# 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.
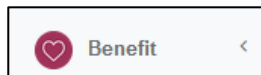
**Step 1:** Go to  .

**Step 2:** Click on  .

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



- *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.
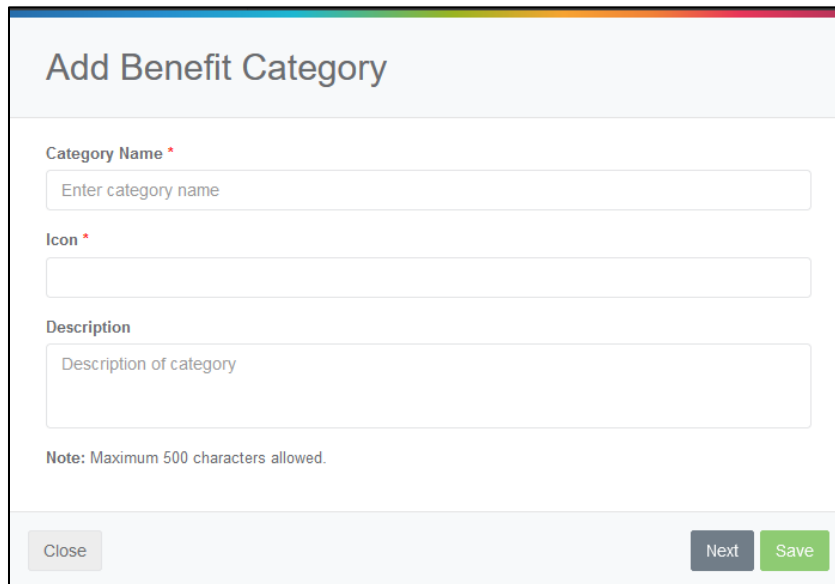
# Benefits Categories Setup

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.



- **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

**Step 1:** To create benefit policies, go to the Benefit Types tab and click [Add Benefit Policy] .

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



- **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:



**Step 4:** Click on [+ Add More Entitlements] to add more increments for additional years.

**Step 5:** To add more benefit policies to this category (e.g. different groups of employees are entitled to different amounts for this category), click on [+ Add More Policy] and repeat steps 6 – 8.

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



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



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



**Step 9**: Click on the **Next** button to proceed to the next part of setting the benefit types.

## Benefit Type

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

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

**Benefit Type \***

| Benefit type |
| --- |

This field is required

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

~~This field is required~~

**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 [ Save ] button to save the setting you have made.  Upon successful creation, you will see a new record added to benefit type:

| Benefit Policy | Benefit Type | | | |
| --- | --- | --- | --- | --- |

Show 10 ∨ entries                                                                                     Search:

| 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.

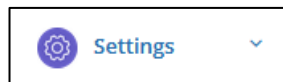To remove or delete existing benefit types created, click on the trashcan icon [🗑] under Actions column.
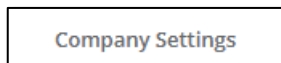
# Approval Configuration

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.





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



**Step 2:** Click on  then go to Approvals > Benefit.
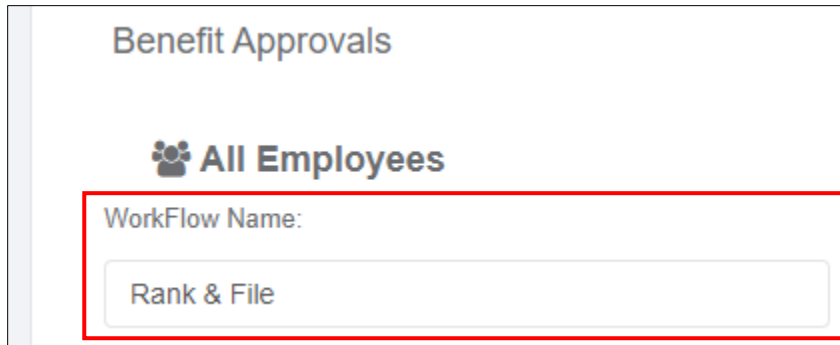




**Step 3:** Click  to get started.

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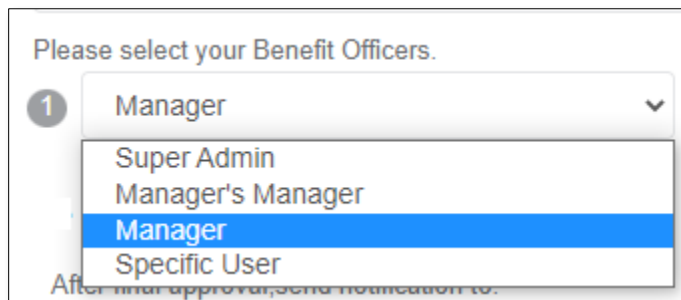


