

Subcontractor Portal – Instructions for vendors

How to Navigate the Claims Dashboard?



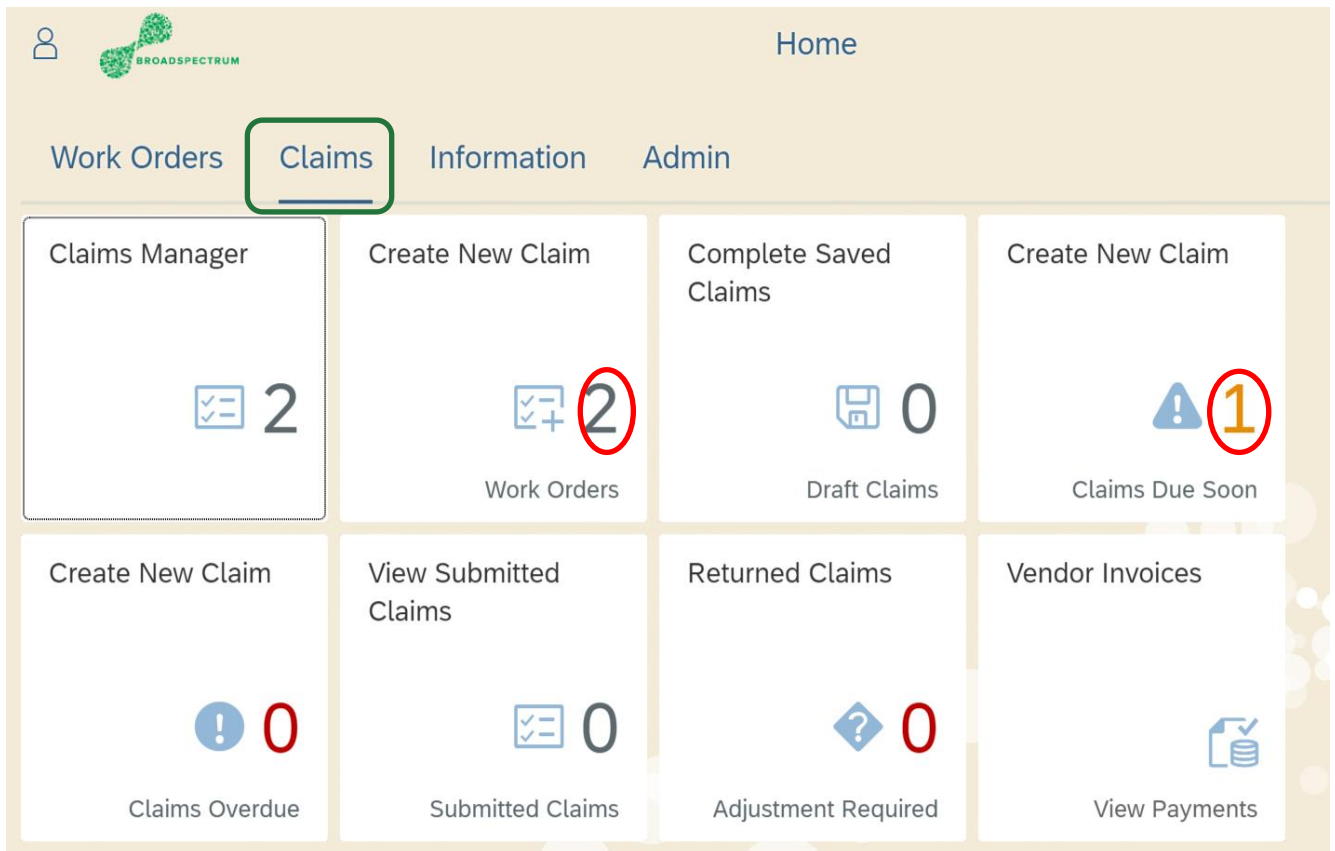
The purpose of this document is:

- to define a common language used throughout the training documents and videos
- to introduce the look and feel of claims

The Claims Dashboard

The Claims Dashboard includes the following files:

1. Claims Manager
2. Create New Claims
3. Complete Saved Claims
4. Create New Claim – Claim Due Soon
5. Create New Claim – Claims Overdue
6. View Submitted Claims
7. Returned Claims
8. Vendor Invoices



The number in each tile represents the number of work orders/claims in each status.

