TIMES Claim

Standard Setup and Maintenance
User Guide for Administrators

Times Software Pte Ltd

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Disclaimer

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Chapter 1. Introduction

TIMES Claim is a web-based claims management system where employees can manage and submit claims online with scanned receipts. The system made use of internet technologies to support web-based paperless claim application of your employees. It helps employees update their claims without hassle for Human Resources and their supervisors. It assists HR to streamline tedious claim management and monthly claim-report generation for each departmental heads. It manages the claim flow and employees can submit their claim application which links to TIMES Payroll. Administrators can easily assess employee's current claim status, details, and retrieve data required for internal claim costing. All departmental heads could easily monitor their own employees' claims.

This guide contains two main sections.

The first section explains the Administrator functionalities of the TIMES Claim. With these functions, the administrator can create claim forms, define claim entitlements, manage employees' claim approval flows and setup claim emails. They are covered under chapters 1 to 19.

The second section explains the HR administrative functionalities in the system. HR functions provide the administrator capabilities to manage employees' claim information and generate reports. They are explained from chapter 20 onwards.

Some chapters in the first section contain technically complex information that may require the reader to have information technology knowledge in order to understand them.

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Alternatively, you can send us an email to the following email addresses:

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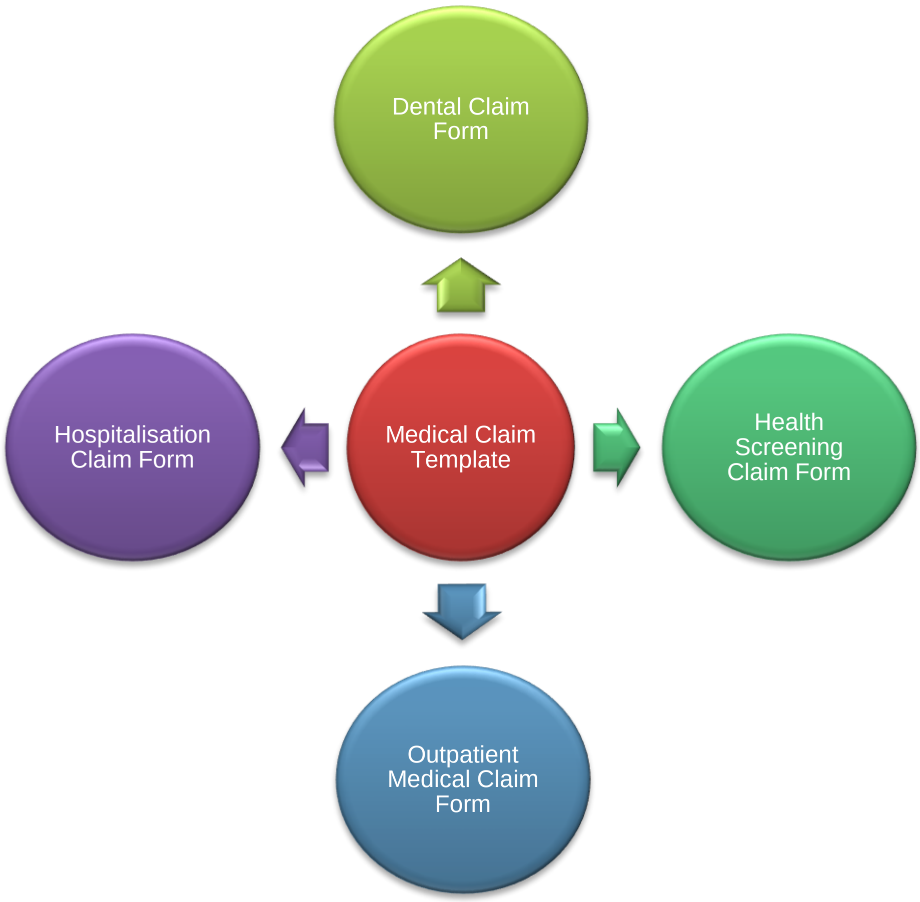
Chapter 2. Standard Setup Workflow

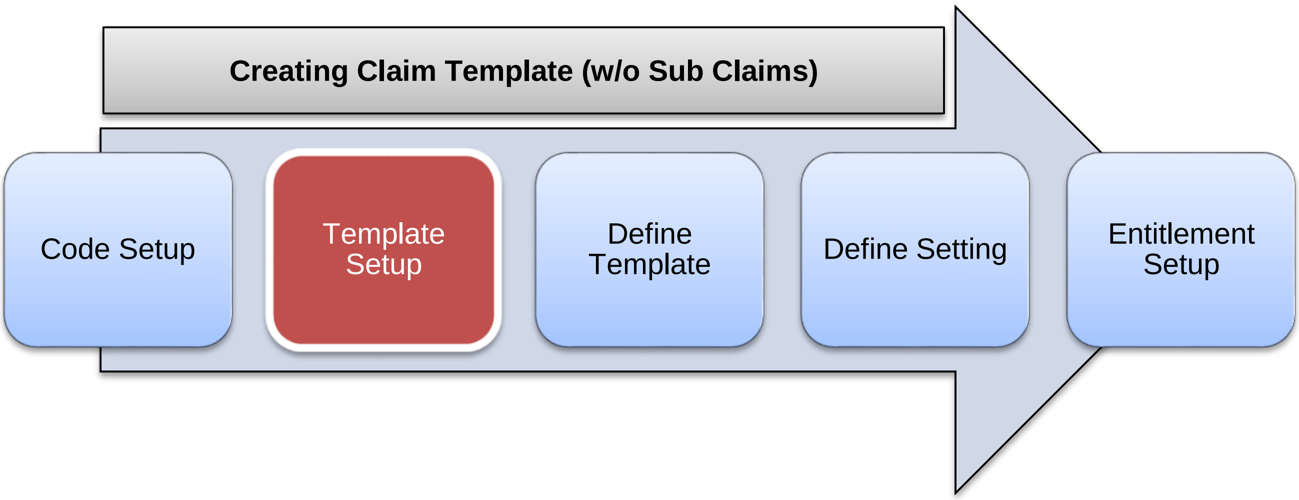
To setup a new TIMES Claim System, the Administrator begins by creating **Claim Forms** that employees can fill in and defining the claim rules that will govern each form. The system uses a template based design to create the forms. This means that the Administrator can create a single template document (known as **Claim Template**) consisting of all the required and Interactable items for an electronic form, and create multiple types of claim forms (known as **Sub Claim**) from this single template document.

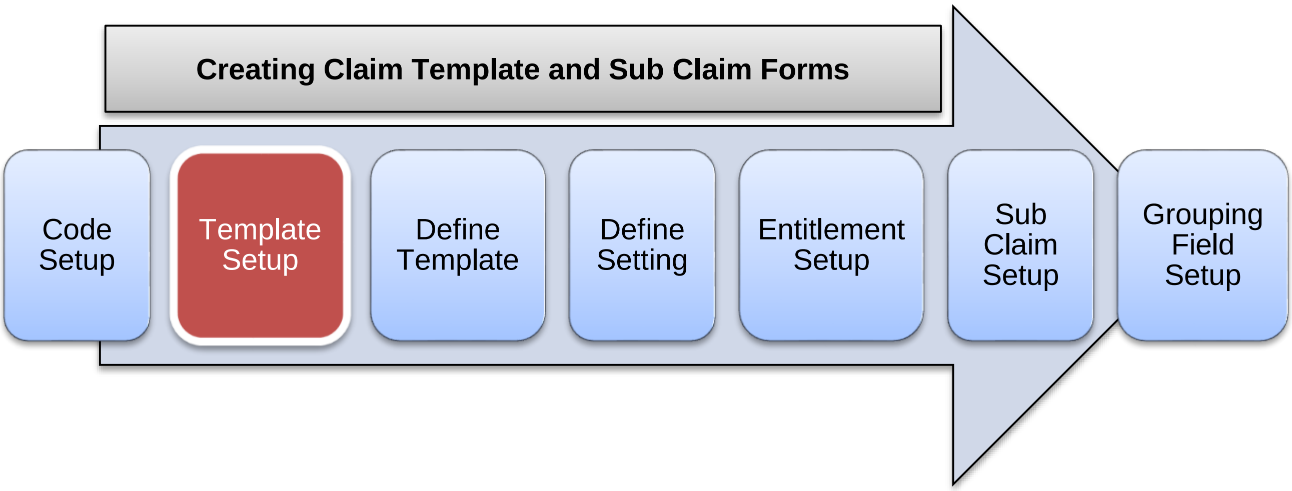
Here is an example:



If sub claims are not required, the Administrator can use the Claim Template as a single Claim Form.

To start off, the Administrator must create the claim forms and define the claim rules for them.





First, master codes for drop-down lists (such as list of Benefit Schemes) in the system will be setup in **Code Setup**.

Next, the physical files and the files' structures (fields, field types, etc.) for the **Claim Templates** are created and maintained at **Template Setup**. *This setup is technically complex.*

The Administrator then creates the Claim Template at **Define Template** by specifying the type of claim that the template will cater for.

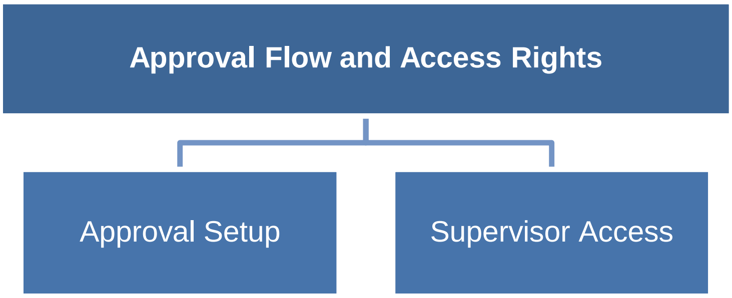
Claim policy and proration method for each Claim Template are defined at **Define Setting**.

The claim entitlement amount for each Claim Template by benefit scheme are defined at **Entitlement Setup**. New benefit schemes can be created there as well.

For Sub Claims, the Administrator can create many sub claim forms from a single Claim Template at **Sub Claim Setup**. Each sub claim can impose a claim limit.

Following that, the Administrator can specify the items that employees can or cannot fill in for each sub claim form at **Grouping Field Setup**.

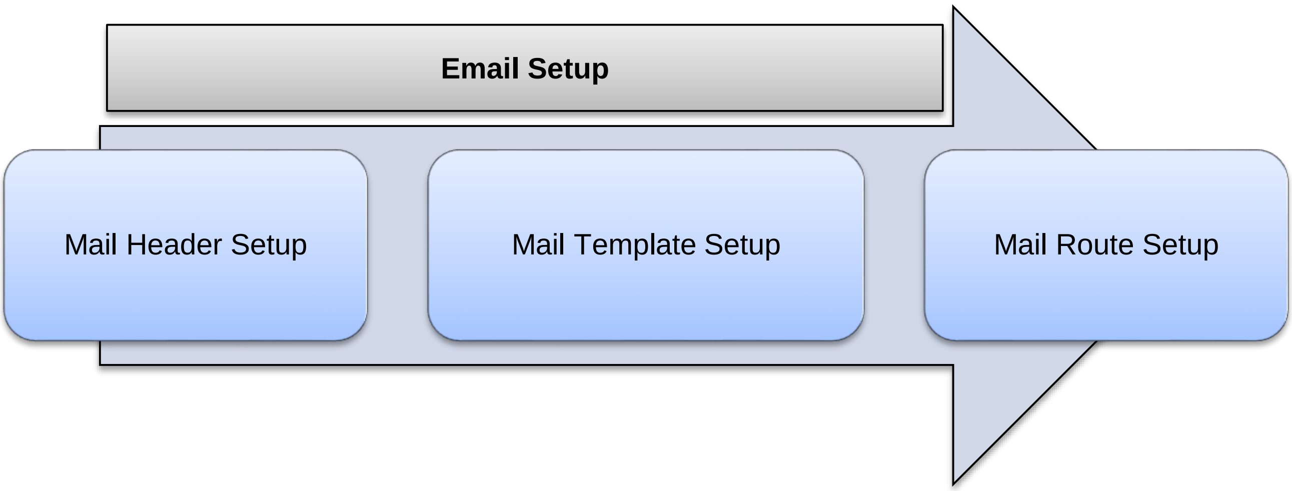
Once the claim forms have been created, the Administrator proceeds to setup the approval flow and claim form edit rights for approvers.



In the **Approval Setup** the Administrator specifies approvers in an approval flow that will approve or reject employees' submitted claim forms. Employees' benefit schemes can be assigned as well.

The Administrator can then specify which approver can make amendments to submitted claim forms at **Supervisor Access**.

Continuing with the setup the Administrator needs to create the email format and the email routing flow for emails that will be sent out by the system.



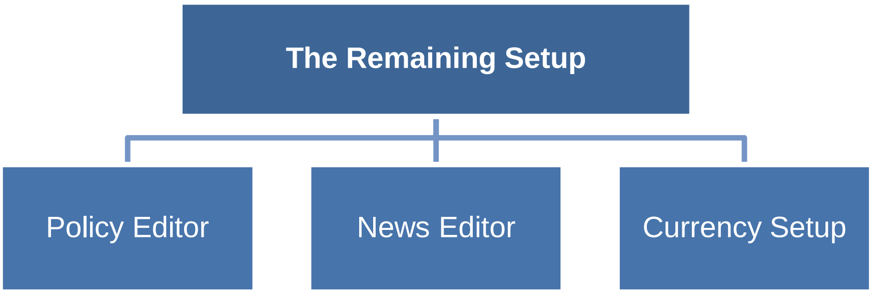
The contents of the email are divided into two sections, the header and the body.

The header section of the email is defined at **Mail Header Setup** and they usually contains the important information such as employee's name, department, claim document number, etc.

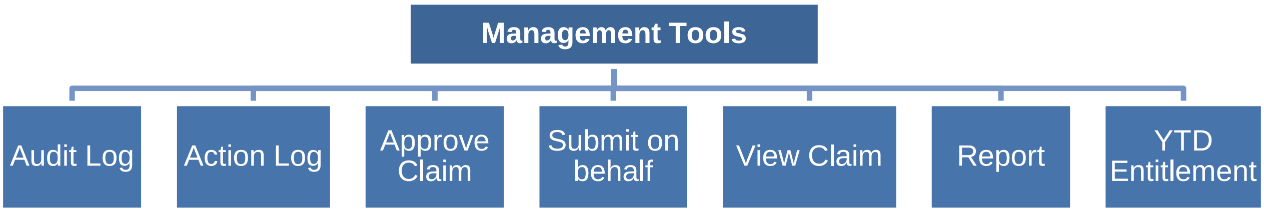
The body section which contains information presented in a table format is defined at **Mail Template Setup** and they contain transactional information from the submitted claim documents such as receipt number, receipt date, receipt amount, etc.

Specifying when and where the emails will be sent out to are defined at **Mail Route Setup**.

Finally for the remaining setup, the Administrator creates and publishes the claim policies (**Policy Editor**) and news (**News Editor**) as well as setup and maintain the currency exchange rate table (**Currency Setup**) for claims involving multi-currencies.



The system provides additional tools to assist the Administrator in managing employees' claim information.



Audit Log tracks transactional record changes in the system.

Action Log tracks user's actions in the system.

Administrator can edit, approve and reject claims in **Approve Claim**.

Administrator can submit claims on behalf of employees in **Submit on behalf**.

Employees' claim documents can be viewed, edited and deleted by Administrator at **View Claim**.

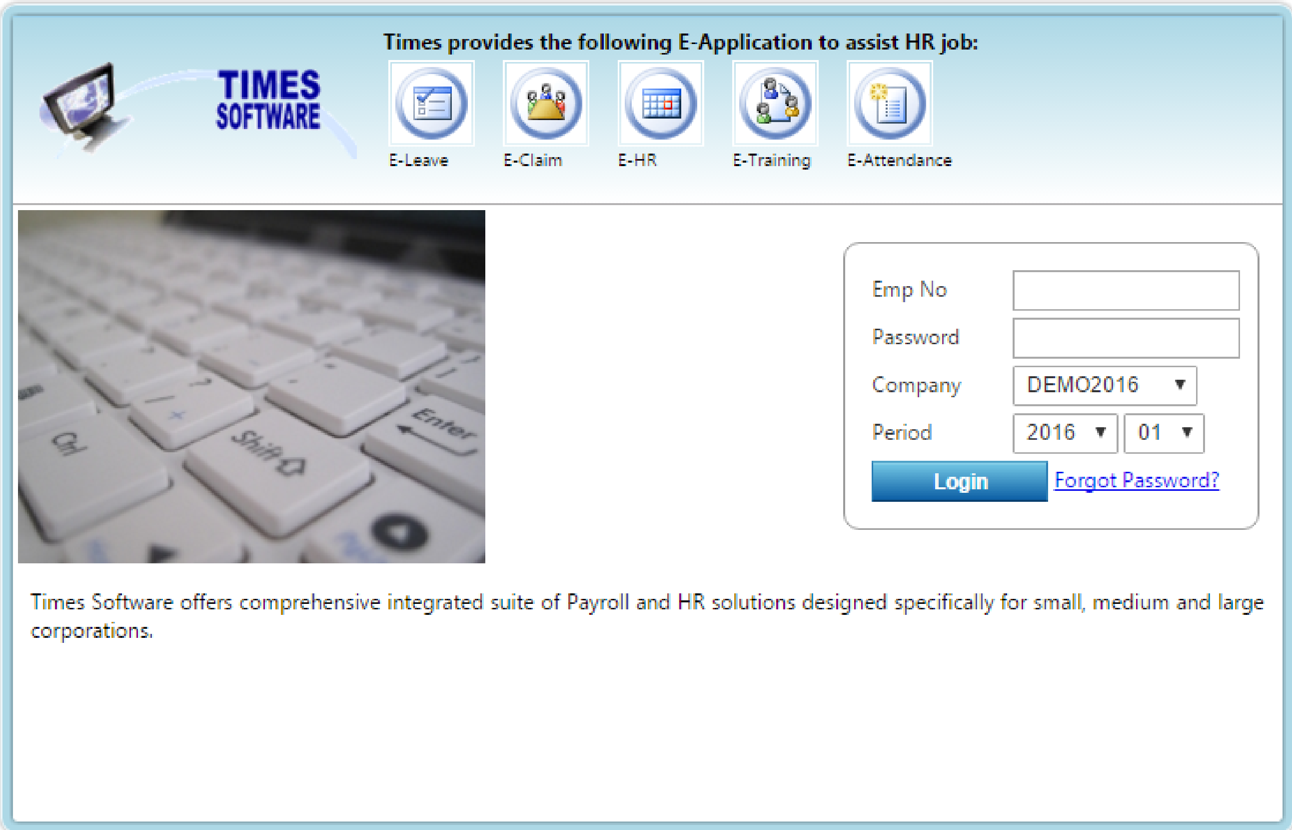
Claim reports can be accessed at **Report**.

YTD Entitlement tracks employees' year to date claim amount entitlement balances and consumptions.

Chapter 3. First time logging into the TIMES Claim System

Open your internet browser and enter the URL address to access the TIMES Solution portal login web page, example: *http://www.myportal.com/esolution/Signin.aspx*

An example of the login page is shown below.

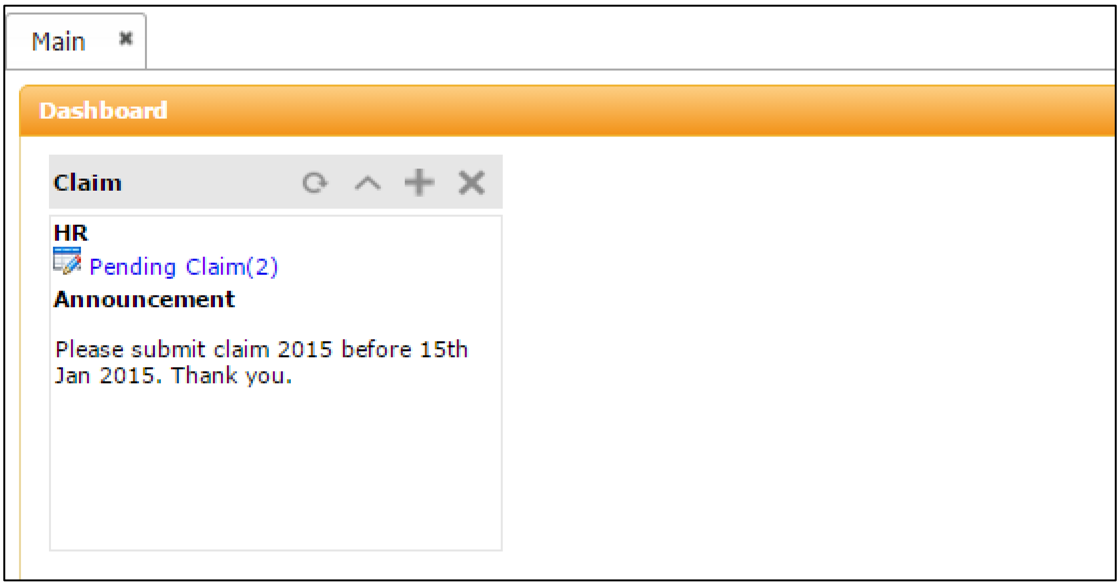


1. Click on the “Company” drop-down list to see a list of available companies and choose the one that you want to access to.
2. Key in your login id at “Emp No”.
3. Key in your password at “Password”.
4. Click the Login button to login into the system.

To effectively use this guide, ensure that you are given the role of Administrator for the company that you are logging into. If the role is not setup yet, use login id *Admin* at “Emp No” to login as the Administrator.

Chapter 4. Dashboard

After logging into the system, you will be presented with your dashboard.



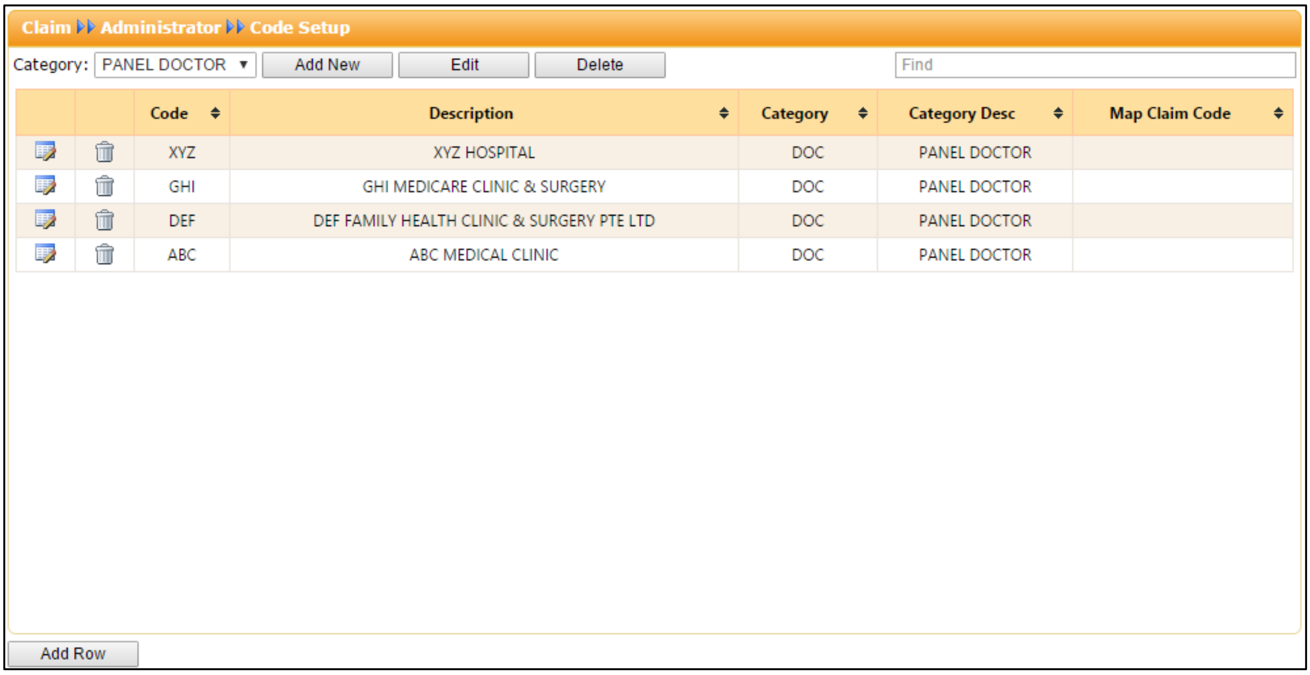
The dashboard shows you a list of items that require your attention.

