

User Guide

Claim

Setup



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1 SETUP SCREEN

Claim Setup		
1	 Claim Types <i>View / Add / Edit / Delete Claim Types</i>	Total 25 Claim Types
2	 Claim Set-up (Shared Limit) <i>View / Add / Edit / Delete Claim Set-up (Shared Limit)</i>	Total 1 Claim Set-up (Shared Limit)
3	 Cash Advance <i>View / Add / Edit / Delete Cash Advance</i>	Total 1 Cash Advance
4	 Claim Group <i>View / Add / Edit / Delete Claim Group</i>	Total 2 Claim Group
5	 Claim Category <i>View / Add / Edit / Delete Claim Category</i>	No Record Found
6	 Custom Information <i>View / Add / Edit / Delete Custom Information</i>	Total 2 Custom Information
Employee's Claim		
7	 Employee's Claim Group <i>Assign employee's claim group</i>	
Additional Setup		
8	 Company Policy <i>View / Edit Company Policy</i>	
9	 Notification Setup <i>Setting for supervisor approval reminder/escalation email</i>	

Figure 1.1

- | | | | |
|---|---|---|---|
| 1 | To set up claim type, which specify the behavior of this claim type | 5 | To set up claim category, which categorize claims |
| 2 | To set up claim shared, which allow 2 or more claim types to share the limit | 6 | To set up custom info, which use to store additional info for the claim |
| 3 | To set up cash advance claim, which specify the behavior of this cash advance claim | 7 | To set up and view employee's claim group |
| 4 | To set up the claim group, which to be assigned to employee as entitlement | 8 | To change the cutoff, validity duration of the claim and currency conversion mode |
| 9 | To set up supervisor approval reminder & escalation email | | |

2 CLAIM TYPE

Click "Claim Types" from Figure 1.1 to set up / view / edit claim type(s)

In this screen, active claim types will be listed as shown in Figure 2.1

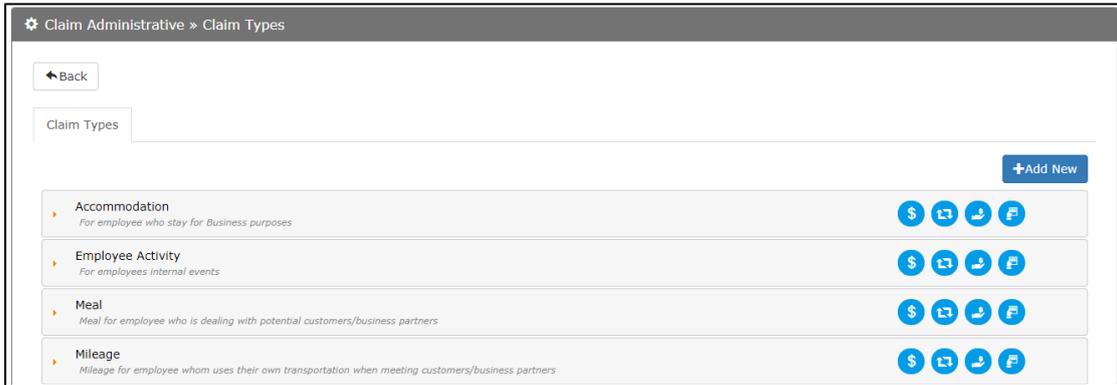


Figure 2.1



Figure 2.2

- | | |
|--|--|
|  Claim Name |  The refreshment duration |
|  Description of the claim |  Claim amount limit per transaction |
|  The limit of the claim |  No. of claim can be made within the period |

2.1 Create new claim type

To create a new claim type, click [+Add New](#). You will be directed to a new screen to set up the claim type

Figure 2.3

Field	Explanation
Claim Code	will only appear in Report and be used as Finance accounting code
Claim Name	Claim type name
Claim Description	Description of the claim type
Claim Default Amount	Claim type limit within claim period
Claim Validity Period	Refresh as per set up basis
Refresh By	Refresh by "Calendar Date" or "Receipt Date" ** For calendar date, factor of 12 will be referring to cut off month of the company claim policy
Claim Limit Per Transaction	The claim amount limit per transaction
Claim Maximum Transaction Occurrence	No. of claim can be made within the period

The screenshot shows the '2. Submission' configuration tab. The settings are as follows:

- Attachment Required ***: Compulsory, Optional
- Description Required ***: Compulsory, Optional
- Receipt / Invoice Number Required ***: Hide, Show
- Vendor Name Required ***: Hide, Show
- Allow Submit By ***: All Employee, Confirmed Employee
- Supervisor Approval ***: Supervisor approval not required, Direct supervisor approval, Levelling approval, Conditional approval base on amount
- HR Approval ***: Not required, Required, Required, Claim amount more than / equal to
- Finance Approval ***: Off, On

Figure 2.4

Field	Explanation
Attachment Required	Specify the particular claim is required to attach attachment
Description Required	Specify the particular claim is required to attach description
Receipt / Invoice Number Required	<ul style="list-style-type: none"> - Specify to show receipt/invoice number - Specify the particular claim is required to attach receipt/invoice number - Specify the particular claim is required to check for duplication of receipt/invoice number
Vendor Name Required	<ul style="list-style-type: none"> - Specify to show vendor name - Specify the particular claim is required to attach vendor name - Specify the particular claim is required to check for duplication of vendor name
Allow Submit By	<ul style="list-style-type: none"> - The claim allows submitted by all employees or only confirmed employees
Supervisor Approval^[A1]	To determine the approval method
HR Approval^[A2]	To determine the next approval personnel / HR after all related supervisor(s) has/have approved the claim item
Finance Approval^[A3]	To determine who is/are the finance approver(s) of this claim after processor has approved the claim item.

