

# E-STAFF SYSTEM – CLAIMS (WELFARE) MODULE

Version: 1.0.11.0

Updated on 28-Sep-2020

## Contents

General Setting .....	2
How HR Check All Pending Claims (Welfare)? .....	6
How HR Cancel Approve Claims (Welfare)?.....	7
Some Tips before LIVE e- Claims Module (Welfare)? .....	8
Welfare Table.....	8
Employee Master – Welfare Table .....	9
Welfare Process .....	10
Welfare Entitlement Listing .....	12
Benefit Code Maintenance (start from ESS version: 1.0.40.0) .....	13

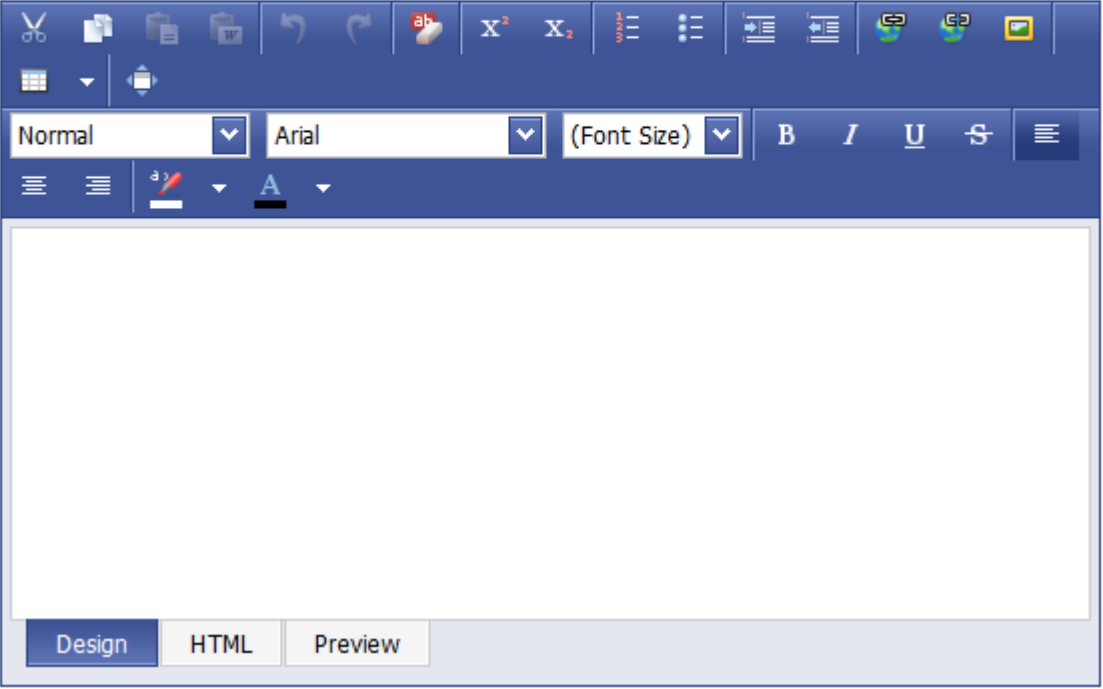
## General Setting

e-Claims (Welfare)

Allow Upload Attachment?       Compulsory Provide Attachment

Stop Submit?      Allow Submit From:  To:

**e-Claims (Welfare) Application Important Notes:**



Design    HTML    Preview

- **Allow Upload Attachment?**

HR can decide whether allow employees submit e-Claims with attachment or not. Just go to “General Setup” to configure the setting to “Allow” or “Not Allow”.

- **Compulsory Provide Attachment?**

HR can decide whether upload attachment is compulsory or not. HR can adjust this setting according to his/her company policy. The setting is at “Admin” – “General Setup”.

