



# Benefit Administrator Guide





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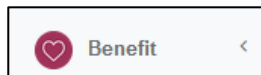
## Introduction

Benefit module is designed to help to manage your flexi-benefits policies. This guide will show you how to set up a pool of benefit options for your employees and also how to process the claims submitted by your employees as an Administrator.

## Benefits Configuration

### General Configuration

This configuration is a general company-wide setting, which will apply to all users in the system.



**Step 1:** Go to



**Step 2:** Click on

This brings you to the Setup page. On this page, please complete the fields.

Setup

Currency

Base currency:

Note: Once a claim has been submitted, the currency cannot be changed.

Show currency symbol.

Transfer to payroll

For a successful transfer to payroll, please make sure the Expense Base Currency is the same as the Payroll currency. Also make sure that the Benefit Type is mapped to Pay Elements.

Transfer to payroll.

- **Currency** – The base currency that claims will be submitted in benefits. You may tick the box if you would like the currency symbol to be reflected on the form.
- **Transfer to payroll** – Tick this option If you would like to transfer the approved benefit claims into the Payroll Module.


**NOTE:** Please ensure the **Benefit Type** is mapped to the corresponding pay elements in your Payroll module configuration.




**Step 3:** Click on the button to save the setting you have made.

## Benefits Categories Setup

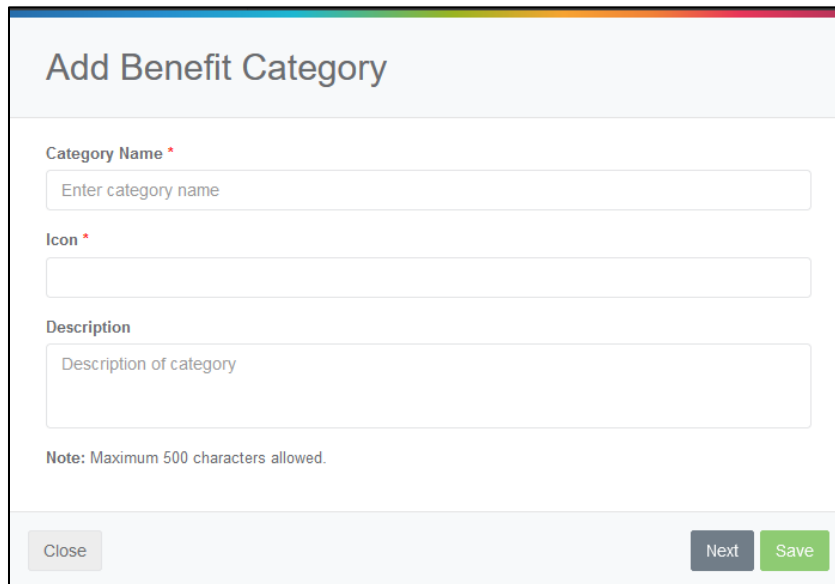
To set up the options of benefits available in your company, go to categories.

**Step 1:** Go to 

**Step 2:** Click on 


**Step 3:** Click on  button on the top right-hand section of the Categories page.

**Step 4:** Update the fields of the Benefit type you are creating.



The screenshot shows a form titled "Add Benefit Category". It contains three input fields: "Category Name" with a red asterisk and a placeholder "Enter category name"; "Icon" with a red asterisk and a dropdown menu; and "Description" with a placeholder "Description of category". Below the description field is a note: "Note: Maximum 500 characters allowed." At the bottom of the form are three buttons: "Close", "Next", and "Save".

- **Category Name** – Enter the name for the benefit group.
- **Icon** – Click the dropdown list to select your preferred icon.
- **Description** – Enter description of what this benefit category is for. Keep this explanation within the 500 characters limit.

**Step 5:** Click on the  button to proceed to the next section of setting benefit policy for this category created.



## Benefit Policy

Add Benefit Policy

**Step 1:** To create benefit policies, go to the Benefit Types tab and click

**Step 2:** Fill in policy details for category.

The screenshot shows the 'Add Benefit Policy' form under the 'General' category. The category description is 'Other flexi-benefit which include claims for fitness, gyms and wellness.' The form has a progress bar with two steps: 'BENEFIT POLICY' (active) and 'BENEFIT TYPE'. Below the progress bar, there are two input fields: 'Benefit Policy \*' (Policy name) and 'Entitlement Amount (per year) \*' (Amount). There is a toggle switch for 'Set up entitlements based on years of service' which is currently turned off. A '+ Add More Policy' link is at the bottom.

- **Benefit policy\*** – The name of the benefit policy under this category.
- **Entitlement Amount (per year)\*** - Enter the total amount employee is entitled to for this Policy.