Figure 2.5

Field	Explanation
Claim Dependencies ^[A4]	Determine which claim is referring to this claim <ul style="list-style-type: none"> - If exceed certain amount only allow to choose the referencing claim
Participant ^[A5]	Determine the claim able to attach internal staff
Extra Condition ^[A6]	Determine the claim is utilizing the setting of: <ul style="list-style-type: none"> - Accommodation - Mileage
Currency	Determine the default currency when user perform a claim submission ** Only "Manual Currency Conversion" able to select the currency from the list
Claim Category	Determine the category of the particular claim
Processor	Determine who is/are the processor(s) of this claim
Custom Info ^[A7]	Determine which custom info to be assigned to the particular claim

Figure 2.6

To save the claim type, click  which located at the bottom-right of the screen as shown in Figure 2.6

2.2 Edit claim type

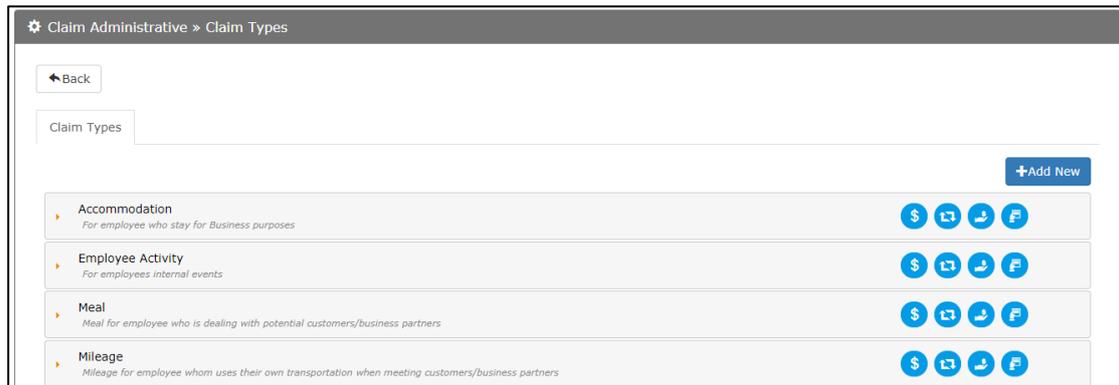


Figure 2.7

To view/edit the claim type, click at the claim type that you wish to view/edit. It will expand to show the details as shown in Figure 2.8

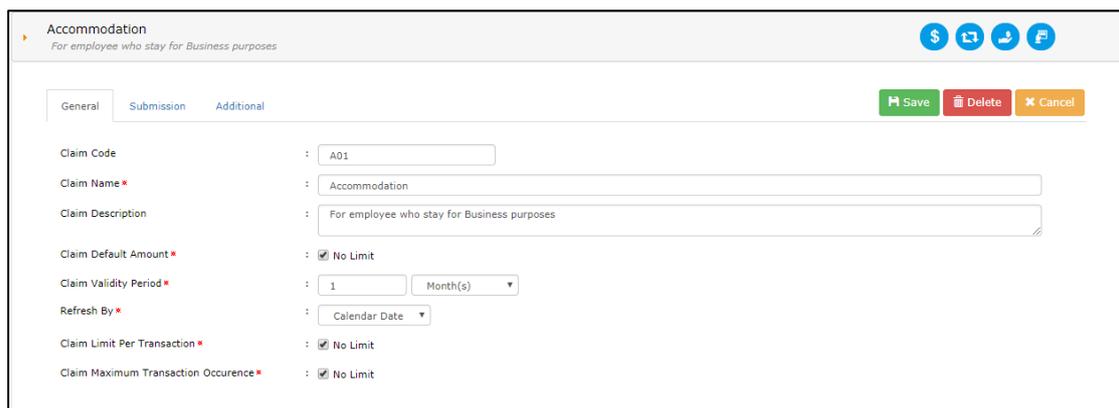


Figure 2.8

Edit the info you want and click  to save the amended info.

2.3 Delete claim type

To delete a claim, click at the claim type that you wish to view/edit. It will expand to show the details as shown in Figure 2.8

Click  to delete the claim.

3 CLAIM SHARED

Click "Claim Set-up (Shared Limit)" from Figure 1.1 to set up / view / edit shared claims

In this screen, active shared claims will be listed as shown in Figure 3.1



Figure 3.1



Figure 3.2

- 1** Name of shared claim
- 2** Description of the shared claim
-  The limit of the claim
-  The refreshment duration
-  No. of claim types within the shared claim

3.1 Create new shared claim

To create a new shared claim, click [+Add New](#). You will be directed to a new screen to set up the shared claim

Figure 3.3

Field	Explanation
Claim Shared Name	Claim shared name
Claim Description	Description of the shared claim
Claim Default Amount	Shared claim limit within claim period
Claim Validity Period	Refresh as per set up basis
Refresh By	Refresh by "Calendar Date" or "Receipt Date" ** For calendar date, factor of 12 will be referring to cut off month of the company claim policy
Claim Category	Determine the category of the particular claim

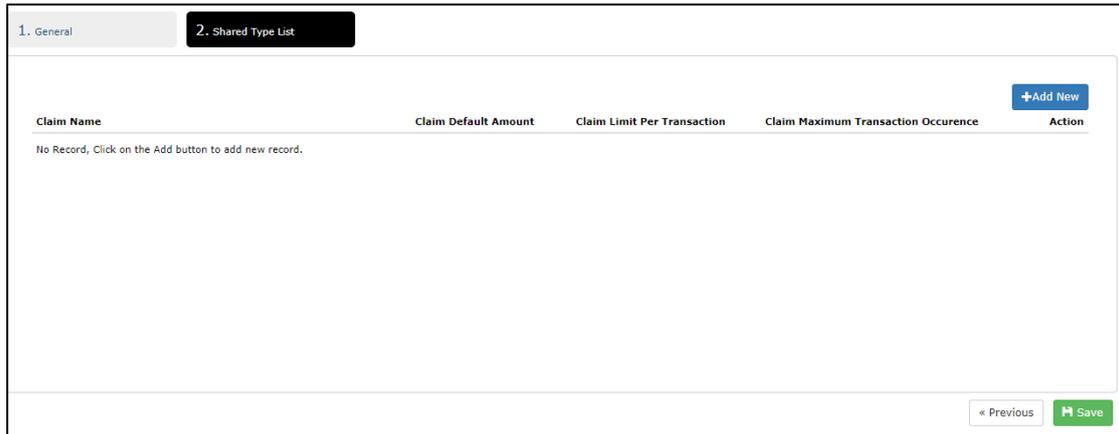


Figure 3.4

After shared claim info has been filled up, create claim types under the shared claim by clicking **+Add New** on the top-right as shown in Figure 3.4

