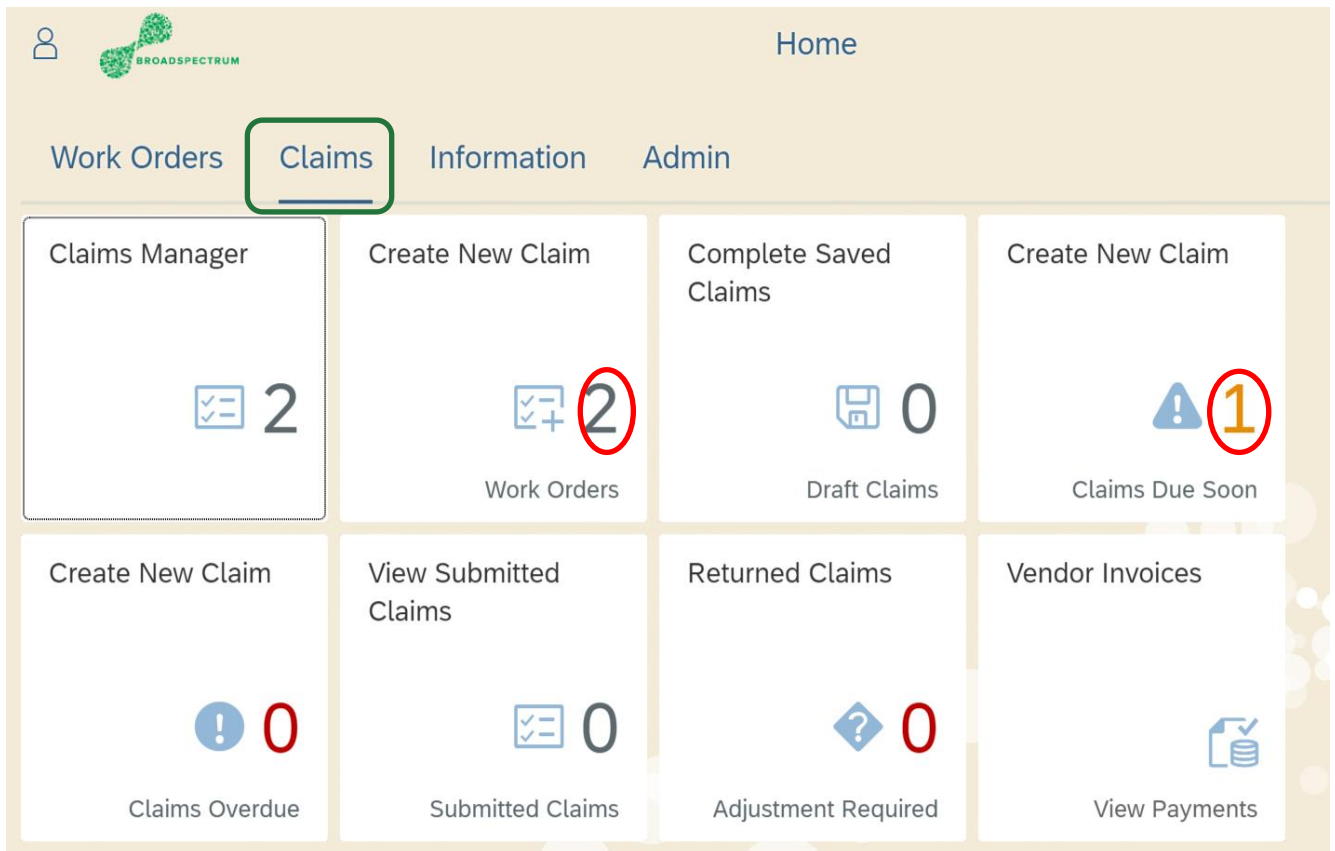# How to Navigate the Claims Dashboard?

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 tiles:

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.

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.

How to Navigate the Claims Dashboard?

Claims Look and Feel

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

Claims Master List
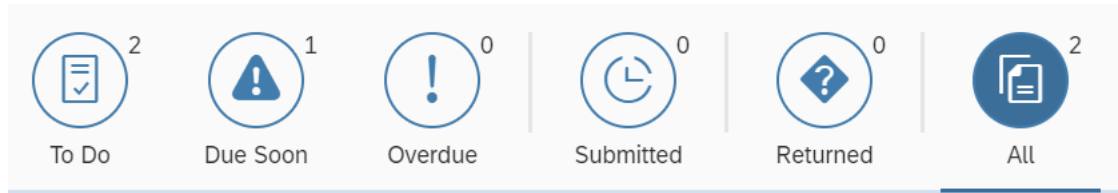
This screen displays a list of claims.

How to Navigate the Claims Dashboard?

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.

How to Navigate the Claims Dashboard?

Claims Details

The claim has three sections:

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

How to Navigate the Claims Dashboard?

Claim Header

The Claim Header contains information such as:

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

How to Navigate the Claims Dashboard?

Services Tab

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

How to Navigate the Claims Dashboard?

Documents Tab

Claim Application ⌄

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Claim Number:

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

Services » Documents

Click here to upload documents

Documents

	Document Type	Number of Required Documents	Number of Attached Documents	Upload	Status
☐	T01-Asset Reports	0	1	⊡	✓
☐	T02-Maintenance Document	0	0	⊡	✓
☐	T24-Ops and MaintManual	0	0	⊡	✓
☐	T28-Supporting AP Docs	0	0	⊡	✓

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