**Step 3:** If the entitlement amount increases based on the employee's years of services in the company, you may enable the option to setup entitlements based on years of service:

The screenshot shows the 'Set up entitlements based on years of service' form. The toggle switch is turned on. There are three input fields: 'No. of years after hire' (Number), 'Extra Entitlement Amount' (Amount), and 'Total Entitlement Amount after 0 year' (Amount). A '+ Add More Entitlements' link is at the bottom.

+ Add More Entitlements

**Step 4:** Click on

**Step 5:** To add more benefit policies to this category (e.g. different groups of employees are entitled to

+ Add More Policy

different amounts for this category), click on and repeat steps 6 – 8.



**Step 6:** Click on dropdown option to update the policy for new employees.

Policy for new employees

Benefit entitlement for new hires will be \*

-Select- ▾

- Select-
- Full Amount
- Prorated

**Step 7:** Update if benefit can be applied during a certain period for new employees.

Able to apply benefit

-Select- ▾ after join date

**Step 8:** Update the percentage that can be carried forward into the following year:

Carry Over Policy

Maximum carry over  % of previous year's entitlement amount

**Note:** Benefit balance will be carried forward on 1st January

Next

**Step 9:** Click on the [Next](#) button to proceed to the next part of setting the benefit types.

## Benefit Type

Add Benefit Types

**Step 1:** To create benefit types, go to the Benefit Types tab and click

Benefit Policy **Benefit Type**

Show 10 entries Search:

Benefit Type	Cap per Year	Cap per Claim	Action
General	300.00	40.00	<a href="#">✎</a> <a href="#">✕</a>

Showing 1 to 1 of 1 entries.

Back [Add Benefit Types](#)



**Step 2:** Enter the name of benefit type

**Benefit Type \***

This field is required

**Step 3:** Select option if attachments are *mandatory* or *optional* for employees

**Attachments \***

Mandatory  Optional


**Step 4:** If you require setting a limit for the benefit type, you may enable the capping options, per claim, per year or both. Enter the amount limit.



**Amount Capping (Turn off if not required)**

Cap per claim   
This field is required

Cap per year   
This field is required




**Step 5:** Click on the  button to save the setting you have made. Upon successful creation, you will see a new record added to benefit type:

Benefit Type	Cap per Year	Cap per Claim	Action
General	300.00	40.00	 

Showing 1 to 1 of 1 entries.

[Back](#) [Add Benefit Types](#)

To update or edit existing benefits created, click on the Pencil Icon  under Actions column.

To remove or delete existing benefit types created, click on the trashcan icon  under Actions column.

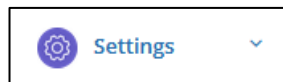


## Approval Configuration

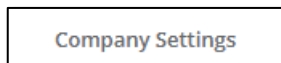
The approval flow for Benefit is available in the Company Settings level. Whether you have one approval flow for all staff or different ones per employee, you have the option to set it according to your business needs.

Employee Name	Dept	Approver Settings	Approver 1	Action
Adrian Lim Kuo Leong	Human Resource	Default	Manager	
Alana Jean Torres	Marketing	Default	Manager	
April Abril	Operations	Default	Manager	
Arya Stark	OPS-OPERATIONS	Default	Manager	
August Lj Jin Hui	OPS-F&B HOUSEKEEPING	Default	Manager	
Bernice Lim	CK-ADMIN&FINANCE	Default	Manager	
Bruno E. Mercury	ENGRG-SCES-Construction	Default	Manager	
celeste	Management	Default	Manager	
Harriet Yap		Default	Manager	
Helen Ang Mui San	OPS-F&B HOUSEKEEPING	Default	Manager	

**Step 1:** From the left menu, Go to



**Step 2:** Click on



then go to Approvals > Benefit.

Settings <

Employee Fields Training Access Levels Custom Fields Approvals

Custom Notifications

Company Settings

Benefit Expense

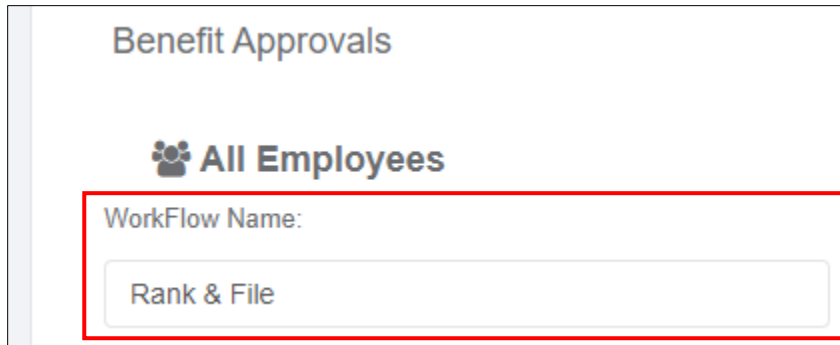
**Step 3:** Click



to get started.



