

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

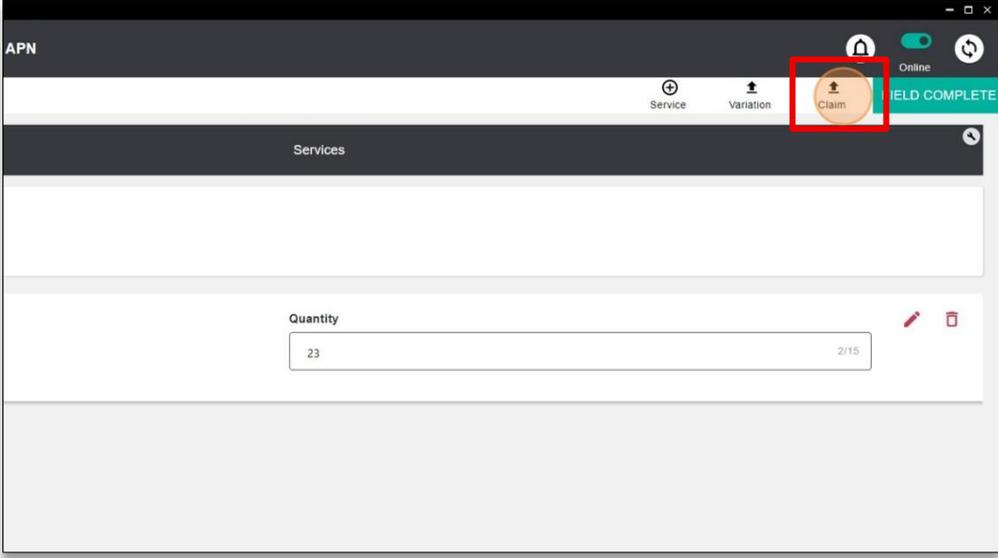
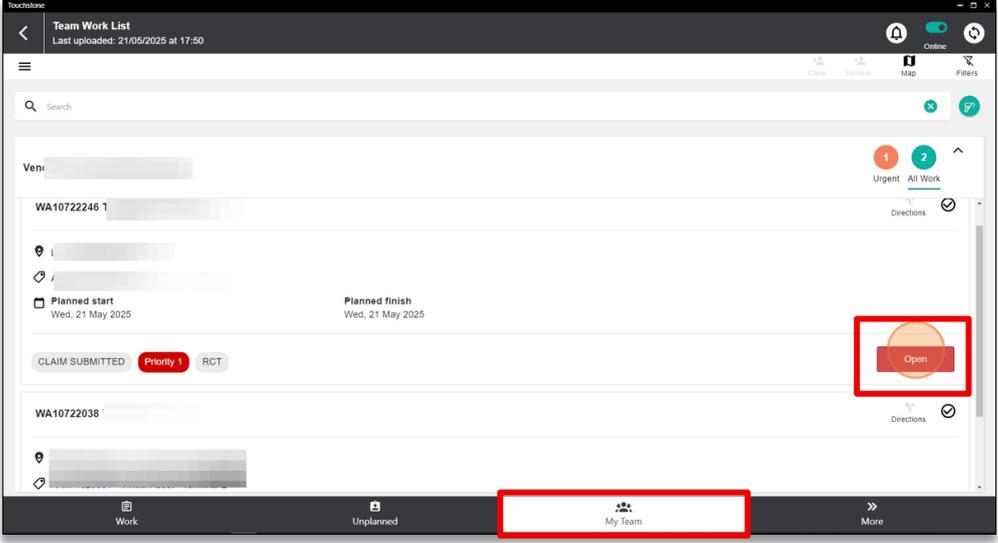
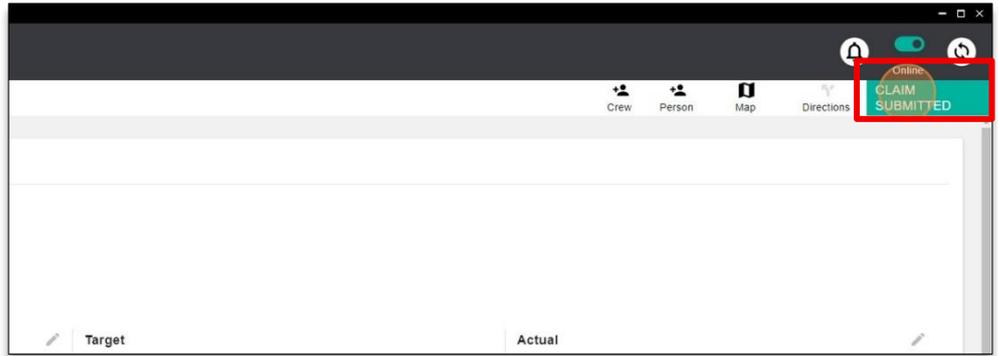
Business Unit Application: This Work Instruction applies to Programmed Facilities Management.