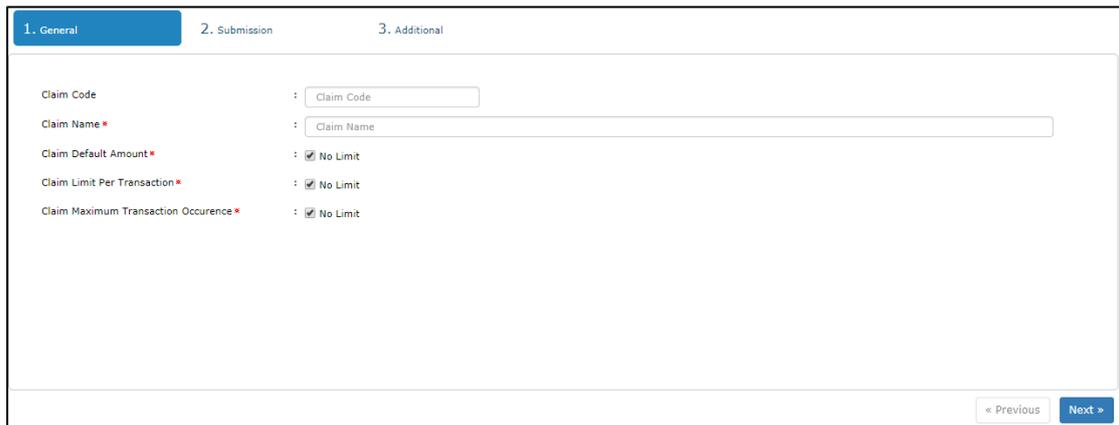


Figure 3.5

Field	Explanation
Claim Code	will only appear in Report and be used as Finance accounting code
Claim Name	Claim type name
Claim Description	Description of the claim type
Claim Default Amount	Claim type limit within claim period
Claim Limit Per Transaction	The claim amount limit per transaction
Claim Maximum Transaction Occurrence	No. of claim can be made within the period

1. General
2. Submission
3. Additional

Attachment Required * : Compulsory Optional

Description Required * : Compulsory Optional

Receipt / Invoice Number Required * : Hide Show

Vendor Name Required * : Hide Show

Allow Submit By * : All Employee
 Confirmed Employee

Supervisor Approval * : Supervisor approval not required
 Direct supervisor approval
 Levelling approval
 Conditional approval base on amount

HR Approval * : Not required
 Required
 Required, Claim amount more than / equal to

Finance Approval * : Off On

Figure 3.6

Field	Explanation
Attachment Required	Specify the particular claim is required to attach attachment
Description Required	Specify the particular claim is required to attach description
Receipt / Invoice Number Required	<ul style="list-style-type: none"> - Specify to show receipt/invoice number - Specify the particular claim is required to attach receipt/invoice number - Specify the particular claim is required to check for duplication of receipt/invoice number
Vendor Name Required	<ul style="list-style-type: none"> - Specify to show vendor name - Specify the particular claim is required to attach vendor name - Specify the particular claim is required to check for duplication of vendor name
Claim Category	<ul style="list-style-type: none"> - Determine the category of the particular claim
Supervisor Approval^[A1]	To determine the approval method
HR Approval^[A2]	To determine the next approval personnel / HR after all related supervisor(s) has/have approved the claim item
Finance Approval^[A3]	To determine who is/are the finance approver(s) of this claim after processor has approved the claim item.

Figure 3.7

Field	Explanation
Claim Dependencies ^[A4]	Determine which claim is referring to this claim <ul style="list-style-type: none"> - If exceed certain amount only allow to choose the referencing claim
Participant ^[A5]	Determine the claim able to attach internal staff
Extra Condition ^[A6]	Determine the claim is utilizing the setting of: <ul style="list-style-type: none"> - Accommodation - Mileage
Currency	Determine the default currency when user perform a claim submission ** Only "Manual Currency Conversion" able to select the currency from the list
Claim Category	Categorize the claim type into respective category
Processor	Determine who is/are the processor(s) of this claim
Custom Information ^[A7]	Determine which custom info to be assigned to the particular claim

To add the claim type into the shared claim, click **Next »** which located at the bottom-right of the screen as shown in Figure 3.7

1. General 2. Shared Type List

[+Add New](#)

Claim Name	Claim Default Amount	Claim Limit Per Transaction	Claim Maximum Transaction Occurrence	Action
Breakfast	8	No Limit	No Limit	
Lunch	12	No Limit	No Limit	
Dinner	20	No Limit	No Limit	
Meal-Full	40	No Limit	No Limit	

[« Previous](#) [Save](#)

Figure 3.8

After a list of claim types been added to shared claim, save the setting by clicking 

3.2 Edit shared claim



Figure 3.9

To view/edit the shared claim, click at the shared claim that you wish to view/edit. It will expand to show the details as shown in Figure 3.10

Figure 3.10

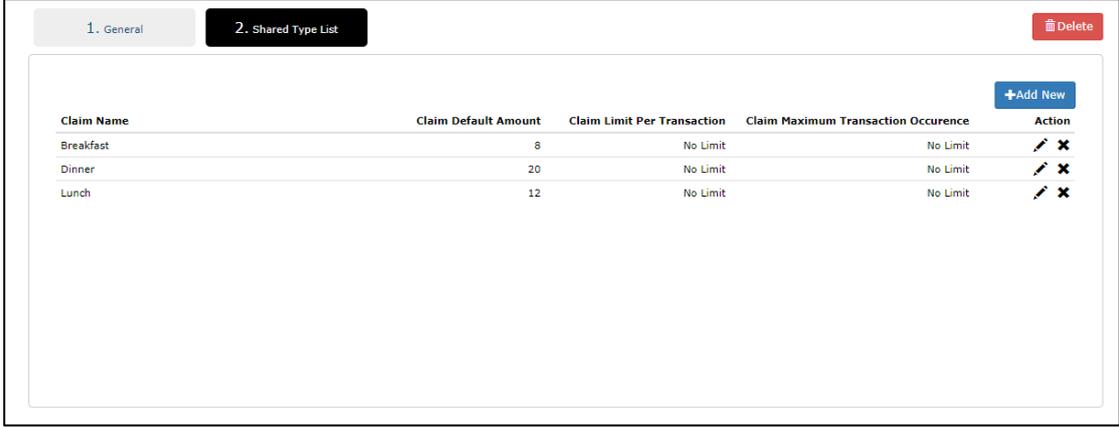
Edit the info you want and click  to save the amended info.

