00           |         |
| <input type="checkbox"/> | Approved | 16/02/2023       | 23021614592311 | MEDICAL    | 001         | ANDY LOW      | BEN LIM   | 111.00       | 111.00           |         |
| <input type="checkbox"/> | Draft    | 01/02/2023       | 23020116073345 | FLEXI      | 001         | ANDY LOW      |           | 200.00       | 200.00           |         |
| <input type="checkbox"/> | Draft    | 01/02/2023       | 23020116052285 | FLEXI      | 001         | ANDY LOW      |           | 200.00       | 200.00           |         |

Figure 5 TIMES PRO Claim View Claim web page sample

|   |  |
|---|--|
| 1 | You can make use of the <b>Data Filters</b> to see specific claim applications. Simply select them and the claim information is filtered for you based on your selections. |
| 2 | You can see all the claim applications' information that have submitted to the approver(s) for review.   |

|                 | The approval status of the claim application is indicated at the <b>Status</b> column.<br>The list of status is as follows:  |   |             |              |   |                |  |                 |  |                 |  |
|-----------------|--|---|-------------|--------------|---|----------------|--|-----------------|--|-----------------|--|
|                 | <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>Draft</b></td> <td>Claim application has been saved as draft copy and awaiting to make further changes before submitting the Claim Form.</td> </tr> <tr> <td><b>Pending</b></td> <td>Claim application has been submitted and awaiting to get approval from the first approver.</td> </tr> <tr> <td><b>Approved</b></td> <td>Claim application has been approved by final approver.</td> </tr> <tr> <td><b>Rejected</b></td> <td>Claim application has been rejected by approver.</td> </tr> </tbody> </table> | Status  | Description | <b>Draft</b> | Claim application has been saved as draft copy and awaiting to make further changes before submitting the Claim Form. | <b>Pending</b> | Claim application has been submitted and awaiting to get approval from the first approver. | <b>Approved</b> | Claim application has been approved by final approver. | <b>Rejected</b> | Claim application has been rejected by approver. |
|                 | Status   | Description   |             |              |   |                |  |                 |  |                 |  |
|                 | <b>Draft</b>   | Claim application has been saved as draft copy and awaiting to make further changes before submitting the Claim Form. |             |              |   |                |  |                 |  |                 |  |
|                 | <b>Pending</b>   | Claim application has been submitted and awaiting to get approval from the first approver.                            |             |              |   |                |  |                 |  |                 |  |
| <b>Approved</b> | Claim application has been approved by final approver.   |   |             |              |   |                |  |                 |  |                 |  |
| <b>Rejected</b> | Claim application has been rejected by approver.   |   |             |              |   |                |  |                 |  |                 |  |
| 3               | You can look for a specific Claim Form by entering the transaction number of the Claim Form at the "Transaction No" and clicking on the <b>Query</b> button.   |   |             |              |   |                |  |                 |  |                 |  |
| 4               | Click on  <b>Apply</b> button in order to prompt to " <b>Submit on Behalf</b> " menu.<br>Click on  <b>Delete</b> button to delete a submitted Claim Form. Please take note that deleted claim forms are unrecoverable.<br>Click on  <b>Reject</b> button to reject the employee's claim application.  |   |             |              |   |                |  |                 |  |                 |  |
| 5               | You can click on the  <b>Info</b> button to access the <b>Claim Details</b> pop-up window to view the breakdown information of daily claims that had been applied in a single claim application form.   |   |             |              |   |                |  |                 |  |                 |  |
| 6               | If the claim application status is at <b>Draft</b> , you can make changes to the claim application.<br>Click on the  <b>Edit</b> button to access the claim application form to edit it.  |   |             |              |   |                |  |                 |  |                 |  |
| 7               | You can print the Claim Form by clicking on the  button.  |   |             |              |   |                |  |                 |  |                 |  |

## Report

To generate and print claim reports, first access the **Claim Report** web page.

The screenshot shows the navigation menu and the main report configuration page. Callout 1 points to the 'CLAIM' menu item in the top navigation bar. Callout 2 points to the 'Report' option in the HR dropdown menu. Callout 3 points to the 'Resignation Date' filter in the 'Terminate Filter' section. Callout 4 points to the 'Print' button at the bottom left of the report configuration area.