You can click on any of the items to access it.

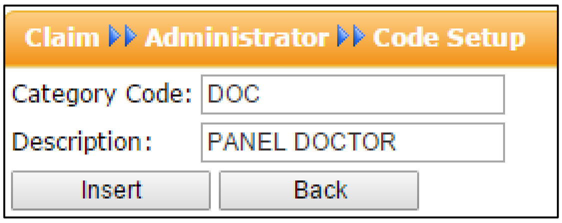
Chapter 5. Code Setup

You can create and manage master codes in **Code Setup**. Codes defined here are used to populate drop-down lists in the TIMES Claim system.

Click on the **Code Setup** option in the Administrator menu to access the Code Setup web page.



To create a new category of codes click the Add New button.



Enter the "Category Code" (maximum 3 characters) and "Description", and click Insert button to create the new category or Back button to cancel the transaction.

If you see the pop-up message *"Category exists. Do you want to merge them?"* when trying to create a new category, this indicates that the "Category Code" that you are trying to create already exists and is in use by other systems. If you agree to merge the category code TIMES Claim will share the same list of codes with the other systems for this category and these codes can be edited by you. Any changes made to these codes will affect all systems sharing these same set of codes.

To make changes to an existing category, choose a "Category" and click Edit button. Enter in the new details and click Update button to update the changes or Back button to cancel the changes.

To delete an existing category, choose a "Category" and click Delete button. Deleted categories are unrecoverable.

If a category is in used in the claim forms it cannot be edited and deleted.

		Code	Description	Category	Category Desc	Map Claim Code
		XYZ	XYZ HOSPITAL	DOC	PANEL DOCTOR	MEDICAL

To add a new code, click on the Add Row button. Enter in the details for the new code and click button to save the code or button to cancel.

The "Map Claim Code" allows a code to be used exclusively for a specific Claim Template. In order to make use of this feature the Claim Template must be created first from **Template Setup** and **Define Template** web pages.

To edit an existing code, click on button, enter the new details and click button to save the code or button to cancel.

To delete a code, click on button. Deleted codes are unrecoverable.

5.1 How the Claim Templates make use of the Codes

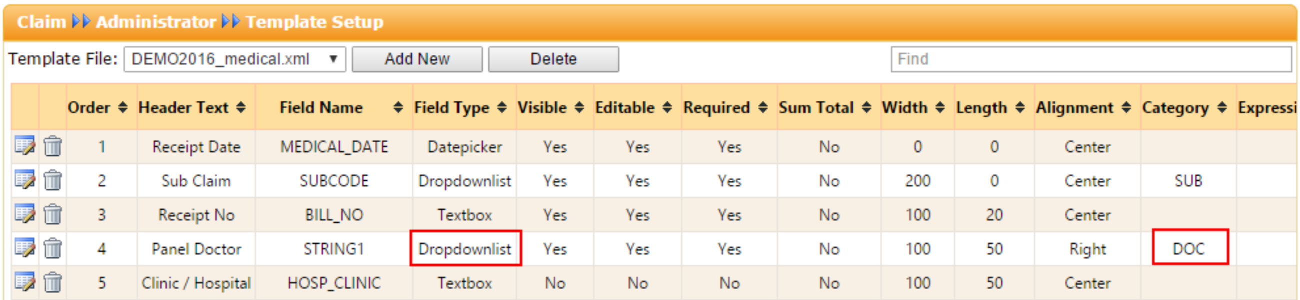
After creating a category, pay close attention to the “Category Code”.


Claim ▸▸ Administrator ▸▸ Code Setup

Category: PANEL DOCTOR | Add New | Edit | Delete | Find

		Code	Description	Category	Category Desc	Map Claim Code
		XYZ	XYZ HOSPITAL	DOC	PANEL DOCTOR	MEDICAL
		GHI	GHI MEDICARE CLINIC & SURGERY	DOC	PANEL DOCTOR	
		DEF	DEF FAMILY HEALTH CLINIC & SURGERY PTE LTD	DOC	PANEL DOCTOR	
		ABC	ABC MEDICAL CLINIC	DOC	PANEL DOCTOR	

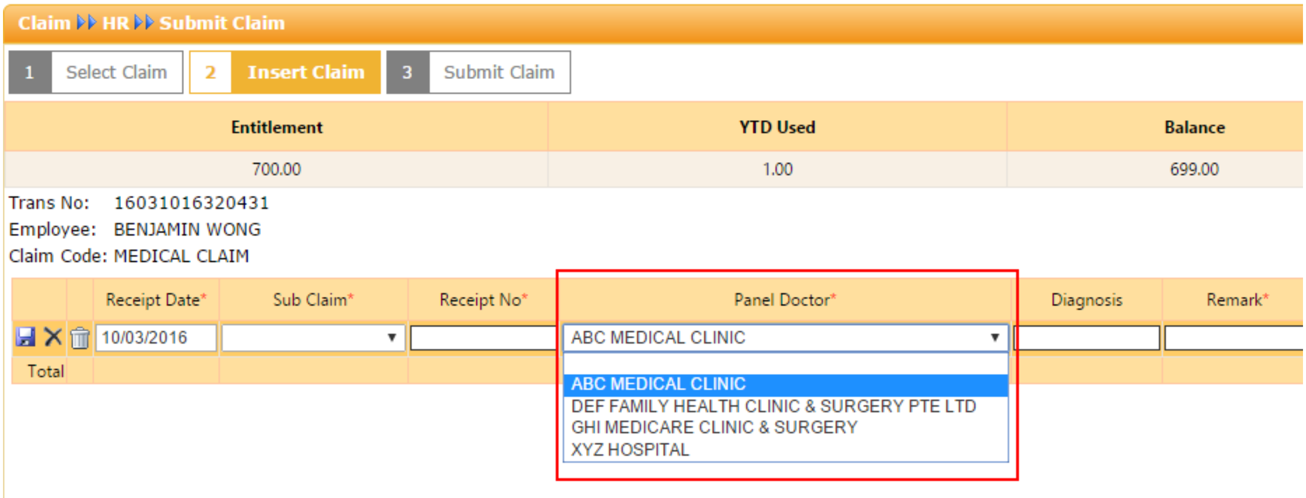
When designing the xml file for the Claim Template[1], you can link a category of codes to a drop-down list in the xml file by indicating the correct category code.


Claim ▸▸ Administrator ▸▸ Template Setup

Template File: DEMO2016_medical.xml | Add New | Delete | Find

		Order	Header Text	Field Name	Field Type	Visible	Editable	Required	Sum Total	Width	Length	Alignment	Category	Expressi
		1	Receipt Date	MEDICAL_DATE	Datepicker	Yes	Yes	Yes	No	0	0	Center		
		2	Sub Claim	SUBCODE	Dropdownlist	Yes	Yes	Yes	No	200	0	Center	SUB	
		3	Receipt No	BILL_NO	Textbox	Yes	Yes	Yes	No	100	20	Center		
		4	Panel Doctor	STRING1	Dropdownlist	Yes	Yes	Yes	No	100	50	Right	DOC	
		5	Clinic / Hospital	HOSP_CLINIC	Textbox	No	No	No	No	100	50	Center		

When users access the Claim Form after all the setup is done, they are able to see and choose from a list of codes in the drop-down list.


Claim ▸▸ HR ▸▸ Submit Claim

1 Select Claim | 2 Insert Claim | 3 Submit Claim

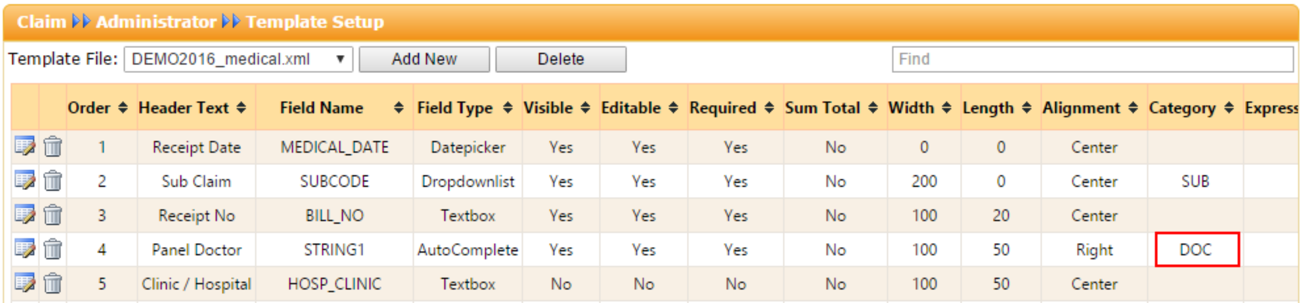
Entitlement	YTD Used	Balance
700.00	1.00	699.00

Trans No: 16031016320431
Employee: BENJAMIN WONG
Claim Code: MEDICAL CLAIM

	Receipt Date*	Sub Claim*	Receipt No*	Panel Doctor*	Diagnosis	Remark*
	10/03/2016			ABC MEDICAL CLINIC		
Total						

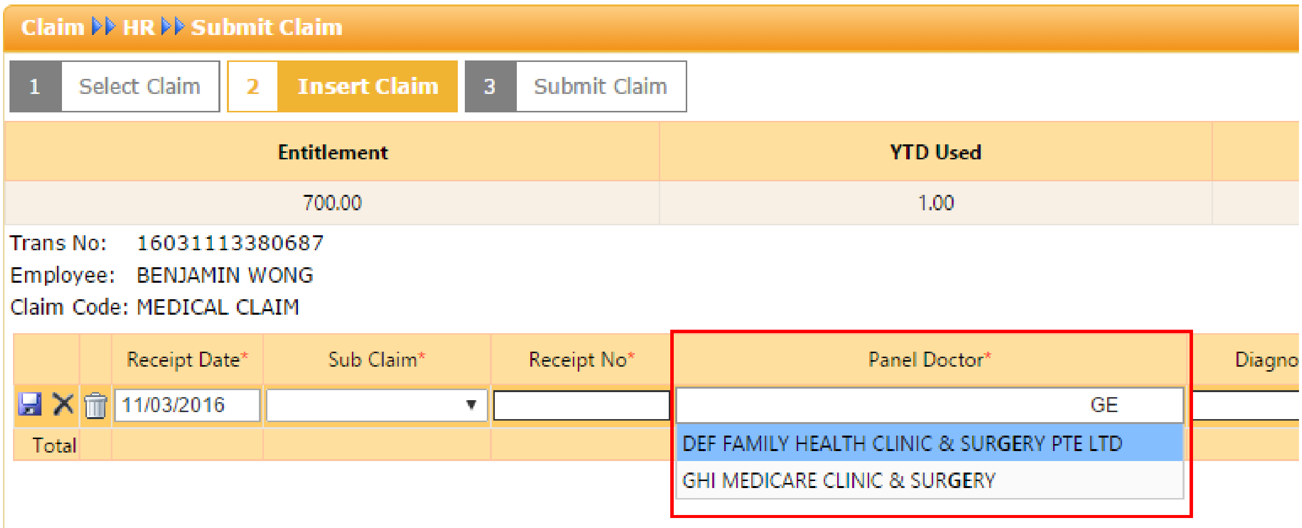
[1] Method to setup Claim Template xml file will be explained in Chapter 6 Template Setup.

You can also link the codes to an *AutoComplete* field.


Claim ▶▶ Administrator ▶▶ Template Setup

Template File: DEMO2016_medical.xml ▾ Add New Delete Find

Order	Header Text	Field Name	Field Type	Visible	Editable	Required	Sum Total	Width	Length	Alignment	Category	Express
1	Receipt Date	MEDICAL_DATE	Datepicker	Yes	Yes	Yes	No	0	0	Center		
2	Sub Claim	SUBCODE	Dropdownlist	Yes	Yes	Yes	No	200	0	Center	SUB	
3	Receipt No	BILL_NO	Textbox	Yes	Yes	Yes	No	100	20	Center		
4	Panel Doctor	STRING1	AutoComplete	Yes	Yes	Yes	No	100	50	Right	DOC	
5	Clinic / Hospital	HOSP_CLINIC	Textbox	No	No	No	No	100	50	Center		



Chapter 6. Template Setup

This chapter is technically complex.

In a standard implementation the system will be installed with preset templates that are tailored to your organisational needs. However, you can still create and customised your own templates.

In the **Template Setup** web page, you can create and manage xml template files which will be used to create Claim Templates in the system. The xml template files contain configurations of database fields, field types, rulesets and formulas that shape the Claim Forms for employees to use.

Click on the **Template Setup** option in the Administrator menu to access the Template Setup web page.

Claim ▶▶ Administrator ▶▶ Template Setup

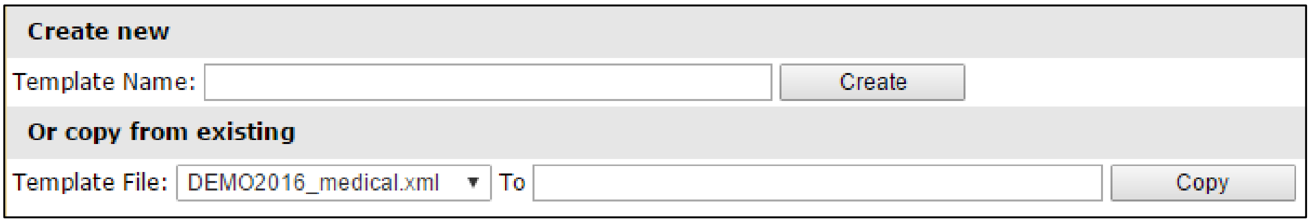
Template File: DEMO2016_medical.xml ▼ Add New Delete Find

	Order	Header Text	Field Name	Field Type	Visible	Editable	Required	Sum Total	Width	Length	Alignment	Category	Expressi
	1	Receipt Date	MEDICAL_DATE	Datepicker	Yes	Yes	Yes	No	0	0	Center		
	2	Sub Claim	SUBCODE	Dropdownlist	Yes	Yes	Yes	No	200	0	Center	SUB	
	3	Receipt No	BILL_NO	Textbox	Yes	Yes	Yes	No	100	20	Center		
	4	Panel Doctor	STRING1	Dropdownlist	Yes	Yes	Yes	No	100	50	Right	DOC	
	5	Clinic / Hospital	HOSP_CLINIC	Textbox	No	No	No	No	100	50	Center		
	6	Diagnosis	DIAGNOSIS	Textbox	Yes	Yes	No	No	100	50	Center		
	7	Remark	REMARK	Textbox	Yes	Yes	Yes	No	100	60	Center		
	8	Purpose / Description	NOTE	Textbox	Yes	Yes	Yes	No	300	255	Center		
	9	Receipt Amount	RECEIPT_AMOUNT	Currency	Yes	Yes	Yes	Yes	100	0	Right		
	10	Claimable Amount	EMPLOYER_AMOUNT	ReadOnly	Yes	Yes	No	Yes	150	0	Right		

Add Row

Choose a “Template File” to see the template’s settings.

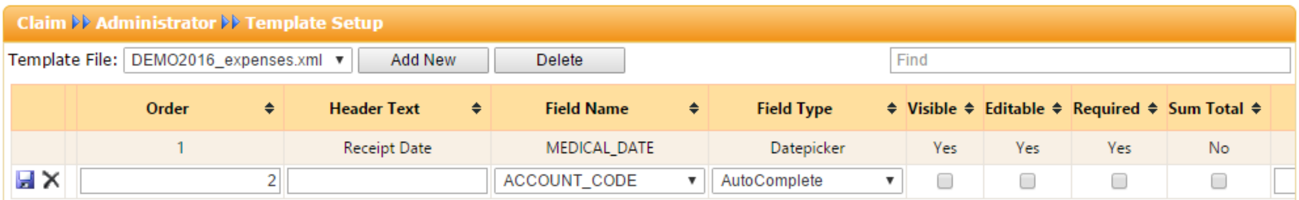
To create a new template file, click the Add New button.



Enter the new “Template Name” and click Create button to create the template file. The format for the “Template Name” must be ***<Your Company Code>_<Template File Name>.xml***. For example, if your company code is *MyCompany* and you want to create a template file to cater for general expenses claim, your template file name should be *MyCompany_expenses.xml*.

If you have multiple companies that have the same type of claim (ex. *expenses*) you will need to create the same claim xml for each company (ex. *MyCompanyA_expenses.xml*, *MyCompanyB _expenses.xml*, *MyCompanyC _expenses.xml*).

You can create a new “Template File” based on the settings of an existing template. To do this, under the heading “Or copy from existing”, choose a “Template File”, enter the name for the new template file that you want to create at “To” and click Copy button.



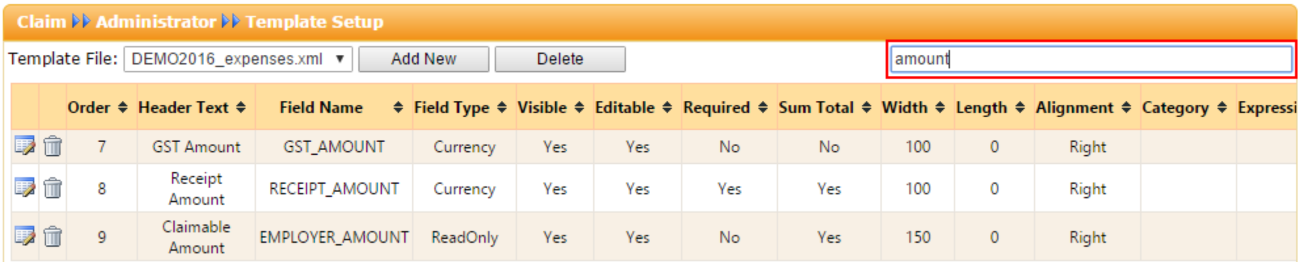
Once the new template file is created you need to setup the template’s settings such as “Field Name” and “Field Type”.

To add a new template setting, click on the Add Row button. Enter in the details for the new setting and click button to save the code or button to cancel.

To edit an existing setting, click on button, enter the new details and click button to save the setting or button to cancel.

To delete a setting, click on button. Deleted settings are unrecoverable.

If you want to delete the entire template file you can click on the Delete button. Deleted template files are unrecoverable.



The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

6.1 Understanding the Template Setup Settings

This sub chapter explains the functions and purpose for each of the Template Setup settings' columns.

Order

The fields will be displayed in the Claim Form from left to right according to the ordering defined here. Order *1* indicates the first field to be displayed, followed by order *2* field and so on.

Header Text

This is the title / name of the field to be displayed in the Claim Form.

Field Name

This is a list of all available database fields that you can use to store and display information in the Claim Form. It is important to note that some of these database fields are reserved for a specific use only. They will be bolded in the list.

Field Name	Purpose
ACCOUNT_CODE	**For Account Code only.**
BILL_NO	**Receipt Number only.**
BOOLEAN1	For answering Yes or No, or True or False. Must use “Field Type” *Checkbox*.
BOOLEAN2	For answering Yes or No, or True or False. Must use “Field Type” *Checkbox*.

Field Name	Purpose
BOOLEAN3	For answering Yes or No, or True or False. Must use "Field Type" *Checkbox*.
CO_PAYMENT	**To indicate whether there is co-payment only. Must use "Field Type" *Checkbox*.**
COMPANY	**For Company Code only.**
COST_CENTRE	**For Cost Centre only.**
COUNTRY_CODE	**For Country Code only.**
CURRENCY_CODE	**For Currency Code only.**
CURRENCY1	Any number values (support decimals).
CURRENCY2	Any number values (support decimals).
CURRENCY3	**For Distance / Mileage used in Transport Claim only. For other types of claims this field can be used for any number values (support decimals).**
CURRENCY4	Any number values (support decimals).
CURRENCY5	Any number values (support decimals).
CURRENCY6	Any number values (support decimals).
CURRENCY7	Any number values (support decimals).
CURRENCY8	Any number values (support decimals).
CURRENCY9	Any number values (support decimals).
CURRENCY10	Any number values (support decimals).
DATE1	Any date.
DATE2	Any date.

Field Name	Purpose
DATE3	Any date.
DAYFREQ	Any number values (support decimals).
DEPARTURE	For departure location.
DEPENDANT	For dependant's name.
DESTINATION	For destination location.
DIAGNOSIS	For medical diagnosis results.
DOCTOR_NAME	For doctor's name.
EE_DEP	**For employee's dependant's identification number only.**
EMPLOYER_AMOUNT	**For Receipt Net Claimable Amount only.**
END_DATE	Any date however can be used in conjunction with "START_DATE" to calculate the period.
END_TIME	Any time however can be used in conjunction with "START_TIME" to calculate the duration.
EXCHANGE_RATE	**For Currency Exchange Rate only.**
FILE1	**For attachments only. Use "Field Type" *FileUpload*.**
FILE2	**For attachments only. Use "Field Type" *FileUpload*.**
FILE3	**For attachments only. Use "Field Type" *FileUpload*.**
FOREIGN_CURRENCY	For Foreign Currency Code.
GST_AMOUNT	**For GST amount only.**
HOSP_CLINIC	**For Hospital or Clinic Name only.**
HRFREQ	Any number values (support decimals).
HRFREQ1	Any number values (support decimals).

Field Name	Purpose
INSURANCE_NO	For insurance number.
JOB_CODE	For Job Code.
MC_DAYS	For number of days of medical leave.
MC_GRANTED	For answering Yes or No for granting medical leave.
MEDICAL_DATE	**Receipt Date only.**
MESSAGE	For message.
MILEAGE_AMOUNT	**The Mileage Amount for Transport Claim only.**
NOTE	**The purpose or description of the claim only.**
OTHOUR	For number of overtime hours.
OTTYPE	For overtime rate.
OTTYPE1	For overtime rate.
PATIENT_TYPE	For indicating type of patient, accepts single character.
PREILLNESS	**For Health Diagnosis and Illness only.**
PRJ_CODE	**For Project Code only.**
RECEIPT_AMOUNT	**For Gross Total of Receipt only.**
REFER_TO_PANEL	For answering Yes or No to refer to panel doctor.
REMARK	**User's remarks only.**
SECTOR_CODE	For Sector Code.
START_DATE	Any date however can be used in conjunction with “END_DATE” to calculate the period.
START_TIME	Any time however can be used in conjunction with “END_TIME” to calculate the duration.

Field Name	Purpose
STRING1	**The Mode of Transport for Transport Claim only. For other types of claims this field can be used for any text information.**
STRING2	Any text information.
STRING3	Any text information.
STRING4	Any text information.
STRING5	Any text information.
STRING6	Any text information.
STRING7	Any text information.
STRING8	Any text information.
STRING9	Any text information.
STRING10	Any text information.
SUBCODE	**Use only if the Claim Template will have sub claim forms. Must define “Field Type”** *Dropdownlist*, **“Visible”** *Yes*, **“Editable”** *Yes*, **“Required”** *Yes* **and “Category”** *SUB*.
TIMESTAMP1	For time. Use “Field Type” *Time*.
TIMESTAMP2	For time. Use “Field Type” *Time*.
TIMESTAMP3	For time. Use “Field Type” *Time*.
VISIT_DATE	For date of visit.

Field Type

This is a list of available field types that will determine the behaviour of the fields in the Claim Form.

Field Type	Purpose
AutoComplete	A wild card search. User types in a word or two into the search and the search produces a list of results that contains those words. User can then choose one of the results. Must define a category code in "Category" to link the field to a list of codes.
AutoRunningNumber	A sequential number that starts at 1 and increments by 1 for each line of transactional record.
CheckBox	A checkbox where the user can click on it to tick or untick it.
Currency	Allows entry of numbers with decimals.
Datepicker	A field that provides a **Calendar Picker**, which is an interactive calendar in a small overlay, for the user to choose a date.
Dropdownlist	Clicking on the field produces a list of items and the user chooses one item from the list. Must define a category code in "Category" to link the field to a list of codes.
Expense	A special field reserved for the TIMES Travel system's Expenses Sub Claim Form.
FileUpload	User can choose a file to upload into the system. This "Field Type" is used exclusively in *FILE1*, *FILE2* and *FILE3* fields.
Numeric	Allows entry of whole numbers without decimals. However, this does not apply to *EXCHANGE_RATE* field which allows 7 decimal points even if it uses this field type.
ReadOnly	Displays information and do not allow data entry. Mainly used for showing automatically calculated values by the system.

