



## Work Instruction

### Accepting, Approving, Disputing Claims for Payment

To accept, approve or dispute claims for payment, complete the following steps:

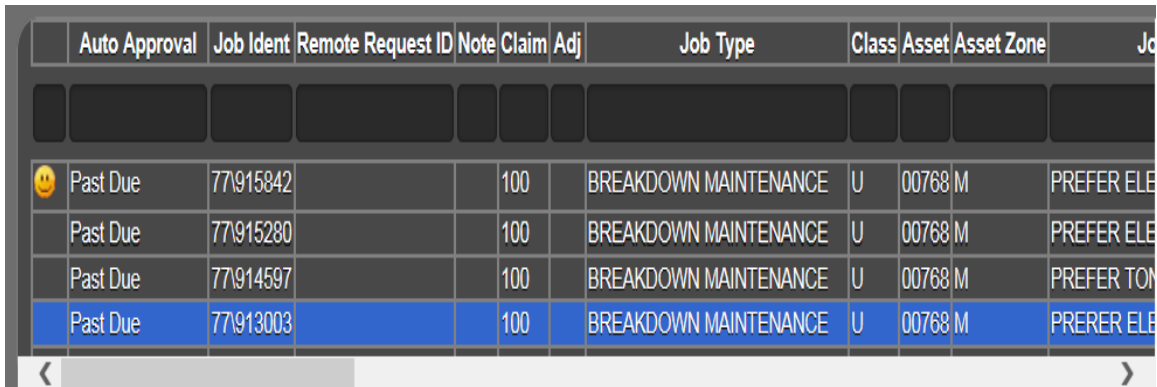
1. Select the *Asset* from the Asset List pane.
2. Select the Approvals tab.
3. Select the Claim Type radio button (e.g. *Claims To Be Accepted* or *Claims To Be Approved*).
4. Long left- click on the job and select the Job Expenses option from the Quick Menu. (**Note:** This will display granular details regarding job expenses (e.g. material, callout fee, equipment etc).

The screenshot shows a software interface with a 'Job Expenses' option circled in red in the 'Quick Menu'. Below it, a 'Job Expense Details' dialog box is open, displaying a table of expense data for job 77831634.

Job	77831634	BUILDING JAN 2015 PREVENTATIVE MAINTENANCE 2014-2015										
Vel Amt	Mileage Amt	Accom Amt	Remote	Oncost Amt	Lab Hrs	A/Hours	Lab Hrs	D/Time	Lab Hrs	Total Lab Hrs	Travel Hrs	A/Hours
0.00	0.00	0.00		0.00	0.00		0.00		0.00	0.00	0.00	0.00
0.00	0.00	0.00		0.00	0.00		0.00		0.00	0.00	0.00	0.00
0.00	0.00	0.00		0.00	0.00		0.00		0.00	0.00	0.00	0.00
0.00	0.00	0.00		0.00	0.00		0.00		0.00	0.00	0.00	0.00
0.00	0.00	0.00		0.00	0.00		0.00		0.00	0.00	0.00	0.00
0.00	0.00	0.00		0.00	4.00		0.00		0.00	4.00	0.00	0.00

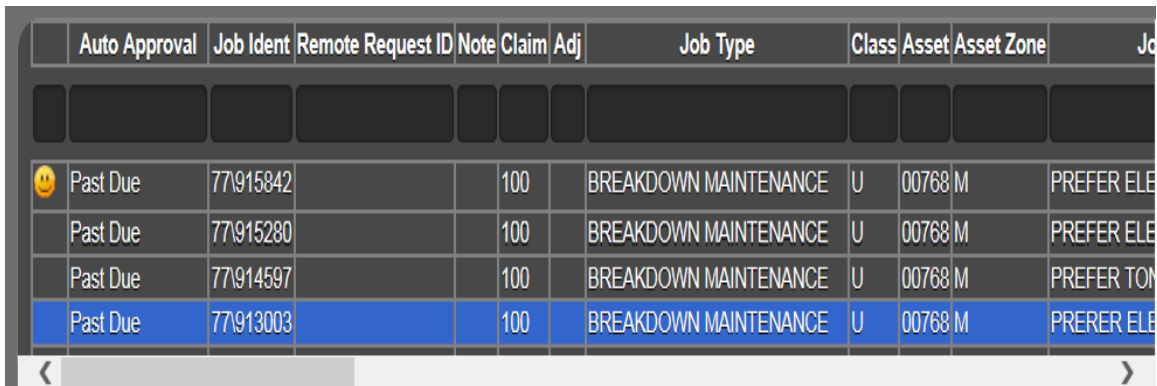
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- 4.1. To accept a job, complete the following steps:
- Click the Authorise button.
  - Double-click any job to be accepted in the display window.
  - Ensure the yellow smiley face displays.
  - Click the Submit button to *accept* the selected job(s).



	Auto Approval	Job Ident	Remote Request ID	Note	Claim	Adj	Job Type	Class	Asset	Asset Zone	Job
☺	Past Due	77915842			100		BREAKDOWN MAINTENANCE	U	00768	M	PREFER ELE
	Past Due	77915280			100		BREAKDOWN MAINTENANCE	U	00768	M	PREFER ELE
	Past Due	77914597			100		BREAKDOWN MAINTENANCE	U	00768	M	PREFER TOM
	Past Due	77913003			100		BREAKDOWN MAINTENANCE	U	00768	M	PRERER ELE

