MAS-WI-0040-Claims

* PROGRAMMED

Project NextGen Igniting change, uniting teams.

Purpose: This Work Instruction defines the steps to review, approve and reject claims in **Maximo Application Suite (MAS)**.

Primary Use: This Work Instruction is used for the following scenarios:

- 1. Review Claims
- 2. Reject Claims
- 3. Approve Claims

Business Unit Application: This Work Instruction applies to Programmed Facilities Management.

Audience: PFM Supervisors

Before you start:

1. The Vendor must submit a claim on the work order via the **Touchstone Mobile App** in order for the claim to be reviewed, approved or rejected in MAS.

Project <u>NextGen</u>

Igniting change, uniting teams.

View Work Order Claim Status in Touchstone:

Explanation	Screenshot
To Review a claim, the Vendor Supervisor must first submit a claim via the Touchstone Mobile App . Click Claim .	APN Service La Complete Service 2 2 2 2 2 2 2 2 2 2 2 2 2 2
In the My Team tab, click Open to open the work order and view the status.	Tam Work Litt Image: Constraint of the second s
Note: The status will show as Claim Submitted if the vendor has submitted a claim.	Crew Person Map Directions

MAS-WI-0040-Claims

* PROGRAMMED

Project <u>NextGen</u>

Igniting change, uniting teams.

Review a Claim in MAS:

Explanation	Screenshot
Go to Work Orders > Work Order Tracking – PFM.	Image: Shart Carther
Select a Site .	Take a for Image acking - PFM Image Work Order Image Image Image
In the Status field, select VendorClaimSub . Press [Enter].	Take a tour Image:
Result: A list containing all work orders with a Vendor Claim Submitted status will be displayed.	Image: Print-MSULAT Manage Name about Image: Print-MSULAT Manage Image: Print-MS

MAS-WI-0040-Claims

* PROGRAMMED

Project <u>NextGen</u>

Igniting change, uniting teams.



MAS-WI-0040-Claims

* PROGRAMMED

Project <u>NextGen</u>

Igniting change, uniting teams.

Reject a Claim:

Explanation	Screenshot
Within the Work Order, click Approve/Reject Claims.	Image: Take tour Image:
Result: A list of work orders pending approval will be displayed. Select one or multiple work orders. Click Reject.	Work Oxder Parks NO Assignments measies Recipios measies Actual Saling Park Col Data Sheet Parket Description Descrint Description <thd< th=""></thd<>
Click OK . To verify the status of the work order, copy the work order number.	Cher Charges MALD722246 * Test ANON-1.44-72 APN Control According According
Paste the work order number into the Find Work Order Search field and [Enter].	Work Order Tracking - PFM Work Order Tracking + PFM

MAS-WI-0040-Claims

Project <u>NextGen</u>

Igniting change, uniting teams.



Approve a Claim:

Explanation	Screenshot	
Within the Work Order, click Approve/Reject Claims.	Prote MAST UM Manage Takes store Strictle Strautet Lubride / Work Order Tracking - PFM	Image: Constraint of the finance System
	View SLAs Cases Description Cases Case Case	GLACCOURT GLACCOURT

MAS-WI-0040-Claims

Project <u>NextGen</u>

Igniting change, uniting teams.



MAS-WI-0040-Claims

Project <u>NextGen</u>

Igniting change, uniting teams.