Field Type	Purpose
Textbox	A box for the user to key in any text information.
Time	Allows entry of time value in the format HH:MM.

Visible

To show or hide the field in the Claim Form. If “Visible” is set as *No*, “Editable” and “Required” must be set as *No*.

Editable

To indicate if this field is Interactable.

Required

To indicate if this field is a mandatory field that the user must select or fill in. In the Claim Form if “Required” set as *Yes* this field will be marked with an asterisk.

Sum Total

To sum the amount of the field for the entire Claim Form into a grand total.

Width

Specify the height of the field in pixels.

Length

Specify the length of the field in pixels.

Alignment

The alignment of the text in the field.

Category

The “Category” column functions as one of the following:

1. To link the field to a “Category Code” from the **Code Setup** in order to pull in those list of codes into the field (such as to populate a drop-down list).
2. To activate **Sub Claim Forms**. “Category” must define as *SUB*, “Field Name” as *SUBCODE*, “Header Text” as *Sub Claim* and “Field Type” as *Dropdownlist* in order for the system to recognize that this field is a Sub Claim Form field and will show the list of selectable Sub Claims.
3. To link the field to a global “Category Code” not found in the **Code Setup** in order to pull in those list of codes into the field (such as to populate a drop-down list). Global category codes are codes that are used for all the systems not just for TIMES Claim.

Expression

To default the value of the field based on the employee’s profile data. Specify the EMPLOYEE table’s field that the system will use to default the value to.

“Expression” must be used together with “Category”.

Here is an example:

We create a drop-down list of Cost Centre that the employee can choose from. However, we want to default the value to the employee’s cost centre.

We create “Header Text” *Cost Centre*, “Field Name” *COST_CENTRE*, “Field Type” *Dropdownlist*, “Visible” *Yes*, “Editable” *Yes* and “Category” *CST*.

After that we will default the value by defining *EMPLOYEE.COST_CENTRE_CODE* at “Expression”. This is where the employee’s cost centre is stored.

When the employee access the Claim Form, a list of cost centre will be shown in the “Cost Centre” drop-down list and the default value will be the employee’s cost centre.

Default Value

Specify manually the default value of the field.

⚠ Do not specify this value if the “Expression” is used.

6.2 Common Global Category Codes

Here is a list of commonly used Global Category Codes that you can use in the Template Setup's "Category" column. Do note that this list is not exhaustive and is subjected to change.

Category Code	Purpose
ADV	Advertisements.
AST	Company assets.
AWD	Company awards.
BEF	Employee benefits.
BEN	TIMES Claim Benefit Schemes.
BIC	Banks.
BRH	Company branches.
CAT	Employee categories.
CAU	Cause of injuries.
CLS	Employee classifications.
COM	Companies.
COU	Educational institutions.
CST	Cost centre.
CTY	Countries.
CUR	Currencies.
DEG	Education certificates.
DEP	Company departments.
DIA	Illness diagnosis.
DIV	Company divisions.
EDU	Education.
HOS	Hospitals and health institutions.
INS	Insurances.
JOB	Employee job grades.
LEA	Types of leaves.
LOC	Locations.
LSC	TIMES Leave Leave Schemes.
LVL	Employee job levels.
MAJ	Academic majors.
MED	Types of claims.
NAT	Nationalities.
OCU	Employee occupations.
ORG	Organisations.
OVL	Employee appraisal grades.
PRJ	Projects.
PRO	Employee career progressions.
RAC	Races.
RE	Relationships.
REL	Religions.
SEC	Employee sections.
SEX	Genders.
SUB	Sub Claim.
SVS	Employee service grades.
TEN	Employee tenure of service.
TER	Employee resignation reasons.
TPT	Modes of transportation.

6.3 Common Expressions

Here is a list of EMPLOYEE table fields that are commonly used in the Template Setup's "Expression" column. Do note that this list is not exhaustive and is subjected to change.

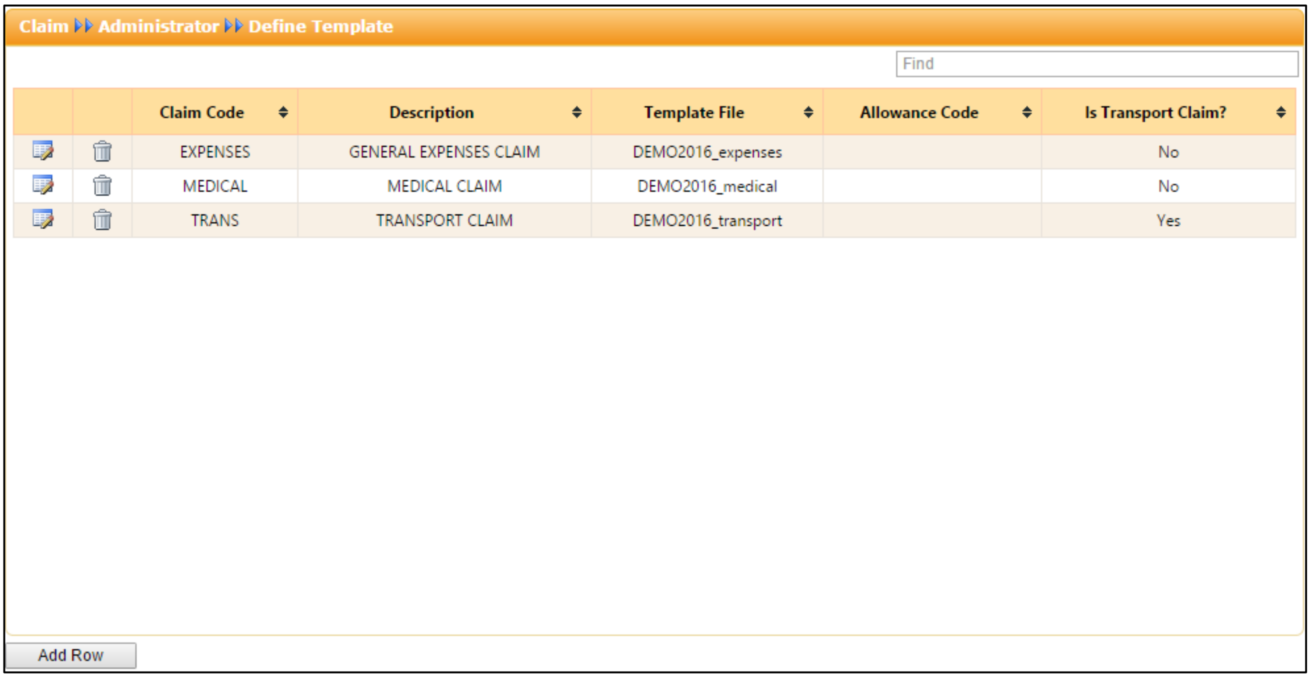
Specific "Expression" can be used for specific global category code.

EMPLOYEE Table Field defined in "Expression"	Purpose	Used in conjunction with Global Category Code
EMPLOYEE.SEX	Employee's gender.	SEX
EMPLOYEE.RACE_CODE	Employee's race.	RAC
EMPLOYEE.NATIONAL_CODE	Employee's nationality.	NAT
EMPLOYEE.RELIGION_CODE	Employee's religion.	REL
EMPLOYEE.LOCATION_CODE	Employee's location.	LOC
EMPLOYEE.BRANCH_CODE	Employee's branch.	BRH
EMPLOYEE.DIVISION_CODE	Employee's division.	DIV
EMPLOYEE.DEPARTMENT_CODE	Employee's department.	DEP
EMPLOYEE.CATEGORY_CODE	Employee's category.	CAT
EMPLOYEE.COST_CENTRE_CODE	Employee's cost centre.	CST
EMPLOYEE.SECTION_CODE	Employee's section.	SEC
EMPLOYEE.CLASSIFICATION_CODE	Employee's classification.	CLS
EMPLOYEE.OCCUPATION_CODE	Employee's occupation.	OCU
EMPLOYEE.EDUCATION_C0DE	Employee's education.	EDU
EMPLOYEE.JOB_GRADE_CODE	Employee's job grade.	JOB
EMPLOYEE.DOBCTRY	Employee's country of birth.	CTY
EMPLOYEE.LEAVE_SCHEME	Employee's leave scheme.	LSC
EMPLOYEE.BENEFIT_SCHEME	Employee's benefit scheme.	BEN
EMPLOYEE.COMPANY_CODE	Employee's company.	COM

Chapter 7. Define Template

Once the template xml files are ready you can begin to create the claim templates for specific claim types in the **Define Template** web page. The claim templates will form the Claim Forms and Sub Claim Forms.

Click on the **Define Template** option in the Administrator menu to access the Define Template web page.



Click on the Add Row button to create a new claim template.

Enter the “Claim Code” to specify which type of claim the template will cater for, “Description” for the claim name and choose an xml file for the template at “Template File”.

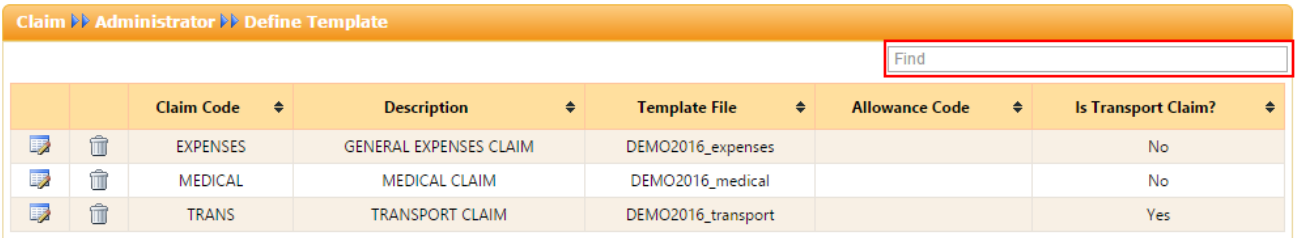
If you are creating a single Claim Form from this template file without sub claims you can specify the "Allowance Code" that the Claim Form's net claimable amount can be transferred to for payroll processing.

If you tick the checkbox for "Is Transport Claim?", the template will use the system's **Mileage Computation Formula** (different claimable amount per distance travelled) and is usually used for transport claims. For claims that do not use this formula make sure it is unticked.

Click button to save the template or button to cancel.

To edit an existing template, click on button, enter the new details and click button to save the template or button to cancel.

To delete a template, click on button. Deleted templates are unrecoverable.


Claim ▸▸ Administrator ▸▸ Define Template

Find

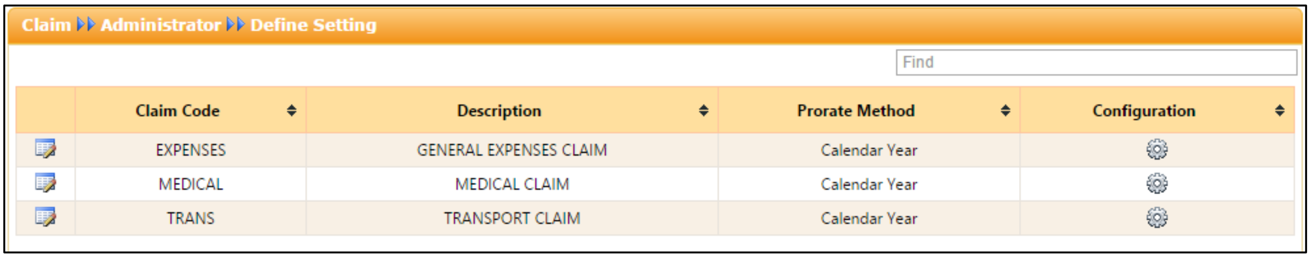
		Claim Code	Description	Template File	Allowance Code	Is Transport Claim?
		EXPENSES	GENERAL EXPENSES CLAIM	DEMO2016_expenses		No
		MEDICAL	MEDICAL CLAIM	DEMO2016_medical		No
		TRANS	TRANSPORT CLAIM	DEMO2016_transport		Yes

The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

Chapter 8. Define Setting

With the claim templates created, it's time to define the claim rules for them. In the **Define Setting** web page, you can setup the claim proration, backdate and capping rules as well as any other special formulas for the template.

Click on the **Define Setting** option in the Administrator menu to access the Define Setting web page.


Claim ▸▸ Administrator ▸▸ Define Setting

Find

	Claim Code	Description	Prorate Method	Configuration
	EXPENSES	GENERAL EXPENSES CLAIM	Calendar Year	
	MEDICAL	MEDICAL CLAIM	Calendar Year	
	TRANS	TRANSPORT CLAIM	Calendar Year	

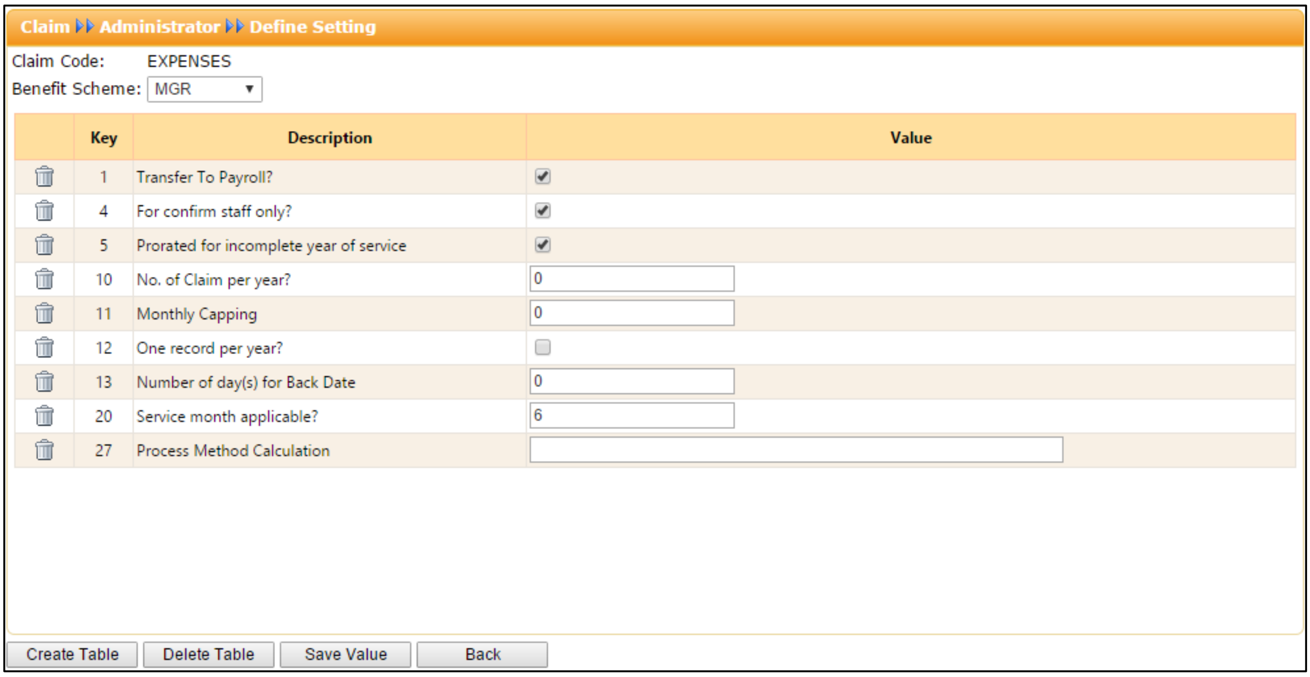
Here you can see a list of all claim templates that you have defined. You can change their "Prorate Method" by clicking on the button.

"Prorate Method" *Calendar Year* grants claim entitlement from 1st January to 31st December and may prorate claim entitlement for employees with incomplete year of service within this period depending on the **Configuration** settings.

"Prorate Method" *Financial Year* grants claim entitlement based on the company's financial year which can be from 1st July current year to 30th June of the following year and may prorate claim entitlement for employees with incomplete year of service within this period depending on the **Configuration** settings.

Click button to save the settings or button to cancel.

Next, access the template's **Configuration** web page by clicking on the button.



If the claim template is a newly created template, there will be no records in the Configuration web page. Click on the Create Table button to generate the default settings for the template.

To delete a setting, click on the 🗑 button.

To refresh the entire list of settings you can click on the Delete Table button followed by Create Table button.

After you have made changes to the settings, click Save Value button to save your changes.

Click Back button to return back to the Define Setting web page.

The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

8.1 Understanding the Configuration Settings

This sub chapter explains the functions and purpose for each of the Configuration settings.

Transfer To Payroll?

Tick the ☐ checkbox to allow net claimable amount for this claim to transfer to payroll. The "Allowance Code" must be defined at either Define Template web page (for single Claim Form) or at Sub Claim Setup web page (for Sub Claim Forms).

For confirm staff only?

Tick the ☐ checkbox to allow confirmed employees only to be able to submit this claim.

Prorated for incomplete year of service

Tick the ☐ checkbox to prorate claim entitlement for employees with incomplete year of service. The system will determine an employee's incomplete year of service based on the employee's hired date within a calendar year or financial year (this is based on the claim template's "Prorate Method" defined at Define Setting web page).

Formula for calculating claim entitlement proration is *(Claim Entitlement Amount for a year / number of calendar days in a year) * number of calendar days left in the year after the employee joins the company.*

For example, if claim entitlement amount is $500.00 a year, prorate method is by calendar year and employee joins the company on 1st June 2016, the employee's prorated claim entitlement amount will be:

*$500.00 / 366 = $1.37 * 214 = $293.18*

No. of Claim per year?

Limit the number of claim submissions per year. *0* indicates unlimited.

Monthly Capping

Limit the amount of claim that can be submitted per month not exceeding the employee's claim entitlement. *0* indicates no capping but the amount must not exceed the entitlement.

One record per year?

Tick the ☐ checkbox to restrict employees to submit a single claim only per year.

Number of day(s) for Back Date

Limit the number of calendar days that a claim submission can back-date to. *0* indicates no restriction.

Service month applicable?

Employees must be in service with the company for the number of months specified here before they can submit this claim.

Process Method Calculation

This method is technically complex.

You can specify special computation here for single Claim Form if this claim template does not have Sub Claims.

The formula accepts simple equations between fields defined in the template's xml file.

Here are some examples:

RECEIPT_AMOUNT = EMPLOYER_AMOUNT

(The amount in EMPLOYER_AMOUNT will be based on RECEIPT_AMOUNT)

*RECEIPT_AMOUNT * 7% = GST_AMOUNT*

(Amount in GST_AMOUNT is calculated based on the gross claim amount in RECEIPT_AMOUNT multiplying with 7 percent)

*(RECEIPT_AMOUNT * 10%) + RECEIPT_AMOUNT = EMPLOYER_AMOUNT*

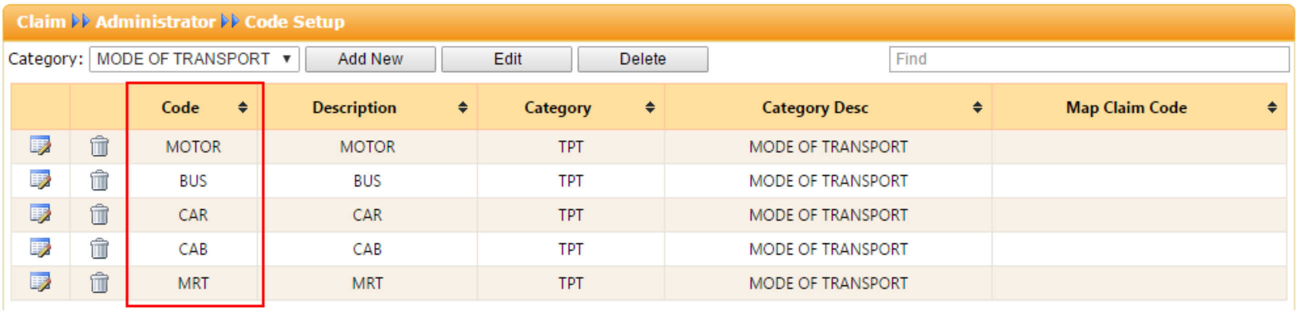
(Calculate the 10% tax amount from the pre-tax gross claim amount in RECEIPT_AMOUNT. Then add the tax amount to the gross claim amount in RECEIPT_AMOUNT to calculate the net claimable amount in EMPLOYER_AMOUNT)

8.2 Configuring Transport Claim with Mileage Computation Formula

This method is technically complex.

This sub chapter explains the method to setup the formula to automatically calculate the claimable amount based on distance travelled and type of vehicle used.

Before you begin to design the **Mileage Computation Formula** into the transport claim template there are a few tasks that you need to complete first. They are:

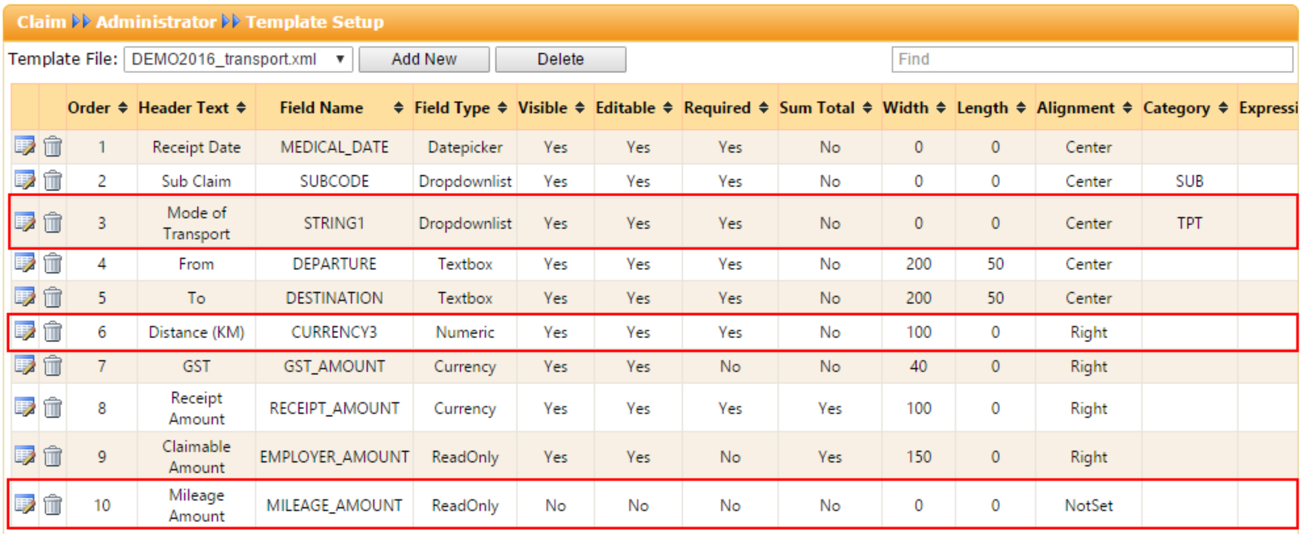


Claim ▸▸ Administrator ▸▸ Code Setup

Category: MODE OF TRANSPORT ▾ Add New Edit Delete Find

		Code	Description	Category	Category Desc	Map Claim Code
		MOTOR	MOTOR	TPT	MODE OF TRANSPORT	
		BUS	BUS	TPT	MODE OF TRANSPORT	
		CAR	CAR	TPT	MODE OF TRANSPORT	
		CAB	CAB	TPT	MODE OF TRANSPORT	
		MRT	MRT	TPT	MODE OF TRANSPORT	

- ✓ A list of modes of transport need to be created in the **Code Setup** web page. Pay attention to the “Code” of those transports.



