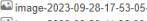
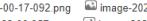
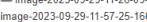
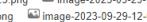
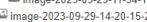
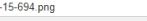
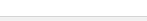
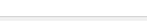
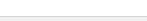
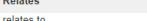


[CRM-242] [Claims] BNP - Transportation - UT Claims Created: 09/20/23 Updated: 10/19/23			
Status:	New		
Project:	CRM		
Component/s:	None		
Affects Version/s:	None		
Fix Version/s:	None		
Type:	Story	Priority:	
Reporter:	Bassel Matta	Assignee:	
Resolution:	Unresolved	Votes:	
Labels:	BNP Claims, UT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		
Attachments:	                  		
Issue Links:	Relates relates to CRM-169 [Claims] BNP Claims - Master	New	
Story Points:	0		
Test Hours:	0		
Dev Hours:	0		

Description:**Search & Filters Function:**

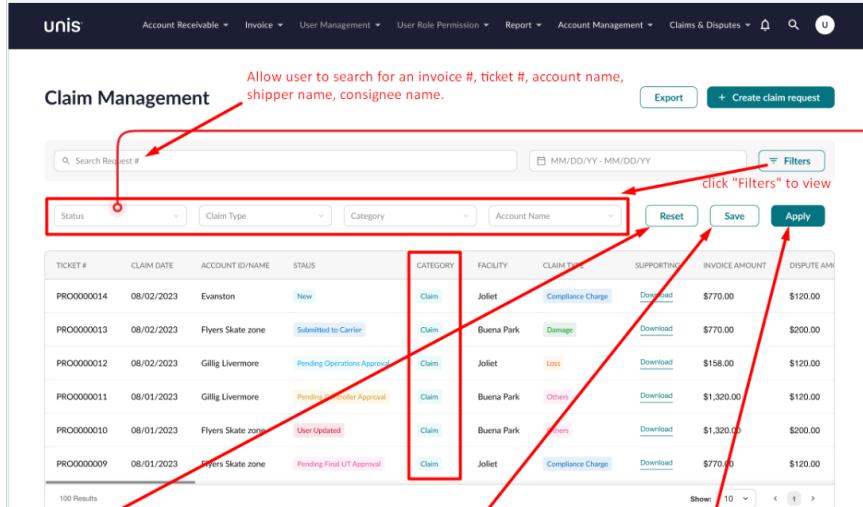
Allow user to search for an invoice #, ticket #, account name, shipper name, consignee name.

click "Filters" to view

"Reset" will make all the filters go to blank.

click "save" to make this filter selections the default for the future searches.

click "apply" to search for the selected filters.



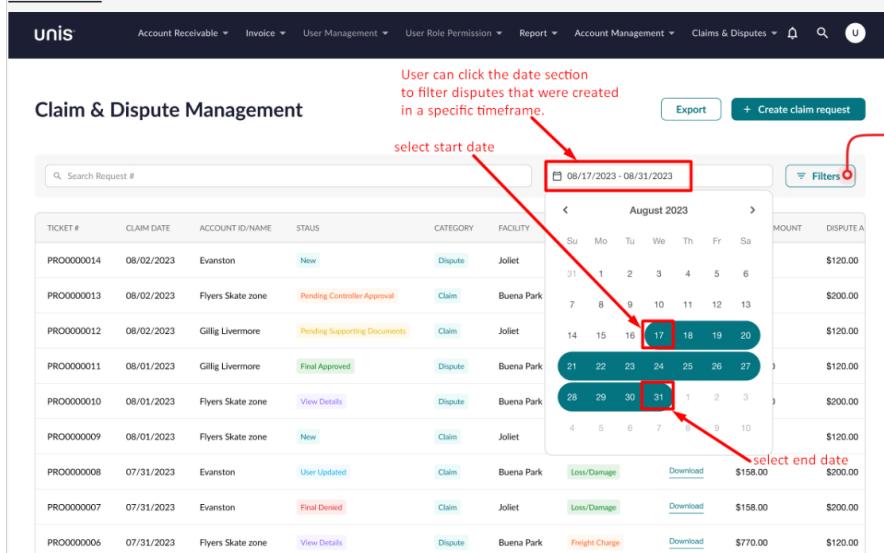
TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTER	INVOICE AMOUNT	DISPUTE AMT
PRO00000014	08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO00000013	08/02/2023	Flyers Skate zone	Pending Carrier Approval	Claim	Buena Park	Damage	Download	\$770.00	\$200.00
PRO00000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Pending Carrier Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00