Once Navision verifies the claim line(s) are correct,	Image Take a tour Cl Image O Image				
the work order status will	Work order macking	16 1111			
	← List View <	Work Order Plans RFQ Assignments	Related Records Tenants Actual	is Safety Plan Log Data S	heet Failure Reporting Specifications 🗸
	Q. Find navigation item	Site		P0#	Attachments Technician
	Available Queries 🗸 🗸			AM52116099 >	View attachments VISHITA-0FEF64056E
	Common Actions	RCT Q		Parent WO	WORKORDER Q
The Claim ID from Finance	New Work Order	Work Order		Invalid Asset(s)?	Status WOSTATUS - Longitude(X)
System field will now	Clear Changes	WA10722246 ¥	đ		сомр
	A Select Owner	* Location		Failure Class	Status Date WOSTATUS - Latitude(Y)
contain a value.	A Take Ownership			FC000053 >	21/6/25 20:45:05
	Application Import	* Asset	□	Heason for Hework	Claim Submissions
	Application Export	Asset Hierarchy		Location/Asset is under Warranty?	Risk Assessment Claim 20 from Finance System
	Approve/Reject Claims More Actions	Electrical Services\Emergency & Exit Lighting\Exit Light			1312906
	Workflow v	Work Classification		Defect?	Front Plastage from the Finance System
	Apply SLAs	>		O	Q Vendor Claim Submission Date
	View SLAs	Class Description		Do not create a PO for the work Underr	GL Account. 21/5/25 20:14:44
	View	+ Work Priority		Out of Scope?	Operationally Complete?
	Work Order History	1 Q			
	Costs PO Information	Priority Justification		Statutory Compliance?	
	Select Safety Hazards	E			
	Remove Safety Plan	Budget Period		Stimulusr	
Should an array apour in	📃 🌞 PFM-MAS UAT 🛛 Mana	age Take a tour			
	where we have a second s				
	Q Work Order Trac	rking - PEM			
Navision, the status will	Work Order Trac	cking - PFM			
Navision, the status will show as CLAIMREJ .	Q Work Order Trac C C C C C C C C C C C C C	Cking - PFM	s Related Records Tenants	Actuals Safety Plan Log [$Q : \left[\bigcirc \mathbb{B} \leftrightarrow \leftarrow \rightarrow \mathbb{Z} \right]$
Navision, the status will show as CLAIMREJ .	Q Work Order Trac C C C C C C C C C C C C C	King - PFM	Related Records Tenants	Actuals Safety Plan Log [$\begin{array}{c c} & & \\ \hline \\ \hline \\ \hline$
Navision, the status will show as CLAIMREJ .	Q Work Order Trace ∞ ← List Vew % Q. Find navigation item Available Queries	<	Related Records Tenants	Actuals Safety Plan Log (Attachments Vew attachments	Q i O O O O O O O O O O O O O O O O O O
Navision, the status will show as CLAIMREJ . The Error Message from	Q Work Order Trace S ← List Vew R Q. Find ravigation item Available Queries Common Actions	<	Related Records Tenants PO# AM52118844 > Parent W0 >	Actuals Safety Plan Log (Attachments Vew attachments v Class WORKORDER	Q i Q is Q is Q is A is Q is Q is Q is Technician V VR0qcExertSol46A > V
Navision, the status will show as CLAIMREJ. The Error Message from the Finance System field	Q Work Order Trace S ← List Vew V Q. Find ravigation item Available Queries Commen Actions Commen Actions New Work Order Here Work Order New Work Order	<	Related Records Tenants PO# Ad02115844 > Perent WO > Invalid Asset(2)?	Actuals Safety Plan Log [Attachments Vew attachments Class WOORKORDER Status	Q : O O O O O O O O O O O O O O O O O O O
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error.	Q Work Order Trace S ← List Vew P Common Actions Common Actions New Work Order Common Actions New York Order	 v Work Order Plans BFQ Assignment v 	Related Records Tenants PO# Ad02115844 > Perent WO > Invalid Asset(d)?	Actuals Safety Plan Log (Attachments Vew attachments Class WOORKORDER Status CLAIMRED	Q i Q is Q is Q is Q is Auto Sheet Failure Reporting Specifications ✓ Technician ✓ ✓ VR0x1x24450466A > ✓ Major bents Q ✓ Q051X1US-Longitude(Q) ✓