Audience: PFM Supervisors

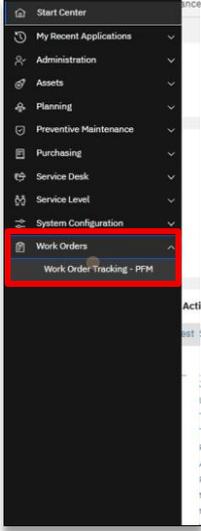
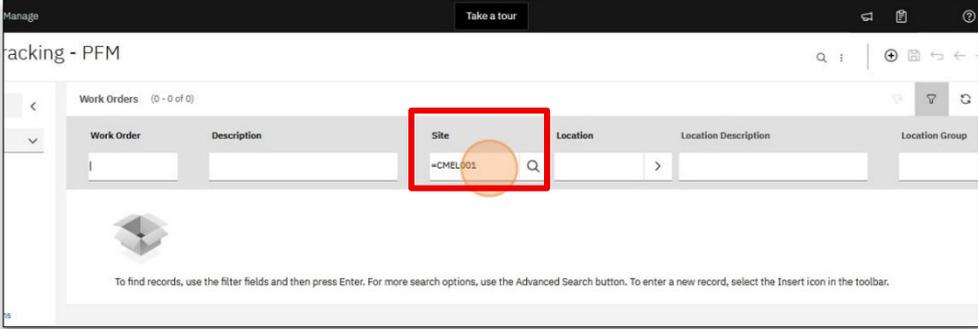
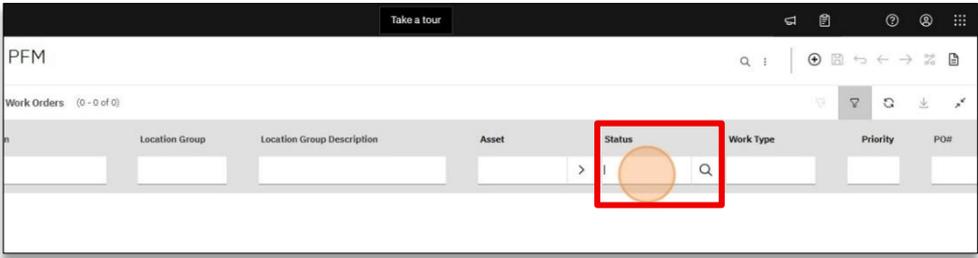
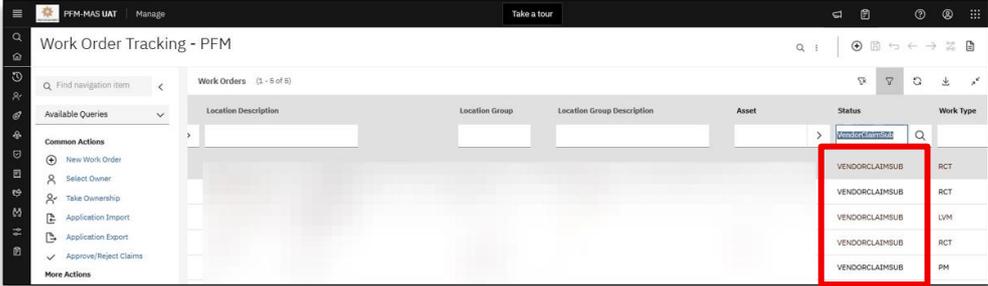
Before you start:

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.