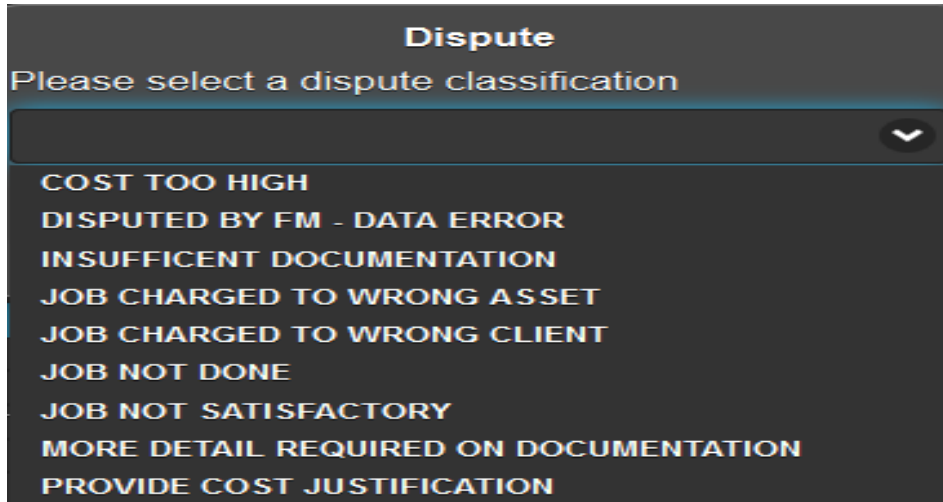
- 4.2. To approve claims for payment, complete the following steps:
- Click the Authorise button.
  - Double-click any job to be approved in the display window.
  - Ensure the yellow smiley face displays.
  - Click the Submit button to *approve* the selected job(s).




	Auto Approval	Job Ident	Remote Request ID	Note	Claim	Adj	Job Type	Class	Asset	Asset Zone	Job
☺	Past Due	77915842			100		BREAKDOWN MAINTENANCE	U	00768	M	PREFER ELE
	Past Due	77915280			100		BREAKDOWN MAINTENANCE	U	00768	M	PREFER ELE
	Past Due	77914597			100		BREAKDOWN MAINTENANCE	U	00768	M	PREFER TOM
	Past Due	77913003			100		BREAKDOWN MAINTENANCE	U	00768	M	PRERER ELE

4.3. To dispute claims for payment, complete the following steps:

- Click the Dispute button.
- Double-click any job to be disputed in the display window. (**Note:** The *Dispute* box will be displayed).
- Select a *dispute reason* from the Dispute classification dropdown list.



- Click the Submit button.
- Ensure the red unhappy face displays.

Auto Approval	Job Ident	Remote Request ID	Note/Claim Adj	Job Type	Class	Asset	Asset Zone	Job Description
	Past Due	77915842	100	BREAKDOWN MAINTENANCE	U	00768	M	PREFER ELECTRIC RESULTS/TROY/BLD 1
	Past Due	77915280	100	BREAKDOWN MAINTENANCE	U	00768	M	PREFER ELECTRIC RESULTS/ATT TROY/B
	Past Due	77914597	100	BREAKDOWN MAINTENANCE	U	00768	M	PREFER TONY@ELECTRIC RESULTS/BLD
	Past Due	77913003	100	BREAKDOWN MAINTENANCE	U	00768	M	PRERER ELECTRICAL RESULTS/TROY/BLD
	Temporary	77910532	100	BREAKDOWN MAINTENANCE	U	00768	M	PREFER FIDESAFE SERVIC/ANNUAL EL

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4.4. To clear an Authorise or Dispute mark, complete the following steps:

- Click the Clear button.
- Double-click any job where the mark is to be cleared.
- Click the Cancel button to clear all marks.

Refer diagram below

The screenshot displays a software interface with a navigation bar at the top containing tabs: Welcome, Budget, Schedules, Work Request, Agreement, Job Tracking, Approvals, Job History, Job Billing, and Invoice. Below the navigation bar is a table with columns: Note, Claim, Adj, Job Type, and Cla. The table contains 18 rows of data, each starting with a smiley face icon and '2 days'. The 6th row is highlighted in blue. A modal window titled 'Claim Type' is open on the right, showing radio buttons for 'All', 'To Be Accepted', 'To Be Approved', and 'To Be Invoiced'. Below these are buttons for 'Authorise', 'Dispute', 'Clear', and 'Submit'. Red boxes with white text provide instructions: 'Double click the job to be marked' points to the 6th row of the table; 'Select the Claim Type' points to the radio buttons; 'Select Action button' points to the 'Dispute' button; and 'Submit or Cancel selections' points to the 'Submit' and 'Clear' buttons.

Note	Claim	Adj	Job Type	Cla
😊 2 days	10537113		BREAKDOWN MAINTENANCE	U
😊 2 days	10536534		BREAKDOWN MAINTENANCE	U
😊 2 days	10535905		CLEANING	U
😊 2 days	10535902		CLEANING	U
😡 2 days	10535125		BREAKDOWN MAINTENANCE	U
😡 2 days	10535089		BREAKDOWN MAINTENANCE	U
😊 2 days	10532290		BREAKDOWN MAINTENANCE	U
😊 2 days	10498970		PREVENTATIVE MAINTENANCE	U
😊 2 days	10498191		HYGIENE	U
😊 2 days	77917525	Y	BREAKDOWN MAINTENANCE	U
😊 2 days	77916955		BREAKDOWN MAINTENANCE	U
😊 2 days	77915788		MINOR WORKS	U
😊 2 days	77915500		BREAKDOWN MAINTENANCE	U
😊 2 days	77911398		BREAKDOWN MAINTENANCE	U
😊 2 days	77907148		BREAKDOWN MAINTENANCE	U
😊 2 days	77881675		MINOR WORKS	P
😊 2 days	77823438		PREVENTATIVE MAINTENANCE	S
😊 2 days	77823437		PREVENTATIVE MAINTENANCE	S