3.3 Delete shared claim

To delete shared claim, click at the shared claim that you wish to view/edit. It will expand to show the details as shown in Figure 3.10

Click  to delete the claim.

However, if you wish to delete the claim type within the shared claim



Claim Name	Claim Default Amount	Claim Limit Per Transaction	Claim Maximum Transaction Occurrence	Action
Breakfast	8	No Limit	No Limit	 
Dinner	20	No Limit	No Limit	 
Lunch	12	No Limit	No Limit	 

Figure 1.11

Click the  icon which located on the most right-hand side of the screen as shown in Figure 1.11 to delete the claim type.

4 CLAIM GROUP

Click "Claim Group" from Figure 1.1 to set up / view / edit claim groups

In this screen, active claim groups will be listed as shown in Figure 4.1



Figure 4.1



Figure 4.2

- | | | | |
|----------|--------------------------------|--|-------------------------------|
| 1 | Name of claim group |  | No. of claim types assigned |
| 2 | Description of the claim group |  | No. of shared claims assigned |

4.1 Create new claim group

1. General 2. Claim List

Claim Group Name :

Description :

< Previous Next >

Figure 4.3

Field	Explanation
Claim Group Name	Name of claim group
Description	Description of the claim group

1. General 2. Claim List

Claim List (Click to select all) : 0 Selected

Search :

Meal Shared Yes No

Optical & Dental Yes No

< Previous Save

Figure 4.4

To assign the previously set up claim type(s) and/or shared claim(s) to claim group, simply click and make sure the "Yes" is highlighted with **light-blue**

Click to save the claim group

To set customize setting at claim group, simply click the  to edit the claim at claim group level

Figure 4.5

Field	Explanation
Authorised to Submit	To determine whether the particular claim can be submitted by which user <ul style="list-style-type: none"> - All - Admin Only

You may follow the steps from [2.2 Edit Claim Types](#) and [3.2 Edit Shared Claims](#)

**** Only some fields stated below can be edited:**

- i. Default Amount
- ii. Claim Validity Period
- iii. Supervisor Approval
- iv. Customize Approval
- v. Custom Info

4.2 Edit Claim Group



Figure 4.6

To view/edit the claim group, click at the claim group that you wish to view/edit. It will expand to show the details as shown in Figure 4.7

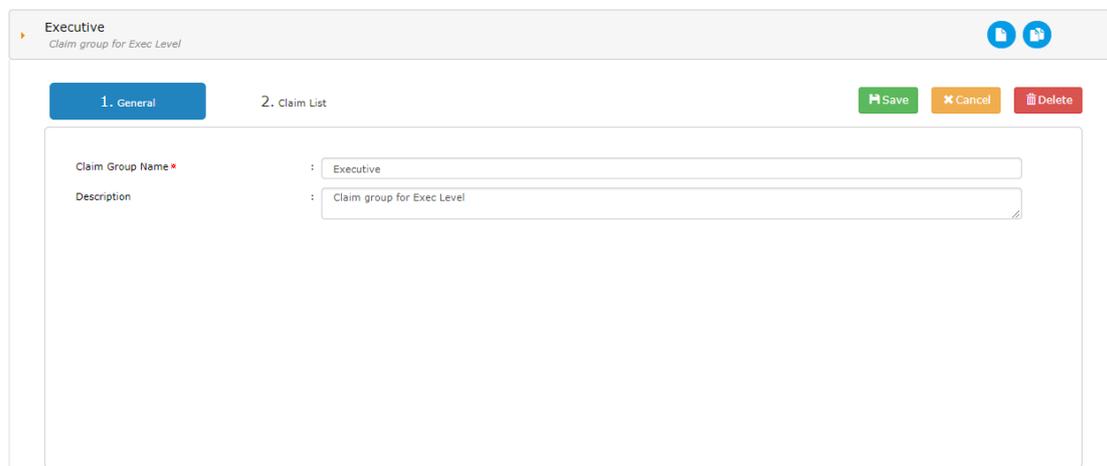


Figure 4.7

Edit the info you want and click  to save the amended info.

4.3 Delete Claim Group

To delete claim group, click at the claim group that you wish to view/edit. It will expand to show the details as shown in Figure 4.7

Click  to delete the claim group.

5 CLAIM CATEGORY

Click "Claim Category" from Figure 1.1 to set up / view / edit claim categories

In this screen, active claim categories will be listed as shown in Figure 5.1

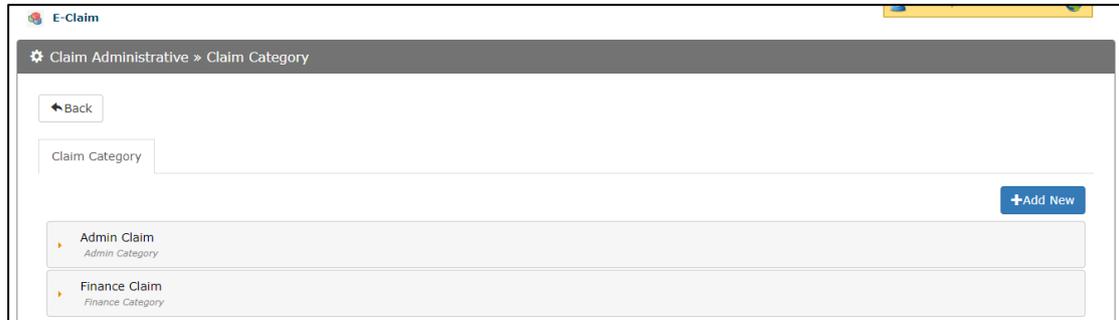


Figure 5.1



Figure 5.2

- 1 Name of claim category
- 2 Description of the claim category

5.1 Create New Claim Category

The screenshot shows a web form titled '1. General'. It contains three main sections:

- Claim Category Name:** A text input field with a red asterisk indicating it is required.
- Description:** A larger text area for providing details about the claim category.
- Claim Type & Claim Shared:** This section is divided into two columns:
 - Available Claim(s):** A list of claim types (Accommodation, Meal Shared, Mileage) that can be assigned to the category. Each item has a search bar above it.
 - Selected Claim(s):** A list where claim types already assigned to the category are shown.