View Work Order Claim Status in Touchstone:

Explanation	Screenshot
<p>To Review a claim, the Vendor Supervisor must first submit a claim via the Touchstone Mobile App.</p> <p>Click Claim.</p>	
<p>In the My Team tab, click Open to open the work order and view the status.</p>	
<p>Note: The status will show as Claim Submitted if the vendor has submitted a claim.</p>	

Review a Claim in MAS:

Explanation	Screenshot
<p>Go to Work Orders > Work Order Tracking – PFM.</p>	
<p>Select a Site.</p>	
<p>In the Status field, select VendorClaimSub. Press [Enter].</p>	
<p>Result: A list containing all work orders with a Vendor Claim Submitted status will be displayed.</p>	

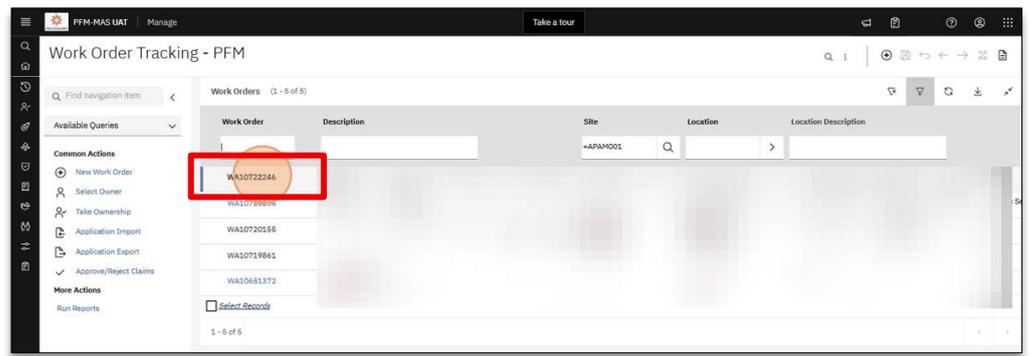
Work Instruction

MAS-WI-0040-Claims

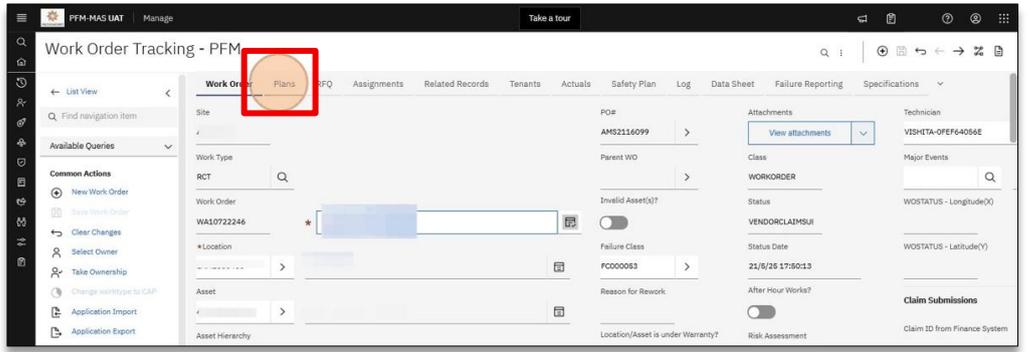
Project NextGen

Igniting change, uniting teams.

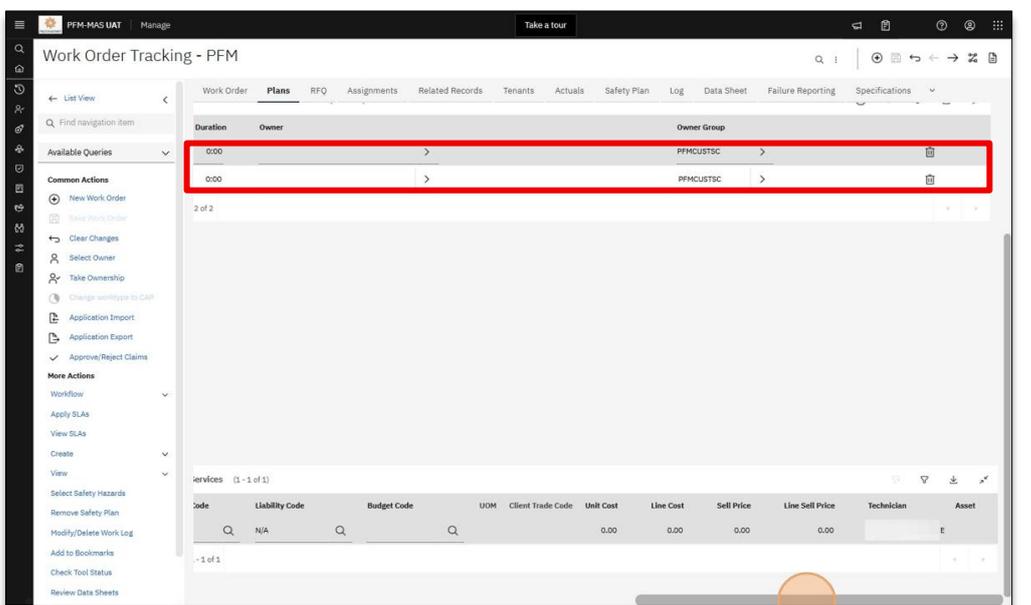
Click on the relevant work order.