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Claims Tiles:

1. [Claims Manager Tile](#)

This is the master tile. All other tiles show a filtered view.
It provides an overview of all claims regardless of their status.

2. [Create New Claims Tile](#)

Displays new and draft claims soon to be submitted.

3. [Complete Saved Claims Tile](#)

Lists all Draft claims.

4. [Create New Claim – Claim Due Soon](#)

Displays unsubmitted claims for work orders between 3 and 5 days after the work order completion day.

5. [Create New Claim – Claims Overdue](#)

Displays unsubmitted claims for work orders that are more than 5 days after the work order completion date.

6. [View Submitted Claims](#)

Lists all submitted claims.

7. [Returned Claims](#)

Lists rejected vendor claims if they are outside the allowed tolerance. You will need to revise and resubmit the claim.

8. [Vendor Invoices](#)

Lists all vendor invoices.

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Claims Look and Feel

When you click on one of the Work Orders Dashboard file, this is the view you see.

Claims Master List

This screen displays a list of claims.

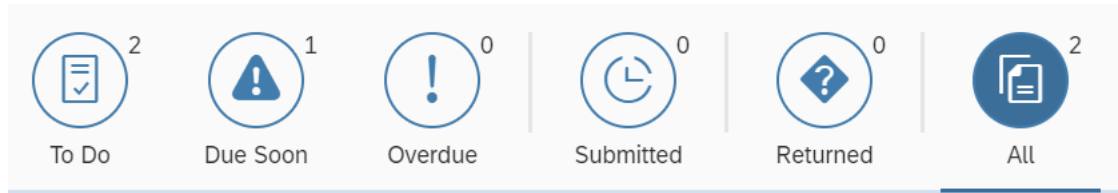
The screenshot shows the 'Claim Application' dashboard. At the top, there are navigation icons and a search bar. Below this is a row of filter buttons: 'To Do' (2), 'Due Soon' (1), 'Overdue' (0), 'Submitted' (0), 'Returned' (0), and 'All' (2). A purple box highlights these buttons with the text 'These are pre-defined filters.' To the right, a green box highlights the search and date selection fields with the text 'Manual search functions'. Below the filters are 'Search' and 'Reset' buttons. On the right side, there are three action buttons: 'Sort orders' (up/down arrows), 'Settings' (gear icon), and 'Export list to a file' (download icon). A yellow box highlights the 'Settings' button with the text 'Settings enables to customise the columns displayed'. The main table has the following columns: Work Order, Operation, Operation Description, WO Completed Date, Cust. Priority, Service Claim, Claim Status, Vendor Reference, Claim Due Date, and Claim Submitted Date. The second row of the table has the work order number '114642193' highlighted in a green box, with a callout box stating 'Clicking the work order number enables to view work order details.' The 'Create Claim' link in the 'Service Claim' column of this row is highlighted in a red box, with a callout box stating 'The Create Claim link opens the Claims screen'.

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Pre-Defined filters



To Do filter

Displays new and draft claims soon to be submitted.

Due Soon filter

Displays unsubmitted claims for work orders between 3 and 5 days after the work order completion day.

Overdue filter

Displays unsubmitted claims for work orders that are more than 5 days after the work order completion date.

Submitted filter

Displays claims that have been submitted.

Returned filter

Displays claims that have been rejected and require you to revise and resubmit.

Returned filter

Displays all claims regardless of status including new, draft and submitted.

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Claims Details

The claim has three sections:

- Claim header
- Services: list of claimable items
- Attachments

The screenshot shows the 'Claim Application' interface. At the top, there is a 'Claim Header' section containing 'Claim Number: 114642540 - 0010' and 'Purchase Order: 4803185251 - 00010'. Below this are two tabs: 'Services' and 'Documents'. The 'Documents' tab is highlighted with a red box and a red arrow pointing to it, with a text box stating: 'Documents Tab: you must attach the mandatory documents otherwise the claim cannot be submitted.' The 'Services' tab is highlighted with a green box and a green arrow pointing to it, with a text box stating: 'Services Tab: lists claimable items'. Below the tabs is a 'Vendor Total Amount Check:' field. The main section is a table of services with columns: Line, Service, Planned Qty, Confirmed Qty, Actual Qty, Curr., Unit Price (excl. GST), Total Amount, Comment, and Warranty. The table contains two rows of services. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Submit'. The 'Save' button is highlighted with a yellow box and a yellow arrow pointing to it, with a text box stating: 'To save the claim draft'. The 'Submit' button is highlighted with a red box and a red arrow pointing to it, with a text box stating: 'To save the final claim and submit it. The claim cannot be edited once submitted.'

