

Work Instruction

TSMob-WI-0040-Create & Submit Variations & Claims

Project NextGen

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Touchstone Mobile Application Create & Submit Variations & Claims

Role: Vendor Supervisors & Technicians

TSMob-WI-0040-Create & Submit Variations & Claims



Purpose:

This Work Instruction defines the steps for Vendor Supervisors & Vendor Technicians to create & submit variations and claims for workorders via the **Touchstone Mobile App**.

Primary Use:

This Work Instruction is used for the following scenarios:

1. Create and submit variations and/or claims dependant on the Touchstone security role/access.

Business Unit Application:

This Work Instruction applies to Programmed Facilities Management.

Audience:

Vendor Technicians & Vendor Supervisors.

Key Fields:

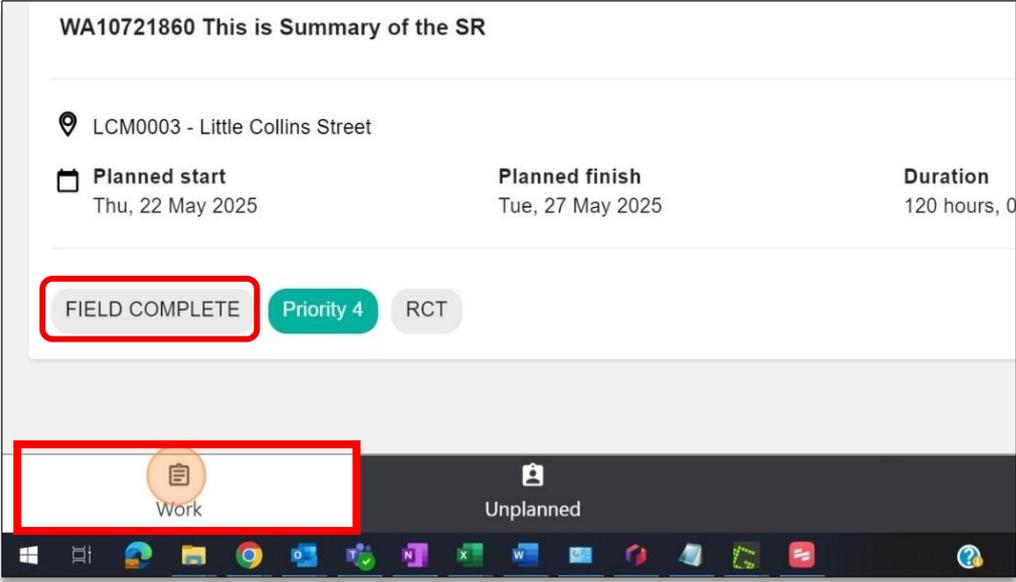
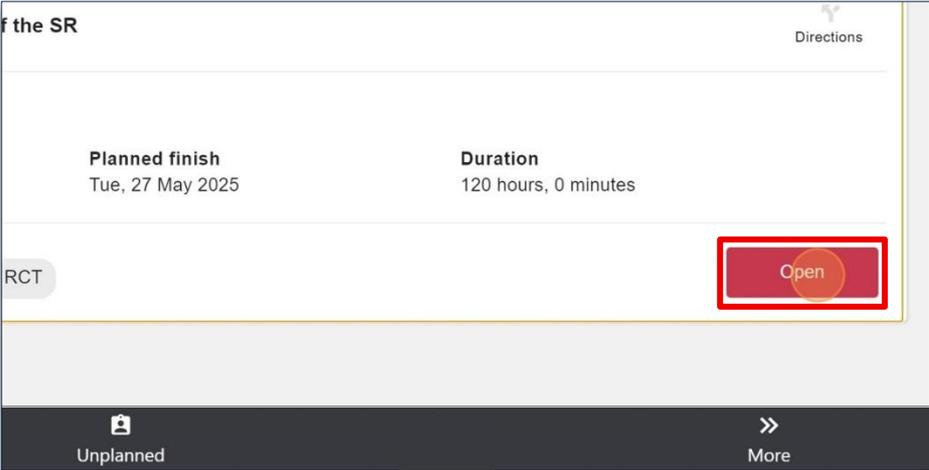
System Field	Definition
SOR	Schedule of Rates
Field Complete	The status which a workorder must be at in order to submit a variation or claim.
Claim Button	The final step in the claims process, only visible to Supervisors.
Variation Button	The final step in the variation process, visible to both Technicians and Supervisors.