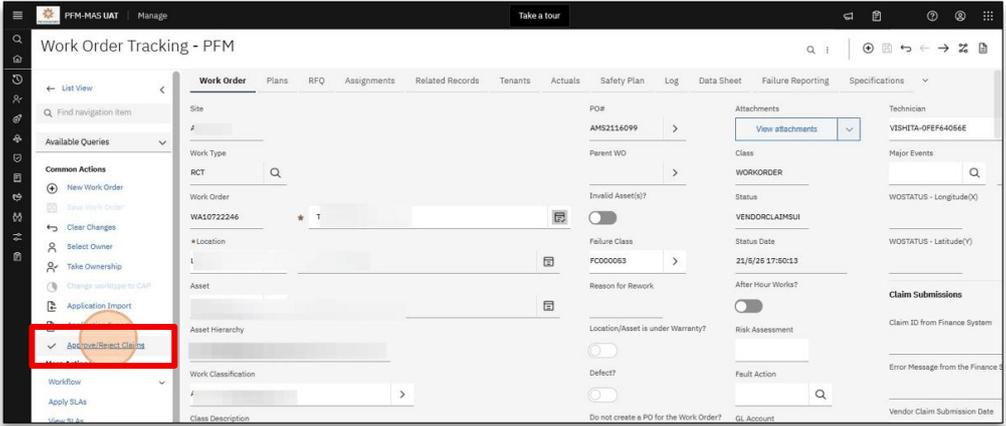
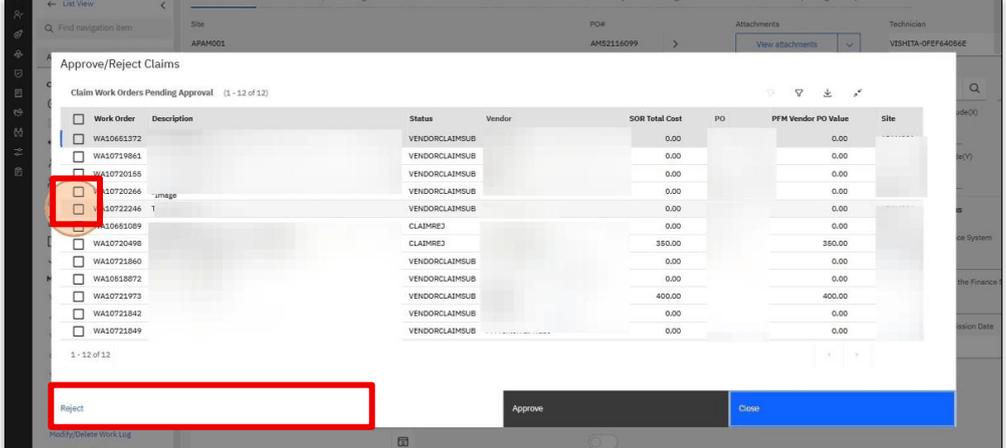
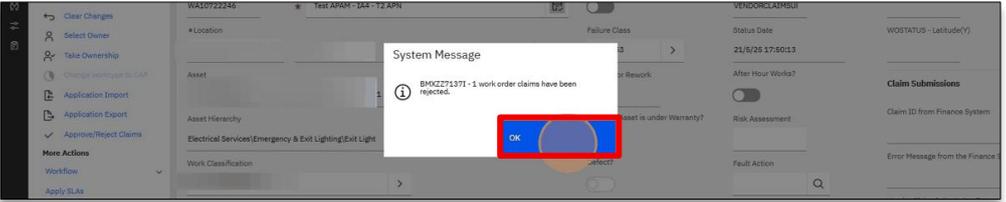
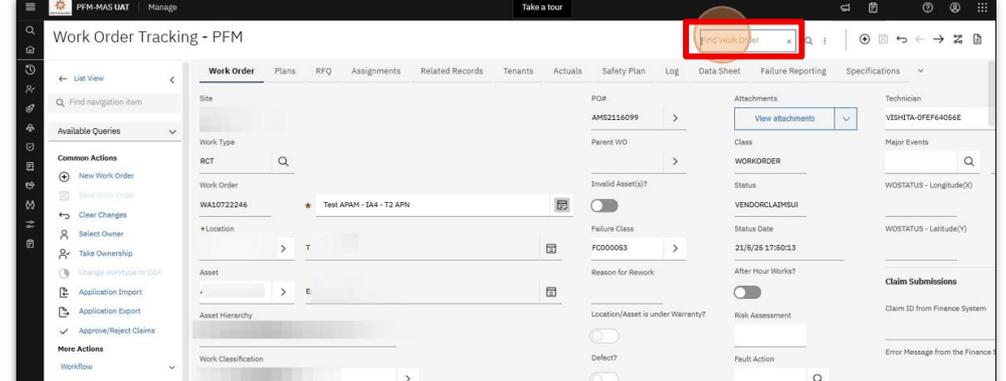
Click the **Plans** tab.