**Step 4:** Enter the WorkFlow Name.



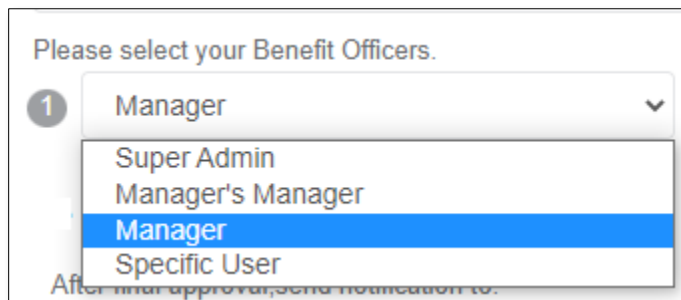
Benefit Approvals

All Employees

WorkFlow Name:

Rank & File

**Step 5:** Select the Approver for this WorkFlow.



Please select your Benefit Officers.

1 Manager

Super Admin

Manager's Manager

Manager

Specific User

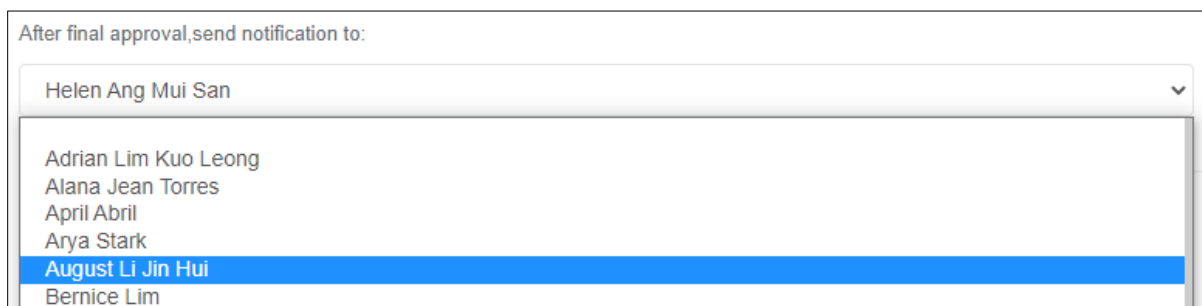
After final approval, send notification to:

- *Super Admin* – Superuser on the account
- *Manager* – The staff's assigned Supervisor (see User Admin)
- *Manager's Manager* – The assigned Supervisor of the submitter's Supervisor
- *Specific User* – anyone who is a Benefit User

[+ Add Approval Level](#)

**Step 6:** Click [+ Add Approval Level](#) should you need to add more levels.

**Step 7:** Select who should be notified after the final approval.



After final approval, send notification to:

Helen Ang Mui San

Adrian Lim Kuo Leong

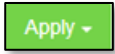
Alana Jean Torres

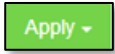
April Abril

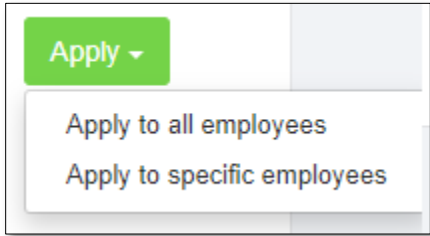
Arya Stark

August Li Jin Hui




Bernice Lim



**Step 8:** Click  to save, whether this WorkFlow is applicable for all employees or to specific user/s.



*'Apply to all employees' will update for all Benefit users, and the Approver Settings will show as Default:*

Employee Name	Dept	Approver Settings	Approver 1	Action
Adrian Lim Kuo Leong	Human Resource	Default	Manager	
Alana Jean Torres	Marketing	Default	Manager	
April Abril	Operations	Default	Manager	

*'Apply to specific employees' option will only save changes for selected employee/s, which will now be a considered a custom workflow.*

### Apply to specific Employees

Show 10 entries      Search:

<input type="checkbox"/>	Employee Name	Department
<input type="checkbox"/>	Adrian Lim Kuo Leong	Human Resource
<input type="checkbox"/>	Alana Jean Torres	Marketing
<input type="checkbox"/>	April Abril	Operations
<input type="checkbox"/>	Arya Stark	OPS-OPERATIONS
<input type="checkbox"/>	August Li Jin Hui	OPS-F&B HOUSEKEEPING
<input type="checkbox"/>	Bernice Lim	CK-ADMIN&FINANCE
<input type="checkbox"/>	Bruno E. Mercury	ENGRG-SCES-Construction
<input type="checkbox"/>	celeste	Management
<input type="checkbox"/>	Harriet Yap	Management
<input type="checkbox"/>	Helen Ang Mui San	OPS-F&B HOUSEKEEPING