Line	Service	Planned Qty	Confirmed Qty	Actual Qty	Curr.	Unit Price (excl. GST)	Total Amount	Comment	Warranty
10	30023314 TASK,TEST,FIRE,EMERGENCY COMMS AS DESIGN	1.200 H	0.000 H	1.200 H	AUD	15.00	\$ 18.00		⊗
20	30019599 TASK,SERVICE,SUPPLY,MATERIAL	1 EA	0 EA	1 EA	AUD	1.00	\$ 1.00		⊗
Total:							\$19.00		

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Claim Header

Claim Application ▾

< Work Order number

Claim Number:

Work Order: 114642540 0010 Work order Operation number

Purchase Order: 4803185251 00010 Purchase order number

Services >> Documents

*Vendor Reference Number:

Vendor Total Amount Check:

Service +

Line	Service	Planned Qty	Confirmed Qty	Actual Qty		Curr.	Unit Price (excl. GST)	Total Amount	Comment	Warranty	
10	30023314 TASK,TEST,FIRE,EMERGENCY COMMS AS DESIGN	1.200 H	0.000 H	1.200 H		AUD	15.00	\$ 18.00			
20	30019599 TASK,SERVICE,SUPPLY,MATERIAL	1 EA	0 EA	1 EA		AUD	1.00	\$ 1.00			
Total:								\$19.00			

[Add a new service](#)

Cancel Save **Submit**

The Claim Header contains information such as:

- The work order number
- The work order operation number
- The purchase order number
- Two tabs:
 - o Services
 - o Attachments

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How to Navigate the Claims Dashboard?



Services Tab

Claim Application ▾

Claim Number:
 Work Order: 114642540 - 0010
 Purchase Order: 4803185251 - 00010

Services Documents

*Vendor Reference Number:
 Vendor Total Amount Check:

Consumed quantity and the actual unit price may be edited.

Line	Service	Planned Qty	Confirmed Qty	Actual Qty	Curr.	Unit Price (excl. GST)	Total Amount	Comment	Warranty
10	30023314 TASK,TEST,FIRE,EMERGENCY COMMS AS DESIGN	1.200 H	0.000 H	<input type="text" value="1.200"/> H	AUD	<input type="text" value="15.00"/>	\$ 18.00	<input type="text"/>	<input type="checkbox"/>
20	30019599 TASK,SERVICE,SUPPLY,MATERIAL	1 EA	0 EA	<input type="text" value="1"/> EA	AUD	<input type="text" value="1.00"/>	\$ 1.00	<input type="text"/>	<input type="checkbox"/>
Total:							\$19.00		

Add a new service

Cancel Save Submit

List of claimable items

Click here to add additional services or items to claim.

To add comments against the claimed item.

Running Total

To delete a claimable item.

The services tab includes information such as:

- The vendor reference number (this could your invoice number)
- The vendor total amount check (This is optional. Used to enter the invoice total value. The system will reconcile this value against the running total and indicate when both match)
- List of services or claimable items

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Documents Tab

Claim Application ▾

Claim Number:
Work Order: 114642540 - 0010
Purchase Order: 4803185251 - 00010

Services > Documents

Click here to upload documents

<input type="checkbox"/> Document Type	Number of Required Documents	Number of Attached Documents	Upload	Status
<input type="checkbox"/> T01-Asset Reports	0	1	<input type="button" value="Upload"/>	✓
<input type="checkbox"/> T02-Maintenance Document	0	0	<input type="button" value="Upload"/>	✓
<input type="checkbox"/> T24-Ops and MaintManual	0	0	<input type="button" value="Upload"/>	✓
<input type="checkbox"/> T28-Supporting AP Docs	0	0	<input type="button" value="Upload"/>	✓

T01-Asset Report.docx
Uploaded By: Cindy Jonquille · Uploaded On: Tue May 28 2019 10:00:00 GMT+1000 (Australian Eastern Standard Time) · File Size: 996962

Cancel Save Submit

Displays list of attached documents

To delete attached document