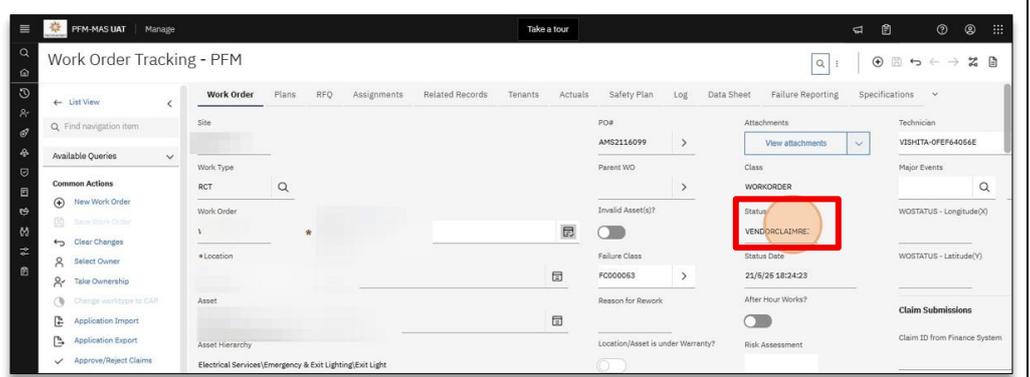
Scroll down to view and verify the **Claim Lines**.



Reject a Claim:

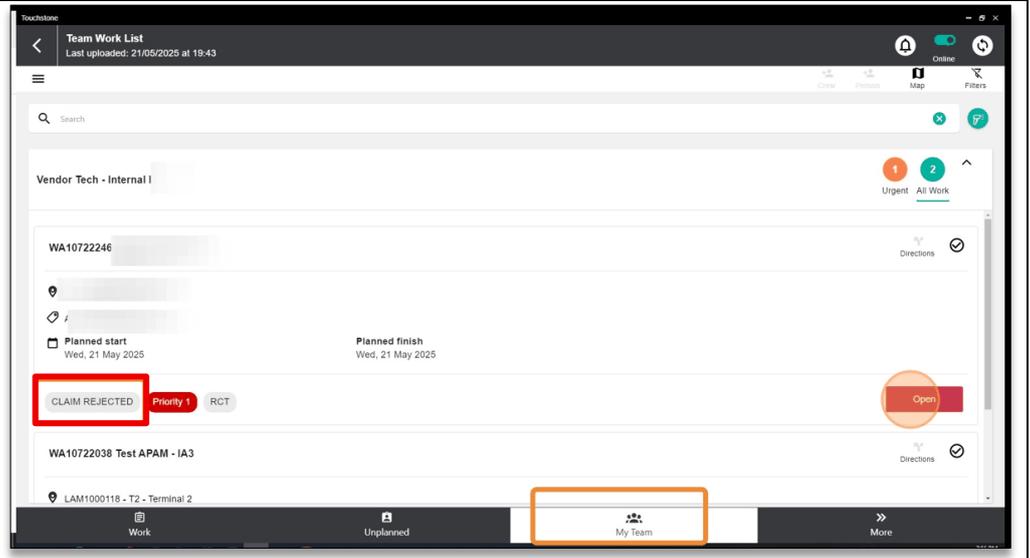
Explanation	Screenshot
<p>Within the Work Order, click Approve/Reject Claims.</p>	
<p>Result: A list of work orders pending approval will be displayed.</p> <p>Select one or multiple work orders.</p> <p>Click Reject.</p>	
<p>Click OK.</p> <p>To verify the status of the work order, copy the work order number.</p>	
<p>Paste the work order number into the Find Work Order Search field and [Enter].</p>	

The work order status will now be **VENDORCLAIMREJECTED**.