Date Filter:

User can click the date section to filter disputes that were created in a specific timeframe.

select start date

select end date



TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	DISPUTE AMT
PRO00000014	08/02/2023	Evanston	New	Dispute	Joliet	\$120.00
PRO00000013	08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	Buena Park	\$200.00
PRO00000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet	\$120.00
PRO00000008	07/31/2023	Evanston	User Updated	Claim	Buena Park	\$158.00
PRO00000007	07/31/2023	Evanston	Final Denied	Claim	Joliet	\$158.00
PRO00000006	07/31/2023	Flyers Skate zone	View Details	Dispute	Buena Park	\$770.00
PRO00000005	07/30/2023	Gillig Livermore	New	Dispute	Buena Park	\$1,320.00

Filters:

Filter - Status: Once the user clicks on the Status dropdown menu they should be able to see the options below, if they select an option and click "Apply" then they will be able to see the claims with that specific status.

New: when a new claim is submitted by the user but no one from BNP or internal claims team have looked at it yet or modified it.

On the frontend on the client portal for the customer, it will show status as "New".

Submitted to carrier: when the internal user on BNP from claims department forward the claim to the carrier we used to ship the package and we are still waiting for them to reply so we can update our customer.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Operations Approval: this is the first step, once a claim is created, it will get assigned to the operations team so they can approve/deny/request docs for the claim.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Controller Approval: when a claim is approved by the operations, it will then get assigned to Controller to approve/deny the claim.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Final UT Approval: when a claim is approved by the Controller, it will then **SOMETIMES** get assigned to Controller to approve/deny the claim **ONLY** if the claim amount is over a certain amount. Please refer to the workflow to see the amount. We want to have internal settings to change the amount, so if claim amount is over or equal to \$XXX then we send the claim to Final UT Approval so they can approve. However if the claim amount is under that amount, then we will consider the controller approval as final approval.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Supporting Documents: when someone from internal team claims department request more documents from the customer, the ticket will still be assigned to the same party in BNP but it will have a new status that is listed above so that way we know that there is some missing documents and we have requested them from the user to upload on the client portal.

On the frontend on the client portal for the customer, it will show status as "Processing".

User Updated: if the user upload new documents that we have requested so we can review, then it will be under "User Updated" so that way someone from BNP claims department who is assigned to the claim can go back and see that the user has uploaded these documents that internal user has requested in the step above.

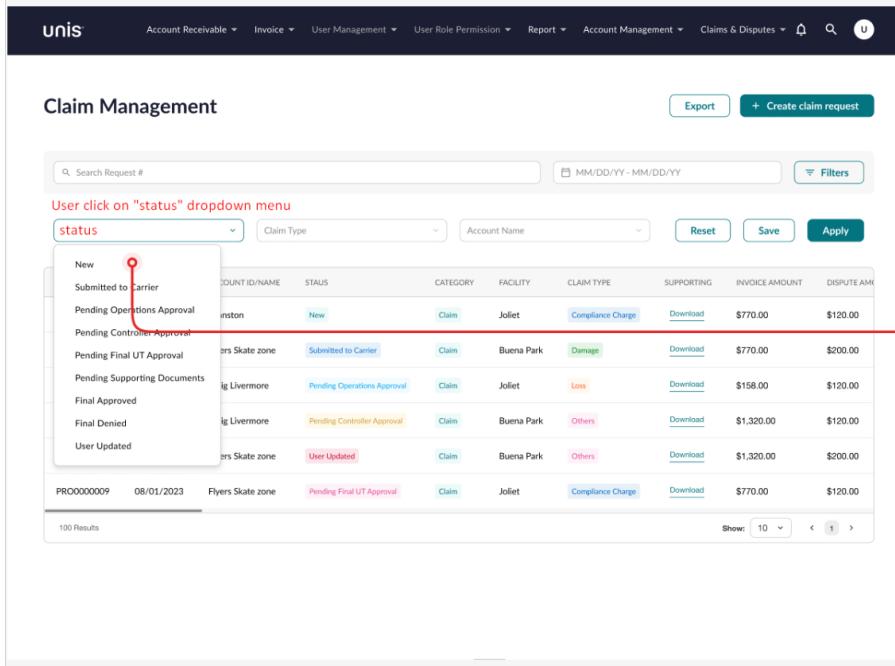
On the frontend on the client portal for the customer, it will show status as "Processing".