At the bottom right of the form, there are two buttons: a grey 'Previous' button and a green 'Save' button.

Figure 5.3

Field	Explanation
Claim Category Name	Name of claim category
Description	Description of the claim category
Claim Type & Claim Shared	<ol style="list-style-type: none"> 1. Available Claim(s) <ul style="list-style-type: none"> - Claim(s) not assigned to particular category 2. Selected Claim(s) <ul style="list-style-type: none"> - Claim(s) assigned to particular category <p>Drag-drop to assign/revoke</p>

Click  Save to save the claim category

5.2 Edit Claim Category

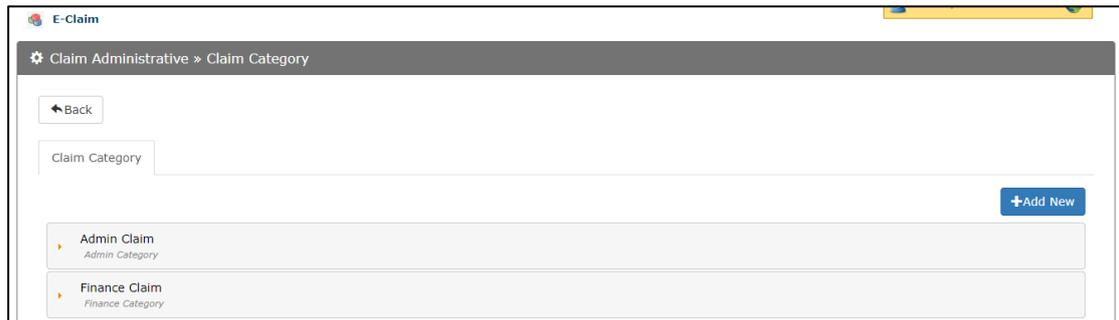


Figure 5.4

To view/edit the claim group, click at the claim group that you wish to view/edit. It will expand to show the details as shown in Figure 5.5

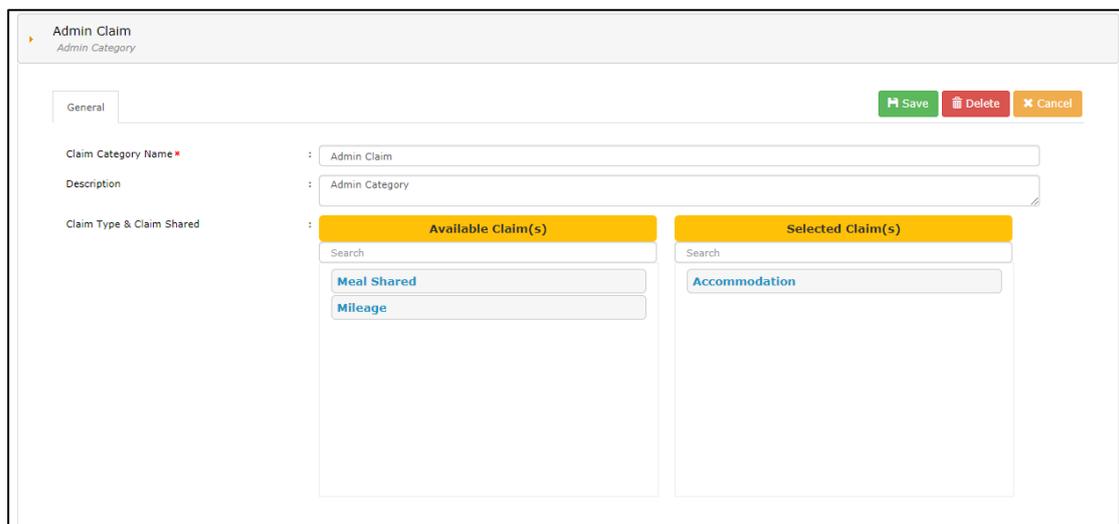


Figure 5.5

Edit the info you want and click  to save the amended info.

5.3 Delete Claim Category

To delete claim category, click at the claim category that you wish to view/edit. It will expand to show the details as shown in Figure 5.5

Click  to delete the claim category.

6 CUSTOM INFO

Click "Custom Info" from Figure 1.1 to set up / view / edit claim custom info

In this screen, active claim custom info will be listed as shown in Figure 6.1



Figure 6.1



Figure 6.2

- 1 Custom Info Name
- 2 Type of the custom info
- 3 View details of the custom info

6.1 Create new custom info

The screenshot shows a web form titled "Claim Administrative » Custom Information". It contains the following fields and controls:

- Display Header:** A text input field with the placeholder "Please key in display header ...".
- Compulsory:** A radio button group with "Yes" (selected) and "No" options.
- Display Information:** A large text area with the placeholder "Please key display information ...".
- Control Type:** A dropdown menu currently set to "Text Only".
- Character Limit:** A text input field with a red asterisk and the text "*Maximum of 200 character limits".

In the top right corner, there are two buttons: a green "Save" button and a grey "Back" button.

Figure 6.3

Field	Explanation
Display Header	Name of displaying header
Compulsory	Determine the field is mandatory/optional to fill up
Display Information	The information that will be shown as tooltip
Control Type	Determine how the types of input <ul style="list-style-type: none"> - Text Only - Date Only - Dropdown Menu - Whole Number - Decimal Number - Time
Next field after control type	The next following field will be depending on the control type, when <ol style="list-style-type: none"> i. Text Only <ul style="list-style-type: none"> - Character Limit: Specify how many characters can be input ii. Dropdown Menu <ul style="list-style-type: none"> - Dropdown details iii. Whole Number <ul style="list-style-type: none"> - Limit: Specify the amount limit iv. Decimal Number <ul style="list-style-type: none"> - Limit: Specify the amount limit

Click  to save the claim custom info

6.2 Edit custom info



Figure 6.4

To view/edit the claim custom info, click at the claim custom info that you wish to view/edit. It will direct you to show the details as shown in Figure 6.5



Figure 6.5

Edit the info you want and click  to save the amended info.