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error.	Q Work Order Trace S ← List Vew Q Find rangation item Available Queries Common Actions Common Actions New Work Order Main Section Sections New Work Order Cise Charges A select Owner A select Owner A select Owner	 Verkörder Plans BFQ Assignment Verkörder Plans BFQ Assignment 	Related Records Tenants PO# Add2115844 > Perent W0 Invalid Asset(s)? Failure Class	Actuals Safety Plan Log (Attachments Vew attachments Class Wookordete Status CLAIPMED Status Date	Q i i i i i Q i i i i i Atta Sheet Fallure Reporting Specifications i Technican i i i VeXite CA#3046CA > i Palior bents Q WOSTATUS-Longitude(0) WOSTATUS-Longitude(0)
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re-	Q Work Order Trace S ← List Vew Q Find rangation item Available Queries Common Actions Common Actions New Work Order Ciencharges Common Actions Q New Work Order Ciencharges Select Owner Q Select Owner Q Table Ownerhip	< <tr> v Work Order Plans BFQ Assignment v all Image: Compared to the second se</tr>	Related Records Tenants POF AVS2115844 > Perent WO Invalid Asset(s)? Failure Class D = D = D = D = D = D = D = D = D = D =	Actuals Safety Plan Log (Attachments Vew attachments vooaconders Status Status Cate Status Cate 20/9/2 10:3006	Q i Q is Q is Q is Auto Sheet Failure Reporting Specifications ✓ Technican ✓ ✓ VeXite EAr3DideCA > ✓ Pajor bents Q ✓ WOSTATUS-Longitude(0) ✓ WOSTATUS-Lastisude(1) ✓
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- cont to the Vender via	Q Work Order Trace Q ← List Vew Q Find navigation item Available Queries Common Actions Q New Work Order Q Select Ourner Q Select Ourner Q Select Ourner Q Select Ourner Q Application Import CLP	cking - PFM	Related Records Tenants POF AVS2115844 > Perent WO Invalid Asset(s)? Failure Class Reason for Revork.	Actuals Safety Plan Log (Attachments Vew attachments Voxoacoroce Status Status CLAIMRED Status Date 20/3/23 103006 After Hour Works?	Q i Q is Q is <td< th=""></td<>
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via	Q Work Order Trace S ← List Vew V Q. Find navigation item Valiable Queries Common Actions Common Actions New Work doder C New Work doder Common Actions New Work doder C New Work doder C Select Ourner A Select Ourner A Select Ourner A Select Ourner A Select Ourner B Application Export	cking - PFM	Related Records Tenants PO# AMS215844 Parent WO Imail Asset(i)? Imail Asset(i)? Palues Class Rescon for Reverk. Location/Asset is under Warnenty?	Actuals Safety Plan Log (Attachments Vew attachments Class Customerts Status St	Q i
Navision, the status will show as CLAIMREJ. The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims, or	Q Work Order Trace Q ← List Vew Q Find navigation item Available Queries Common Actions Q New Work Order Q Select Ourner Q Select Ourner Q Select Ourner Q Apploxition Export Q Apploxition Export Apploxition Export Apploxition Export	cking - PFM	Related Records Tenants PO# AdS215844 Perent WO Trouble Asset(s)? Trouble Asset(s)? Reacon for Revork Locotion(Asset is under Warrenty? O	Actuals Safety Plan Log (Attachments Vew attachments Class Cass Status CALIMIRED Status Status CALIMIRED Status St	Q i
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance	Work Order Trace Common Actions Common Acti	cking - PFM		Actuals Safety Plan Log (Attachments Vew attachments Class Class Status CLIMMRD Status Date 20/3/25 103006 After frour Works7 Elisk Assessment Fuck Action	Q i
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error	Work Order Trace Common Action Co	cking - PFM	Related Records Tenants POr Add2115844 Perent WO Perent WO Perent WO Perent WO Paulure Class Reacon for Reverk Location(Asset is under Warrenty? Defect? O	Actuals Safety Plan Log (Attachments Vew attachments Class Status CLIMMRD Status CLIMMRD Status CLIMMRD Status CLIMMRD Status CLIMMRD Status CLIMMRD Status CLIMMRD Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Sta	Q i i i i i Atta Sheet Failure Reporting Specifications × Technican × i VRORE-EAR/SD46CA > × Major bentis Q