Final Approval: if the claim is finally approved by "Controller" (Maria) if it is less than \$XX amount. Or if the claim is finally approved by "Final UT Approval" (Raul). Then it will be assigned this tag, and the user on the frontend will know that the claim has been approved for a \$XX.xx amount that the internal user in BNP approves.

On the frontend on the client portal for the customer, it will show status as "Approved".

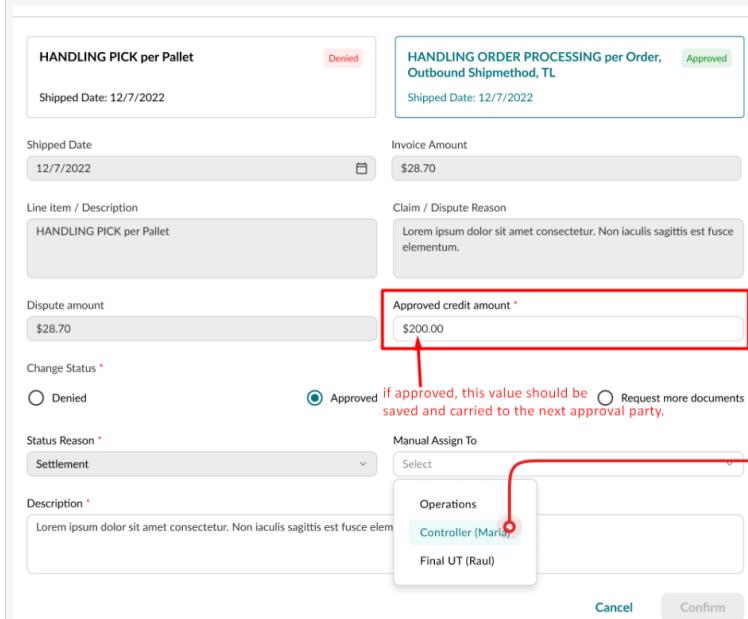
Final Denied: if the claim is denied by the last approval party, it will get this status.

On the frontend on the client portal for the customer, it will show status as "Denied".



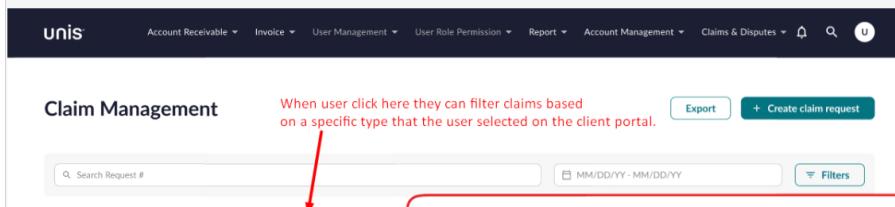
The screenshot shows the 'Claim Management' page of the Unis system. At the top, there are several navigation tabs: Account Receivable, Invoice, User Management, User Role Permission, Report, Account Management, and Claims & Disputes. Below the tabs is a search bar with placeholder 'Search Request #' and a date range selector 'MM/DD/YY - MM/DD/YY'. A 'Filters' button is also present. The main area displays a table of claims with columns: COUNT ID/NAME, STATUS, CATEGORY, FACILITY, CLAIM TYPE, SUPPORTING, INVOICE AMOUNT, and DISPUTE AMT. A dropdown menu labeled 'status' is open, showing a list of options: New, Submitted to Carrier, Pending Operations Approval, Pending Controller Approval, Pending Final UT Approval, Pending Supporting Documents, Final Approved, Final Denied, and User Updated. The 'Pending Controller Approval' option is highlighted with a red box and a red arrow pointing to it from the text above. The table data includes entries for Flyer's Skate zone, Joliet, and Buena Park, with various status and type indicators like 'Pending Operations Approval' and 'Pending Controller Approval'.