Showing 1 to 10 of 37 entries      Previous Next

Close Save Changes



**Step 9:** To change from Default to a different workflow, click Edit (pen icon).

Employee Name	Dept	Approver Settings	Approver 1	Action
Sophia Tang Mei Rui	Operations	Default	Manager	

**Step 10:** Name the new WorkFlow and set Approvers.

Benefit Approvals

Sophia Tang Mei Rui

WorkFlow Name:  
Managers

Please select your Benefit Officers.  
1 Manager's Manager

+ Add Approval Level

After final approval, send notification to:  
celeste

**Step 11:** Click Apply - Save Custom Approval.

Apply ▾

Save Custom Approval

Apply to all employees

Apply to specific employees

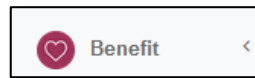
*Approver Settings will show as Custom:*

Employee Name	Dept	Approver Settings	Approver 1	Action
Sophia Tang Mei Rui	Operations	Custom	Manager's Manager	

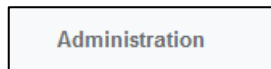


## Administration

### Adjustments



**Step 1:** To make any adjustments for your employee's benefits, go to



**Step 2:** Click on

**Step 3:** Complete the fields as required for the employee(s)


The screenshot shows the 'Adjustments' form in the JustLogin system. The form is divided into two tabs: 'Adjustments' (selected) and 'Benefit Users'. Below the tabs, there are two sub-sections: 'Adjustments' (selected) and 'History'. The form contains the following fields, each highlighted with a red box and labeled with a letter on the right:

- a** For Year: A dropdown menu with '-Select-' and a downward arrow.
- b** Benefit Category: A dropdown menu with '-Select-' and a downward arrow.
- c** Employees: A text input field with the placeholder 'Select employee'.
- d** Amount: A text input field with the placeholder 'Enter amount here' and a note below it: 'Note: For deductions, add minus symbol (-) before the amount.'
- e** Effectivity Date: A date picker field with the placeholder 'Select date' and a calendar icon.
- f** Remarks: A text input field with the placeholder 'Enter remarks here'.

Update the details for who you are doing the adjustment for:

- a) *For Year* – Select the year that the adjustment is being made for.
- b) *Benefit Category* – Select the Benefit category that you have set up. If this hasn't been set up, refer to the Configuration guide [here](#).
- c) *Employees* – Select which employee(s) this adjustment is being made for.
- d) *Amount* – the value of the claim adjustment.
- e) *Effectivity Date* – Select the date when this entitlement adjustment will be applied.
- f) *Remarks* – If there are any additional comments to supplement this claim, you may enter here.



**Step 4:** Click on the  button to confirm and submit the adjustment.

**Step 5:** Any adjustments done, will be reflected under the 'History' tab. You will be able to check all past adjustments that you have successfully saved here.

Adjustments **Benefit Users**

Adjustments **History**

For Year: 2022

Show 10 entries

Search:

Adjustment Type	Benefit Category	Adjusted For	Amount	Adjustment By	Adjusted On	Effectivity Date	Remarks
Credit	Medical	Vila	10.00	Vila	03/06/2022	03/06/2022	

Showing 1 to 1 of 1 entries.

### Benefit Users:

To check and update which employees are entitled and able to apply for benefits entitlements, you may go to Benefit Users.

**Step 1:** Ensure employees who are eligible and allowed to submit claims are ticked.

Adjustments **Benefit Users**

Show 10 entries

Search:

Employee	Email	Department	Benefits
George Stan	vila.justlogin+GeorgeStan@gmail.com	Operations	<input checked="" type="checkbox"/>
Dan Lim	vila.justlogin+Danlim@gmail.com	Operations	<input checked="" type="checkbox"/>
Harry Anderson	vila.justlogin+HarryAnderson@gmail.com	Operations	<input checked="" type="checkbox"/>
Lady Yap	vila.justlogin+ladyyap@gmail.com	Finance	<input checked="" type="checkbox"/>
Jen Pang	vila.justlogin+JenPang@gmail.com	Finance	<input checked="" type="checkbox"/>
Bruce Wayne	vila.justlogin+wayne@gmail.com	Finance	<input checked="" type="checkbox"/>
Peter Parker	vila.justlogin+parker@gmail.com	Finance	<input checked="" type="checkbox"/>
Natasha Romanoff	vila.justlogin+NatashaR@gmail.com	Customer Experience	<input checked="" type="checkbox"/>
Vila	vila.justlogin@gmail.com	Customer Experience	<input checked="" type="checkbox"/>
Xian Lim	vila.justlogin+XL@gmail.com	Customer Experience	<input checked="" type="checkbox"/>

Showing 1 to 10 of 15 entries.