Result: The work order status in Touchstone will update to **Claim Rejected**.

From Touchstone, the vendor is able to resubmit the same claim again or modify the claim and submit.

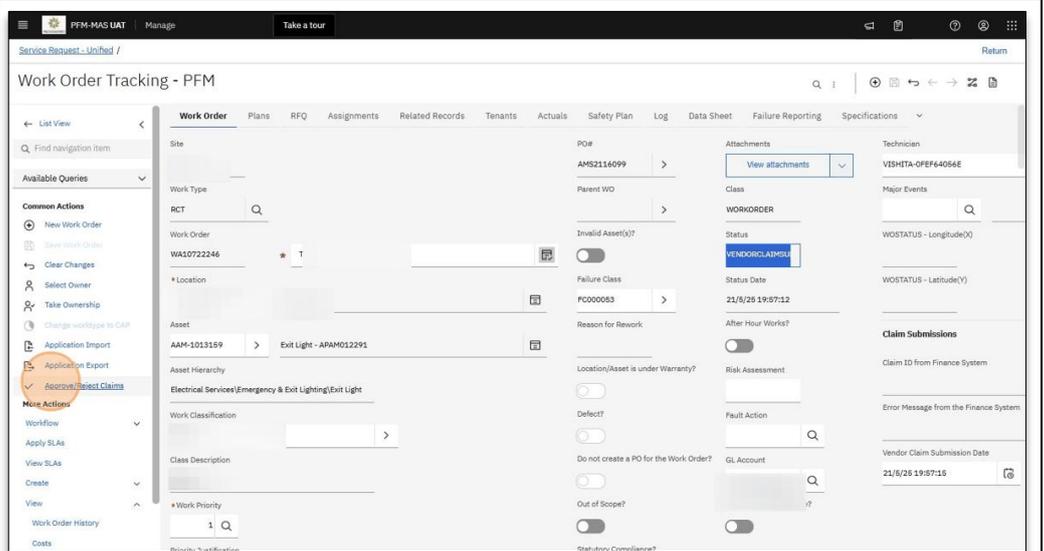


Approve a Claim:

Explanation

Within the Work Order, click **Approve/Reject Claims**.

Screenshot



Work Instruction

MAS-WI-0040-Claims

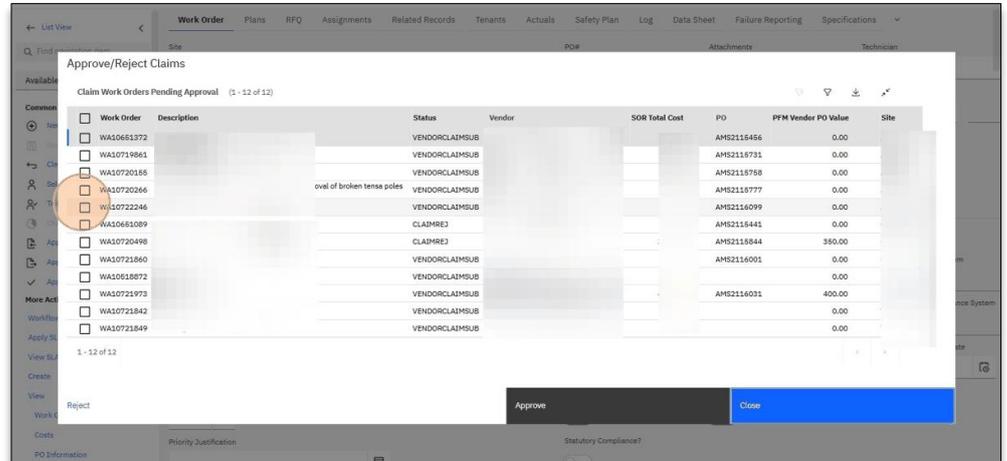
Project NextGen

Igniting change, uniting teams.

Result: A list of work orders pending approval will be displayed.