Important Note:

Supervisors are unable to submit claims on behalf of another Technician or Supervisor. The work order must first be assigned to the Supervisor submitting the claim to complete the claim process.

Create a variation and submit a claim for a workorder:

Note: Technicians may submit variations or add claims for their own work orders only.
Supervisors may submit claims for their work orders only.

Explanation	Screenshot
<p>Navigate to the Work tab.</p> <p>Note: A workorder must be in Field Complete status to submit a variation or claim.</p>	
<p>1. Click Open.</p>	

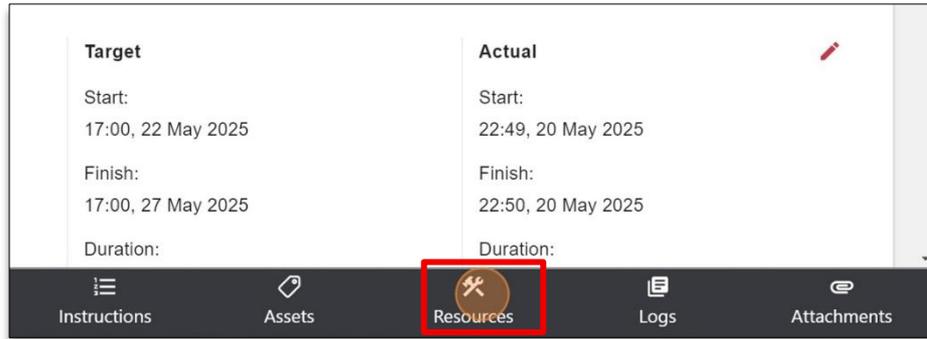
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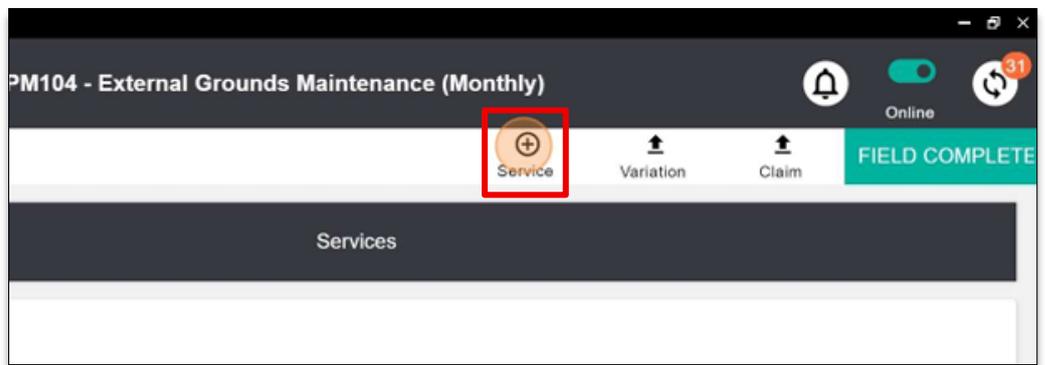
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2. Select **Resources**.