**Report**

Departmental Claim in Summary

Format: Excel

Department: - All -

Employee: All

Claim: All

Sub Claim: All

Type: Creation Date

Date Range

01/02/2023

28/02/2023

Period

01

E

Terminate Filter: Resignation Date

Status:

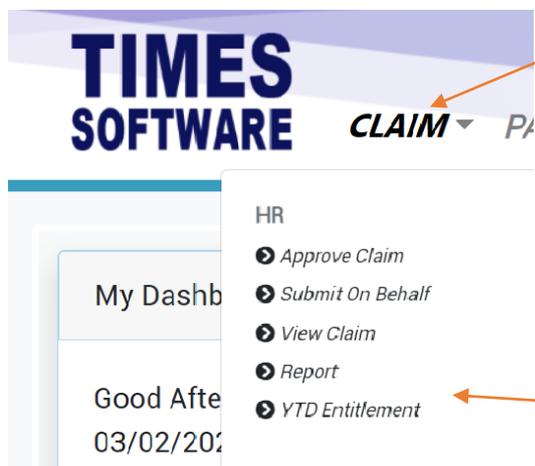
Print

Figure 6 TIMES PRO Claim Report web page

| 1                        | Choose the type of <b>Report</b> that you want to generate and the <b>Format</b> of the report.  |        |             |                         |  |                          |  |
|--------------------------|--|--------|-------------|-------------------------|--|--------------------------|--|
| 2                        | Choose your criteria (such as "Department"). If you have made multiple selections, you can view them by clicking the <b>i</b> button.  |        |             |                         |  |                          |  |
| 3                        | <p>You can filter the claim application report using the <b>Terminate Filter</b> feature. The list of Terminate Filter is as follows:</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>Resignation Date</b></td> <td>Indicating the resigned employee's last day of employment.</td> </tr> <tr> <td><b>Last Payment Date</b></td> <td>Date when employee get their last payment.</td> </tr> </tbody> </table> | Status | Description | <b>Resignation Date</b> | Indicating the resigned employee's last day of employment. | <b>Last Payment Date</b> | Date when employee get their last payment. |
| Status                   | Description  |        |             |                         |  |                          |  |
| <b>Resignation Date</b>  | Indicating the resigned employee's last day of employment.   |        |             |                         |  |                          |  |
| <b>Last Payment Date</b> | Date when employee get their last payment.   |        |             |                         |  |                          |  |
| 4                        | Click on the  <b>Print</b> button to generate the report.   |        |             |                         |  |                          |  |

## YTD Entitlement

At the **YTD Entitlement** web page you can view each employee's claim entitlement amount and balances.



The screenshot shows the TIMES SOFTWARE logo on the left. To its right is a navigation menu with the following items: **CLAIM** (with a dropdown arrow), **PA**, and **HR**. Under the **HR** section, there is a list of options: **Approve Claim**, **Submit On Behalf**, **View Claim**, **Report**, and **YTD Entitlement**. An orange arrow points from the text 'Click on the CLAIM menu to access the menu list.' to the **CLAIM** menu item. Another orange arrow points from the text 'Click on YTD Entitlement to access the claim application.' to the **YTD Entitlement** option in the list.

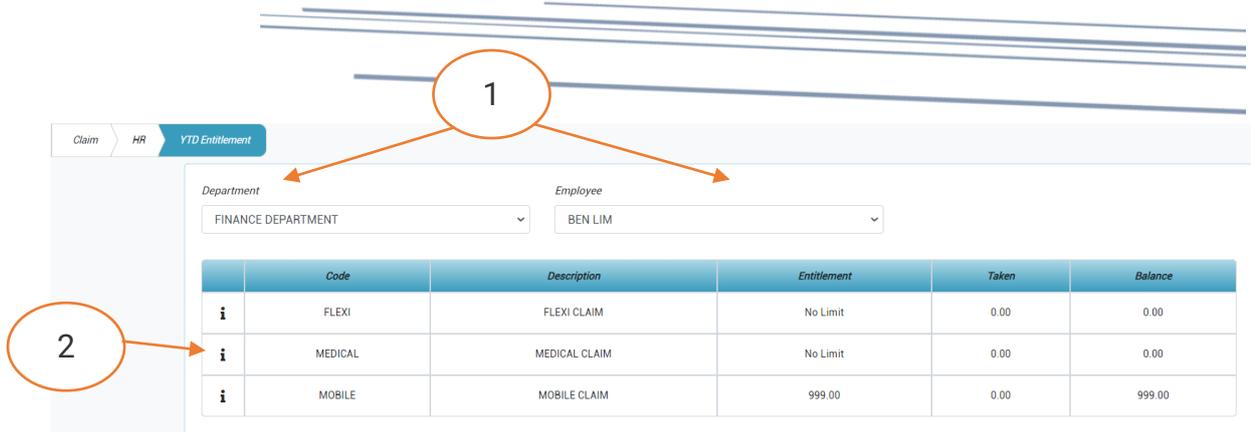


Figure 7 TIMES PRO Claim Report web page

|   |   |
|---|---|
| 1 | Choose the <b>Department</b> and <b>Employee</b> that you want to check for their claim entitlement amounts and balances. |
| 2 | Click on the <b>i Info</b> button to check for each sub claim's entitlement and balance.                                  |

End of Document