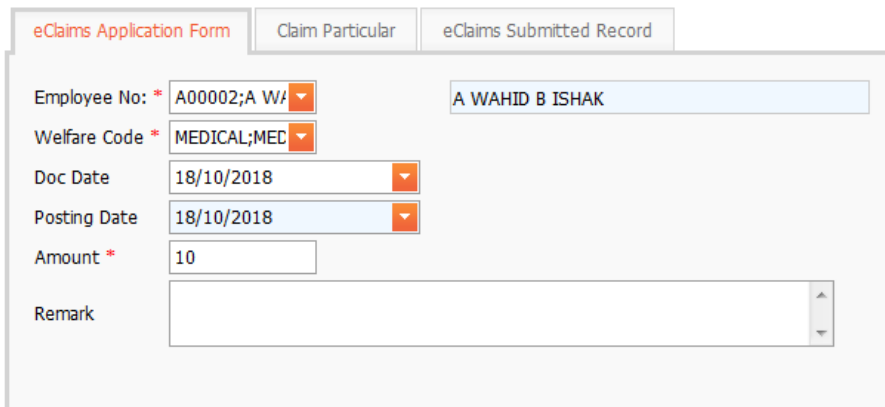
- **Stop Submit?**

HR Administrator can set deadline for employees to submit their claims before certain date range.

▪ **Stop Submit?**

For example, when HR set from “1” to “10”. Employees submit his/her claims on 18-Oct-2020, system will reject his/her submission because 18/Oct already late than date range between 1/Oct – 10/Oct. He/she will show below error message when submit his/her claims:

- E-claim for all staff is only active from 1 to 10 of every month. After 10, no staff are allowed to submit their reimbursement.



The screenshot shows an 'eClaims Application Form' with the following fields:

Employee No: *	A00002;A W/	A WAHID B ISHAK
Welfare Code *	MEDICAL;MED	
Doc Date	18/10/2018	
Posting Date	18/10/2018	
Amount *	10	
Remark		

### e-Claims (Welfare) Application Important Notes:

The screenshot shows a rich text editor interface. At the top, there is a toolbar with various icons for editing text and images. Below the toolbar, the text is formatted in Arial font, size 24pt, with bold, italic, underline, and strikethrough options visible. The main content area contains the following text:

# CLAIM POLICY

- 1) Any claims which are not properly submitted with the relevant supporting documents or are not in accordance with the relevant policies will be return to the respective employees.
- 2) All original supporting documents (bills, invoices, receipts, etc.) need to be attached with the claims Where the employee is unable to provide any

At the bottom of the editor, there are three tabs: 'Design' (selected), 'HTML', and 'Preview'.

- When enter above message in welfare general setting, employee will see above message when they apply claims, refer to below screen shot:

#### Claims Application (Welfare)

##### Welfare Table:

Benefit Code	
BFwd	0
Entitlement	0
Usage	0
Adjust	0
Excess	0
Credit	0
Balance	0
YOS	0
Update On	1/1/0001 12:00:00 AM
Expired Date	1/1/0001 12:00:00 AM
Pending Amount (Waiting Approve)	0.00

## CLAIM POLICY

- 1) Any claims which are not properly submitted with the relevant supporting documents or are not in accordance return to the respective employees.
- 2) All original supporting documents (bills, invoices, receipts, etc.) need to be attached with the claims. Where any supporting documents, an explanation must be provided and send to HR department before 15<sup>th</sup> of the month.
- 3) All claims for expenses incurred or entitlement of benefits must be submitted within a period of two (2) mont expenses or entitlement. Any claims submitted after the two (2) months validity period will not be entertained.

eClaims Application Form    Claim Particular    eClaims Submitted Record

Got Attachment?

Employee No: \*

Welfare Code \*

Doc Date

Posting Date 14/9/2020

Amount \*

Remark

Step 1

**General** | e-Pay | e-Employee | e-Leave | e-OT | e-OT Plan | Attendance | e-Claims

Current Pay Period  
Current Pay Period: **201812**

General Setting - Cut Off

No Payroll License?

Current Attendance Period:

CutOff Start:  CutOff End:

*\* This setting used by CallService - Import Approve Plan OT to OT Approval Form, e-Attendance Check Close Period.*

Themes

Layout: **SoftOrange; SoftOrange** ▼

SMS

SMS Method:  ▼

File Upload

Maximum File Size:  MB

Maximum File Attachment:

File Upload Format:  (Example: .jpg,.gif)

Step 2: HR must specify file format allowed to upload in this text box. If this field keep BLANK, employee will upload failed with their supporting documents.

## How HR Check All Pending Claims (Welfare)?

Before HR Administrator do their payroll calculation, they need to know whether still got any pending claims still exist in e-Claims system or not. They must make sure all claims already submit and exist inside iFLEXI HRMS payroll system.