Claim ▸▸ Administrator ▸▸ Template Setup

Template File: DEMO2016_transport.xml ▾ Add New Delete Find

		Order	Header Text	Field Name	Field Type	Visible	Editable	Required	Sum Total	Width	Length	Alignment	Category	Expressi
		1	Receipt Date	MEDICAL_DATE	Datepicker	Yes	Yes	Yes	No	0	0	Center		
		2	Sub Claim	SUBCODE	Dropdownlist	Yes	Yes	Yes	No	0	0	Center	SUB	
		3	Mode of Transport	STRING1	Dropdownlist	Yes	Yes	Yes	No	0	0	Center	TPT	
		4	From	DEPARTURE	Textbox	Yes	Yes	Yes	No	200	50	Center		
		5	To	DESTINATION	Textbox	Yes	Yes	Yes	No	200	50	Center		
		6	Distance (KM)	CURRENCY3	Numeric	Yes	Yes	Yes	No	100	0	Right		
		7	GST	GST_AMOUNT	Currency	Yes	Yes	No	No	40	0	Right		
		8	Receipt Amount	RECEIPT_AMOUNT	Currency	Yes	Yes	Yes	Yes	100	0	Right		
		9	Claimable Amount	EMPLOYER_AMOUNT	ReadOnly	Yes	Yes	No	Yes	150	0	Right		
		10	Mileage Amount	MILEAGE_AMOUNT	ReadOnly	No	No	No	No	0	0	NotSet		

- ✓ The transport claim template’s xml file needs to be ready in the **Template Setup** web page. The xml file must contain a field to link to the modes of transport for employees to choose from, a *CURRENCY3* field to enter the distance travelled by employees and the field *MILEAGE_AMOUNT* for the system to calculate the mileage amount based on the mode of transport and distance travelled.

Claim ▸▸ Administrator ▸▸ Define Template

Find

		Claim Code	Description	Template File	Allowance Code	Is Transport Claim?
		EXPENSES	GENERAL EXPENSES CLAIM	DEMO2016_expenses		No
		MEDICAL	MEDICAL CLAIM	DEMO2016_medical		No
		TRANS	TRANSPORT CLAIM	DEMO2016_transport		Yes

- ✓ The transport claim template created in **Define Template** web page based on the xml file and the “Is Transport Claim?” checkbox ticked.
- ✓ The claim rules defined for the transport claim template at **Define Setting** web page.

There are two places that you can define the formula and this all depends on whether the transport claim template has Sub Claim Forms.

Claim ▸▸ Administrator ▸▸ Define Setting

Claim Code: TRANS
Benefit Scheme: MGR

	Key	Description	Value
	1	Transfer To Payroll?	☑
	4	For confirm staff only?	☑
	5	Prorated for incomplete year of service	☑
	10	No. of Claim per year?	0
	11	Monthly Capping	0
	12	One record per year?	☐
	13	Number of day(s) for Back Date	0
	20	Service month applicable?	6
	27	Process Method Calculation	CAR:0-100?0.65,CAR:101-300?0.85,CAR:301-99999?0.99,MOTOR:0-20

If the transport claim template do not have **Sub Claims**, you define the formula at **Configuration** web page in the **Define Setting** at the setting “Process Method Calculation”.

Claim ▸▸ Administrator ▸▸ Sub Claim Setup

Find

		Code	Description	Claim Code	Benefit Scheme	Allowance Code	Formula	Limit	Method	Block Year
		EXP_STA	STATIONERIES	EXPENSES		STRM	RECEIPT_AMOUNT * 7% = GST_AMOUNT	50.00	Per Transaction	0
		EXP_WIN	WINTER CLOTHING	EXPENSES	MGR	WINTER	(RECEIPT_AMOUNT * 10%) + RECEIPT_AMOUNT = EMPLOYER_AMOUNT	1,000.00	Block Year	2
		MED_DEN	DENTAL	MEDICAL			RECEIPT_AMOUNT=EMPLOYER_AMOUNT;	0.00		0
		MED_HLT	HEALTH SCREEN	MEDICAL			RECEIPT_AMOUNT=EMPLOYER_AMOUNT;	0.00		0
		MED_HOS	HOSPITALISATION	MEDICAL		HOSP		250.00	Per Year	0
		MED_OUT	OUTPATIENT MEDICAL	MEDICAL		MED		50.00	Per Month	0
		TRS_ERP	ERP	TRANS				0.00		0
		TRS_MIL	MILEAGE	TRANS			CAR:0-100?0.65,CAR:101-300?0.85,CAR:301-99999?0.99,MOTOR:0-200?0.30,MOTOR:201-400?0.60,MOTOR:401-99999?0.80	0.00		0
		TRS_PAR	PARKING	TRANS				0.00		0

Add Row

If the transport claim template has **Sub Claims**, you must define the formula at the “Formula” column for the specific **Sub Claim Form** in **Sub Claim Setup** web page. (For more information on setting up the Sub Claim Forms, refer to Chapter 10 Sub Claim Setup.) Do not define the formula at the Configuration web page’s “Process Method Calculation” setting.

The format for the **Mileage Computation Formula** is:

<Vehicle Code>:<Distance Range>?<Claimable Amount per 1 unit of distance travelled)

Ex: *CAR:0-100?0.65*

Employee who travels in a car, from **0-100** KM/Miles, the claimable rate is at **$0.65** per KM/Mile travelled.

If the employee has travelled **80** KM/Miles, then the claimable amount is 80 * $0.65 = **$52.00**.

Multiple vehicles and multiple distance ranges per vehicle can be set with this example:

<First Vehicle Code>:<First Distance Range>?<First Claimable Amount per 1 unit of distance travelled),<First Vehicle Code>:<Second Distance Range>?<Second Claimable Amount per 1 unit of distance travelled), <First Vehicle Code>:<Third Distance Range>?<Third Claimable Amount per 1 unit of distance travelled), <Second Vehicle Code>:<First Distance Range>?<First Claimable Amount per 1 unit of distance travelled),<Second Vehicle Code>:<Second Distance Range>?<Second Claimable Amount per 1 unit of distance travelled), <Second Vehicle Code>:<Third Distance Range>?<Third Claimable Amount per 1 unit of distance travelled)

Ex: *CAR:0-100?0.65,CAR:101-300?0.85,CAR:301-99999?0.99,MOTOR:0-200?0.30,MOTOR:201-400?0.60,MOTOR:401-99999?0.80*

For employees travelling in a car, the claimable rate is at **$0.65** per KM/Mile travelled for the first **100** KM/Miles, subsequent claimable rate is at **$0.85** per KM/Mile travelled from **101 – 300** KM/Miles and lastly the claimable rate is at **$0.99** per KM/Mile travelled from **301** KM/Miles onwards.

If the employee has travelled **350** KM/Miles in a car, the claimable amount is (100 * $0.65) + (199 * $0.85) + (49 * $0.99) = $65.00 + $169.15 + $48.51 = **$282.66**.

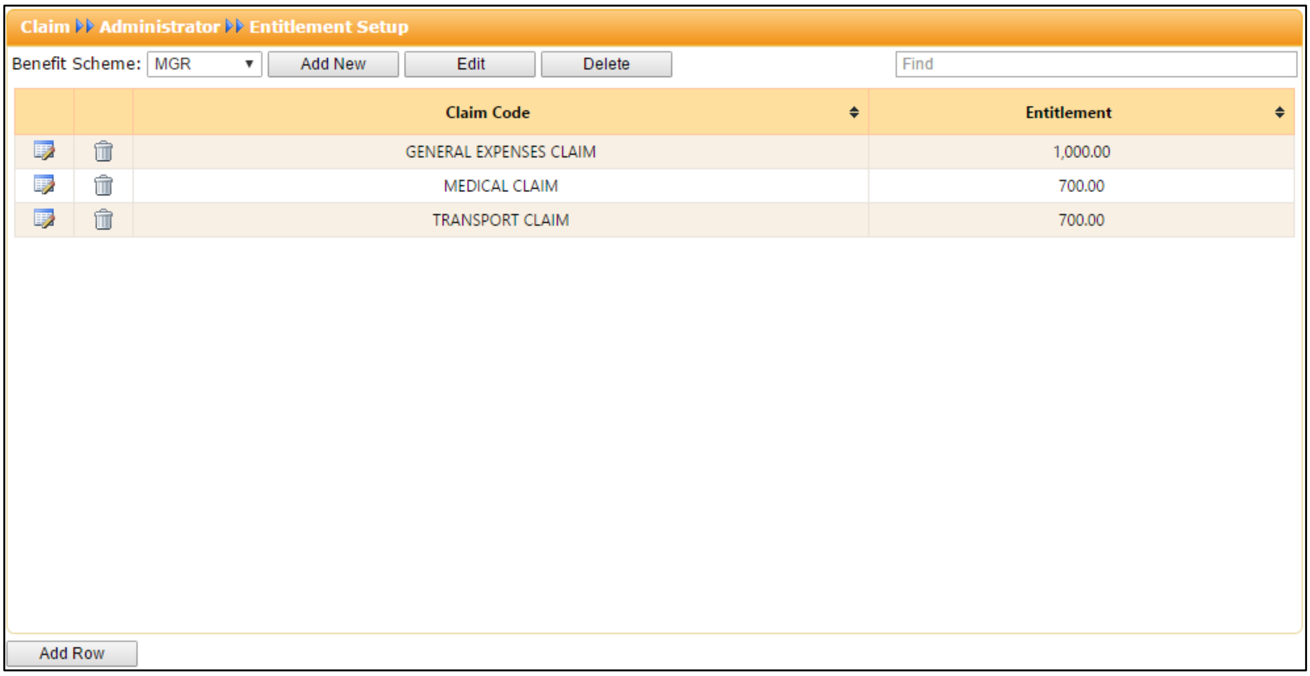
For employees travelling in a motorcycle, the claimable rate is at **$0.30** per KM/Mile travelled for the first **200** KM/Miles, subsequent claimable rate is at **$0.60** per KM/Mile travelled from **201 – 400** KM/Miles and lastly the claimable rate is at **$0.80** per KM/Mile travelled from **401** KM/Miles onwards.

If the employee has travelled **450** KM/Miles in a motorcycle, the claimable amount is (200 * $0.30) + (199 * $0.60) + (49 * $0.80) = $60.00 + $119.40 + $39.20 = **$218.60**.

Chapter 9. Entitlement Setup

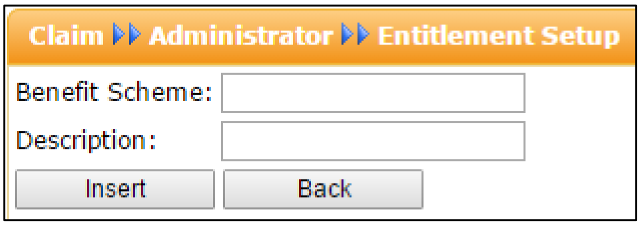
In the **Entitlement Setup** web page, you can define the yearly claim entitlement amount for each claim type per benefit scheme.

Click on the **Entitlement Setup** option in the Administrator menu to access the Entitlement Setup web page.



Choose "Benefit Scheme" and a list of entitlement settings if any will be shown on the page.

To create a new benefit scheme, click the Add New button.

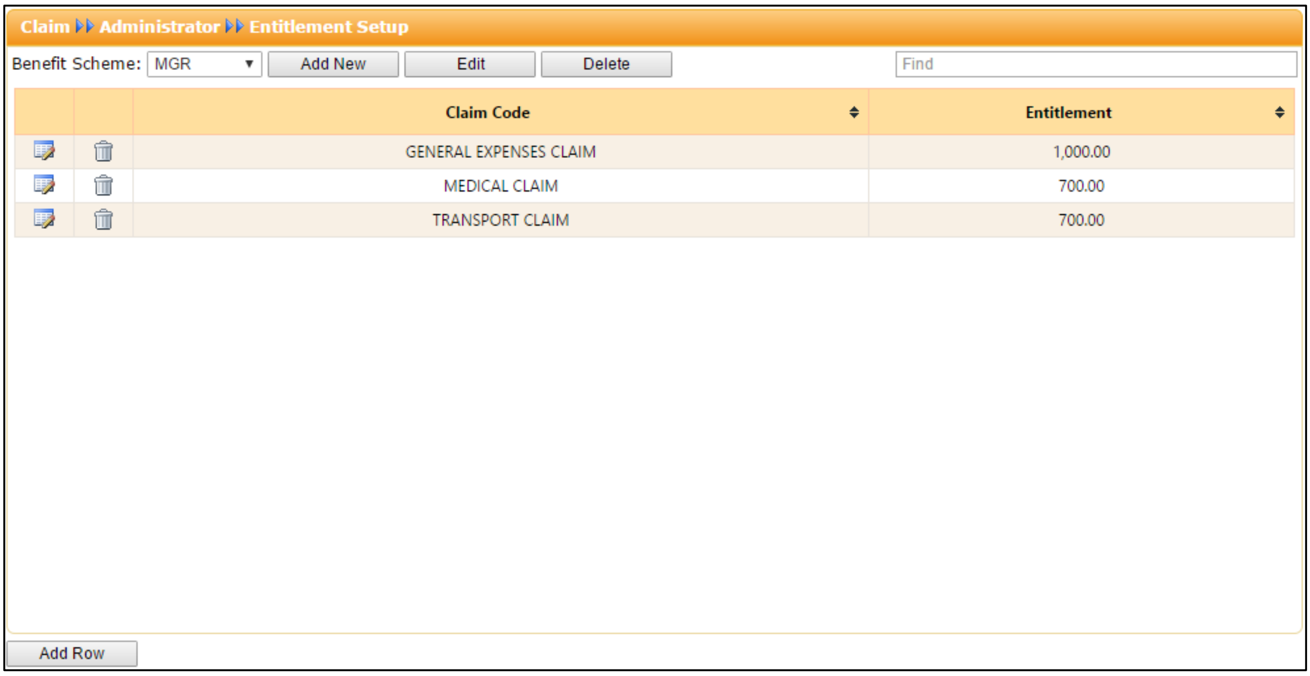


Enter the details and click [Insert] button to create the new scheme or [Back] button to cancel the transaction.

You can assign the new claim benefit schemes that you have created to employees at the Approval Setup web page.

To edit an existing benefit scheme, choose a "Benefit Scheme" and click the [Edit] button. Make the necessary changes and click [Update] button to save the changes or [Back] button to cancel the transaction.

To delete an existing benefit scheme, choose a "Benefit Scheme" and click the [Delete] button. Deleted schemes are unrecoverable.



To add in new entitlement settings for a benefit scheme, choose "Benefit Scheme" and click the [Add Row] button.

Choose the claim template in “Claim Code” and specify the yearly claim entitlement amount in “Entitlement”. Click button to save the settings or button to cancel.

You can only specify one entitlement for one claim code per benefit scheme.

To edit an existing setting, click on button, enter the new details and click button to save the setting or button to cancel.

To delete a setting, click on button. Deleted settings are unrecoverable.

The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

At this juncture if you are creating a single Claim Form (without Sub Claims), you can proceed directly to Chapter 12 Approval Setup.

Chapter 10. Sub Claim Setup

In the **Sub Claim Setup** web page, you can create multiple Sub Claim Forms from a single Claim Template.

Before you begin designing sub claims, ensure the following tasks are completed first:

- ✓ A claim template's xml file is created at **Template Setup** web page and designed with a *SUBCODE* field with the settings "Header Text" *Sub Claim*, "Field Name" *SUBCODE*, "Field Type" *Dropdownlist*, "Visible" *Yes*, "Editable" *Yes* and "Category" *SUB*.
- ✓ A Claim Template is created with the xml file at **Define Template** web page.
- ✓ Define the claim rules for the Claim Template at **Define Setting** web page.
- ✓ Employees' yearly claim entitlement amounts setup for the Claim Template at **Entitlement Setup** web page.

Click on the **Sub Claim Setup** option in the Administrator menu to access the Sub Claim Setup web page.

Claim ▶▶ Administrator ▶▶ Sub Claim Setup

Find

		Code	Description	Claim Code	Benefit Scheme	Allowance Code	Formula	Limit	Method	Block Year
		EXP_STA	STATIONERIES	EXPENSES		STRM	RECEIPT_AMOUNT * 7% = GST_AMOUNT	50.00	Per Transaction	0
		EXP_WIN	WINTER CLOTHING	EXPENSES	MGR	WINTER	(RECEIPT_AMOUNT * 10%) + RECEIPT_AMOUNT = EMPLOYER_AMOUNT	1,000.00	Block Year	2
		MED_DEN	DENTAL	MEDICAL			RECEIPT_AMOUNT=EMPLOYER_AMOUNT;	0.00		0
		MED_HLT	HEALTH SCREEN	MEDICAL			RECEIPT_AMOUNT=EMPLOYER_AMOUNT;	0.00		0
		MED_HOS	HOSPITALISATION	MEDICAL		HOSP		250.00	Per Year	0
		MED_OUT	OUTPATIENT MEDICAL	MEDICAL		MED		50.00	Per Month	0
		TRS_ERP	ERP	TRANS				0.00		0
		TRS_MIL	MILEAGE	TRANS			CAR:0-100?0.65,CAR:101-300?0.85,CAR:301-99999?0.99,MOTOR:0-200?0.30,MOTOR:201-400?0.60,MOTOR:401-99999?0.80	0.00		0
		TRS_PAR	PARKING	TRANS				0.00		0

Add Row

To create a new Sub Claim Form, click on the Add Row button. Enter in the details for the new Sub Claim Form and click button to save the code or button to cancel.

To edit an existing Sub Claim Form, click on button, enter the new details and click button to save the setting or button to cancel.

Once an employee has accessed and saved a Sub Claim Form, you cannot edit it.

To delete a Sub Claim Form, click on button. Deleted Sub Claim Forms are unrecoverable.

The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

10.1 Understanding the Sub Claim Setup columns

This sub chapter explains the functions and purpose for each of the **Sub Claim Setup**'s standard columns.

Code

This is the code of the Sub Claim Form. It is a unique identifier and can be any code.

Description

The name of the Sub Claim Form.

Claim Code

This is the **Claim Template** that the Sub Claim Form will be based from.

Benefit Scheme

Either employees who have this claim benefit scheme can use this Sub Claim Form or the form can be opened to all employees.

Allowance Code

Payroll's Allowance Code that will receive the net claimable amount from the Sub Claim Form.

If you specify an allowance code here you must ensure the Claim Template, that the Sub Claim Form is based from, has the "Transfer to Payroll?" checkbox ticked in the **Configuration** web page.

Formula

This is where you can define simple equations between fields defined in the Claim Template's xml file similar to **Define Setting**'s "Process Method Calculation". (For more information refer to 8.1 Understanding the Configuration Settings)

You can also define **Mileage Computation Formula** for Transport Sub Claim Forms here as well. (For more information on how to define the formula you can refer to 8.2 Configuring Transport Claim with Mileage Computation Formula)

Limit

Specify the claim amount limit or capping for the Sub Claim Form. The method of limit or capping is defined at "Method".

Method

Where “Limit” specifies the claim amount to cap, “Method” specifies how to cap it.

Method	Purpose
Per Record	Limit the amount the can be claimed per row of record in the Claim Form.
Per Transaction	Limit the amount that can be claimed per Claim Form.
Per Day	Limit the amount that can be claimed per day.
Per Month	Limit the amount that can be claimed per calendar month.
Once Per Month	Limit the amount that can be claimed per calendar month and only one Sub Claim Form can be submitted per calendar month.
Per Year	Limit the amount that can be claimed per calendar or financial year depending on the Claim Template’s, which the Sub Claim is based from, “Prorate Method” in **Define Setting** web page.
Once Per Year	Limit the amount that can be claimed per calendar or financial year depending on the Claim Template’s, which the Sub Claim is based from, “Prorate Method” in **Define Setting** web page and only one Sub Claim Form can be submitted per calendar or financial year.
Block Year	Limit the amount that can be claimed per blocks of years. Once this method is selected the “Block Year” column can be used.

Block Year

Specify the number of years in blocks that the claim amount limit will be in effect. The system will use the employee's hired date to determine when to start enforcing the block year claim amount limit.

Here is an example:

Sub Claim Form Description: Winter Clothing

Limit: $400.00

Block Year: 2

Employee Hired Date: 21st June, 2016

Employee can claim winter clothing expenses not exceeding $400.00 in total from 21st June, 2016 to 20th June, 2018. On 21st June, 2018 the employee can submit winter clothing expenses claims again not exceeding the total of $400.00 till 20th June, 2020.

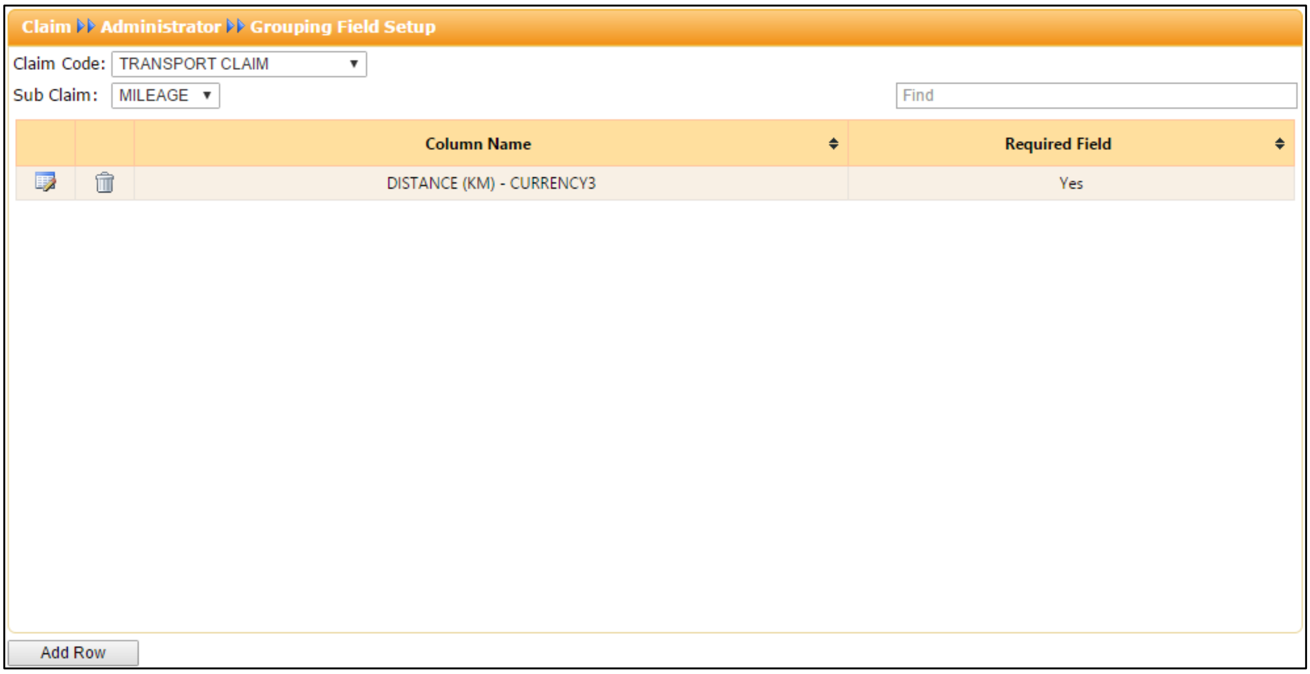
Chapter 11. Grouping Field Setup

It is effective to design a single Claim Template xml file that contains all the required fields for all the Sub Claim Forms that will be using this template. However, not every fields are applicable for each Sub Claim Form.

In the **Grouping Field Setup** web page you can determine which field are applicable or not for each Sub Claim Form.

It is important to note that, in order for this feature to work, once you add a **Grouping Field** record to a **Sub Claim Form** of a **Claim Template**, all the remaining Sub Claim Forms of that Claim Template must have one record as well. Do not leave them blank.

Click on the **Grouping Field Setup** option in the Administrator menu to access the Grouping Field Setup web page.



To start adding a new **Grouping Field** record for a Sub Claim Form, first choose the Claim Template at “Claim Code” and the Sub Claim Form at “Sub Claim”.

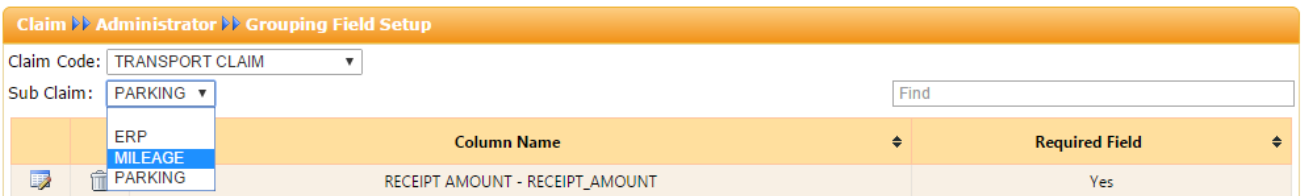
Then click on the Add Row button to add a new blank record for the Sub Claim Form.