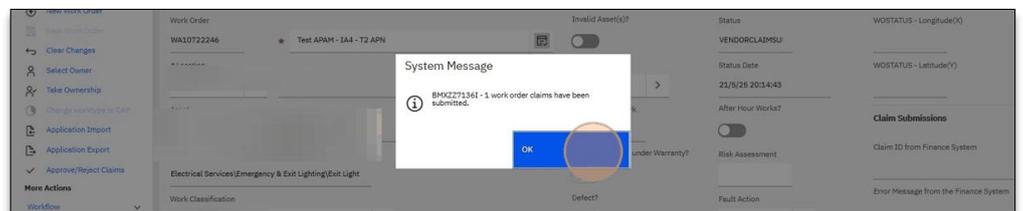
Select one or multiple work orders.

Click **Approve**.

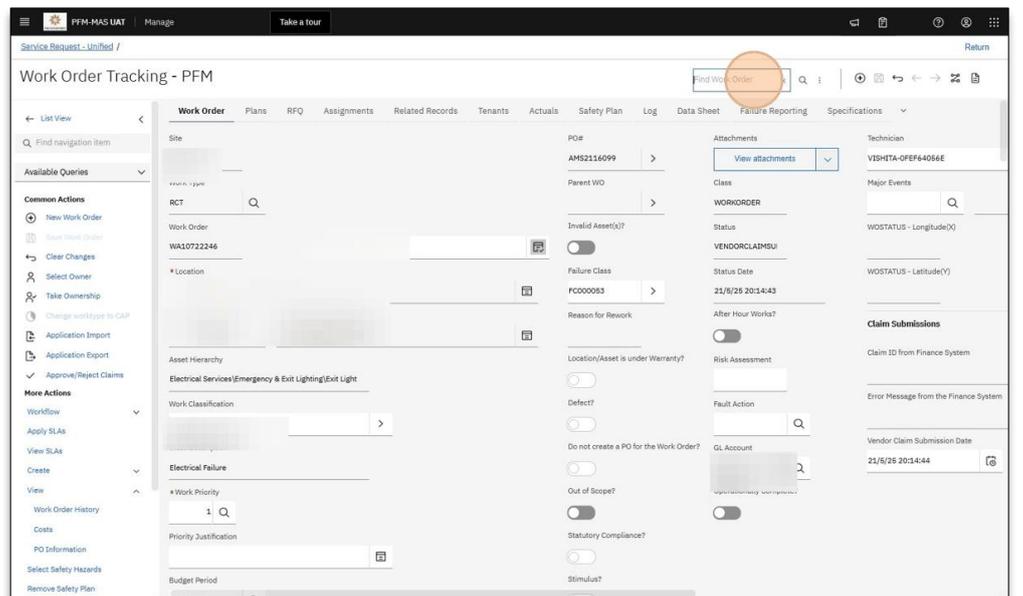


Click **OK**.

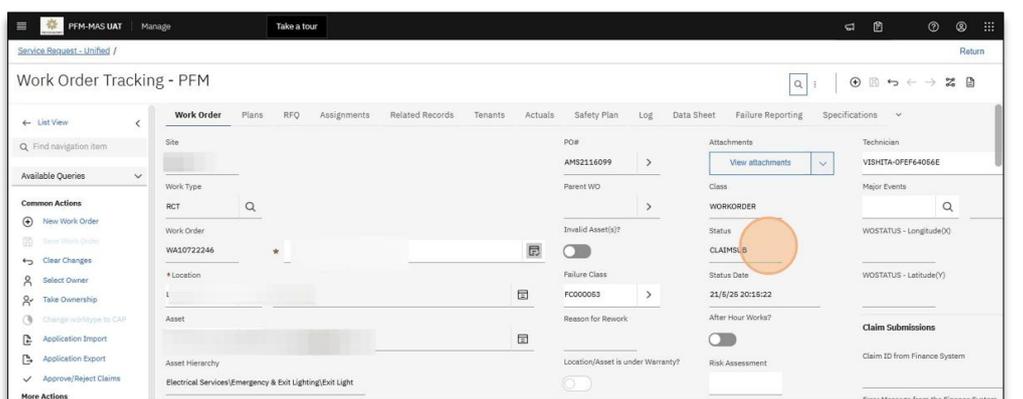
To verify the status of the work order, copy the work order number.