How they check pending Claims which still waiting approver's action? HR must login to e-Staff system, and go to below menu:

**Step 1**

Home | e-Employee | e-Leave | e-Payslip | e-Claims | **e-Claims (Welfare)** | Admin

Claims Activity (Welfare) | Supervisor Menu (Welfare) | Claims General Setting (Welfare) | Claims Reports (Welfare) | Claims Administration (Welfare)

Checklist - Pending Claims (Welfare)  
Claims Approve - Cancel (Welfare)

**Step 2**

Page 1 of 3 (232 items) < 1 2 3 >

Drag a column header here to group by that column

ID	EmpNo	Name	Posting Date	Level	Benefit Code	Amount	Approve Amount	Doc Date	Remark	Approval	Got Backup?	Created Date
CLA-14/09/20-002047	KL0013	██████ BT LAGATUWO	14-Sep-20	1	MEDICAL	35.00	35.00	12-Sep-20	CLAMIS KLINIK	MOHAMED HAJA RAJIBUDEEN BIN SM SHAIK MOHAMED,	N	14-Sep-20 09:38:35
CLA-14/09/20-002051	KL0025	██████ NG	14-Sep-20	1	MEDICAL	24.00	24.00	11-Sep-20		SILAS MAGAKUMAR DAS,	N	14-Sep-20 09:45:12
CLA-12/09/20-002046	N00228	██████ BINTI MATALI	12-Sep-20	2	MEDICAL	35.00	35.00	11-Sep-20		SHAHRLIL B DATUK DR. HJ. MOHAMED HANIFFA, SHARON B DATUK DR. HJ. MOHAMMED HANIFFA,	N	12-Sep-20 10:08:13
CLA-11/09/20-002044	A00236	██████ ABD MUTALIB	11-Sep-20	1	MEDICAL	30.00	30.00	10-Sep-20		VERONICA CHUA POH CHOO,	N	11-Sep-20 08:20:42
CLA-11/09/20-002045	KL0048	██████ DHLI BIN SUHAINI	11-Sep-20	1	MEDICAL	35.00	35.00	19-Aug-20		NG KOK WENG,	N	11-Sep-20 16:02:31

# How HR Cancel Approve Claims (Welfare)?

Please note for any Claims which already approve by final level of approver and already go to iFLEXI HRMS Payroll system, employee/ supervisor or approver cannot cancel approved claims anymore. They must contact HR regarding approve claims which they want to cancel.

How HR cancel approved claims? HR CANNOT go to iFLEXI HRMS Payroll system to cancel claims as those claims is approved by approver from e-Claims system. HR must login to e-Claims system to cancel those approved claims.

The screenshot shows the navigation path in the e-Claims (Welfare) system. The top menu includes 'Payslip', 'e-Claims', 'e-Claims (Welfare)', and 'Admin'. Under 'e-Claims (Welfare)', there are sub-menus for 'Welfare)', 'Claims General Setting (Welfare)', 'Claims Reports (Welfare)', and 'Claims Administration (Welfare)'. A dropdown menu under 'Claims Administration (Welfare)' shows 'Checklist - Pending Claims (Welfare)' and 'Claims Approve - Cancel (Welfare)'. A red arrow labeled 'Step 1' points to 'Claims Approve - Cancel (Welfare)'. Below this, the 'Claims Approve (Welfare) - Cancel' page is shown. It features a search bar with 'Emp No: A00250' and 'Posting Date From: ' To: ' fields, along with 'Refresh' and 'Export Approve Claims (Cancelled) To Excel' buttons. A red arrow labeled 'Step 2: ✓ this box.' points to a checkbox in the first column of a table. The table has columns: '#', 'Action', 'EmpNo', 'Name', 'Posting Date', 'Benefit ID', 'Benefit Code', 'Claims Amount', 'Approve Amount', 'Doc Date', 'Ref. No.', 'Remark', 'Attachment', and 'Approver'. The table contains one row with the following data: '#', 'Action', 'A00250', 'BINTI MOHD SALEH', '06-Sep-2020', 'CLA-04/09 /20-002034', 'MEDICAL', 'RM35.00', 'RM35.00', '03-Sep-2020', 'Ref. No.', 'Remark', 'Attachment: 03092020\_polklmk 20209411210.pdf', and 'Approver: LONG'. A red arrow labeled 'Step 3' points to a 'Cancel Claims (Welfare)' button at the bottom left of the page.

Step 1

Step 2: ✓ this box.

