

# User Guide

Claim

HR



## CONTENTS

|                                   |   |
|-----------------------------------|---|
| Contents .....                    | 0 |
| 1 Approval Screen .....           | 1 |
| 2 Approval .....                  | 2 |
| 2.1 Approve or Reject Claim ..... | 2 |
| 2.2 Incomplete Claim .....        | 3 |
| 3 Summary .....                   | 4 |
| 3.1 Claim Summary .....           | 4 |

## 1 APPROVAL SCREEN

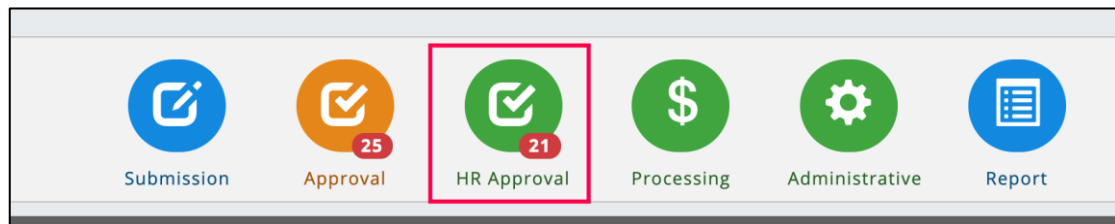


Figure 1.1

To perform a claim approval, please follow the steps below or follow as what has shown in Figure 1.1

Claim -> HR Approval

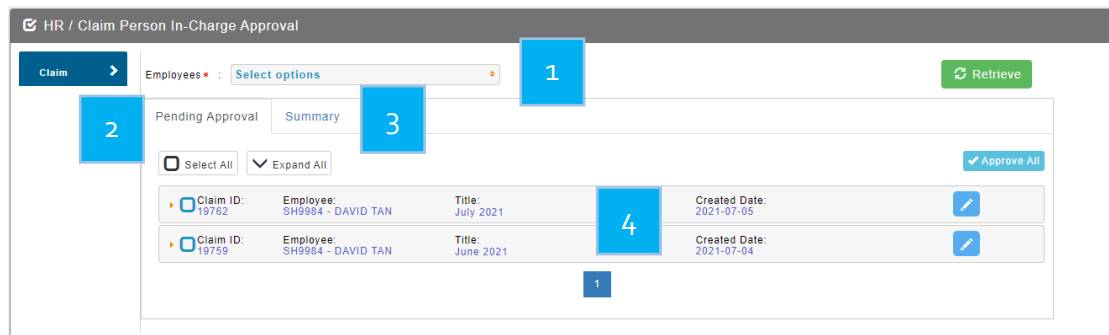


Figure 1.2

1 Employee selections

3 History Tab

2 Pending Approval Tab

4 Pending item list

## 2 APPROVAL

### 2.1 Approve or Reject Claim

| Claim ID | Employee           | Title     | Created Date |  |
|----------|--------------------|-----------|--------------|--|
| 19762    | SH9984 - DAVID TAN | July 2021 | 2021-07-05   |  |
| 19759    | SH9984 - DAVID TAN | June 2021 | 2021-07-04   |  |

Figure 2.1



Figure 2.2



Figure 2.3

☒ Approve Selected ☐ Incomplete Selected ☐ Reject Selected

|                          |  |
|--------------------------|--|
| Created Date: 2021-07-05 |  |
| Created Date: 2021-07-04 |  |

Figure 2.4

Follow the steps to approve a claim:

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. Click ☒ Approve Selected as shown in Figure 2.4 to approve the ticked claim(s)
3. (Optional) HR can expand the item to tick only certain items within the claim group to approve

Follow the steps to reject a claim

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. Click ☐ Reject Selected as shown in Figure 2.4 to approve the ticked claim(s)
3. (Optional) HR can expand the item to tick only certain items within the claim group to reject

Alternatively, HR can click ☒ Approve All as shown in Figure 2.4 to approve all items straight away.