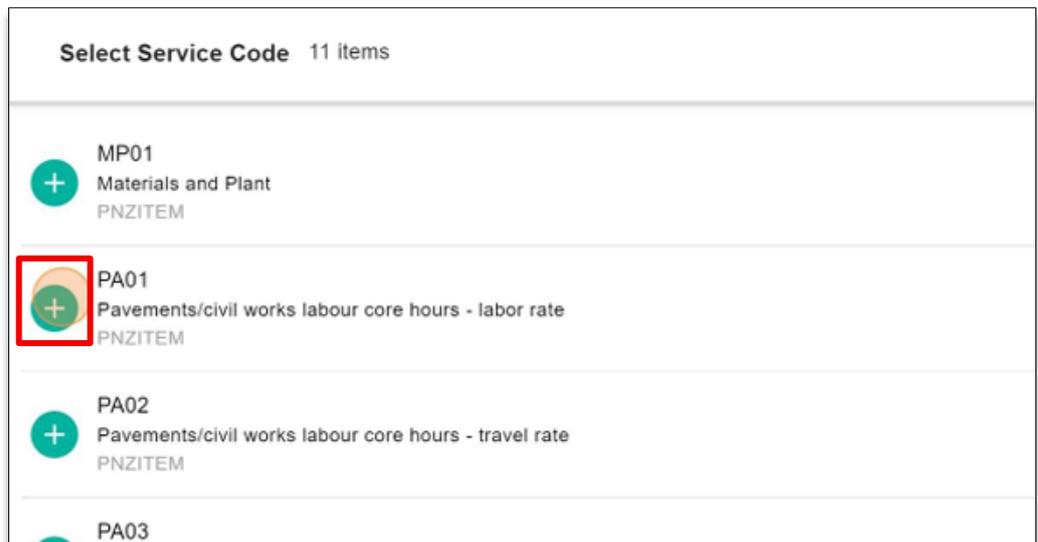


Adding SOR's to a Work Order.

3. To add new SOR's, click **+Service**.



4. Select an **SOR code** from the list.



5. Click the icon on the **Technician** field.



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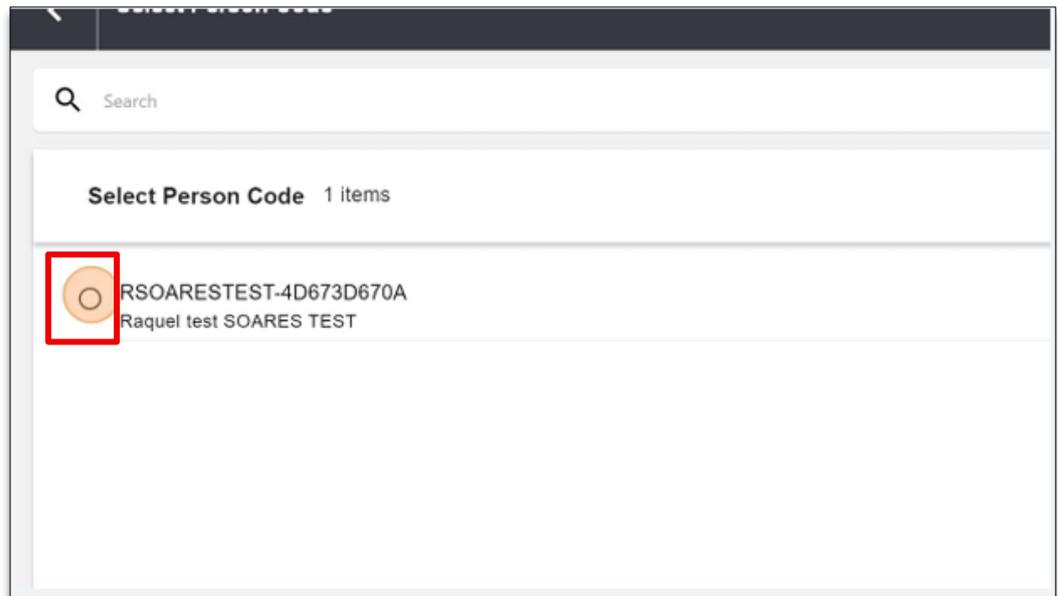
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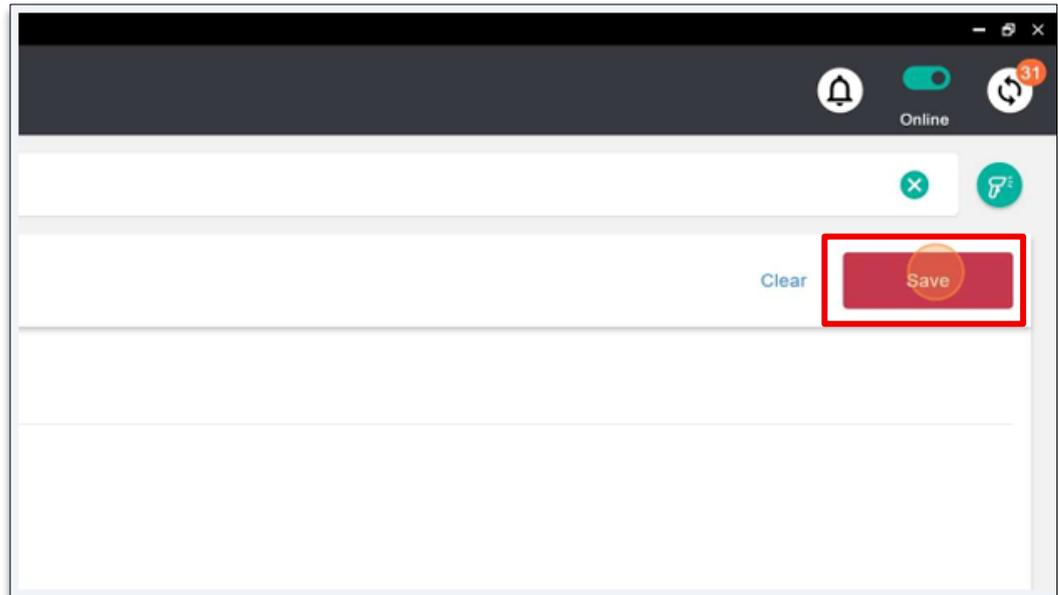
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6. Select a **Person** from the list.