6.3 Delete Custom Info

To delete claim custom info, click at the claim custom info that you wish to view/edit. It will direct you to show the details as shown in Figure 6.5

Click  to delete the claim custom info.

7 COMPANY CLAIM POLICY

E-Claim

Claim Administrative > Company Policy

Back

Company Policy

Save

Claim Validity Period : 30 Day(s)

Financial Year * : Cut-off Month Dec

Currency Conversion Mode * : Manual Exchange Rate

Figure 7.1

Field	Explanation
Claim Validity Period	To determine how long can the claim be claimed
Financial Year	To determine the cut off month for claim which is refreshed by "Calendar Date" and is factor of 12 months
Currency Conversion Mode	To determine currency conversion mode for all claims

Click  to save the setting

8 ASSIGN CLAIM GROUP TO EMPLOYEE

Pay Groups Info

Name of Pay Groups: MYWAVE

Pay Groups Info (*Denotes Required)

Name of Pay Groups: MYWAVE

Pay Group Description: MYwave Sdn Bhd

Types of Pay Period: Actual Date Range

Cut-off Schedule: Monthly

Mid-month cut-off: -

Month-End cut-off: 31

Claim Group ID: Manager Group

Leave Group: -

Asset Group: Asset Group

Bonus Factor:

EPF er:

Internal Order:

Work Experience:

Save Cancel

Figure 8.1

To assign claim group to employee, Pay Group should be set up beforehand.

To do so go to *Company Benefit Setup* -> *Pay Group* then assign claim group to it and then save.

After pay group is properly set, go to *Employee Profile (Admin)*

Search for the employee, go to "Payment Info" and select the "Pay Group" that has just created to assign claim group to the employee.

Finally click "Save" to save the data.

Employee Information - VIC LEE CHANG EU

Add Delete Restore Export Work Permit History Only Export All to Excel

Employee: MY0037 - VIC LEE CHANG EU

Personal Contacts Dependents Bond **Payment Info** Job Cost Allocation Qualifications Training Statutory Benefits Supervisor Transport Asset Disciplinary Work Calendar

Pay Information

Currency: Malaysian Ringgit (MYR)

Basic Salary: 0 [View Salary History](#)

New Basic Salary: 2000

New Salary Effective Date: 2020-01-01

Payment Frequency: Monthly

Salary Calculation Method: Hourly

Pay Group: MYWAVE

Payee Bank: -

Save

Figure 8.2

9. NOTIFICATION SETUP

Claim Administrative » Notification Setup

Back Save

Notification Setup

Supervisor Approval Reminder
Send email to supervisor when claim is pending approval/cancellation approval for certain no. of days

Yes No
 Send email reminder when claim(s) is / are not approved for Day(s)

Escalation Notification
Send email notification to alert manager and all delegated managers when a supervisor did not approve an employee claim within a timeframe.

Yes No
 Send escalation email when claim(s) is / are not approved for Day(s)

HR email to receive notification if escalation email is missing (optional)

✕

[Add Email Address](#)

Figure 9.1

Field	Explanation
Supervisor Approval Reminder	Send reminder email to supervisor if claim have yet to approve for more than the input day(s)
Escalation Notification	Send escalation email if supervisor have yet to approve subordinate claim for more than the input day(s)

Click  to save the setting

[A1] Supervisor Approval

Supervisor Approval *	: <input checked="" type="radio"/> Supervisor approval not required
	<input type="radio"/> Direct supervisor approval
	<input type="radio"/> Levelling approval
	<input type="radio"/> Limit approval
	<input type="radio"/> Conditional approval base on amount

Figure A1.1

The setting is located in "Submission" under every claim setup

Supervisor approval not required

- ❖ When claim is set with this setting, supervisor does not need to approve this particular claim.
- ❖ Notification from this kind of claim will still be sent out to the respective supervisor

Direct supervisor approval

- ❖ When claim is set with this setting, direct reporting supervisor will need to approve this particular claim
- ❖ Notification from this kind of claim will be sent out to the respective supervisor

Levelling approval

- ❖ When claim is set with this setting, all supervisors will need to approve this particular claim based on the level set in the setting
- ❖ Notification from this kind of claim will be sent out to the respective supervisors

Limit approval

- ❖ This claim is set in the company hierarchy settings, in which it will be seeing the amount set in the setting.
 - Scenario
 - Condition
 - If claim amount < \$1,000 requires 2 levels of approvals
 - If claim amount >= \$1000 but less than \$2000 requires 3 levels of approvals
 - Otherwise requires 4 levels of approvals
 - Only supervisors which has the job titles consist of "Manager" and "Officer" will be able to approve such claims
 - Supervisors must be in the same reporting route
 - May refer to A1.2 for reference, only employees that is highlighted in blue able to perform approval

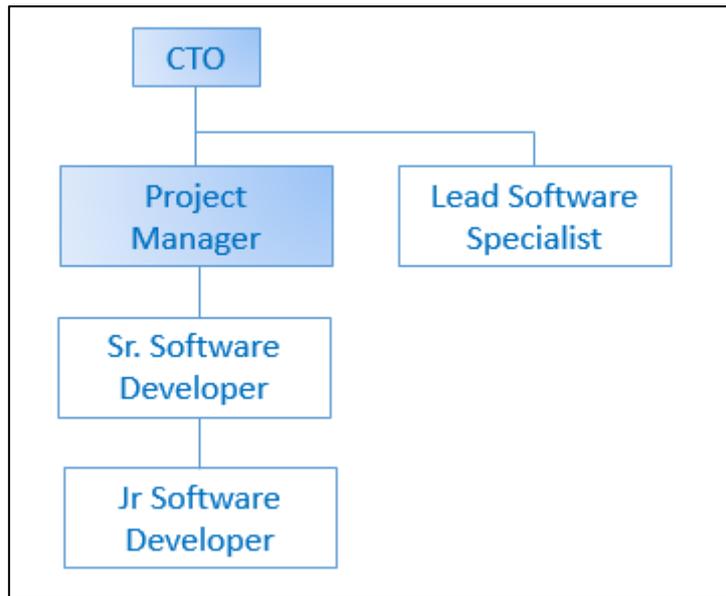


Figure A1.2

- ❖ Notification from this kind of claim will be sent out to the respective supervisors