Note: For Approval, when an internal user approves and put an amount in the "Approved Claim Amount" field, this value should carry to the next step in the workflow but it should still be editable so the next person in the workflow can make the necessary modifications to the amount if needed.



The screenshot shows the 'HANDLING ORDER PROCESSING per Order' form. It includes fields for 'Shipped Date' (12/7/2022), 'Invoice Amount' (\$28.70), 'Line Item / Description' (HANDLING PICK per Pallet), 'Claim / Dispute Reason' (Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.), 'Dispute amount' (\$28.70), and 'Approved credit amount' (\$200.00). A red box highlights the 'Approved credit amount' field. Below these fields are radio buttons for 'Approved' (selected) and 'Denied', with a note: 'Approved if approved, this value should be saved and carried to the next approval party.' There are also fields for 'Change Status' (Denied), 'Status Reason' (Settlement), and 'Description' (Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.). A 'Manual Assign To' dropdown menu is open, showing 'Operations', 'Controller (Maria)', and 'Final UT (Raul)'. A red box highlights the 'Controller (Maria)' option, and a red arrow points to it from the text above.

Filter - Claim Type: Once internal user clicks here, they can filter claims based on a specific type that the user selected on the client portal.



The screenshot shows the 'Claim Management' page of the Unis system. At the top, there are several navigation tabs: Account Receivable, Invoice, User Management, User Role Permission, Report, Account Management, and Claims & Disputes. Below the tabs is a search bar with placeholder 'Search Request #' and a date range selector 'MM/DD/YY - MM/DD/YY'. A 'Filters' button is also present. The main area displays a table of claims with columns: COUNT ID/NAME, STATUS, CATEGORY, FACILITY, CLAIM TYPE, SUPPORTING, INVOICE AMOUNT, and DISPUTE AMT. A red box highlights the 'Filters' button, and a red arrow points to it from the text above. The table data includes entries for Flyer's Skate zone, Joliet, and Buena Park, with various status and type indicators like 'Pending Operations Approval' and 'Pending Controller Approval'.

New Claim Type Account Name Reset Save Apply

TICKET #	CLAIM DATE	ACCOUNT ID	CATEGORY	Facility	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMT
PRO00000014	08/02/2023	Evanston	Transportation Compliance Charge	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO00000013	08/02/2023	Flyers Skate zone	Transportation Damage	Buena Park	Damage	Download	\$770.00	\$200.00
PRO00000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Joliet	Loss	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Buena Park	Others	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	User Updated	Buena Park	Others	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Joliet	Compliance Charge	Download	\$770.00	\$120.00

100 Results Show: 10 < 1 >

This is where the customer selects the claim type on the frontend on the client portal:

Claims & Disputes > File New Claim > Transportation > Claim > Select Claim Type:

Tracking Claims & Disputes History File New Claim

All Claims Dispute

Filter

Status

View Details

View Details

View Details

View Details

Back X

What type of claim are you looking to file?

Please select your Claim Type

Loss
Damage
Compliance chargeback
Others

Please select your PRO #

Next

Filter - Account Name:

unis Account Receivable Invoice User Management User Role Permission Report Account Management Claims & Disputes Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

New Transportation Compliance Charge Account Name Reset Save Apply

TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	SUPPORTING	INVOICE AMOUNT	DISPUTE AMT	
PRO00000014	08/02/2023	Evanston	New	Claim	Download	\$770.00	\$120.00	
PRO00000013	08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Download	\$770.00	\$200.00	
PRO00000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Joliet	Loss	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Buena Park	Others	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	User Updated	Buena Park	Others	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Joliet	Compliance Charge	Download	\$770.00	\$120.00

100 Results Show: 10 < 1 >

user can select a claim for a specific customer account.