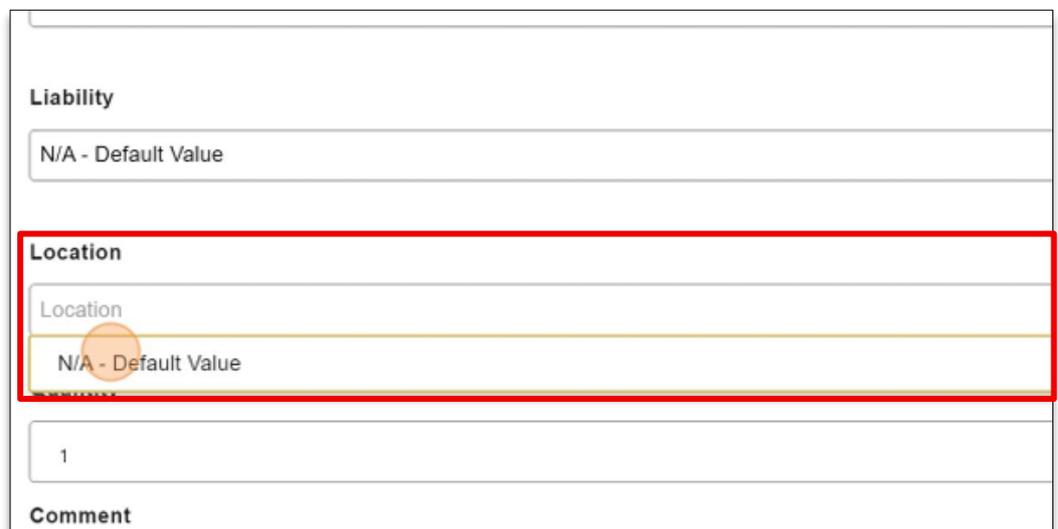
Note: Supervisors are unable to submit claims on behalf of another Technician or Supervisor. The work order must first be reassigned to the Supervisor submitting the claim to complete the claim process.



7. Click **Save**.



8. Select a **Location** from the list.



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9. Enter a **Quantity**.