Conditional approval base on amount

- ❖ When claim is set with this setting, the claim amount must be within the set amount for the supervisors to perform approval
- ❖ E.g. Claim amount below \$500 will require 2 levels approvals, otherwise 5 levels based on Figure A1.4

Supervisor Approval *

- Supervisor approval not required
- Direct supervisor approval
- Levelling approval
- Limit approval
- Conditional approval base on amount

Claim Amount : *

- Claim amount less than 500
- Claim amount more than / equal to 500

Figure A1.3

[A2] HR Approval

HR Approval

Not required
 Required
 Required, Claim amount more than / equal to

Submission : Notify Only Required Approval

Effective Start Date	Effective End Date	Approver	Action
2020-01-09	Onwards	Select options	

[Add Row](#)

Figure A2.1

The setting is located in "Submission" under every claim setup

Required

- ❖ This approval personnel are act as another layer of approval personnel after all supervisors has approved the claim.
- ❖ Please note that as current system only supports additional 1 layer of approval personnel as shown in Figure A2.2

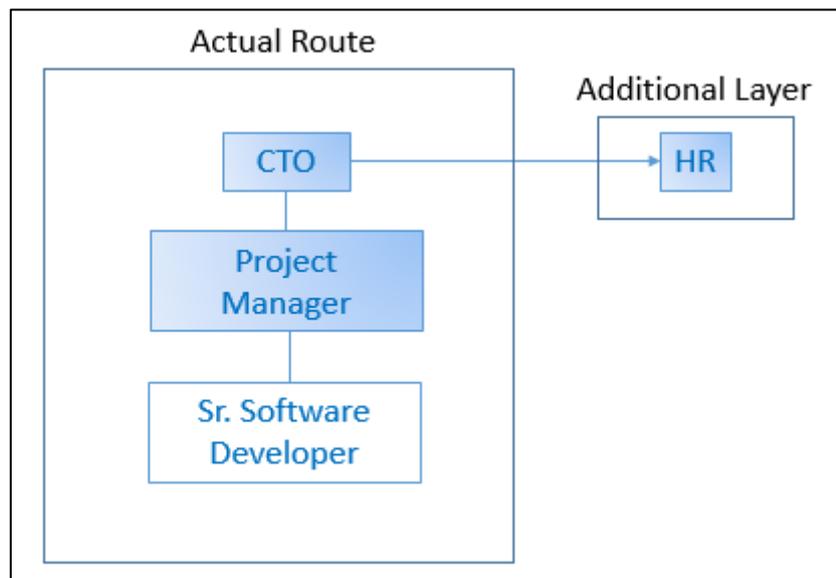


Figure A2.2

Required, claim amount more than / equal to

- ❖ This approval setting is same as the above, the only difference is that the setting will be applied if and only condition is met

[A3] Finance Approval

Level	Level Name	Approvers	Approval / Notify	Amount more than / equal to	Action
1		0 Approver(s)	Approval Notify	1	

[Add Row](#)

Figure A3.1

Effective Start Date	Effective End Date	Approver	Action
2010-01-01	Onwards	Select options	

[Add Row](#)

[Confirm](#) [Close](#)

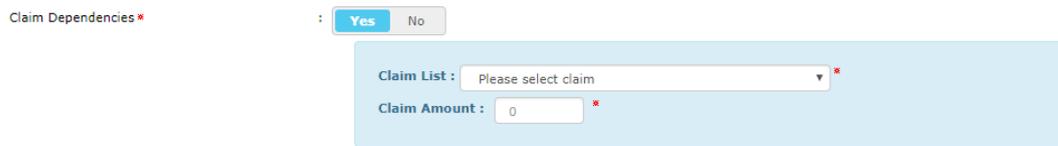
Figure A3.2

The setting is located in "Submission" under every claim setup

On

- ❖ This approval personnel are act as another layer of approval personnel after processor has approved the claim.
- ❖ Figure A3.2 will pop out to select finance approver after click 0 Approver(s)
- ❖ Level name will show on the top of the select finance approver pop out.

[A4] Claim Dependencies



Claim Dependencies * : **Yes** No

Claim List : Please select claim *

Claim Amount : 0 *

Figure A4.1

The setting is located in “Additional” under every claim setup

To apply claim dependencies on the claim, turn on the setting to “Yes”

[Pre-requisite] Please make sure the referencing claim is created before hand

Scenario 1

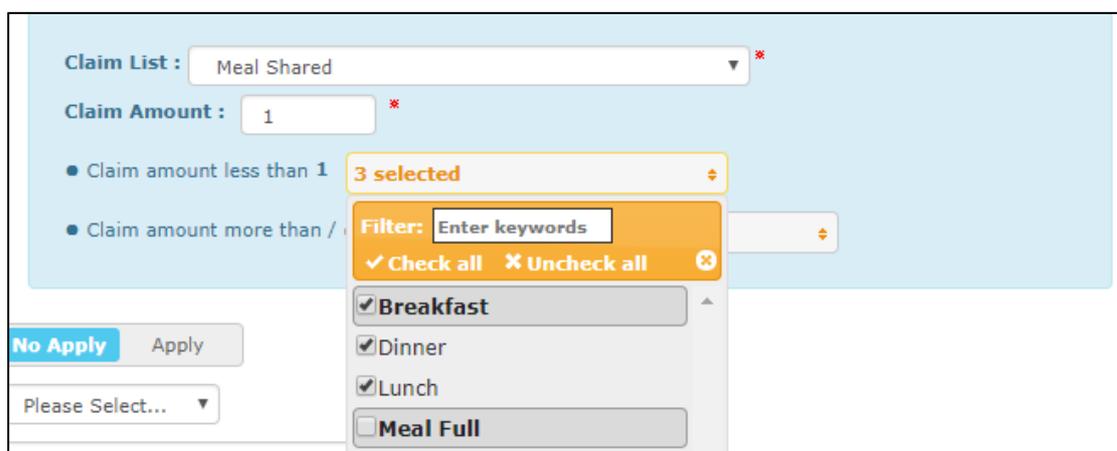
Employee is entitled to full \$40 Meal claim if the employee stays overnight in the hotel.