Step 3

#	Action	EmpNo	Name	Posting Date	Benefit ID	Benefit Code	Claims Amount	Approve Amount	Doc Date	Ref. No.	Remark	Attachment	Approver
	<input type="checkbox"/>	A00250	BINTI MOHD SALEH	06-Sep-2020	CLA-04/09 /20-002034	MEDICAL	RM35.00	RM35.00	03-Sep-2020			03092020_polklmk 20209411210.pdf	LONG

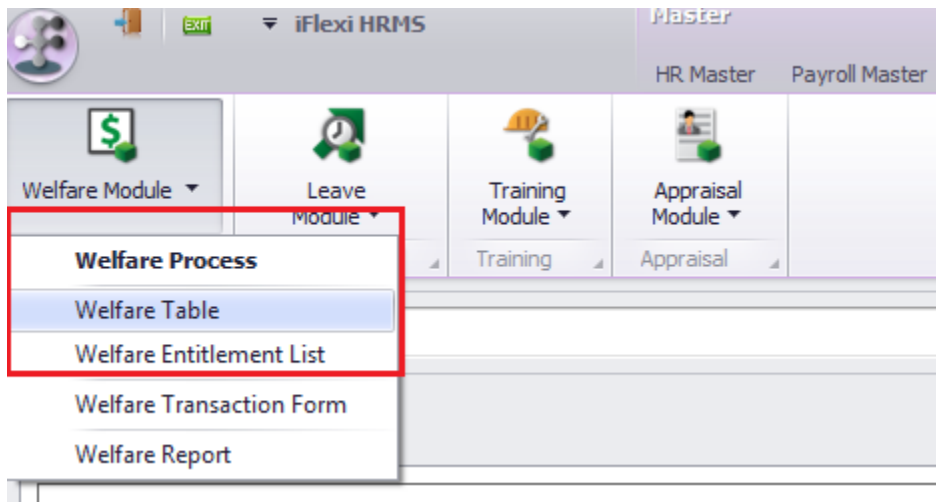


## Some Tips before LIVE e- Claims Module (Welfare)?

- HR Administrator need to take notes for WELFARE Module in iFLEXI HRMS Payroll system before LIVE the e- Claims Module.

### Welfare Table

- Make sure you already create Welfare Table, refer to below screen shot:








The screenshot shows the 'Welfare Table Master' screen. At the top, there are four action buttons: 'Add' (with a green plus icon), 'Edit' (with a pencil icon), 'Delete' (with a red X icon), and 'Refresh' (with a blue circular arrow icon). Below the buttons is a table with the following data:

Welfare Table Master	
Welfare Table	Description
⊕ MEDICAL	MEDICAL CLAIM
⊕ MEDICAL 2018	MEDICAL CLAIM POLICY 2018

## Employee Master – Welfare Table

- Please make sure you already assign Welfare Table for every employees in Employee Master, refer to below screen shot:

**Employee Master**

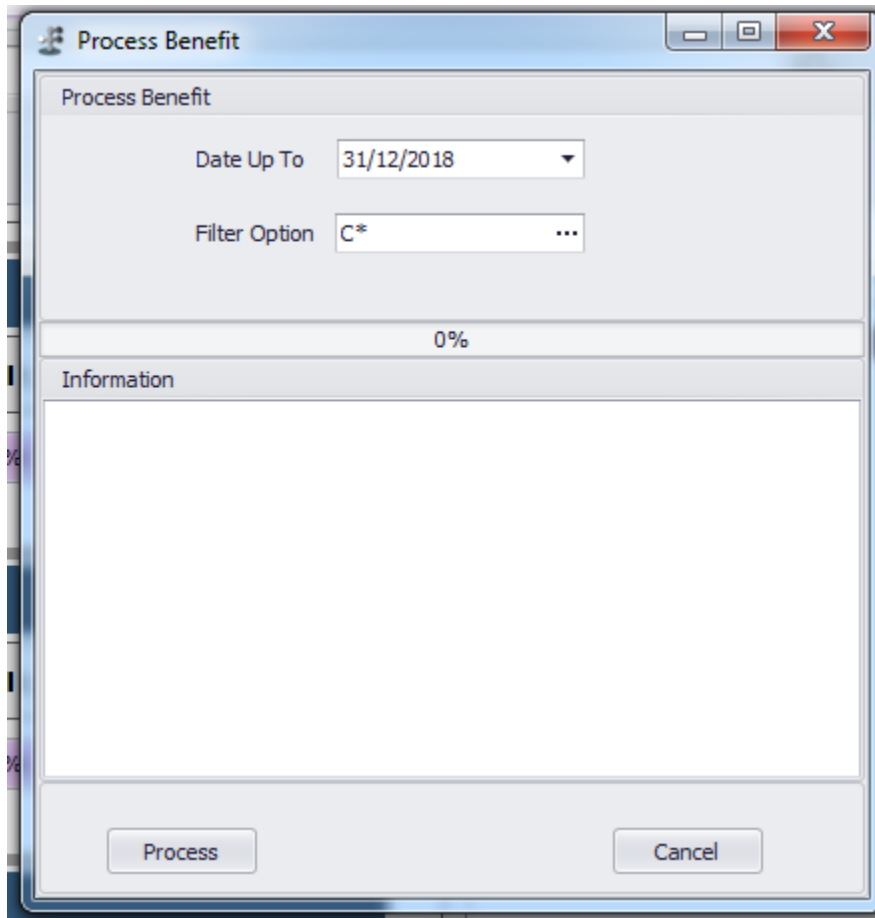
 New  Edit  Print  Delete  Refresh  Active  Non-Active