N/A - Default value

Location

N/A - Default Value

Quantity

1

Comment

Comment

10. Click **Save**.

3/15

Clear

9/50

Cancel

Save

11. Click the back arrow.

Touchstone

Select Service Code

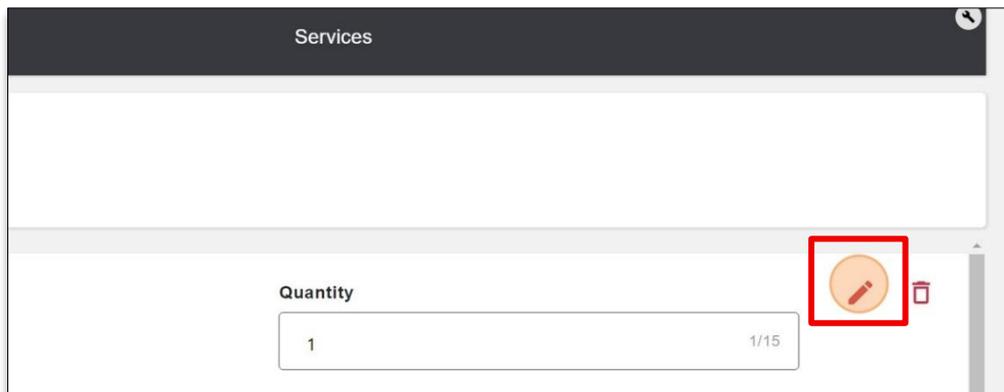
Search

Select Service Code 11 items

MP01
Materials and Plant
PNZITEM

Updating existing SOR's within a Work Order.