Choose the Claim Template field that you want to enable ***exclusively*** for this Sub Claim Form at “Column Name” column. To indicate this field is mandatory and must be filled in by employees (cannot be left blank when employees access this Sub Claim Form), tick the “Required Field” checkbox.

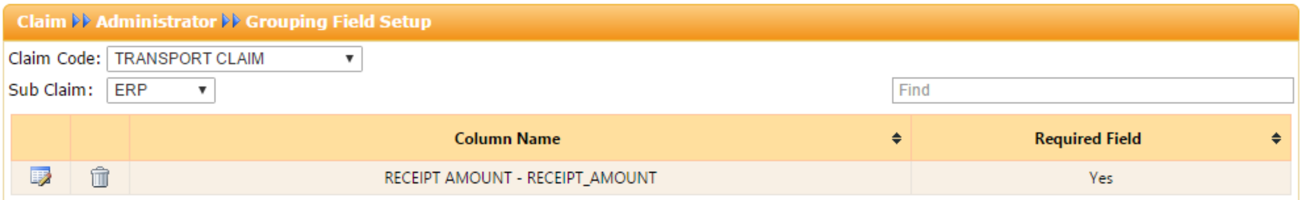
Click button to save the Grouping Field record or button to cancel.

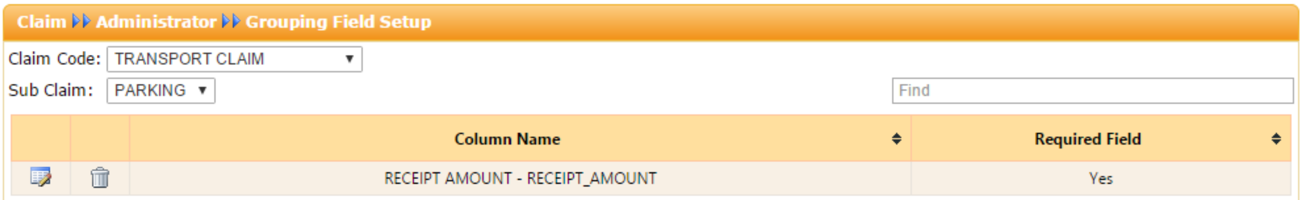
Once a Claim Template field is enabled ***exclusively*** for a Sub Claim Form, employees accessing this Sub Claim Form will be able to access this field. However, employees accessing other Sub Claim Forms for this same Claim Template will not be able to access this field (the field will be greyed out) ***unless that same field is also added in*** as Grouping Field record for those Sub Claim Forms.

Here are some examples to better illustrate the points above.

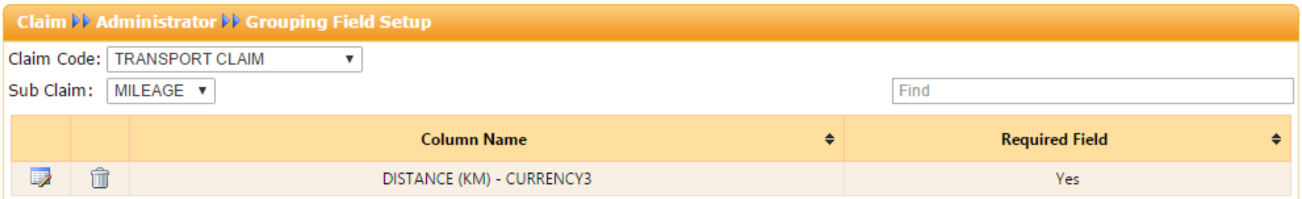


Transport Claim Template has 3 Sub Claim Forms. One Sub Claim Form processes ERP charges claims, another processes mileage claims and the final form processes parking fees claims.



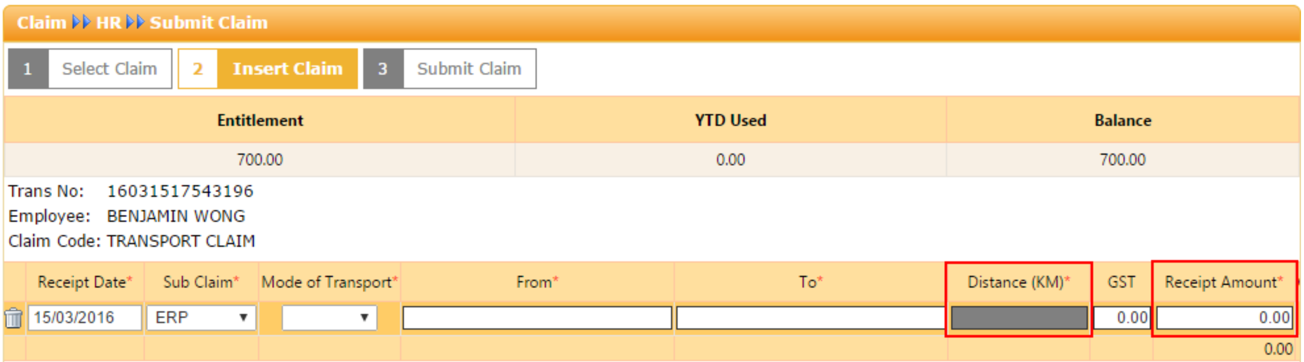


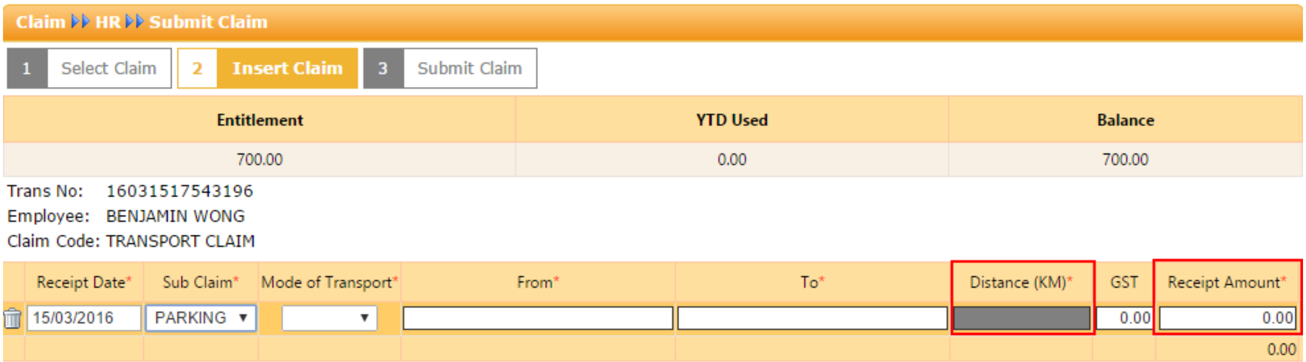
Both ERP charges and parking fees sub claims require employees to key in their claim amount. So they both require the Transport Claim Template xml field "RECEIPT_AMOUNT" to achieve this.



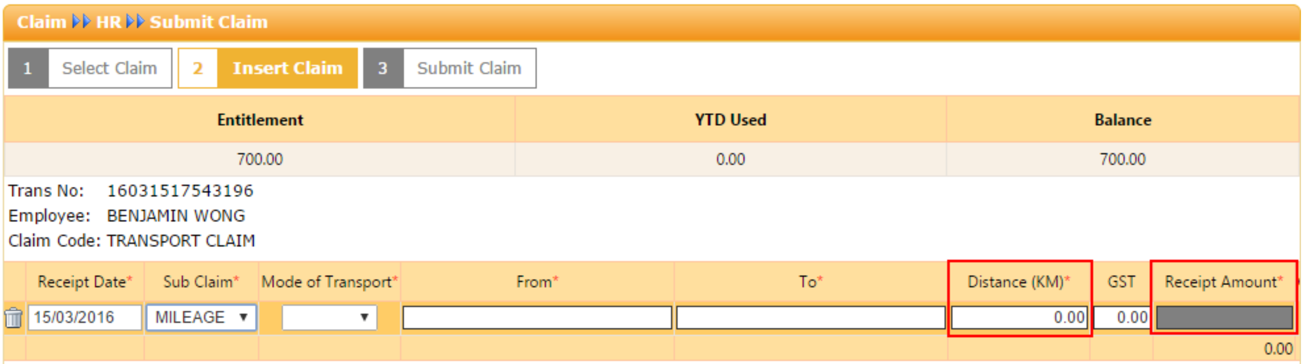
However, mileage sub claim is using a ***Mileage Computation Formula*** *to automatically calculate the claimable amount and do not require employees to key in their claim amount. Employees must key in their distance travelled and so the Transport Claim Template xml field "CURRENCY3" is added in as Grouping Field record for this Sub Claim Form.*

At this point of the setup, the "RECEIPT_AMOUNT" field which is named as RECEIPT AMOUNT is enabled exclusively for Sub Claim Form ERP and PARKING, and it is disabled for MILEAGE. The field "CURRENCY3" which is named as DISTANCE (KM) is enabled exclusively for Sub Claim Form MILEAGE and disabled for both ERP and PARKING.

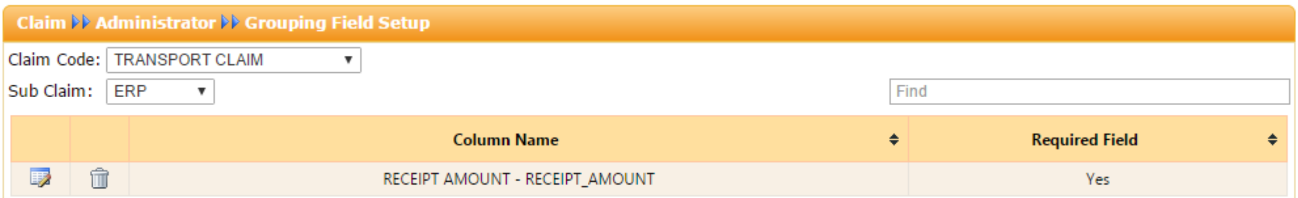




When employees access the Sub Claim Forms ERP and PARKING, the field "Distance (KM)" is disabled (greyed out) and the "Receipt Amount" is enabled and made mandatory.



For Sub Claim Form MILEAGE, the field "Distance (KM)" is enabled and made mandatory. However, the field "Receipt Amount" is disabled because it was added in the Grouping Field Setup exclusively for Sub Claim Form ERP and PARKING.



To edit an existing Grouping Field record, click on button, enter the new details and click button to save the record or button to cancel.

To delete a Grouping Field record, click on button. Deleted records are unrecoverable.

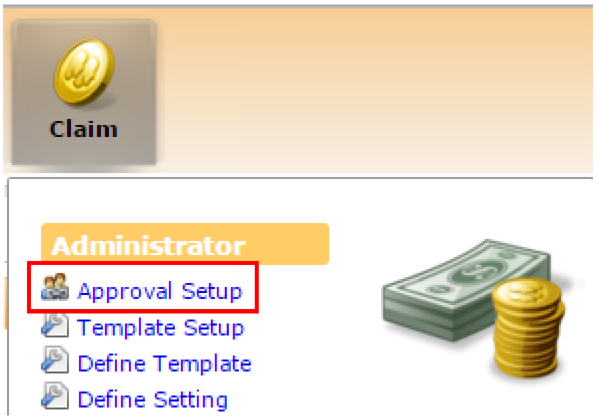
The Grouping Field Setup web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

Chapter 12. Approval Setup

The **Approval Setup** function allows you as the Administrator to setup the approval flow for each employee by indicating each employee's reporting supervisors as the employee's TIMES Claim approvers.

These approvers will be responsible in reviewing, approving and rejecting their reporting employees' claim applications.

Additionally, you can designate the roles of Administrator and Entry Officer to specific employees in this function. Do note that Administrators have access to both HR and Administrator menus.



1. Click on the **Approval Setup** option in the Administrator menu to access the Approval Setup web page.

2. At the Approval Setup web page, ensure the "Flow Type" is *Claim*.
3. Choose either – *Default* – or a specific Claim Template from "Claim Code". Approval flow for – *Default* – "Claim Code" applies to all Claim Templates that do not have any approval flow defined specifically for them.
4. Choose "Department" and a list of employees who are assigned to the selected department(s) will be shown on the web page. If you had made multiple selections, you can click button to see your selections.

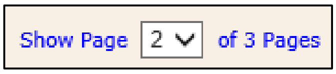
5. Alternatively you can use the "Advanced Employee" search to retrieve a list of employees based on the text that you enter in it. This search will find the nearest matching employee number or name. After you had entered the text in it, click Search to see the results.

12.1 Navigating the Approval Setup

If your organization has a large number of employees, you will most likely have a large list of employees. To help you sort out and see the different web pages of records, you can use the following functions (they are located at the bottom of the web page):

Click on the "Display Records Per Page" dropdown list to choose the number of records that can be shown on the web page.

A maximum of 500 records can be shown on a single web page.

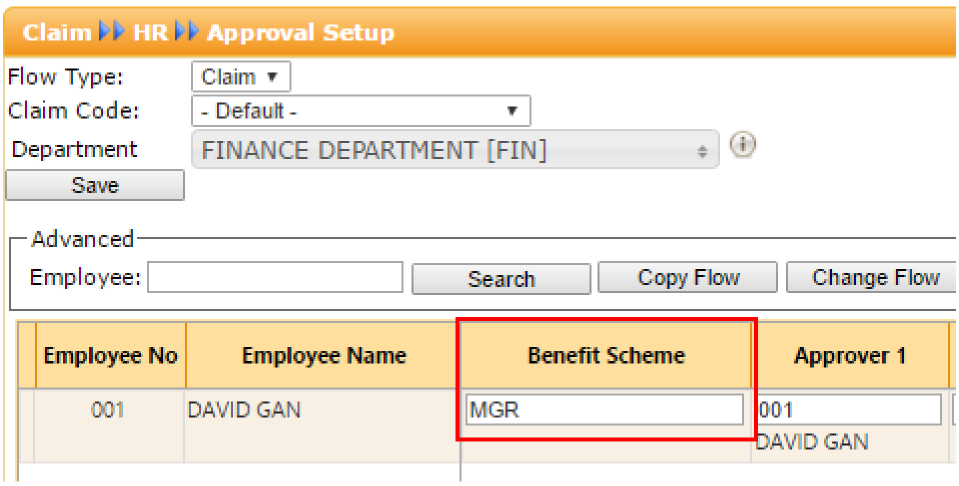


Click on the "Show Page" dropdown list to choose a specific web page of records.

Click on the "First", "Prev", "Next" or "Last" hyperlinks to navigate to each of the web pages if there are more than a single web page.

12.2 Editing Benefit Scheme for each Employee

If you have created new Benefit Schemes from Entitlement Setup web page, you can assign and change employees' Benefit Schemes at the **Approval Setup** web page.



Enter or change the "Benefit Scheme" and click Save button to save the changes.

12.3 Setting up the Claim Approval Flow

To setup the approval flow, you need to key in the approver's employee number for each employee under the approver columns (they are called "Approver 1", "Approver 2" and "Approver 3"). You can also designate the stand-in approvers for each of the main approvers (they are called "Stand In Appr 1", "Stand In Appr 2" and "Stand In Appr 3").

Employee No	Employee Name	Benefit Scheme	Approver 1	Stand In Appr 1	Approver 2	Stand In Appr 2	Approver 3	Stand In Appr 3	Hr Query	Entry Query
005	JAMES ONG	MGR	001 DAVID GAN	003 CINDY LIM						
101	CHRIS LEE	NON-MGR	001 DAVID GAN	003 CINDY LIM	002 BENJAMIN WONG	004 LAWRENCE LEE				
102	SALLY CHONG	NON-MGR	001 DAVID GAN	003 CINDY LIM	002 BENJAMIN WONG	004 LAWRENCE LEE				

The system provides up to three levels of approval for each employee and these approvers must be entered into the approver columns in a proper sequence. It's not mandatory to setup all three levels of approval.

For example, if an employee reports to a supervisor and the supervisor reports to the head of department, then the supervisor's employee number is setup at "Approver 1" and the head of department's employee number is setup at "Approver 2" for the employee.

Once you have completed the entry, click the Save button. If you had entered the correct employee's number for the approvers, their names will appear on the web page. If not, just re-key in the correct employee number under the approver columns and click on the Save button.

12.4 Assigning the Administrator Role

The role of Administrator grants the employee access to the **Administrator** and **HR** menu.

Before you can designate an employee as Administrator, you must have a **Query** created from TIMES Payroll application. The Query will determine the list of employees that this Administrator can have access to in order to manage their information.

Employee No	Employee Name	1	Stand In Appr 1	Approver 2	Stand In Appr 2	Approver 3	Stand In Appr 3	Hr Query	Entry Query
001	DAVID GAN							ALL	ALL
002	BENJAMIN WONG								
003	CINDY LIM								

To designate an employee as Administrator, enter the Query Name (<u>case sensitive</u>) at the "Hr Query". Then click the Save button to save the entry.

To remove the Administrator role from an employee, simply delete the Query Name at the "Hr Query" and click the Save button.

12.5 Assigning the Entry Officer Role

The role of Entry Officer grants the employee the ability to submit on behalf his or her colleagues' claim applications and will have access to the **Entry Officer** menu.

Before you can designate an employee as an Entry Officer, you must have a **Query** created from TIMES Payroll application. The Query will determine the list of employees that the Entry Officer can have access to in order to manage their duty rosters and time sheets.

Employee No	Employee Name	1	Stand In Appr 1	Approver 2	Stand In Appr 2	Approver 3	Stand In Appr 3	Hr Query	Entry Query
001	DAVID GAN							ALL	ALL
002	BENJAMIN WONG								
003	CINDY LIM								

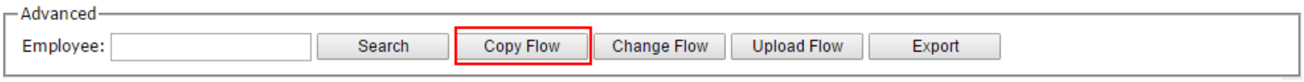
To designate an employee as an Entry Officer, enter the Query Name (<u>case sensitive</u>) at the "Entry Query". Then click the Save button to save the entry.

To remove the Entry Officer role from an employee, simply delete the Query Name at the "Entry Query" and click the Save button.

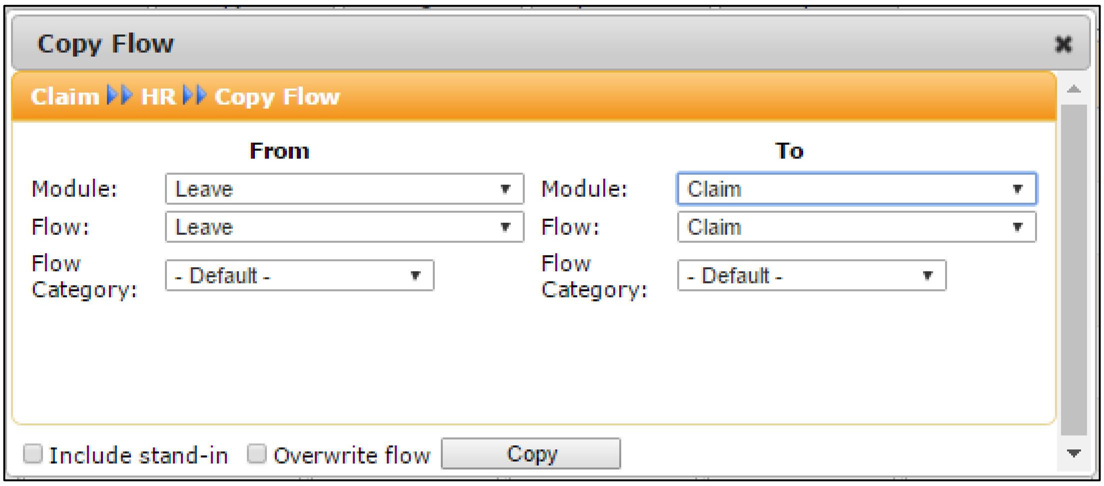
12.6 Automatic Setup of the Approval Flow

You can only use this feature if you have other TIMES Solution systems (such as TIMES Leave) installed otherwise skip this sub chapter.

You can quickly populate the list of approvers for each employee by using the Copy Flow. This function transfers the list of approvers from one source location (such as from another system or module) over to this system.



Click on the Copy Flow button to access the **Copy Flow** pop-up window.



Choose the "Module", "Flow" and "Flow Category" dropdown lists under the column **From** to indicate the source location where the system will copy the list of approvers from and choose the "Module" and "Flow" dropdown lists under the column **To** to indicate where this list will be copied over to.

Choose "Flow Category" to copy the approval flow to a Claim Template. Choosing – *Default* – indicates global setting.

If the source has stand-in approvers setup, you can click on the Include stand-in checkbox to tick it in order for the system to copy them over.

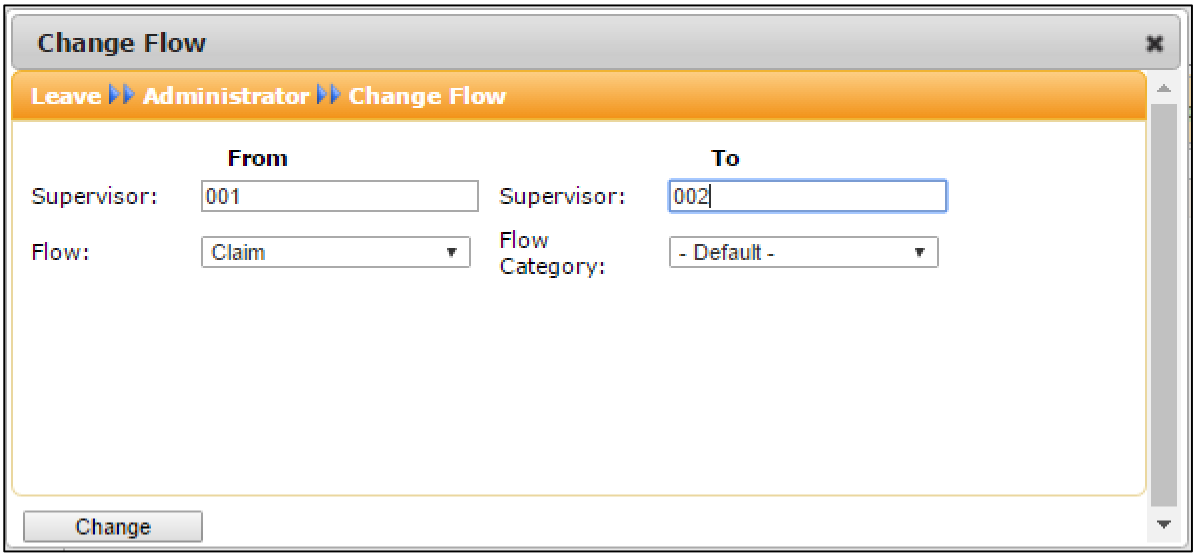
On default the system will transfer the list of approvers for employees who do not have their approval flow setup information at the Approval Setup. If you wish to overwrite the employees' existing approval flow setup information click on the Overwrite flow checkbox to tick it.

Click Copy to initiate the process. You can still manually change the approvers for each employee after Copy Flow had been executed.

12.7 Easy Change of Approver

In the event you need to change an approver for many employees, you can use the Change Flow feature to easily perform that action without the need to manually change the approver for each employee.

Click on the Change Flow button to access the **Change Flow** pop-up window.



Enter the employee number of the approver that you want to change at "Supervisor" under the column **From** and the replacement approver at "Supervisor" under the column **To**.

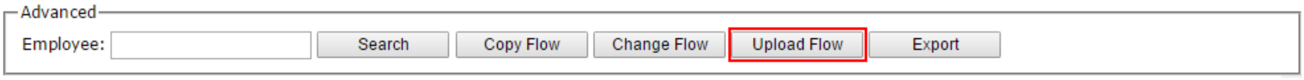
Choose a Claim Template or leave it as default at "Flow Category" to indicate which approval flow will be updated.

Ensure the "Flow" is *Claim* and click Change to proceed with the changes.

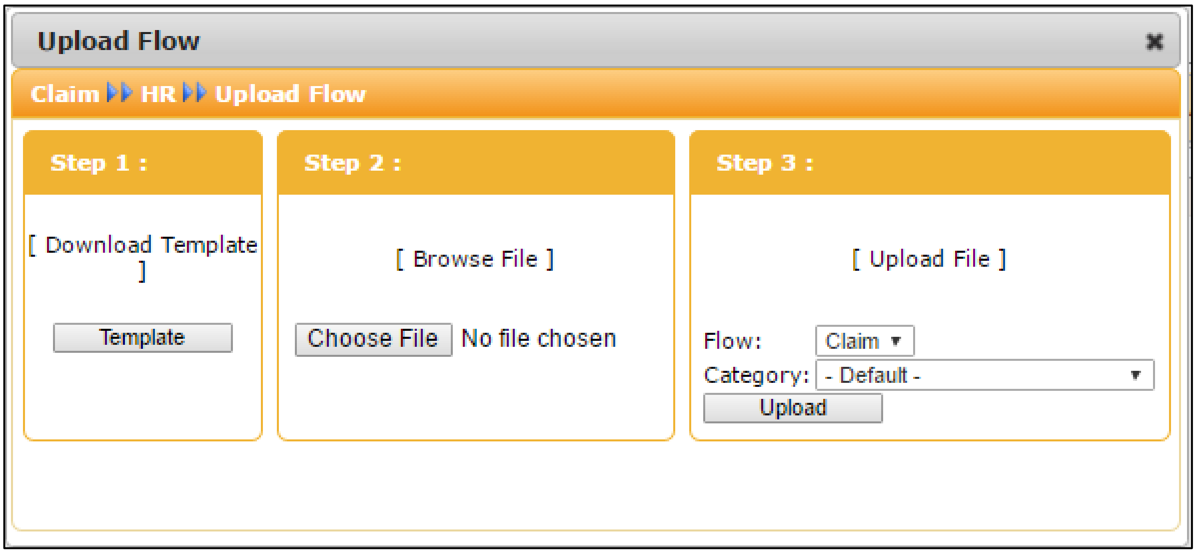
In this example, all employees who have the approver *001* will be replaced with approver *002*.

12.8 Uploading Approval Flow into the system from Excel

If you like to prepare the approval flows in an excel document, you can use the system's excel template document to enter the approval flow information and upload them into the system by using the Upload Flow feature.



Click on the Upload Flow button to access the **Upload Flow** pop-up window.



First step is to download the system's excel template document. Click on the Template button at "Download Template" at Step 1 to download the document.

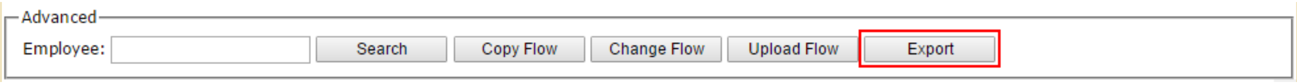
Next, open the excel template document and enter the approval flows into the document. Make sure to save the document.

Once done, proceed to Step 2 and click on Choose File to choose the completed excel document.

Finally, at Step 3, ensure the "Flow" is *Claim*, choose a Claim Template or default at "Category" and click the Upload button to upload the approval flow information from the selected excel document into the system.

12.9 Export the system's Approval Flow into an Excel document

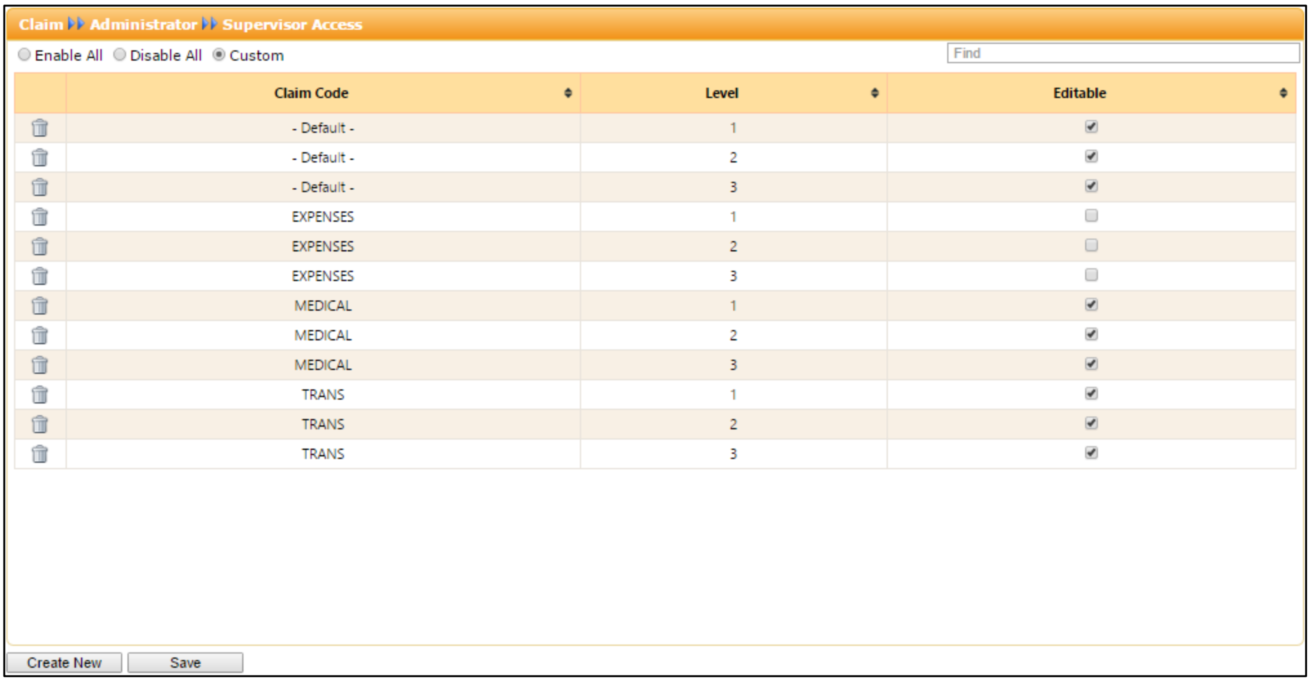
You can export the system's approval flow into an excel document. To do so, first retrieve the list of approval flows and then click on the Export button.



Chapter 13. Supervisor Access

You can assign the rights for approvers to make changes to their reporting employees' submitted claim applications at **Supervisor Access** web page.

Click on the **Supervisor Access** option in the Administrator menu to access the Supervisor Access web page.



	Claim Code	Level	Editable
	- Default -	1	☑
	- Default -	2	☑
	- Default -	3	☑
	EXPENSES	1	☐
	EXPENSES	2	☐
	EXPENSES	3	☐
	MEDICAL	1	☑
	MEDICAL	2	☑
	MEDICAL	3	☑
	TRANS	1	☑
	TRANS	2	☑
	TRANS	3	☑

If you have created new Claim Templates, click on the Create New button to allow the system to automatically create rows of record for the new templates.

To allow an approver at a specific approval flow level to make changes to submitted claim applications, click checkbox under the column "Editable" to tick it. Then Save button to save the changes.

You can click on Enable All to allow all approvers to be able to make changes to submitted claim applications or Disable All to deny them.

To delete a record, click the button.

If you want to recover the deleted records, you need to first delete all records for the Claim Template and then click on the Create New button to re-generate the records.

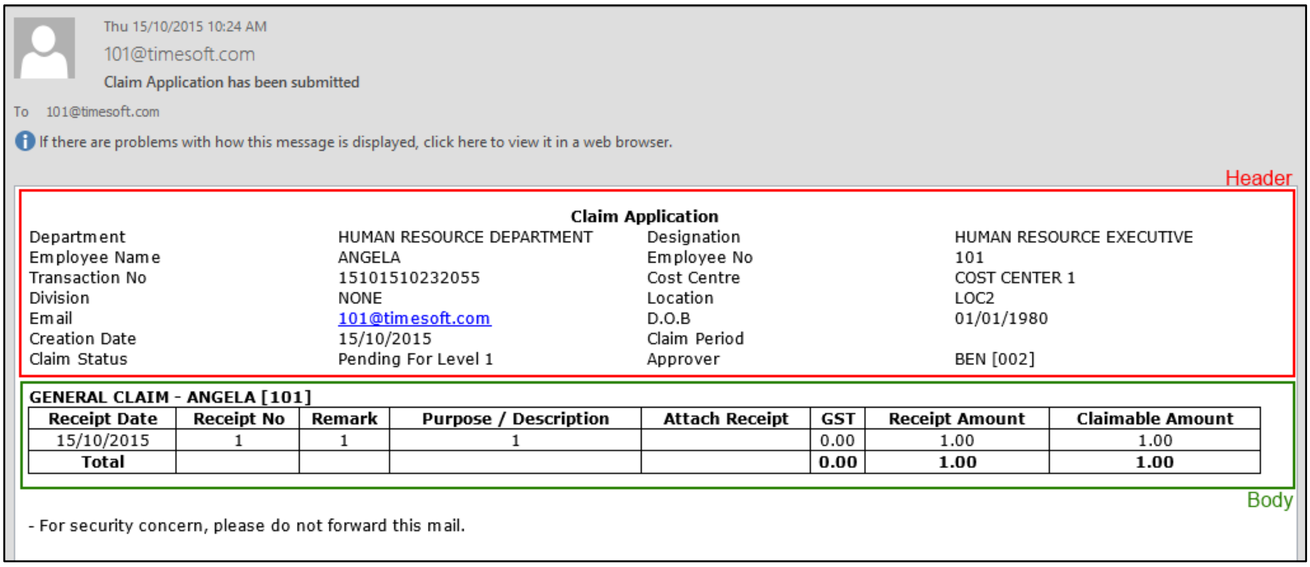
The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

Chapter 14. Setting up Email

With the Claim Templates, Sub Claim Forms (if applicable), Claim Rules, Claim Entitlements and Approval Flows setup completed, before employees can access their Claim Forms the system's automated emails need to be setup for each Claim Template.

You need to first setup the header format for the email, followed by the email's body contents and lastly the email routing flow.

Here's a sample email format that illustrate the header and body portions of the email:



Thu 15/10/2015 10:24 AM
101@timesoft.com
Claim Application has been submitted
To 101@timesoft.com
If there are problems with how this message is displayed, click here to view it in a web browser.

Header

Claim Application

Department	HUMAN RESOURCE DEPARTMENT	Designation	HUMAN RESOURCE EXECUTIVE
Employee Name	ANGELA	Employee No	101
Transaction No	15101510232055	Cost Centre	COST CENTER 1
Division	NONE	Location	LOC2
Email	101@timesoft.com	D.O.B	01/01/1980
Creation Date	15/10/2015	Claim Period	
Claim Status	Pending For Level 1	Approver	BEN [002]

GENERAL CLAIM - ANGELA [101]

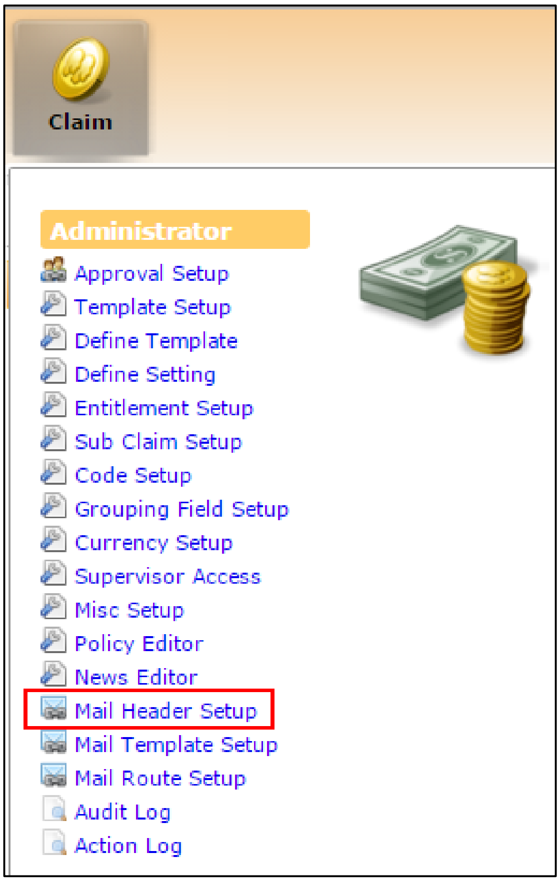
Receipt Date	Receipt No	Remark	Purpose / Description	Attach Receipt	GST	Receipt Amount	Claimable Amount
15/10/2015	1	1	1		0.00	1.00	1.00
Total					**0.00**	**1.00**	**1.00**

Body

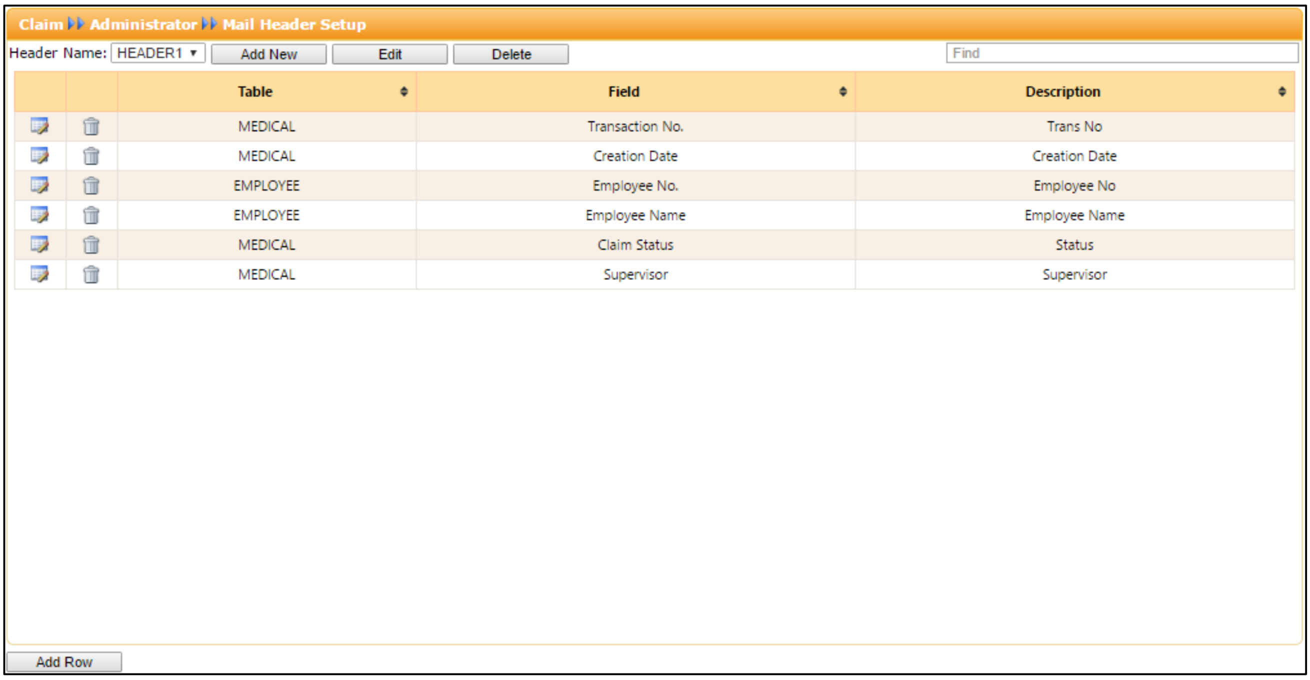
- For security concern, please do not forward this mail.

14.1 Setting up Email Header

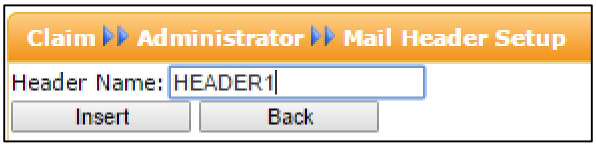
To start off we first create the email's header format.



Click on the **Mail Header Setup** option in the Administrator menu to access the Mail Header Setup web page.



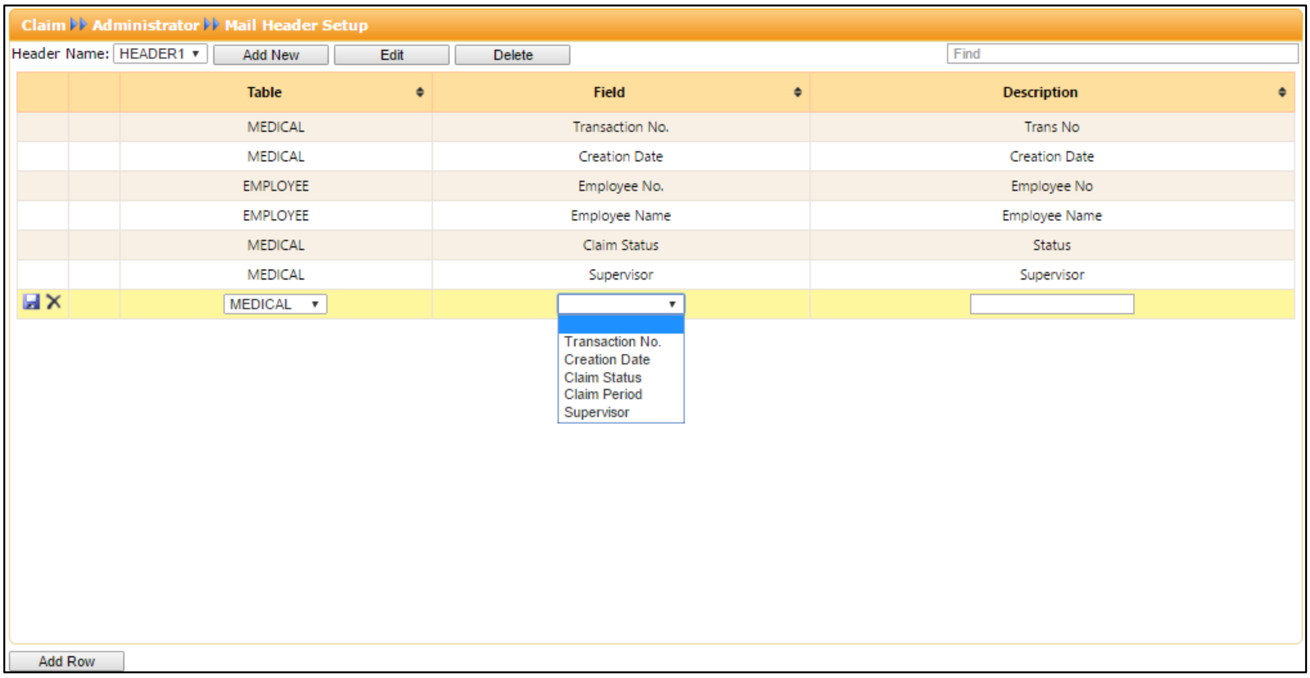
To create a new email header format, click on the Add New button.



Enter the “Header Name” and click Insert button to create the new header or Back to cancel the transaction.

To make changes to the email header format’s name, click on the Edit button. Make the necessary changes and click Update button to save the changes or Back button to cancel the transaction.

To delete the email header format, click on the Delete button. ⚠ Deleted email header formats are unrecoverable.



With the new header created, click on the Add Row button to create a new contents record for the header.

Choose the “Table” and “Field” for the location where the system will read from and name the content in “Description”. Click button to save the record or button to cancel.

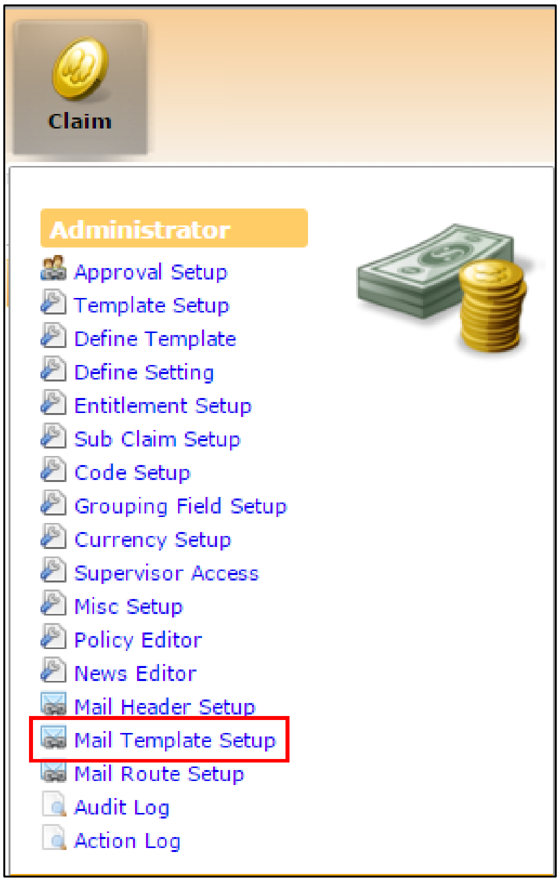
To edit an existing record, click on button, enter the new details and click button to save the record or button to cancel.

To delete a record, click on button. Deleted records are unrecoverable.

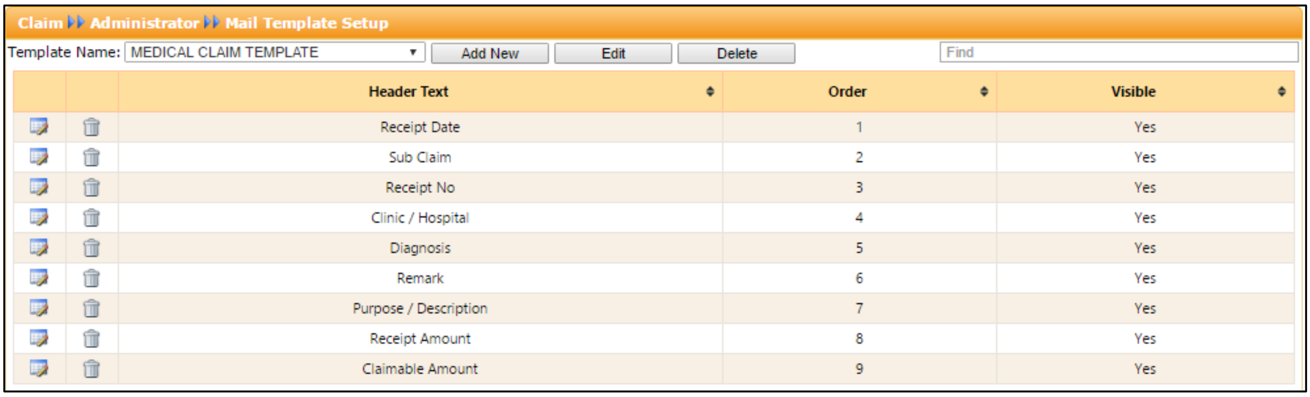
The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

14.2 Setting up Email Body

Next we create the email's body format.



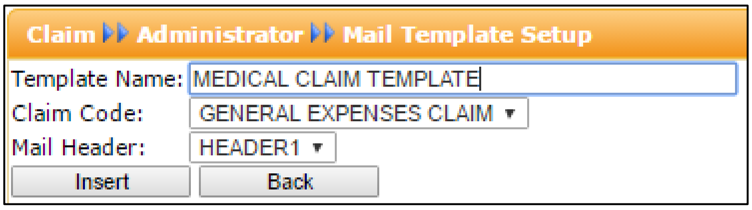
Click on the **Mail Template Setup** option in the Administrator menu to access the Mail Template Setup web page.


Claim ▸▸ Administrator ▸▸ Mail Template Setup

Template Name: MEDICAL CLAIM TEMPLATE | Add New | Edit | Delete | Find

		Header Text	Order	Visible
		Receipt Date	1	Yes
		Sub Claim	2	Yes
		Receipt No	3	Yes
		Clinic / Hospital	4	Yes
		Diagnosis	5	Yes
		Remark	6	Yes
		Purpose / Description	7	Yes
		Receipt Amount	8	Yes
		Claimable Amount	9	Yes

To create a new email body format, click on the Add New button.



Enter the name of the email body format name at “Template Name”.