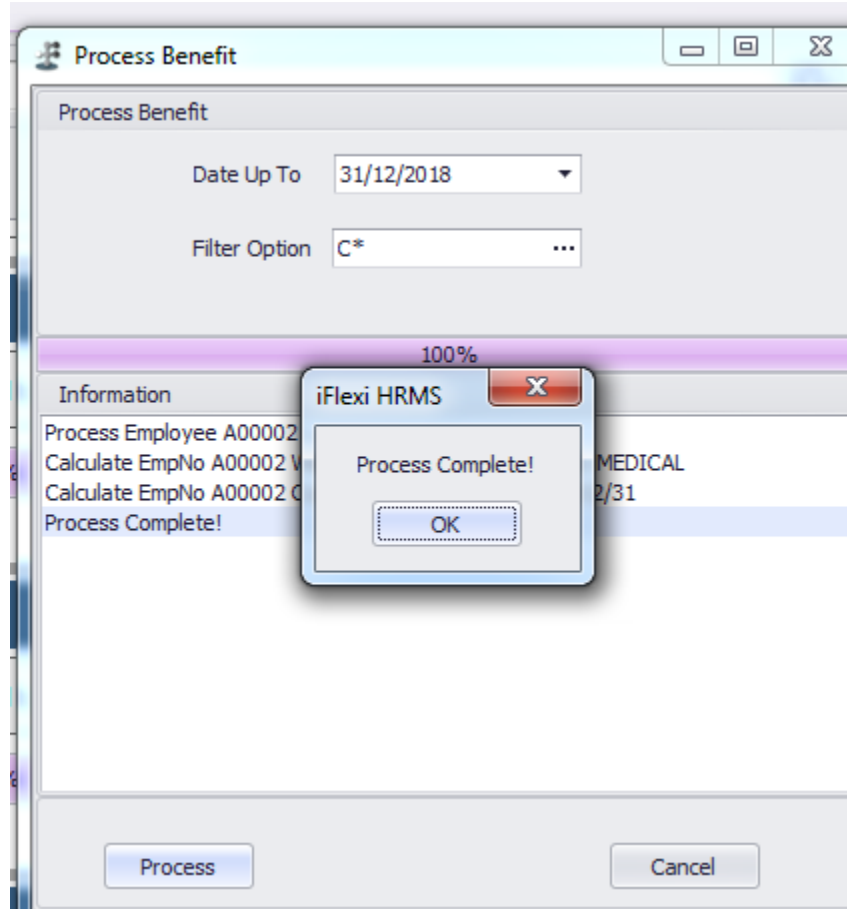
Drag a column header here to group by that column