**Step 5:** Select the Approver for this WorkFlow.
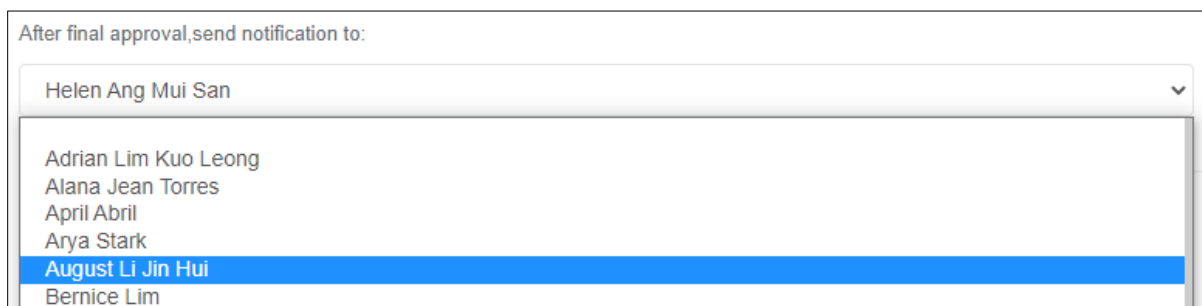


- *Super Admin* – Superuser on the account
- *Manager* – The staff's assigned Supervisor (see User Admin)
- *Manager's Manager* – The assigned Supervisor of the submitter's Supervisor
- *Specific User* – anyone who is a Benefit User

**Step 6:** Click  should you need to add more levels.

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

**Step 8:** Click [Apply ▾] to save, whether this WorkFlow is applicable for all employees or to specific user/s.
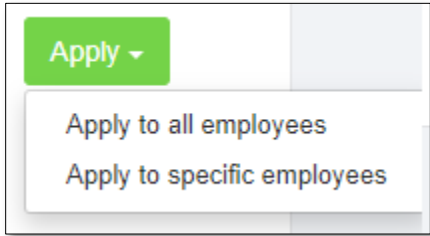
*'Apply to all employees' will update for all Benefit users, and the Approver Settings will show as Default:*

| 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: [          ]

| | Employee Name | Department | |
|---|---|---|---|
| ☐ | Adrian Lim Kuo Leong | Human Resource | |
| ☐ | Alana Jean Torres | Marketing | |
| ☐ | April Abril | Operations | |
| ☐ | Arya Stark | OPS-OPERATIONS | |
| ☐ | August Li Jin Hui | OPS-F&B HOUSEKEEPING | |
| ☐ | Bernice Lim | CK-ADMIN&FINANCE | |
| ☐ | Bruno E. Mercury | ENGRG-SCES-Construction | |
| ☐ | celeste | Management | |
| ☐ | Harriet Yap | Management | |
| ☐ | 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).



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



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



*Approver Settings will show as Custom:*

justlogin
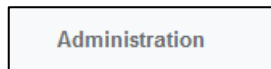
# Administration

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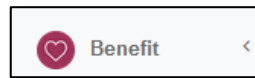
**Step 1:** To make any adjustments for your employee's benefits, go to

**Step 2:** Click on                                                    .

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

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 <mark>here</mark>.
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 **Save** 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.



## 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.
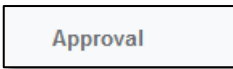
**Step 3:** Click on the [Save] button to confirm the changes.

## Approval of Employee Benefit Claims

**Step 1:** To approve your employees' benefits claims submitted, go to [♥ Benefit ‹].

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

| | Employee | Benefit Category | Benefit Type | Amount | Submitted On | Action |
|---|---|---|---|---|---|---|
| ☐ | Peter Parker | Medical | Dental | 50.00 | 25/07/2022 | 🔖 👁 |
| ☐ | Vila | Medical | Medical | 10.00 | 06/07/2022 | 🔖 👁 |

Pending Actions | Approval History

Show 10 entries          Search:

Showing 1 to 2 of 2 entries.

Reject          Approve

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

| | Employee | Benefit Category | Benefit Type | Amount | Submitted On | Action |
|---|---|---|---|---|---|---|
| ☐ | Peter Parker | Medical | Dental | 50.00 | 25/07/2022 | 🔖 👁 |

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

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



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

[ Approve ]

then click confirm on the popup window.



**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.

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



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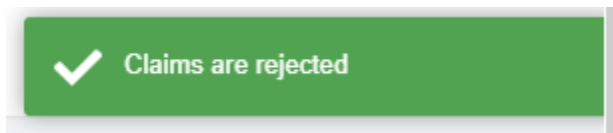


You can also reject the claim from the **Pending Actions** page.

**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.