## 2.2 Incomplete Claim

Pending Approval Summary

☐ Select All ☐ Expand All

|  |                              |                  |                          |                                     |
|--|------------------------------|------------------|--------------------------|-------------------------------------|
| ▶ <input type="checkbox"/> Claim ID: 19762 | Employee: SH9984 - DAVID TAN | Title: July 2021 | Created Date: 2021-07-05 | <input type="button" value="Edit"/> |
| ▶ <input type="checkbox"/> Claim ID: 19759 | Employee: SH9984 - DAVID TAN | Title: June 2021 | Created Date: 2021-07-04 | <input type="button" value="Edit"/> |

1

Figure 2.5



Figure 2.6



Figure 2.7

|                          |                                     |
|--------------------------|-------------------------------------|
| Created Date: 2021-07-05 | <input type="button" value="Edit"/> |
| Created Date: 2021-07-04 | <input type="button" value="Edit"/> |

Figure 2.8

Follow the steps to incomplete 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. Click  as shown in Figure 2.8 to incomplete the ticked claim(s)
3. (Optional) HR can expand the item to tick only certain items within the claim group to incomplete claim

### 3 SUMMARY

#### 3.1 Claim Summary

Claim item(s) can be view in the summary tab.

The screenshot displays the 'HR / Claim Person In-Charge Approval' interface. On the left, there is a sidebar with 'Claim' and 'Cash Advance' options. The main area has a 'Claim' tab selected. Below the sidebar, there are filters for 'Employees' (a dropdown menu) and 'Status' (radio buttons for All, Pending Payable, Incompleted by supervisor / HR, Rejected, Paid, Incompleted by processor, and Rejected by processor). A 'Retrieve' button is in the top right. The 'Summary' tab is active, showing a table of claims. The table has columns for Claim ID, Employee, Title, Created Date, and Status. The status is represented by a color-coded bar and a text string. The table lists four claims: 3070 (Hotel), 3063 (Meal), 2983 (claim test 3), and 2954 (test advanced 2).

| Claim ID | Employee | Title           | Created Date | Status                             |
|----------|----------|-----------------|--------------|------------------------------------|
| 3070     |          | Hotel           | 2021-03-08   | 1 A   0 R   0 C   0 P   0 I   1 PP |
| 3063     |          | Meal            | 2021-02-19   | 1 A   0 R   0 C   0 P   0 I   1 PP |
| 2983     |          | claim test 3    | 2020-12-06   | 0 A   0 R   0 C   0 P   0 I   0 PP |
| 2954     |          | test advanced 2 | 2020-11-26   | 1 A   0 R   0 C   0 P   0 I   0 PP |

Figure 3.1

The screenshot shows a detailed view of a claim item. At the top, it displays the Claim ID (3063), Employee, Title (Meal), Created Date (2021-02-19), and Status (1 A | 0 R | 0 C | 0 P | 0 I | 1 PP). Below this, there is a section for the claim item details. It shows the item name 'Meal' with a status 'Approved & Pending Payable'. The 'Receipt / Invoice Date' is 2021-02-18, and the 'Claim Amount (MYR)' is 10.00. There are icons for a receipt, a person, and a list. The 'Description' is 'Meal'. At the bottom, a summary bar shows 'Total Item' as 1 and 'Total Claim Amount (MYR)' as 10.00.

| Claim ID | Employee | Title | Created Date | Status                             |
|----------|----------|-------|--------------|------------------------------------|
| 3063     |          | Meal  | 2021-02-19   | 1 A   0 R   0 C   0 P   0 I   1 PP |

Meal  
Approved & Pending Payable  
Receipt / Invoice Date: 2021-02-18  
Claim Amount (MYR): 10.00  
Description: Meal  
Total Item: 1  
Total Claim Amount (MYR): 10.00

Figure 3.2