Employee No	Name	EIS Contri...	Contract Date	Hire Date	Confirm D...	Pay Mode	Department	A...	Welfare Table
F00053	[REDACTED]	Y		25/04/2016	25/07/2016	BANK	KK-Physio	Y	MEDICAL
F00055	[REDACTED]	Y		03/05/2016	03/08/2016	BANK	KK-Biomed	Y	MEDICAL
F00056	[REDACTED]			04/07/2016	04/10/2016	CASH	Marketing	Y	MEDICAL
F00059	[REDACTED]			21/06/2017	21/06/2017	BANK	English	Y	MEDICAL
F00060	[REDACTED]	Y		01/08/2017	31/10/2017	BANK	Dentistry	Y	MEDICAL
G00004	[REDACTED]			02/09/2011	02/12/2011	BANK	Medicine	Y	MEDICAL
G00012	[REDACTED]			01/04/2013	01/07/2013	BANK	Medicine	Y	MEDICAL
G00014	[REDACTED]		28/01/2015	15/01/2014	28/01/2015	BANK	Marketing	Y	MEDICAL
G00015	[REDACTED]	Y		07/04/2014	07/07/2014	BANK	Registrar	Y	MEDICAL
G00016	[REDACTED]		27/05/2014	21/05/2014	21/05/2014	BANK	Medicine	Y	MEDICAL

## Welfare Process

- You must do Welfare Process for every employees who will using e-Claims module to submit their Claims for approvers.
- Please refer to below screen shot to show you how to process Welfare for every employees:

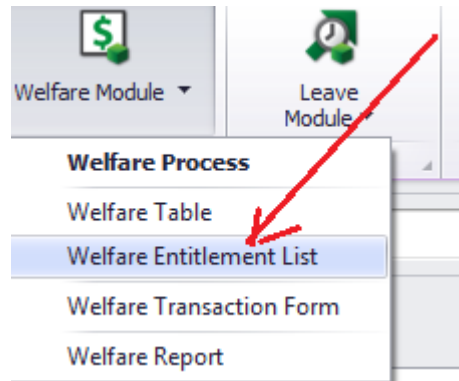




- You will see below message "Process Complete!" after you process welfare successfully.

## Welfare Entitlement Listing

- After you do the process Welfare, the system will show each employees' welfare entitlement listing by clicking on below link:



**Employee Benefit Record**  Show Active  Show Inactive Refresh Close

Employee Benefit Record

Drag a column header here to group by that column

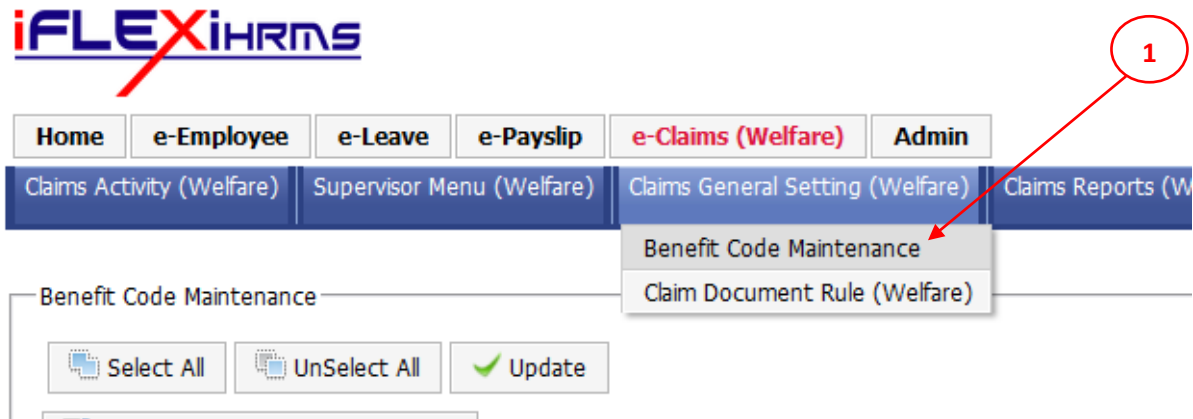
Emp No	Name	Welfare Table	Benefit Code	Before Entitlement	Entitlement	Usage	Adjust	Balance	Yos	Update On	Explanation
123456789		MEDICAL	MEDICAL	0.00	200.00	0.00	0.00	200.00	2.00	28/02/2018	<a href="#">Explanation</a>
A00002		MEDICAL	MEDICAL	0.00	200.00	0.00	0.00	200.00	10.00	31/12/2018	<a href="#">Explanation</a>
A00007		MEDICAL	MEDICAL	0.00	200.00	0.00	0.00	200.00	11.00	28/02/2018	<a href="#">Explanation</a>
A00008		MEDICAL	MEDICAL	0.00	200.00	0.00	0.00	200.00	12.00	28/02/2018	<a href="#">Explanation</a>
A00012		MEDICAL	MEDICAL	0.00	200.00	35.00	0.00	165.00	12.00	28/02/2018	<a href="#">Explanation</a>

**\*Notes: If you missed out any step as above, employees will failed to submit their Claims through e-Claims module.**

## Benefit Code Maintenance (start from ESS version: 1.0.40.0)

Allow HR enable/disable certain benefit code.