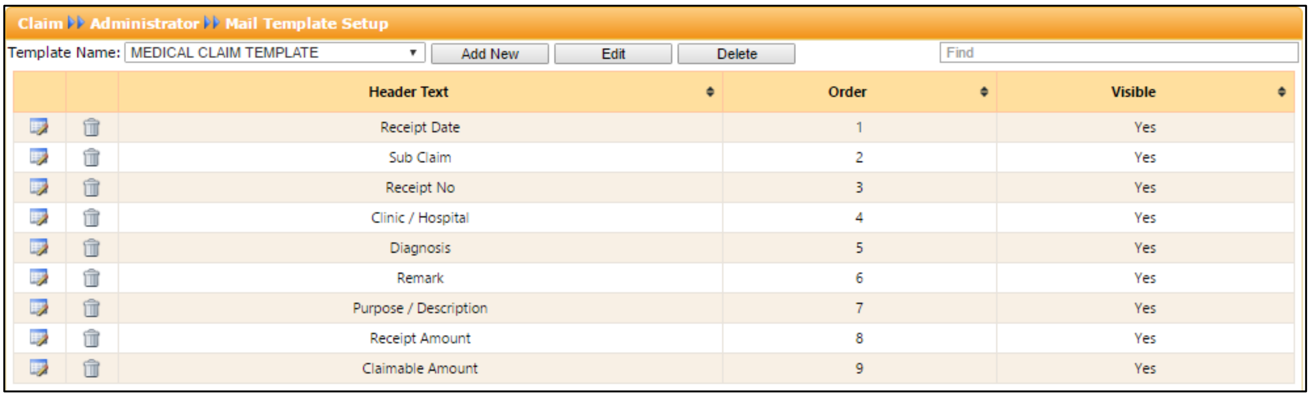
Choose a Claim Template at “Claim Code”.

Choose an email header format at “Mail Header”.

Click Insert button to create the new body or Back to cancel the transaction.

To make changes to the email body format, click on the Edit button. Make the necessary changes and click Update button to save the changes or Back button to cancel the transaction.

To delete the email body format, click on the Delete button. Deleted email body formats are unrecoverable.



		Header Text	Order	Visible
		Receipt Date	1	Yes
		Sub Claim	2	Yes
		Receipt No	3	Yes
		Clinic / Hospital	4	Yes
		Diagnosis	5	Yes
		Remark	6	Yes
		Purpose / Description	7	Yes
		Receipt Amount	8	Yes
		Claimable Amount	9	Yes

Once you have created the new email body, the system will show you the list of fields that are obtained from the Claim Template.

Click on the button to make changes to the ordering of the field by entering the “Order” and to indicate if the field should be displayed in the email by ticking the “Visible” checkbox.

Click button to save the changes or button to cancel.

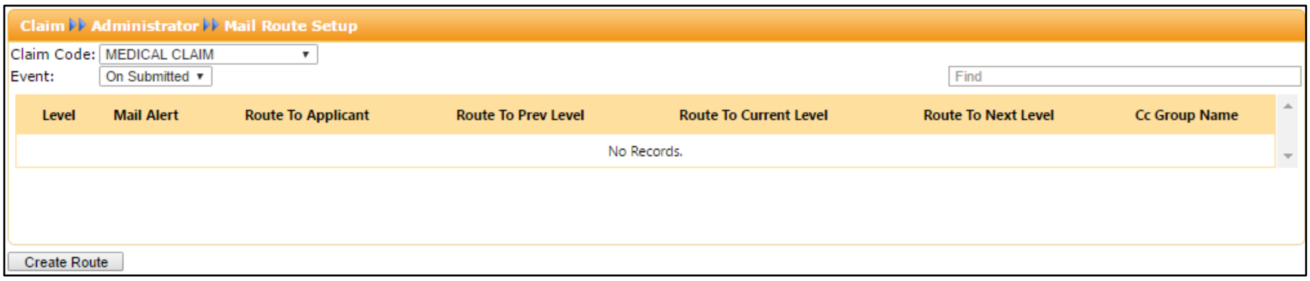
To delete a record, click on button. Deleted records are unrecoverable.

The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

14.3 Setting up Email Routing

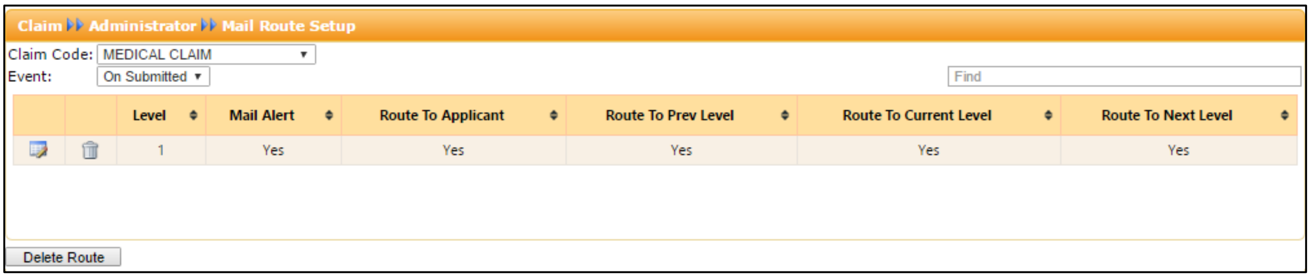
Once the email format setup completed, you can then begin to design the email routing at **Mail Route Setup** web page.

Click on the **Mail Route Setup** option in the Administrator menu to access the Mail Route Setup web page.



Choose the Claim Template at “Claim Code” and “Event”. ⚠ You must create an email routing rule for every event.

Click on Create Route button to create an email route record.



Click on the button to start configuring the email route record.

Click on the “Mail Alert” checkbox to tick it in order to activate the email route record.

Decide who will receive the email by clicking on the checkboxes for routing to applicant, previous approver, current approver and next approver.

Click button to save the changes or button to cancel.

To delete a record, click on button. Deleted records are unrecoverable.

To delete the entire email routing rules for a Claim Template and event, click on the Delete Route button.

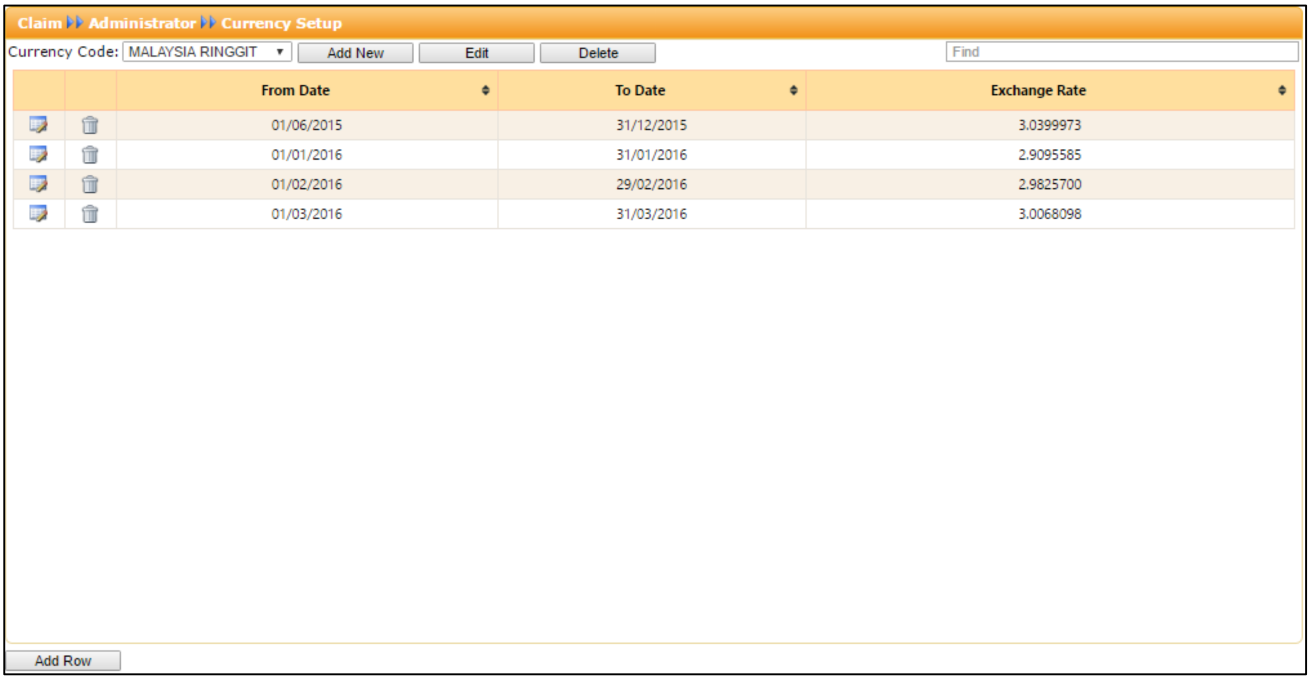
The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

Chapter 15. Currency Setup

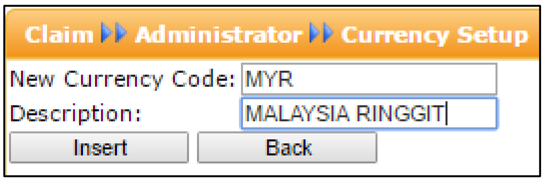
For multi-currencies claims, you can setup and maintain the currency exchange rate table in **Currency Setup** web page for the system to refer to when the system performs a currency conversion.

All exchange rate for each foreign currency defined here is based on the exchange rate of 1 unit of local currency to the foreign currency or the foreign currency's selling rate.

Click on the **Currency Setup** option in the Administrator menu to access the Currency Setup web page.



To create a new currency code, click the Add New button.



Enter the details and click Insert button to create the new currency or Back to cancel the transaction.

Click Add Row button to add a new currency rate record. Enter the date range and the exchange rate. Click button to save the changes or button to cancel.

To edit an existing record, click on button, enter the new details and click button to save the record or button to cancel.

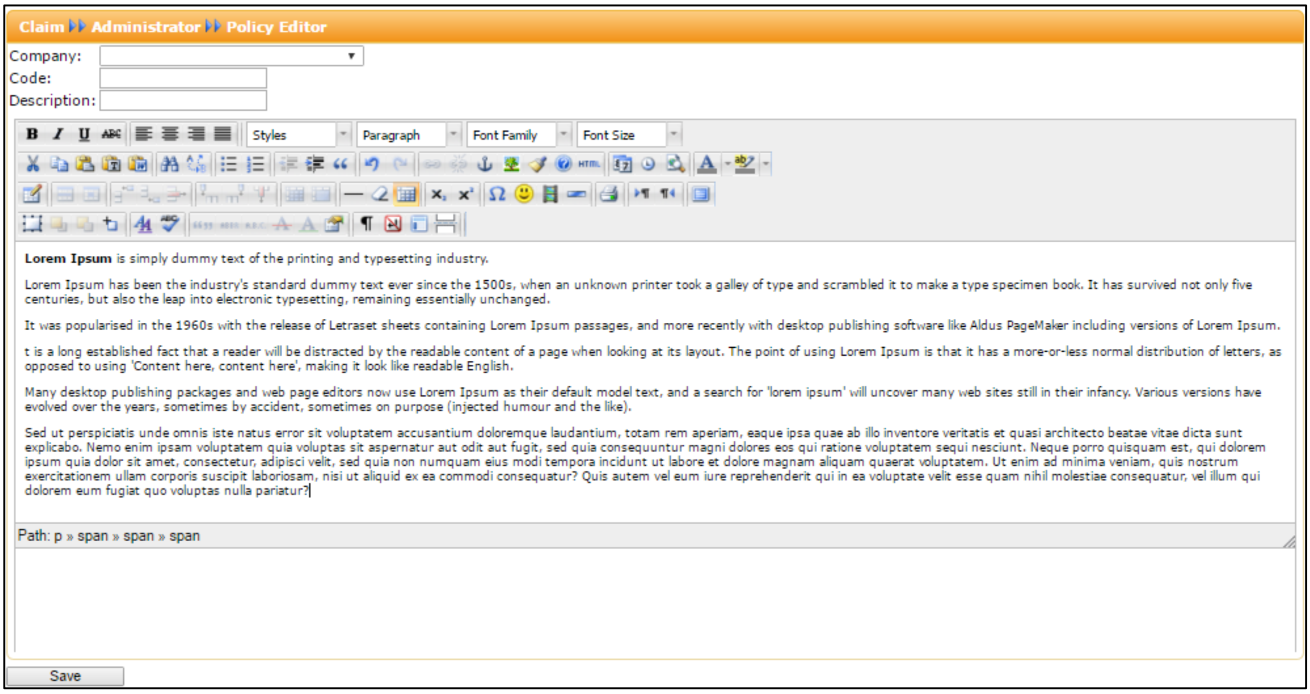
To delete a record, click on button. Deleted records are unrecoverable.

The web page has a wildcard search at the top right corner where you can quickly look for specific items in the web page.

Chapter 16. Policy Editor

You can write-up your organisation's claim policies and publish them at the **Policy Editor** web page.

Click on the **Policy Editor** option in the Administrator menu to access the Policy Editor web page.



Choose a "Company".

Enter the “Code” and “Description” for the claim policy.

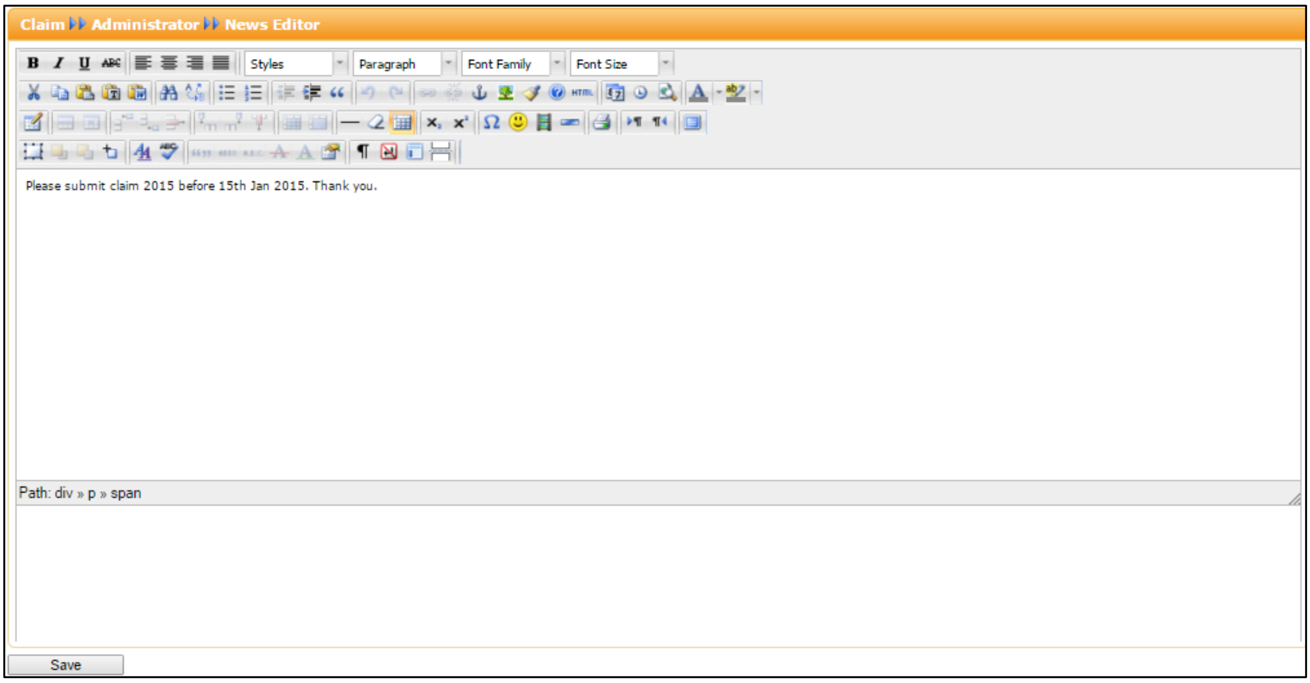
Enter the claim policy details in the word editor.

Click Save button to save the claim policy and publish it for all users to see in their **Policy** web page.

Chapter 17. News Editor

You can publish news at the **News Editor** web page.

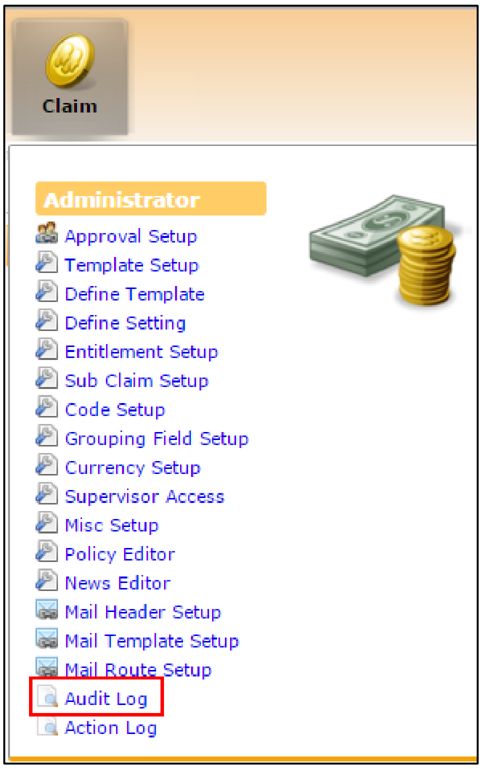
Click on the **News Editor** option in the Administrator menu to access the News Editor web page.



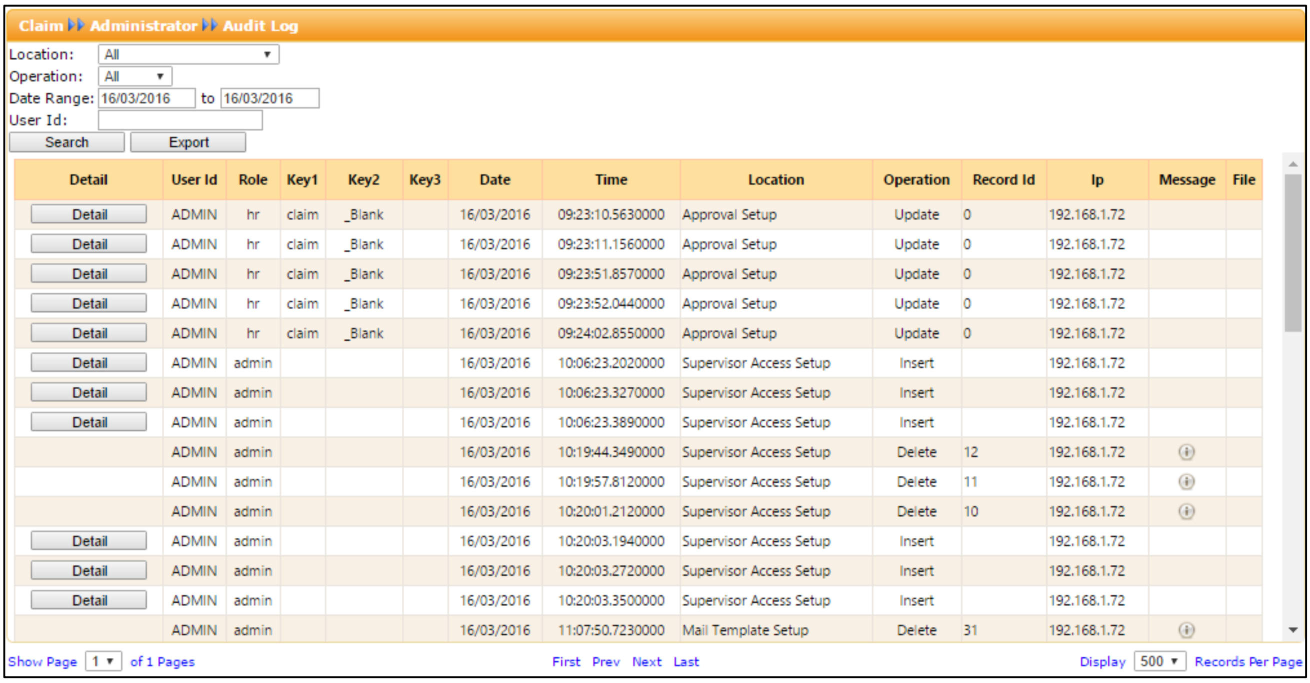
Enter the news in the word editor and click Save button. All users can see the news under the **Announcement** heading at their dashboards.

Chapter 18. Audit Log

You can track transactions made by administrators at the **Audit Log** web page.



Click on the **Audit Log** option in the Administrator menu to access the Audit Log web page.


Claim ▸▸ Administrator ▸▸ Audit Log

Location: All
Operation: All
Date Range: 16/03/2016 to 16/03/2016
User Id:
Search Export

Detail	User Id	Role	Key1	Key2	Key3	Date	Time	Location	Operation	Record Id	Ip	Message	File
Detail	ADMIN	hr	claim	_Blank		16/03/2016	09:23:10.5630000	Approval Setup	Update	0	192.168.1.72		
Detail	ADMIN	hr	claim	_Blank		16/03/2016	09:23:11.1560000	Approval Setup	Update	0	192.168.1.72		
Detail	ADMIN	hr	claim	_Blank		16/03/2016	09:23:51.8570000	Approval Setup	Update	0	192.168.1.72		
Detail	ADMIN	hr	claim	_Blank		16/03/2016	09:23:52.0440000	Approval Setup	Update	0	192.168.1.72		
Detail	ADMIN	hr	claim	_Blank		16/03/2016	09:24:02.8550000	Approval Setup	Update	0	192.168.1.72		
Detail	ADMIN	admin				16/03/2016	10:06:23.2020000	Supervisor Access Setup	Insert		192.168.1.72		
Detail	ADMIN	admin				16/03/2016	10:06:23.3270000	Supervisor Access Setup	Insert		192.168.1.72		
Detail	ADMIN	admin				16/03/2016	10:06:23.3890000	Supervisor Access Setup	Insert		192.168.1.72		
	ADMIN	admin				16/03/2016	10:19:44.3490000	Supervisor Access Setup	Delete	12	192.168.1.72		
	ADMIN	admin				16/03/2016	10:19:57.8120000	Supervisor Access Setup	Delete	11	192.168.1.72		
	ADMIN	admin				16/03/2016	10:20:01.2120000	Supervisor Access Setup	Delete	10	192.168.1.72		
Detail	ADMIN	admin				16/03/2016	10:20:03.1940000	Supervisor Access Setup	Insert		192.168.1.72		
Detail	ADMIN	admin				16/03/2016	10:20:03.2720000	Supervisor Access Setup	Insert		192.168.1.72		
Detail	ADMIN	admin				16/03/2016	10:20:03.3500000	Supervisor Access Setup	Insert		192.168.1.72		
	ADMIN	admin				16/03/2016	11:07:50.7230000	Mail Template Setup	Delete	31	192.168.1.72		

Show Page 1 of 1 Pages First Prev Next Last Display 500 Records Per Page

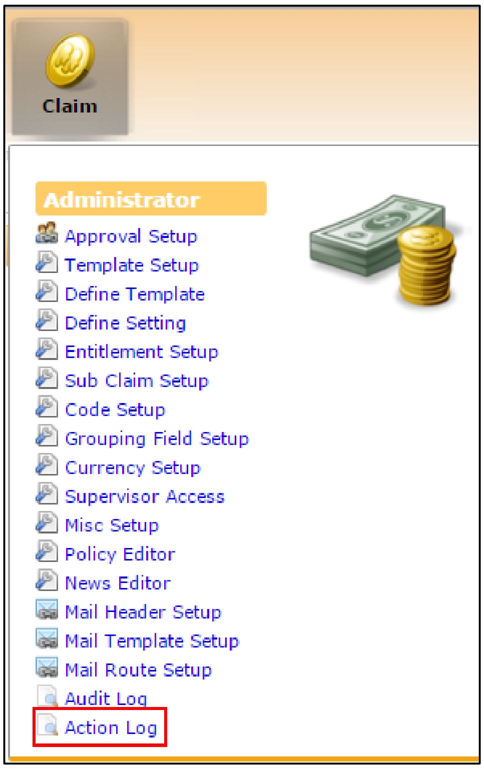
Enter your search criteria and click Search button to retrieve the audit log.

Click Detail button to see the details of the record and button for messages.