Main dashboard columns:

unis Account Receivable Invoice User Management User Role Permission Report Account Management Claims & Disputes Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

New Transportation Compliance Charge Account Name Reset Save Apply

TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	SUPPORTING	INVOICE AMOUNT	DISPUTE AMT	
PRO00000014	08/02/2023	Evanston	New	Claim	Download	\$770.00	\$120.00	
PRO00000013	08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Download	\$770.00	\$200.00	
PRO00000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Joliet	Loss	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Buena Park	Others	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	User Updated	Buena Park	Others	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Joliet	Compliance Charge	Download	\$770.00	\$120.00

100 Results Show: 10 < 1 >

New				Transportation Compliance Charge		12067 - Flyers Skate Zone		Reset	Save	Apply
TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMT	
PRO00000014	08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	
PRO00000013	08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$200.00	
PRO00000012	08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00	
PRO00000011	08/01/2023	Gillig Livermore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00	
PRO00000010	08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00	
PRO00000009	08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	

All of the data and columns data shown in the image above are from the user on client portal. They enter this info when they are creating the claim, then all the data will get mapped to here. A lot of the data they do not enter, it is set automatically based on the selections they make on the client portal claims pages.

The ticket # is created automatically. In this case we will use the PRO # as the ticket number.

When the user click the "Download" button under "SUPPORTING", they will see a popup box that looks like this:

When "View Data" is clicked on claim:

Claim & Dispute

Search Request #

Status

CLAIM DATE	ACCU	DISPUTE AMOUNT
08/02/2023	Evans	120.00
08/02/2023	Flyers	200.00
08/02/2023	Gillig Livermore	120.00
08/01/2023	Gillig Livermore	120.00
08/01/2023	Flyers	120.00
08/01/2023	Flyers	120.00
07/31/2023	Evans	200.00
07/31/2023	Evans	200.00
07/31/2023	Flyers	200.00
07/30/2023	Gillig Livermore	200.00

Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Ticket # PRO0000010 Denied Status

Ticket number

Customer ID * DELPRD0002

Po # 123456

Ship to * TESTER

Location * UT-Grand Prairie

Address 2250 Lion Country Parkway, Suite 100, Grand Prairie, TX 75051, UNITED STATES

Description * Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Email Tester@unisco.com

Phone Number 1234567890

Customer Name * DELTA ELECTRONICS (Americas) LTD - NEW

Reference Number

Shipped Date * 08-08-2023

Claim amount * \$28.70

Signature *



Name Tester

Data inputted by the customer when creating the claim

Close

When "Change Status" is clicked on claim:

unis

Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾ + Create claim request

Claim & Dispute Management

Export + Create claim request

Search Request # MM/DD/YY - MM/DD/YY Filters

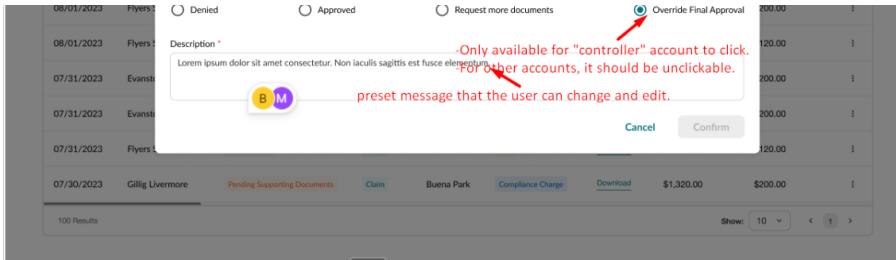
Claim Date	Account ID/Name	Status	Category	Facility	Claim Type	Supporting	Invoice Amount	Dispute Amount	Action
08/02/2023	Evanston	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	View Data Change Status
08/02/2023	Flyers Skate zone	Submitted to Carrier	Claim	Buena Park	Damage	Download	\$770.00	\$200.00	View Data Change Status
08/02/2023	Gillig Livermore	Pending Operations Approval	Claim	Joliet	Loss	Download	\$158.00	\$120.00	View Data Change Status
08/01/2023	Gillig Livermore	Pending Controller Approval	Claim	Buena Park	Others	Download	\$1,320.00	\$120.00	View Data Change Status
08/01/2023	Flyers Skate zone	User Updated	Claim	Buena Park	Others	Download	\$1,320.00	\$200.00	View Data Change Status
08/01/2023	Flyers Skate zone	Pending Final UT Approval	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	View Data Change Status
07/31/2023	Evanston	Final Approved	Claim	Buena Park	Damage	Download	\$158.00	\$200.00	View Data Change Status
07/31/2023	Evanston	Final Denied	Claim	Joliet	Damage	Download	\$158.00	\$200.00	View Data Change Status
07/31/2023	Flyers Skate zone	View Details	Claim	Buena Park	Loss	Download	\$770.00	\$120.00	View Data Change Status
07/30/2023	Gillig Livermore	Pending Supporting Documents	Claim	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00	View Data Change Status

100 Results Show: 10 1 2 3

-Override approval option is only available for "Controller" access to click on it. Once clicked, it will mean that this is final approval and the claim will not be assigned to "Final UT Approval" if it were to go to that department. Sometime this department is travelling or unavailable so allow the "Controller" to take the final decision sometimes.

- "Approved Claim amount" field is only available for fill-out if the status "Approved" or "Override Approval" is selected.

The screenshot shows the 'Claim & Dispute Management' section of the Unis platform. A specific claim is selected, identified by the ticket number 'PRO0000010' and the status 'Submitted'. The interface includes a search bar, export and create buttons, and a filters section. The main claim details are displayed in a box, with annotations pointing to various fields: 'ticket status' points to the status indicator, 'ticket number' points to the ticket ID, 'user enter amount' points to the 'Approved credit amount' field, and 'Data from claim provided by customer on client portal' points to the 'Line item / Description' and 'Invoice Amount' fields. The claim details include: Shipped Date (12/7/2022), Invoice Amount (\$28.70), Line item / Description (HANDLING PICK per Pallet), Claim / Dispute Reason (Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.), and Dispute amount (\$28.70). The 'Change Status' button is also visible.



-After each "Status Reason" is selected from the dropdown menu, we will have a template message to show for each of the options from the dropdown menu in the "Description Box". The text in the description box will be editable in case the internal user want to change it.

"Approved" Option:

The user can select from the dropdown menu called "Status Reason" the message that they like, then they can change the message after it shows in the text box.

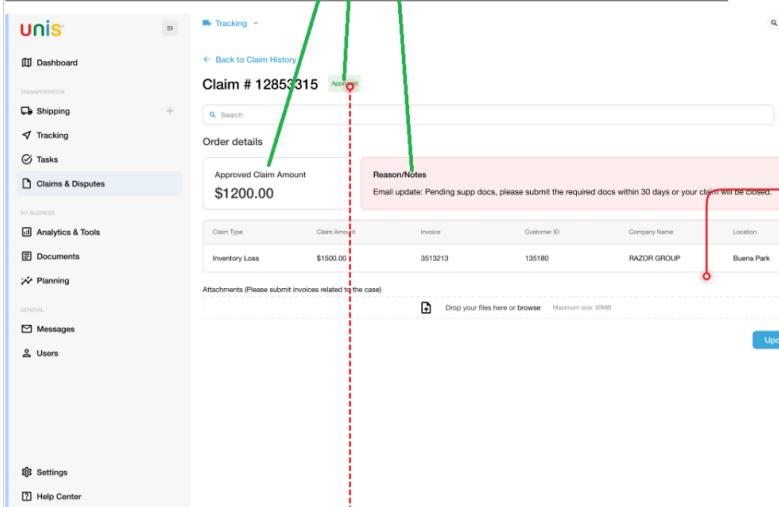
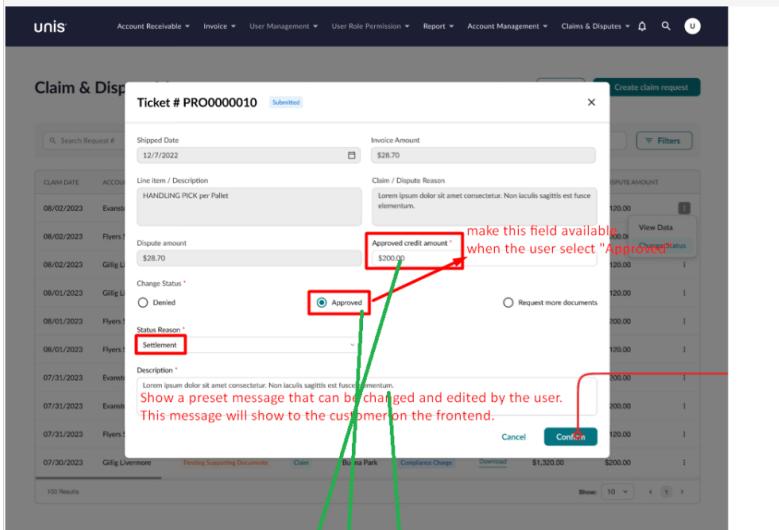
Auto populate "Description" message 1:

- Your claim has been approved with a settlement amount of \$X.xx

Auto populate "Description" message 2:*

- Your claim has been approved with a settlement amount of \$X.xx. Once your account is current payment will be released.

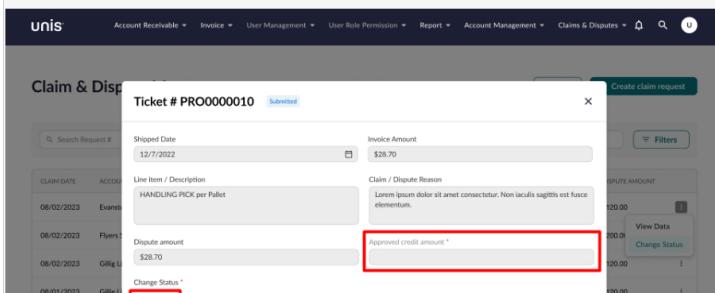
Mapping:



"Denied" Option:

Once the user select "Denied" they will not be able to enter an amount.

And they will see different options in the dropdown menu of "Status Reason".



Denied Approved Request more documents

8/1/2023 Flyers
8/1/2023 Flyers
7/31/2023 Evans
7/31/2023 Evans
7/31/2023 Flyers
7/30/2023 Gillig Livermore

100 Results

8/1/2023 Flyers Pending Supporting Documents Claim Buena Park Compliance Charge Downloaded \$1,320.00 \$200.00 \$200.00 \$200.00 \$200.00

Show: 10 < >

Note that if we are at the "Controller" level to make the decision, and the controller decide to "deny" the claim, then it will be sent back to the previous party to verify, so in this case the claim will be sent back to "Operations" team to review the claim again. Please refer to the workflow below for visual representation.

Auto "Description" messages for each selection will be as follows:

Mitigation/Other

Per NMFC guidelines, it is the responsibility of a shipper to mitigate the costs of a claim to the least amount possible, which essentially means shippers are required to do their part to help minimize financial loss. Mitigation is usually done by selling the damaged item at a discount, selling it for parts or scrap, or by repairing the item rather than replacing it completely. If making repairs, the cost of repairing the item would be the amount filed for in the claim.

Freight Charges

Under NMFC regulations the freight bill must be paid. Please contact our claims department once the charges have been satisfied.

Clear Delivery

We have concluded our investigation and determined that no exceptions were noted by the receiver at the time of delivery. Since there is no evidence of carrier mishandling to show that the damage or loss occurred before delivery, we respectfully decline participation in this claim.

Past Allotted Time

We have concluded our investigation and determined your claim was filed past the allotted time; therefore, we respectfully decline participation in this claim.