Step 1: Click on "Benefit Code Maintenance" under e-Claims (Welfare)



**iFLEX HRMS**

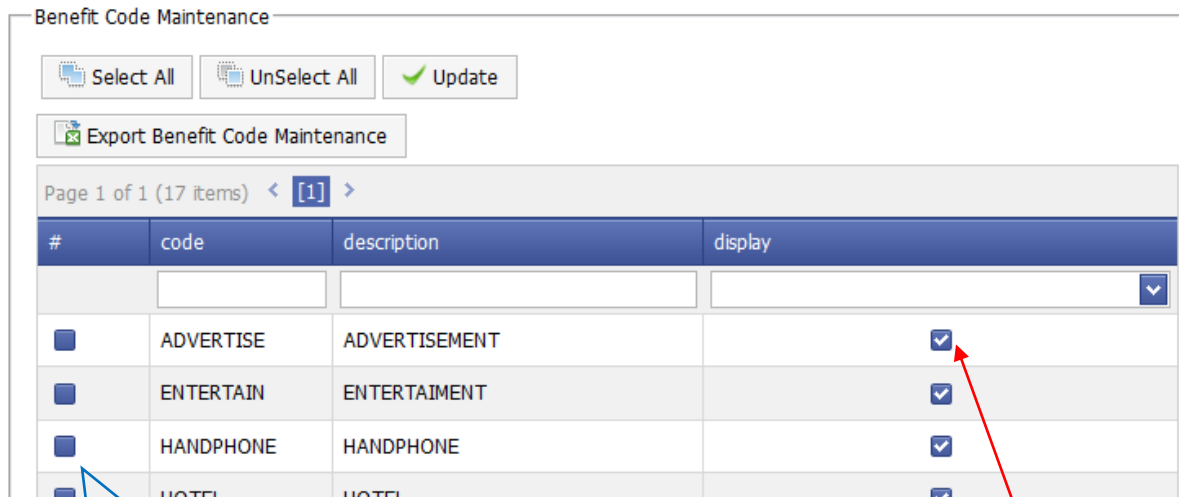
Home e-Employee e-Leave e-Payslip **e-Claims (Welfare)** Admin

Claims Activity (Welfare) Supervisor Menu (Welfare) Claims General Setting (Welfare) Claims Reports (Welfare)

Benefit Code Maintenance  
Claim Document Rule (Welfare)

Select All UnSelect All Update

Step 2: Enable/ disable Benefit Code



Benefit Code Maintenance

Select All UnSelect All Update

Export Benefit Code Maintenance

Page 1 of 1 (17 items) < [1] >

#	code	description	display
<input type="checkbox"/>	ADVERTISE	ADVERTISEMENT	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ENTERTAIN	ENTERTAINMENT	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HANDPHONE	HANDPHONE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HOTEL	HOTEL	<input checked="" type="checkbox"/>

### How to disable benefit code?

- ✓ the box in front of the record, and click on "Update" button.

If you see ✓ here, mean this benefit code is enable and will display in claims application form.

### Important Notes:

If customer already using e-Claims module (Welfare), you need to import ALL benefit codes from iFlexiHRMS database into ESS database. Below SQL Script you need to run in ESS database:

```
declare @code varchar(10)
declare @description varchar(40)

DECLARE db_cursor CURSOR FOR
SELECT code,description FROM [iFlexi_XXXX].dbo.[MiscMaster] WHERE ftype='WELFR'

OPEN db_cursor

FETCH NEXT FROM db_cursor INTO @code,@description
IF(NOT EXISTS(SELECT 1 FROM dbo.BenefitCodeMaster))
    WHILE @@FETCH_STATUS = 0
        BEGIN
            INSERT INTO dbo.BenefitCodeMaster(code,description,display)VALUES(@code,@description,'Y');
            FETCH NEXT FROM db_cursor INTO @code,@description
        END

CLOSE db_cursor
DEALLOCATE db_cursor
```

### Notes:

- [iFlexi\_XXXX]. Change iFlexiHRMS database name according to different customer.