Paste the work order number into the **Find Work Order** search field and **[Enter]**.



The work order status will now be **CLAIMSUB**.



Work Instruction

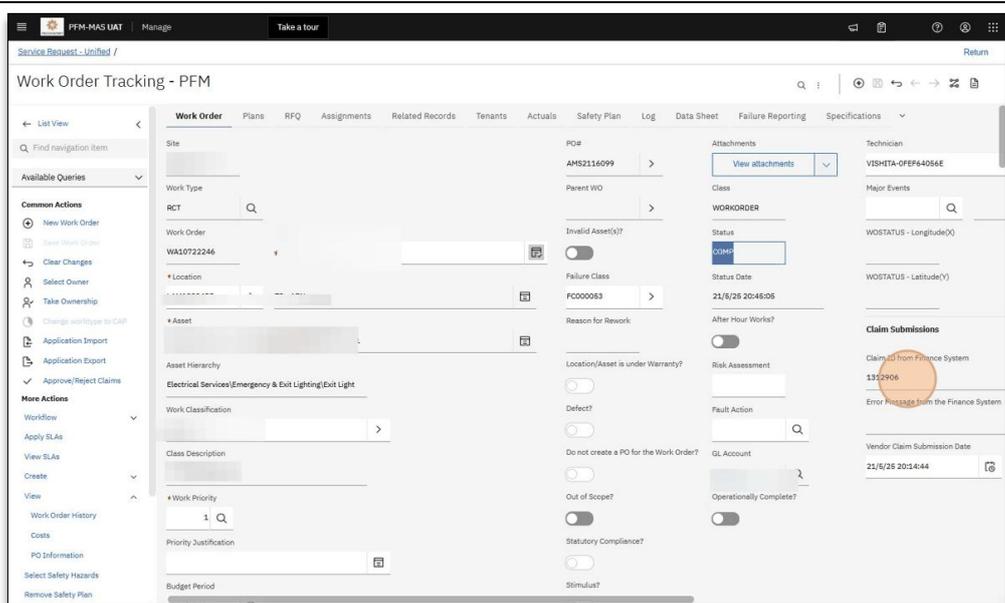
MAS-WI-0040-Claims

Project NextGen

Igniting change, uniting teams.

Once Navision verifies the claim line(s) are correct, the work order status will update to **COMP**.

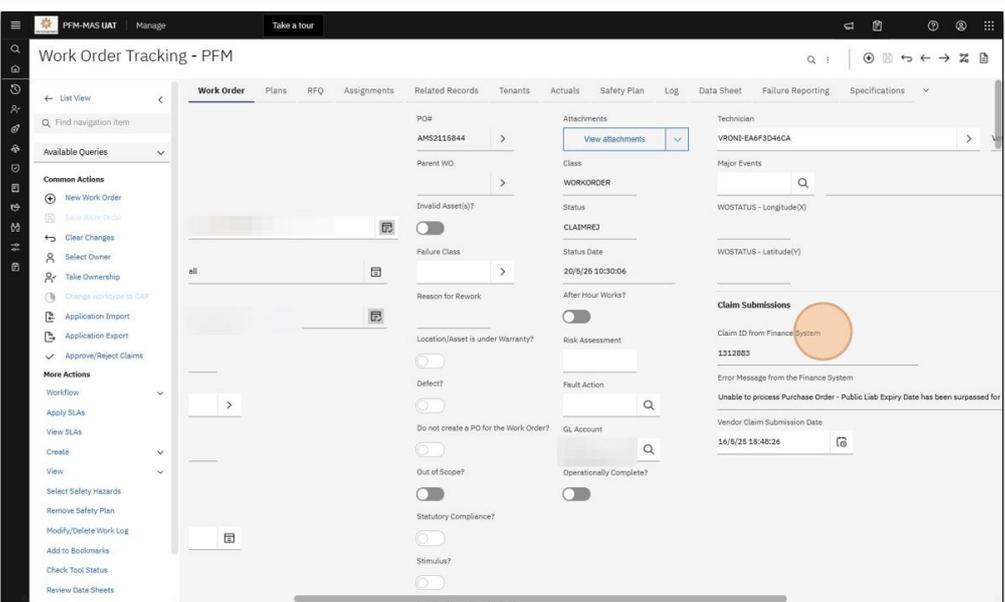
The Claim ID from Finance System field will now contain a value.



Should an error occur in 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.



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	