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required	Work Order Trace Unit Vew Common Advised Optimized Common Advised	cking - PFM		Actuals Safety Plan Log (Attachments Vew attachments Class Status CALMMRD Status CALMMRD Status Stat	Q i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i A i i i i i
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required.	Work Order Trace Unit Vew Common Advised Outer Common Advised Outer Common Advised Commo	cking - PFM		Actuals Safety Plan Log (Attachments Vew attachments Class Class Status Status CLIMMRD Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status CLIMMRD Status Status Status Status Status CLIMMRD Status Statu	Q i i i i i Patter Sheet Failure Reporting Specifications > Technican VROME-EAR/3D46CA > > VROME-EAR/3D46CA > > > Major bentis Q
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required.	Work Order Trace Unit Vew Commendation New York Order New York Order Commendation New York Order Commendation Commendat	cking - PFM		Actuals Safety Plan Log C Attachments Vew attachments Vew attachments Vew attachments Vew attachments Vew attachments Status CLAIMREZ Status	Q i i i i i Technican × i i i VROME-EAR/3D46CA > i i Value Control Q i i i Major Dentis Q i i i WOSTATUS - Longbude(0) i i i i WOSTATUS - Longbude(0) i i i i Claim 50-bindisolors Claim 50-bindisolors i i 232683 Enror Heasege from the Finance System i i Worder Claim Submission Date i i i 140/23 15:46226 i i i
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required.	Work Order Trace Unit Vew Common Actions C	cking - PFM		Actuals Safety Plan Log C Attachments Vew attachments Vew attachments Vew attachments Vew attachments Status CLAIMREZ Status	Q i i i i i Technician × i i i VROME-EAR/3DBECA > i i VROME-EAR/3DBECA i i VROME-EAR/3DBECA i i VROME-EAR/3DBECA i i
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required.	Work Order Trace Unit Vew Common Actions C	cking - PFM		Actuals Safety Plan Log 0 Attachments Vera attachments Vera attachments Vera attachments Vera attachments Vera attachments Class Status CLAMMED Status Date 20/3/35 103006 After Hour Works? Fisk Attessement Fault Action G. Account Operationally Complete?	Q i i i i i Technician × i i i VROME-EAR/3D46CA > i i Value Service
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required.	Work Order Trace	cking - PFM		Actuals Safety Plan Log C Actuals Variationenis Class VorokoROBCR Status CLAMMED Status Date 20/0/35 03006 After Hoar Works? Fisk Assessment Fisk Assessment Genetationally Complete? Operationally Complete?	Q i Q is Q is Q is Q is VeloceSAS2046CA > > > Major Exerts Q > > > VeloceSAS2046CA > > > > WOSTATUS - Longloude(0) Q > > > VeloceStatUs - Longloude(0) Q > > > Claim 3bothreleoires C C > > Claim 5bothreleoires C > > > Veloce Claim 5bothreleoires C > > Veloce Claim 5bothreleoires C > > Veloce Claim 5bothreleoires C > > Veloce Cl
Navision, the status will show as CLAIMREJ . The Error Message from the Finance System field contains details of the error. The Work Order can be re- sent to the Vendor via Approve/Reject Claims , or followed up with Finance regarding the error received if required.	Work Order Trace Current of the second of	cking - PFM		Actuals Safety Plan Log C Actuals Variationenis Class VootKoRDER Status CLAMMED Status Dale 20/0/35 03006 After Hour Works? Fish Assessment Fish Assessment Genetationally Complete? Operationally Complete?	Q i Q is Q is Q is Q is Veroise Specifications Veroise Q Major Exerts Q Veroise Q Veroise Q Veroise Q Veroise Q Veroise Q Veroise Q Veroise Q Veroise Q Veroise Veroise Q Veroise Q Veroise Veroise Q Veroise Veroise Claim 3b oftnoise/orse Claim 5b fortice/orse Veroise Uselies to process furthers for bert 14/9/24 13:48:28 Q

Related Work Instructions or Process Maps:

MAS-WI-0010-Navigation & Overview MAS-WI-0020-Work Order Management (Supervisors) TSMob-WI-0020-Work Order Management (Supervisors)

History			
Description	Reference #	Date	Authority / WI Owner
New Work Instruction		29 th May 2025	Programmed Facilities Management
Next Review Due		Upon Next Release	