12. If there is an existing SOR, click the Pencil icon to edit the quantity (if applicable).

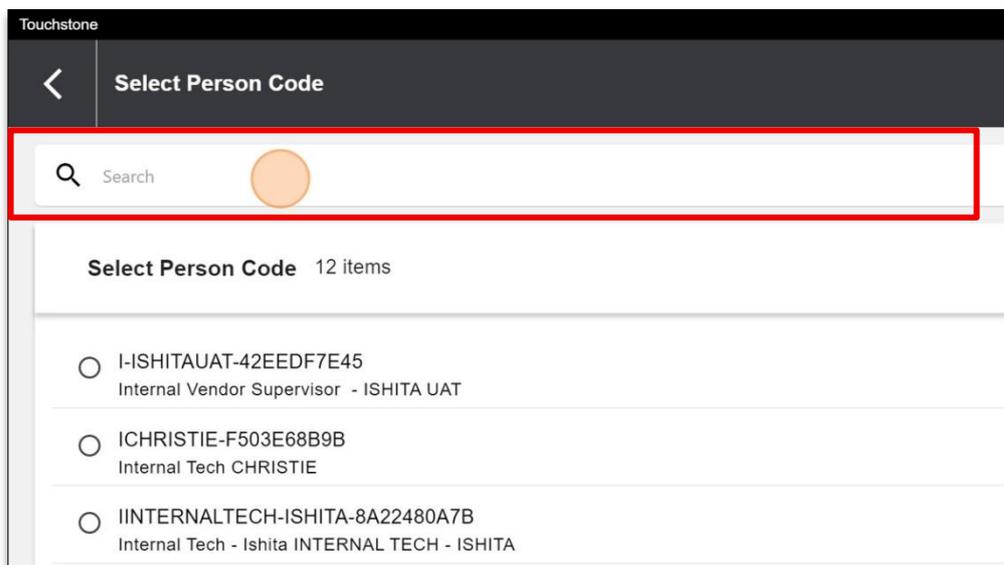


13. Click on the icon to enter a **Technician**.

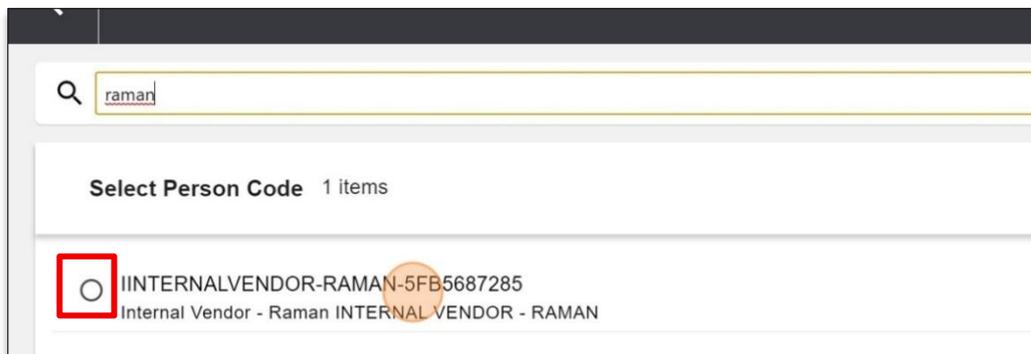


14. Locate a **Technician** from the list or via the **Search** field.

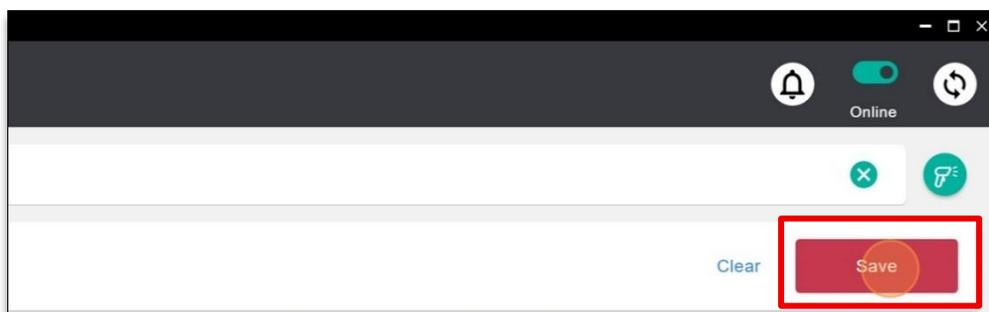
Note: Supervisors are unable to submit claims on behalf of another Technician or Supervisor. The work order must first be reassigned to the Supervisor submitting the claim to complete the claim process.



15. Select a **Person** from the list.



16. Click **Save**.



17. The **Location & Liability** fields will default to **N/A – Default Value** in most cases. If these fields are blank, select a value.

