

# User Guide

## Cash Advance Processing



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## 1 PROCESSING SCREEN

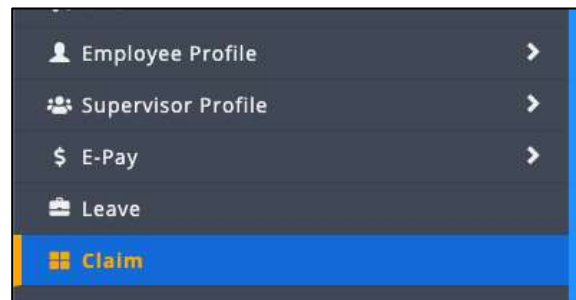


Figure 1.1

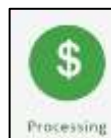


Figure 1.2

Click on “Claim” in the side bar as shown in Figure 1.1. After that click on the “Processing” on the top menu as shown in Figure 1.2

**Processing**

Claim ID:  1

Employee:

Claim Types:

Approve Start Date:  Approve End Date:

Status:

Processor Action:

Processor Comment:  Payable Date:

Claim ID	Employee	Title	Created Date	Status
1469	MY0027 - VIC LEE CHANG BU	2018-10-22	2018-10-22	1 A 1 R 1 G 1 B 1 T 1 P

2

3

Figure 1.3

- ```

graph LR
    1[1 Filter options] --> 2[2 Process action]
    2 --> 3[3 Claim Item(s)]
  
```

## 2 PROCESSING

### 2.1 Process claim/Input Payable Date



The screenshot shows a web interface for processing claims. At the top, there are fields for 'Payable Date' and 'Finance Comment'. Below these, there are buttons for 'Select All' and 'Expand All', and a green 'Submit Select' button. A table lists claims with columns for 'Claim ID', 'Employee', 'Claim Title', and 'Created Date'. The first row shows 'Claim ID: 1469', 'Employee: HY0007 VIC LEE CHANG EU', 'Claim Title: September 2018', and 'Created Date: 2019-09-24'. A blue '1' button is located below the first row.

Figure 2.1



Two buttons are shown side-by-side. The left button has a blue unchecked checkbox icon followed by the text 'Claim ID: 1469'. The right button has a blue checked checkbox icon followed by the text 'Claim ID: 1469'.

Figure 2.2

Figure 2.3



The screenshot shows the 'Processor Action' section. It includes a 'Processor Comment' field with a dropdown menu set to 'Paid'. To the right, there is a 'Payable Date' field with a date picker set to '2020-03-31'. Both the dropdown and the date picker are highlighted with red rectangles.

Figure 2.4

Follow the steps to process a claim/input Payable Date:

1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Key in the "Payable Date" which located at the top-left corner as shown in Figure 2.4 and click  as shown in Figure 2.4 to process the ticked claim(s)
3. (Optional) Processor can expand the item to tick only certain items within the claim group to process

## 2.2 Reject claim



Figure 2.5



Figure 2.6

Figure 2.7

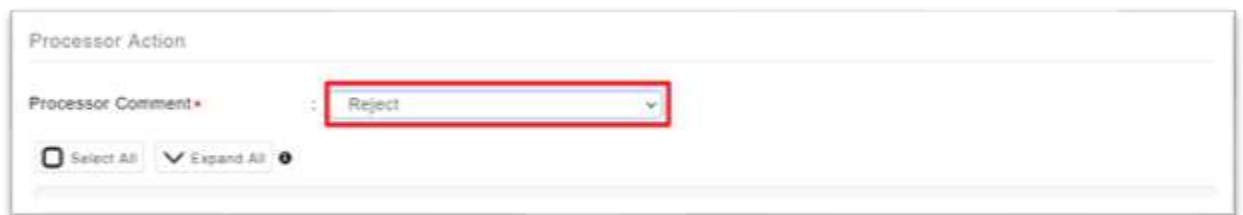


Figure 2.8

Follow the steps to reject a claim:

1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.6 it will become as shown in Figure 2.7
2. Select "Reject" from Finance Comment as shown in Figure 2.8 and click  as shown in Figure 2.8 to reject the ticked claim(s)
3. (Optional) Processor can expand the item to tick only certain items within the claim group to reject

## 2.3 Mark claim as incomplete



Figure 2.9



Figure 2.10

Figure 2.11

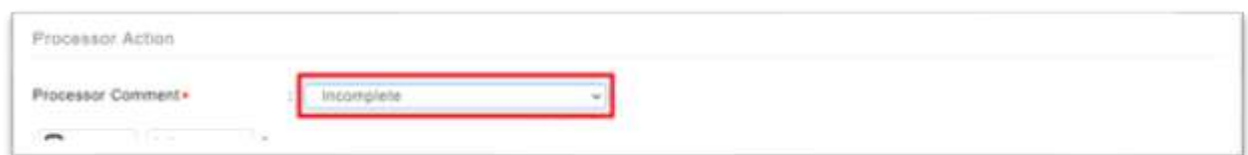


Figure 2.12

Follow the steps to mark a claim incomplete:

1. Select whichever item to mark as incomplete by ticking the ☐ which shown in Figure 2.10 it will become as shown in Figure 2.11
2. Select "Incomplete" from Finance Comment as shown in Figure 2.12 and click **Submit Select** as shown in Figure 2.12 to mark as incomplete on the ticked claim(s)
3. (Optional) Processor can expand the item to tick only certain items within the claim group to mark claim as incomplete