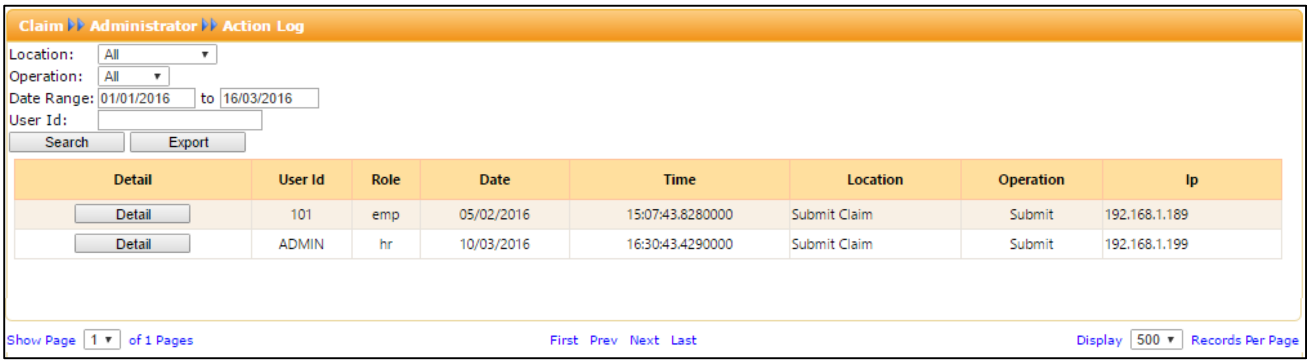
Click Export button to export the audit log into a report.

Chapter 19. Action Log

You can track transactions made by users at the **Action Log** web page.



Click on the **Action Log** option in the Administrator menu to access the Action Log web page.



Enter your search criteria and click Search button to retrieve the audit log.

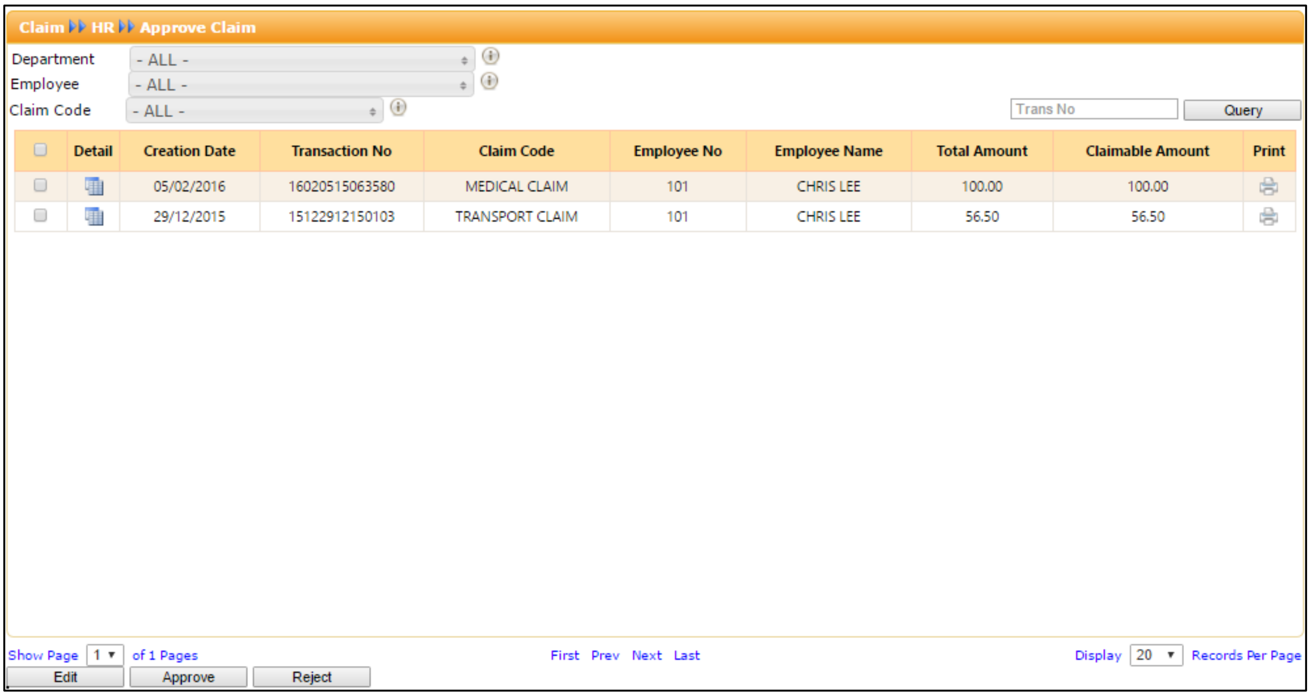
Click Detail button to see the details of the record.

Click Export button to export the audit log into a report.

Chapter 20. Approve, Reject and Edit Claim

As TIMES Claim HR Administrator you can make changes, approve and reject employees' submitted Claim Forms without any restrictions at the **Approve Claim** web page.

Click on the **Approve Claim** option in the HR menu to access the Approve Claim web page.



You can use the "Department", "Employee" and "Claim Code" drop-down lists to filter the list of submitted Claim Forms. If you have selected multiple values you can view them by clicking on this button.

You can look for a specific Claim Form by entering the transaction number of the Claim Form at the "Trans No" and clicking on the Query button.

To see the details of the Claim Form click on the button.

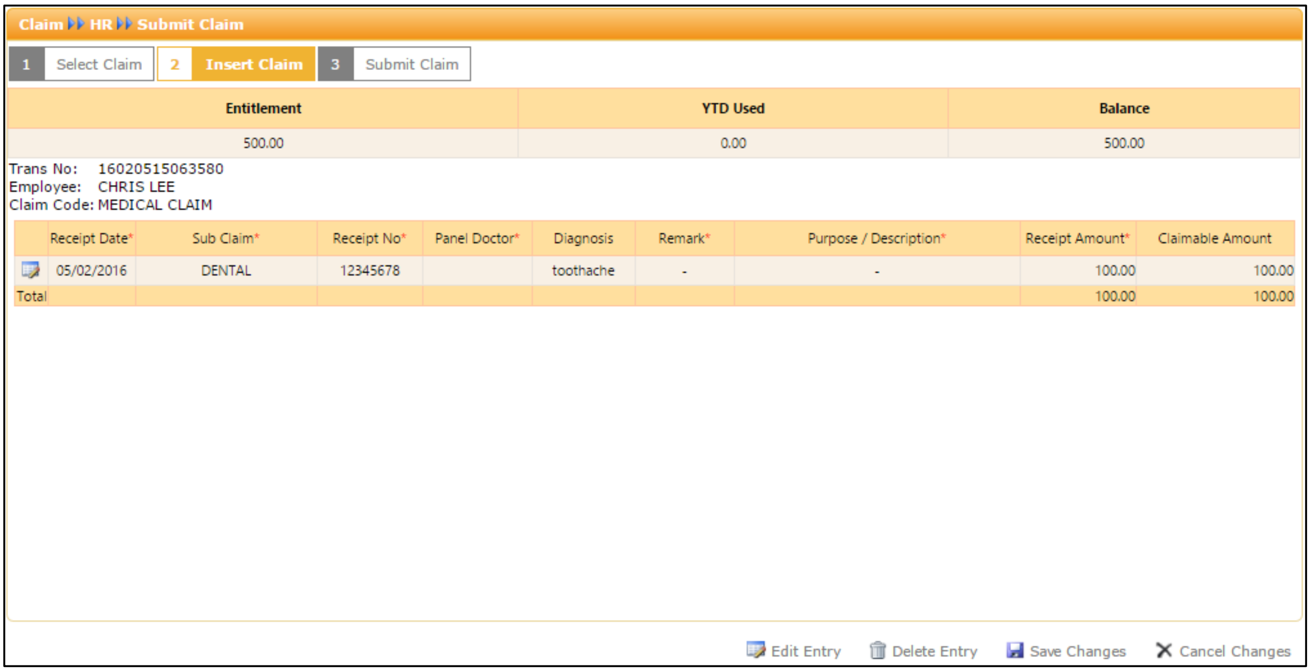
To print the Claim Form click on the button.

To approve a Claim Form, click on the Claim Form's checkbox to tick it in order to select it and click the Approve button.

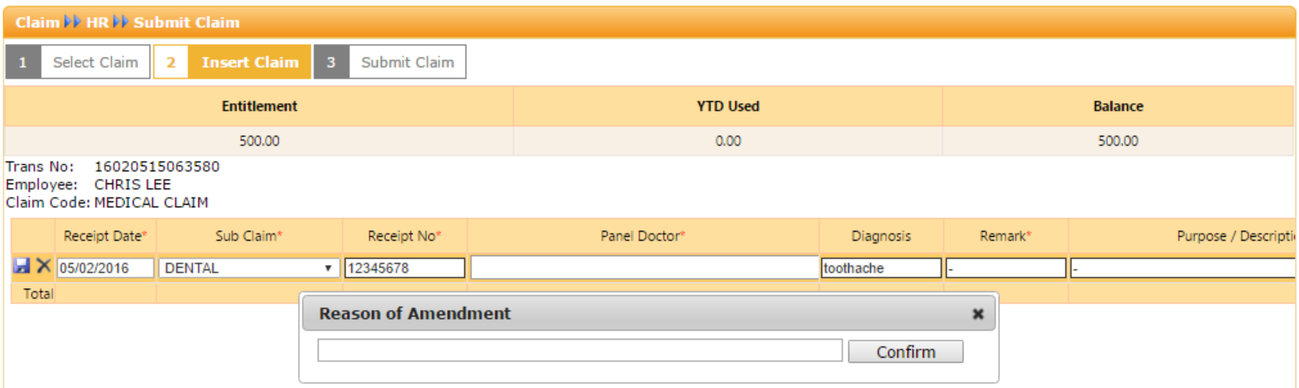
To reject a Claim Form, click on the Claim Form's checkbox to tick it in order to select it and click the Reject button.

20.1 Editing a Claim Form

To edit a Claim Form, click on the Claim Form's checkbox to tick it in order to select it and click the Edit button.



You will then see the entire Claim Form. Click on the button to edit the records in the Claim Form.



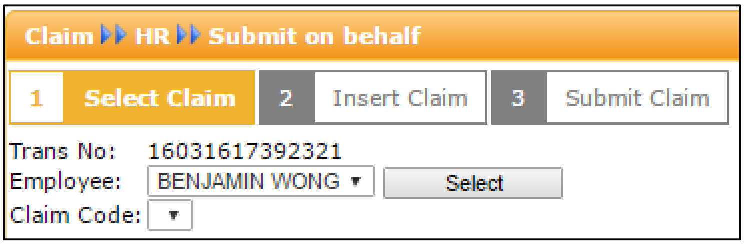
Make the necessary changes and click button to save the record or button to cancel.

Before saving the changes, the system will ask you to enter the "Reason for Amendment". Enter the reason and click Confirm button.

Chapter 21. Submit Claim on Behalf

You can submit claim applications on behalf of employee at the **Submit on behalf** web page.

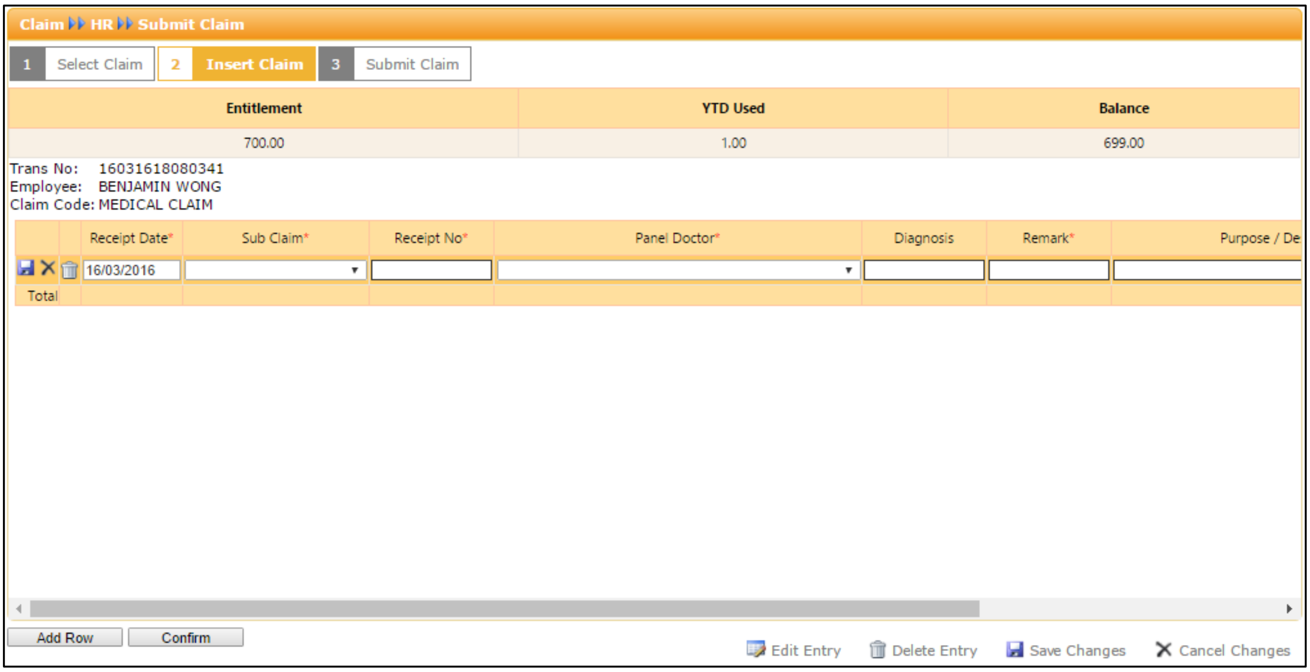
Click on the **Submit on behalf** option in the HR menu to access the Submit on behalf web page.



Choose an "Employee" and click Select button.

Choose a Claim Form in "Claim Code".

If you want to re-select a different employee, click on the button.



Enter the details in the Claim Form.

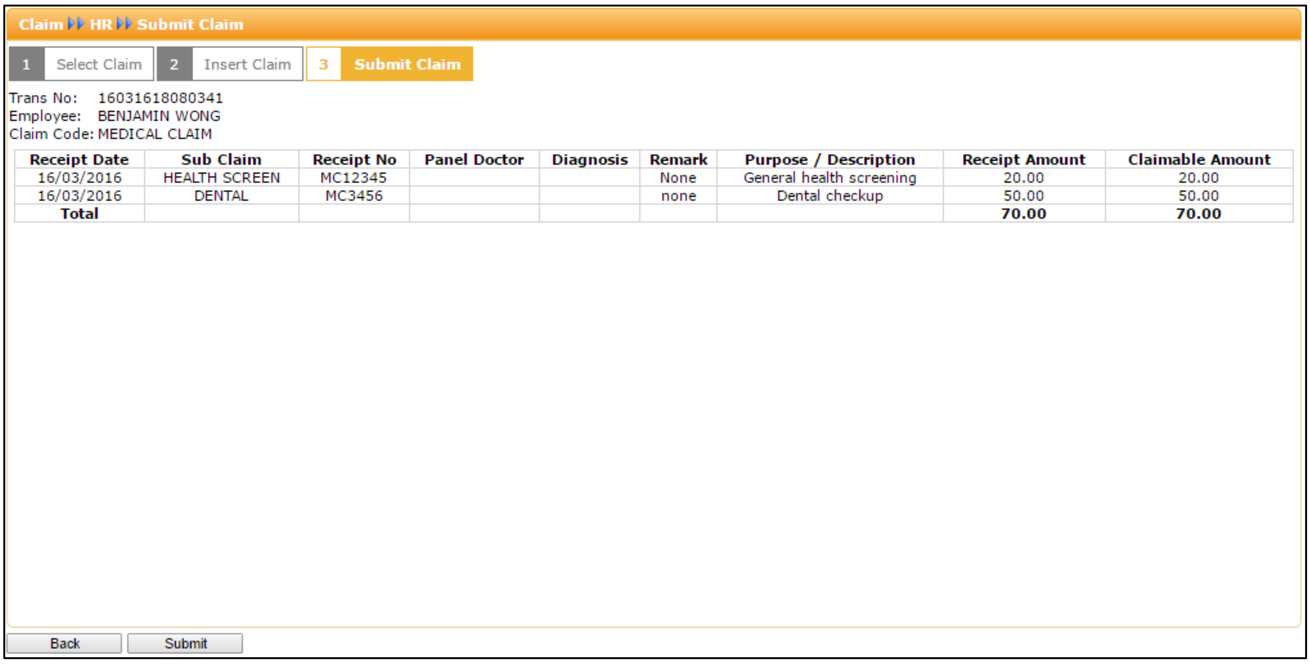
Click button to save the record or button to cancel the transaction.

After saving the record you can click Add Row button to add another record into the Claim Form. Then enter the details for the new record and click button to save the record.

To edit a record click on the button.

To delete a record click on the button. Deleted records are unrecoverable.

Once you have finished with your transactions, click on the Confirm button to save the Claim Form as a draft copy.



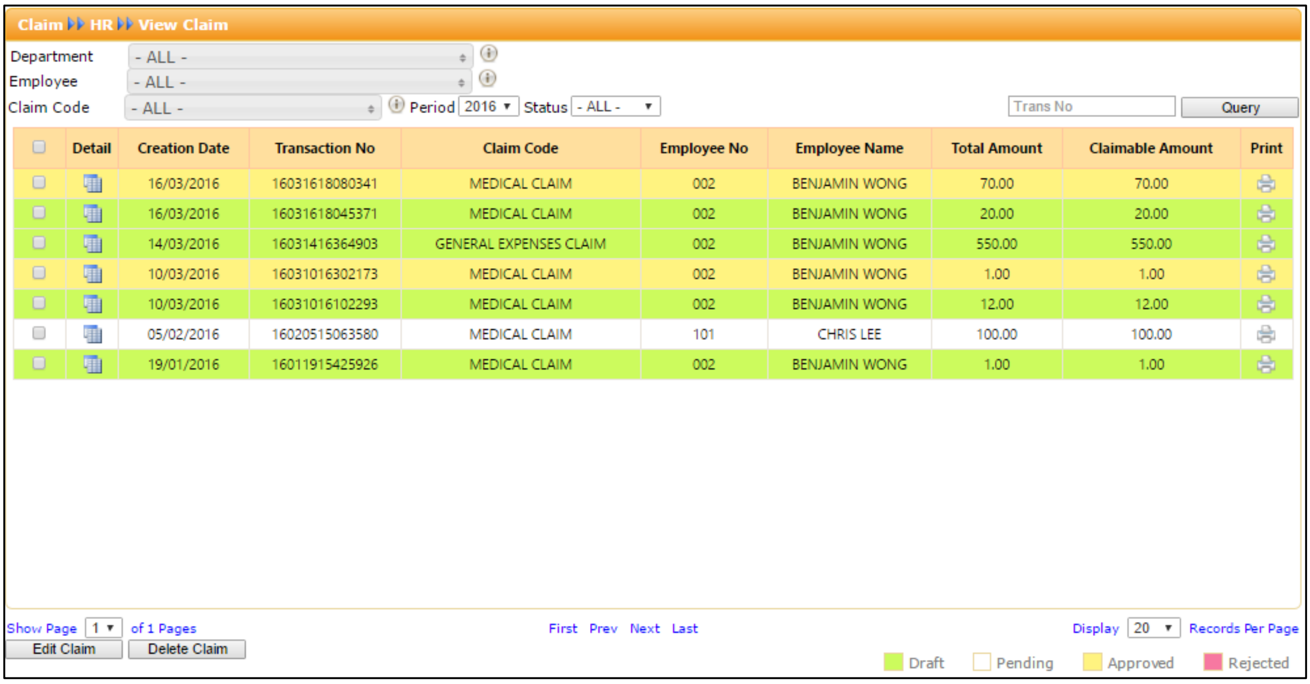
Receipt Date	Sub Claim	Receipt No	Panel Doctor	Diagnosis	Remark	Purpose / Description	Receipt Amount	Claimable Amount
16/03/2016	HEALTH SCREEN	MC12345			None	General health screening	20.00	20.00
16/03/2016	DENTAL	MC3456			none	Dental checkup	50.00	50.00
Total							**70.00**	**70.00**

At the draft copy of the Claim Form you can choose to click on the Submit button to submit the Claim Form to the approvers for review or click on Back button to make further changes to the Claim Form.

Chapter 22. View Claim

At the **View Claim** web page you can view employees' Claim Forms as well as make changes to them or delete them.

Click on the **View Claim** option in the HR menu to access the View Claim web page.



You have the filters (such as "Department") to filter the list of Claim Forms in the web page. If you have selected multiple values you can view them by clicking on this button.

You can look for a specific Claim Form by entering the transaction number of the Claim Form at the "Trans No" and clicking on the Query button.

To see the details of the Claim Form click on the button.

To print the Claim Form click on the button.

To edit a Claim Form, click on the Claim Form's checkbox to tick it in order to select it and click the Edit Claim button.

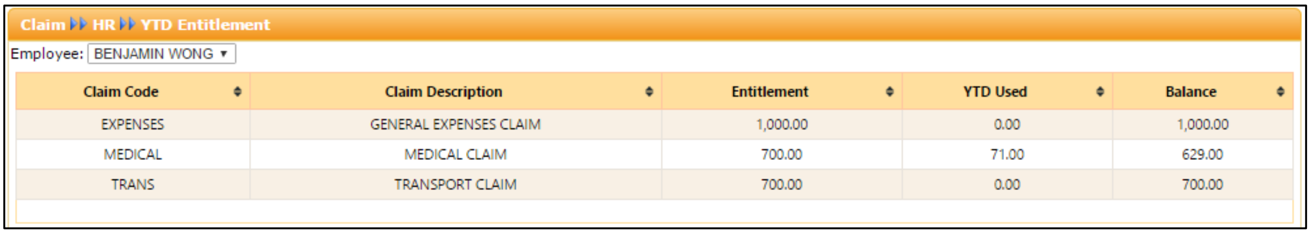
To delete a Claim Form, click on the Claim Form's checkbox to tick it in order to select it and click the Delete Claim button.

Deleted Claim Forms are unrecoverable.

Chapter 23. Year To Date Claim Entitlement

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

Click on the **YTD Entitlement** option in the HR menu to access the YTD Entitlement web page.



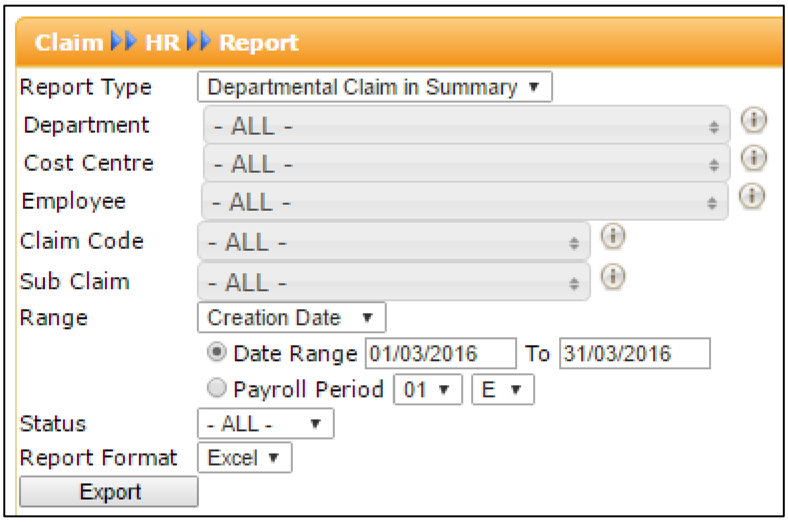
Claim Code	Claim Description	Entitlement	YTD Used	Balance
EXPENSES	GENERAL EXPENSES CLAIM	1,000.00	0.00	1,000.00
MEDICAL	MEDICAL CLAIM	700.00	71.00	629.00
TRANS	TRANSPORT CLAIM	700.00	0.00	700.00

Choose an "Employee" to see the employee's claim entitlement amounts and balances.

Chapter 24. Report

You can generate reports in **Report** web page.

Click on the **Report** option in the HR menu to access the Report web page.



1. Choose “Report Type”.
2. Choose your criteria (such as “Department”). If you have made multiple selections you can view them by clicking the ⓘ button.
3. Choose “Report Format”.
4. Click Export button to generate the report.

24.1 List of Reports

The following is a list of reports available for the Administrator.

Departmental Claim in Summary

A report to show departmental employees' claim information in summary.

Department Claim in Details

A report to show departmental employees' claim information in details.

Personal Claim in Summary

A report to show own claim information in summary.

Personal Claim in Details

A report to show own claim information in details.