18. The **Quantity** against the SOR lines can be amended if required.

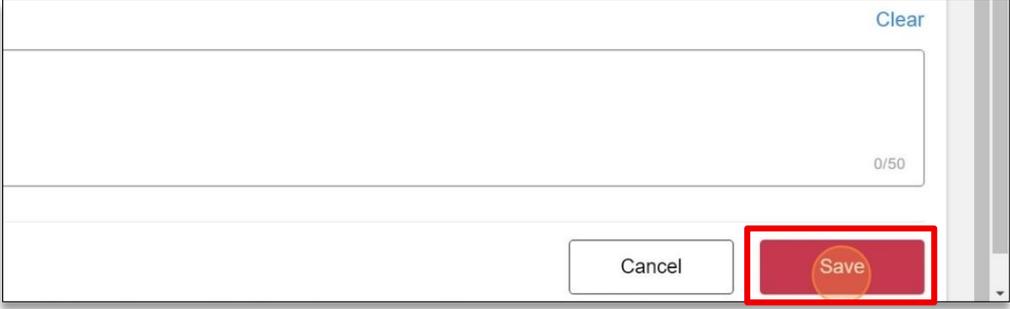
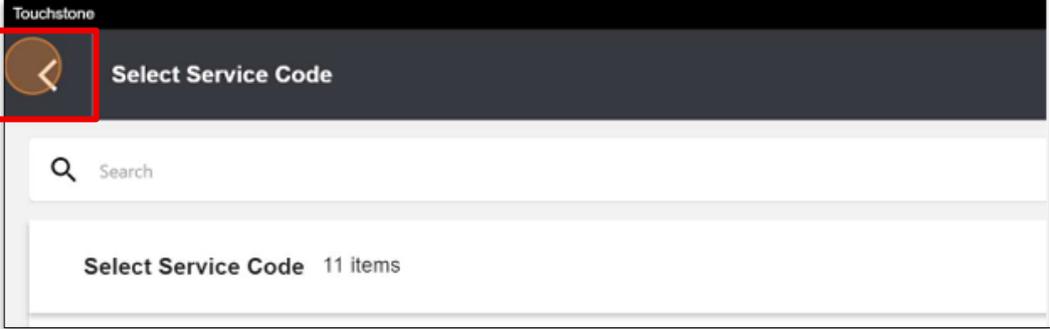
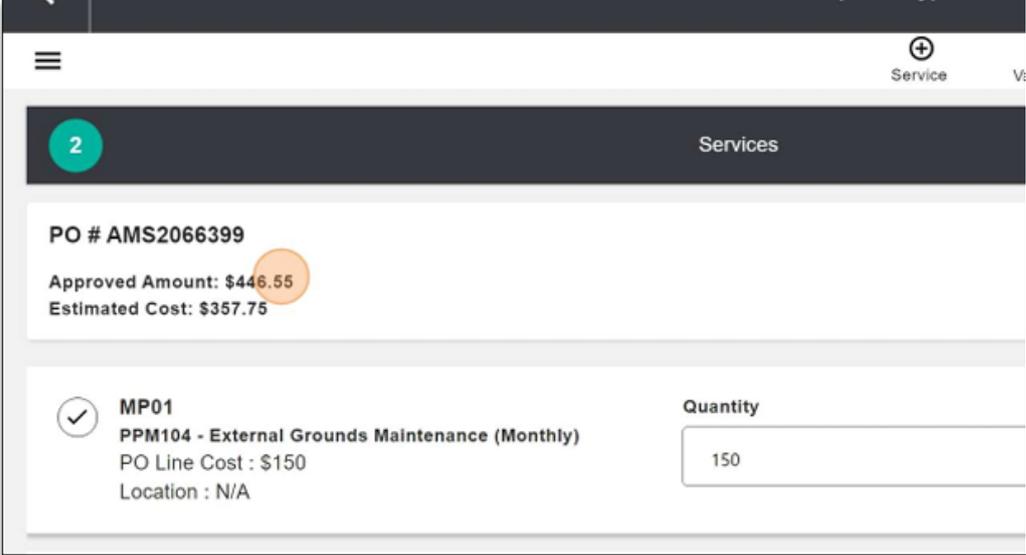


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<p>19. Click Save.</p> <p>20. If more SOR's need to be added, repeat steps 4-10. If not, proceed to step 21.</p>	 <p>A screenshot of a web form. At the top right is a 'Clear' link. Below it is a large text input field with '0/50' characters remaining. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangular box.</p>
<p>21. Click the back arrow.</p>	 <p>A screenshot of a mobile application screen titled 'Select Service Code'. A back arrow icon in a circular button is highlighted with a red box. Below the title is a search bar with a magnifying glass icon and the word 'Search'. At the bottom, it says 'Select Service Code 11 items'.</p>
<p>22. Once all SOR's have been added to the work order, review the Quantity against the SOR codes.</p>	 <p>A screenshot of a mobile application screen titled 'Services'. It shows a list item for 'MP01 PPM104 - External Grounds Maintenance (Monthly)'. The 'Quantity' field is set to '150'. Above the list item, it shows 'PO # AMS2066399', 'Approved Amount: \$446.55', and 'Estimated Cost: \$357.75'. A red circle highlights the 'Approved Amount' value.</p>

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<p>23. Supervisors:</p> <p>Select Variation when a pre-approval of a PO claim is required. Otherwise, select Claim.</p> <p>Technicians:</p> <p>Technicians select Variation.</p>	
<p>Result: The status will progress to Claim Submitted.</p>	

Related Work Instructions or Process Maps:

History			
Description	Reference #	Date	Authority / WI Owner
New Work Instruction		19 th May 2025	Programmed Facility Management
Reviewed		16 th June 2025	Programmed Facility Management
Next Review Due		Upon new release	