First << 1 2 >> Last

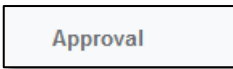


**Step 3:** Click on the button to confirm the changes.

## Approval of Employee Benefit Claims



**Step 1:** To approve your employees' benefits claims submitted, go to



**Step 2:** Click on which brings you to Pending Actions page where you are able to see all your pending actions.

Pending Actions [Approval History](#)

Show 10 entries Search:

<input type="checkbox"/>	Employee	Benefit Category	Benefit Type	Amount	Submitted On	Action
<input type="checkbox"/>	Peter Parker	Medical	Dental	50.00	25/07/2022	
<input type="checkbox"/>	Vila	Medical	Medical	10.00	06/07/2022	

Showing 1 to 2 of 2 entries.

**Step 3:** To view the details of the employee claim, click on the eye icon under Actions column.

<input type="checkbox"/>	Employee	Benefit Category	Benefit Type	Amount	Submitted On	Action
<input type="checkbox"/>	Peter Parker	Medical	Dental	50.00	25/07/2022	



**Step 4:** You can view the details, and then click on to approve the individual claim.



View Details

### Dental for Peter Parker

Date	Amount
19/04/2022	50

Description  
dental visit claim

Attachment

Back Reject **Approve**

#### \* Medical

Example Medical Benefit

Benefit Types:	
Medical	40.00/claim, 250.00/year
Dental	100.00/claim, 200.00/year

Entitlement	194.62
Pending	50.00

Opening Balance	144.62
Adjustments (+)	0.00
Claimed (-)	0.00

**Available 144.62**

Step 5: Click **Confirm** to proceed to approve.

## Confirm Approval

Are you sure you want to approve the benefit claim?

Close **Confirm**

You may repeat the steps for all other pending approvals, or you may also approve all in one go from the **Pending Actions** page.



**Step 6:** To approve via the Pending Actions page, tick the boxes for the pending items, then click



then click confirm on the popup window.

Pending Actions [Approval History](#)

Show 10 entries Search:

<input checked="" type="checkbox"/>	Employee	Benefit Category	Benefit Type	Amount	Submitted On	Action
<input checked="" type="checkbox"/>	Peter Parker	Medical	Dental	50.00	25/07/2022	
<input checked="" type="checkbox"/>	Vila	Medical	Medical	10.00	06/07/2022	

Showing 1 to 2 of 2 entries.

**Step 7:** Once the claims have been approved, you will see this notification appear on the top right-hand side of your screen.



## How to Reject a Claim

**Step 1:** Follow steps 1-3 on how to approve the claim.

**Step 2:** From the claim details page, select the Reject button instead.

View Details

Medical for Vila

Date: 13/01/2022 Amount: 10

Description: medical

Attachment:

**Medical**  
Example Medical Benefit

**Benefit Types:**

Medical	40.00/claim, 250.00/year
Dental	100.00/claim, 200.00/year

Entitlement: 200.00  
Pending: 20.00

Opening Balance: 180.00  
Adjustments (+): 10.00  
Claimed (-): 30.00

**Available 160.00**





Confirm

**Step 3:** Add remarks as to why the claim is rejected. Click **Confirm** to submit.

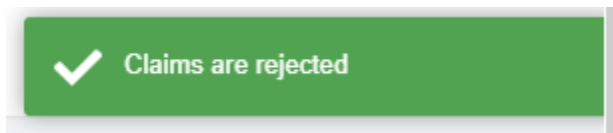
### Confirm Rejection

Are you sure you want to reject the benefit claim?

not valid

Close **Confirm**

**Step 4:** A notification message will appear to confirm the action.



You can also reject the claim from the **Pending Actions** page.

**Step 5:** Tick the box/es selected and click the Reject button on the lower-left side corner. Follow steps 2-3 above to proceed.

Pending Actions [Approval History](#)

Show 10 entries Search:

<input checked="" type="checkbox"/>	Employee	Benefit Category	Benefit Type	Amount	Submitted On	Action
<input checked="" type="checkbox"/>	Vita	Medical	Medical	10.00	26/07/2022	

Showing 1 to 1 of 1 entries.

**Reject** **Approve**