Otherwise, it will be a separate claim which consist of

1. Breakfast - \$8
2. Lunch - \$12
3. Dinner - \$20

In order to set this kind of claim, name this claim as “Hotel” (depends company naming convention), turn on claim dependencies and select “Meal Shared” which previously in [3.1 Create new shared claim](#).

When “Hotel” has not been claimed, set exactly as shown in Figure A4.2



Claim List : Meal Shared *

Claim Amount : 1 *

● Claim amount less than 1

● Claim amount more than /

3 selected

Filter: Enter keywords

✓ Check all ✗ Uncheck all

✓ Breakfast

✓ Dinner

✓ Lunch

☐ Meal Full

No Apply Apply

Please Select...

Figure A4.2

When "Hotel" has been claimed, set exactly as shown in Figure A4.3

Claim List : Meal Shared *

Claim Amount : 1 *

● Claim amount less than 1 3 selected

● Claim amount more than / equal to 1

No Apply Apply

Please Select... ▼

Please select ... ▼

Please select ...

Default Customize

Filter: Enter keywords

✓ Check all ✗ Uncheck all ✕

- Breakfast
- Dinner
- Lunch
- Meal Full

Figure A4.3

[A5] Participant

Participant ▼ : No Apply Apply

Rate Per Staff : No Limit 50

Headcount : No Limit FROM 1 TO 20

Figure A5.1

The setting is located in “Additional” under every claim setup

When the claim is to attach the name of the participant, the particular must turn on the setting as shown Figure A5.1

Scenario 1

When a supervisor from IT team wishes to bring his/her team members for a farewell lunch

Supervisor can attach the employee list under the particular claim, please note that this setting will become 1 of the caps during submission

Example:

Entitlement for “Meal” is as follow,

1. Entitled Amount - \$500
2. Enforce participant setting

If the supervisor brings his/her team members which consist of 5 persons including the supervisor himself/herself.

Rate: \$50 per headcount

Headcount: 5

$$\$50 * 5 = \$250$$

The system will pick whichever lowest as the entitled amount for that particular claim.

As for this case, \$250 will be the entitled amount

[A6] Extra Condition

The setting is located in "Additional" under every claim setup

1. If the claim is to set to use "Mileage" setting, select "Mileage" from the dropdown as shown in Figure A6.1

The screenshot shows the 'Extra Condition' form for the 'Mileage' setting. The dropdown menu is set to 'Mileage'. The 'Effective Start Date' is 2018-10-25 and the 'Effective End Date' is 'Onwards'. The 'Accumulative' checkbox is unchecked. The 'Setting Unit of Measure' is set to 'Kilometer'. The table below shows the mileage rates:

FROM (Kilometer)	Less Than (Kilometer)	Rate (Kilometer)	Action
0	1000	0.7	
1000	2000	0.4	
2000	Onwards	0.3	

At the bottom, there is an 'Add Row' button.

Figure A6.1

2. If the claim is to set to use "Accommodation" setting, select "Accommodation" from the dropdown as shown in Figure A6.2

The screenshot shows the 'Extra Condition' form for the 'Accommodation' setting. The dropdown menu is set to 'Accommodation'. The 'Effective Start Date' is 2018-10-25 and the 'Effective End Date' is 'Onwards'. The 'Accumulative' checkbox is checked. The 'Setting Unit of Measure' is set to 'Night(s)'. The table below shows the accommodation rates:

FROM (Night(s))	Less Than (Night(s))	Rate (Night(s))	Action
0	Onwards	200	

At the bottom, there is an 'Add Row' button.

Figure A6.2

Scenario 1

If the claim policy of the company for mileage claim was set as the following:

1st 1,000 km - \$0.70

2nd 1,000km - \$0.40

After 1,500 km and onwards - \$0.3

For this case, it would be exactly the same setting as shown in A6.1, the "Accumulative" must be unticked

Scenario 2

If the claim policy of the company for mileage claim was set as the following:

Up to 1,000 km - \$0.30

Up to 2,000 km- \$0.40

1,500 km onwards - \$0.7

For this case, it would be exactly the same setting as shown in A6.3, the "Accumulative" must be ticked

Extra Condition : Mileage + Add New Period

Effective Start Date : 2018-10-25 Effective End Date : Onwards

Accumulative : Setting Unit of Measure : Kilometer Miles

FROM (Kilometer)	Less Than (Kilometer)	Rate (Kilometer)	Action
0	1000	0.30	
1000	2000	0.40	
2000	Onwards	0.70	

+ Add Row

Figure A6.3

Scenario 3

If the claim policy of the company for accommodation claim was set as the following:

Regardless of how many night(s) of hotel the employee is staying, \$200 per night

For this case, it would be exactly the same setting as shown in A6.2, for this setting check-in and check-out dates both are required to fill up

[A7] Custom Info

Custom Information : No Apply **Apply**

Custom Information : Please select ... **+ Add to list**

Effective Start Date : 2018-01-01 Effective End Date : Onwards

Field Required : Compulsory **Optional** Click To Show Configured Additional Information

Custom Information	Effective Start Date	Effective End Date	Field Required	Action
Hotel Name	2018-01-01	Onwards	Compulsory	
Panel Clinic	2018-10-01	Onwards	Optional	

Figure A7.1

To use custom information, click "Apply" and select custom information from the dropdown as shown in Figure A7.1

For custom info which is a dropdown type,

Custom Information : Panel Clinic [Click here to view dropdown items](#) **Update** **Cancel**

Effective Start Date : 2018-10-01 Effective End Date : Onwards

Field Required : Compulsory **Optional** Click To Show Configured Additional Information

Custom Information	Effective Start Date	Effective End Date	Field Required	Action
Hotel Name	2018-01-01	Onwards	Compulsory	

Figure A7.2

Panel Clinic

<input checked="" type="checkbox"/> *	Dropdown Item	Effective Start Date *	Effective End Date
<input checked="" type="checkbox"/>	24 hours	2018-10-01	Onwards
<input checked="" type="checkbox"/>	Penang Clinic	2018-10-01	Onwards

Save **Close**

Figure A7.3

Click the "Click here to view dropdown items" to tick and set effective dates for the dropdown items as shown in Figure A7.2 and Figure A7.3

[A8] Notification Setup

- Escalation 2 day(s).
- Sup = Supervisor
- Emp = Employee