Salvage Availability

We have concluded our investigation and determined that damaged freight should be available for carrier pick-up until claim settlement. Since the salvage is unavailable for carrier pick up, carrier liability cannot be established, we respectfully decline participation in this claim.

Properly Packaged

We have concluded our investigation and determined there's no sufficient evidence that the damage was caused by the carrier. Our investigation revealed the product was not properly packaged for transit by a motor carrier.

Spotted Delivery

After further review, it was determined that the shipment was delivered to a customer that requests their shipments be spotted for delivery. This prevents the driver from being present during the unloading process. Our checking records indicate the complete shipment was intact when tendered to the consignee. Without our representative being present when the product is delivered, there is no way to validate any loss or damage regarding this shipment. Considering this circumstance, we must respectfully decline participation in your claim at this time.

"Request more documents" Option:

Status of the claim will change to "Pending more documents".

Once the user select "Request More Documents" they will not be able to enter an "approved claim amount".

And they will see different options in the dropdown menu of "Status Reason". They can select multiple documents missing.

unis Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Claim & Disp

Ticket # PRO0000010 Submitted

Shipped Date: 12/7/2022 Invoice Amount: \$28.70

Line Item / Description: HANDLING PICK per Pallet Claim / Dispute Reason: Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Dispute amount: \$28.70 Approved credit amount: *

Change Status: Denied Approved Request more documents

Select Documents Required: Repair invoice Commercial invoice Sales invoice BOL Proof of delivery

Cancel Confirm

8/1/2023 Flyers Pending Supporting Documents Claim Buena Park Compliance Charge Downloaded \$1,320.00 \$200.00 \$200.00 \$200.00 \$200.00

Show: 10 < >

Auto "Description" messages for each selection will be as follows:

Incomplete/Inadequate Documentation

Our initial review of your claim finds the file to be incomplete. The following indicated documentation is needed:

- Pictures of claimed goods to establish the nature and extent of the damage.

This claim is respectfully closed as filed until the requested documentation is received.

-----> The bullet points above will be the selected documents that the user is requesting the customer to upload.

Manual Assign To:

unis Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Claim & Disp

Ticket # PRO0000010 Submitted

Shipped Date: 12/7/2022 Invoice Amount: \$28.70

Line Item / Description: HANDLING PICK per Pallet Claim / Dispute Reason: Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Dispute amount: \$28.70 Approved credit amount: *

User can select one of these options below or from "Manual Assign To" but not both.

Cancel Confirm

8/1/2023 Flyers Pending Supporting Documents Claim Buena Park Compliance Charge Downloaded \$1,320.00 \$200.00 \$200.00 \$200.00 \$200.00

Show: 10 < >

Start Date	End Date	Description	Category	Amount	Comments								
08/01/2023	Gilling L	Denied	Approved	Request more documents	120.00								
08/01/2023	Flyers				200.00								
08/01/2023	Flyers				120.00								
07/31/2023	Evanst				200.00								
07/31/2023	Evanst				200.00								
07/31/2023	Flyers				120.00								
07/30/2023	Gilling Livermore	New	Dispose	Buena Park	Compliance Change	Download	\$1,320.00	\$200.00	100 Results	Show: 10			

Select Documents Requested *

Multiple options

Description *

Lore ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce ele

Manual Assign To

Select

Operations

Controller (Maria)

Final UT (Raul)

[Cancel](#)

[Confirm](#)

The user will have an option to manual assign a claim to someone in their team.

If they use this option, then they will not be able to use the circle buttons to approve, deny, override approve. The selection circles above will be unclickable, they will be gray. And if the user clicks on them, then the dropdown menu for "Manual Assign To" will be grey. So they can use either option but not both.

The user will have a dropdown menu where they can select to assign the claim to a specific team in the claim department. Once the user make the selection and click confirm, then the claim will be assigned to that user that has been selected.

This feature should only be available as Turn ON/OFF for specific accounts, allow permission level for this feature. Not all accounts will be able to use the "Manual Assign To" feature. And it should be selected by admin as who will be able to use this feature from account settings.

Workflow:

