

DATE: 17.10.2023

QUERIES:

1. Every team need a revert option to write query for request raised to respective functional teams and need to get reply – **Sabira**.
2. Remove old cases from bucket (as started to use only last month) – **Sabira**.
3. Dashboard view – **Veera**.
4. All the reverted cases need to be made visible to QC team – **Veera**.
5. Payroll components must be visible only to payroll, QC and finance team alone need to disable for other teams.
6. Provide an option to enable the opening of attachments even after the completion of the QC process – **Veera**.
7. After F & F, In case of any additional payouts the user should be able to reopen the account and do the process again – **Sabira, Ruban**.
8. In HRL001, while adding entries need checklist in the next tab itself – **Anita**.
9. In Claim finance, ITN001 need a trigger option for checklist - **Anita**.
10. In PRIT001, Need to remove checklist and stage gate – **Anita**.

REQUIREMENTS:

1. Recovery cases to be directly moved to a different part.
2. Automate the process of uploading the F&F statement, converting the Excel file to PDF, and sending it via email.
3. **Resettlement cases** - First payment and second-time payment details should be made available. **E.g.** First payment for FF, second time for Bonus, and third time for Sales incentive - All details should be made available.
4. Function wise (Bucket wise) TAT to be defined at each level as per the table enclosed for TAT.
5. Escalation to the next levels (TAT to be defined at each level as per the table enclosed).
6. **Report Automation:**
 - Daily report with function wise status (Completed within TAT, Completed beyond TAT, Pending within TAT and Pending beyond TAT)
 - Overall weekly report with Closure TAT considering all the functions.
 - Function wise report.
 - Aging report.
 - A manual report format to be defined with selection of specific time period.
7. Mail communication at each leg to the respective SPOCs as and when a case is moved to their buckets.

8. Escalation:

- Level 1 - An email should be triggered immediately upon exceeding the TAT (Turnaround Time).
- Level 2 - An email should be triggered when 50% of the user's TAT duration has been crossed after escalation to Level 1 (i.e. if the user TAT is 3 hrs, after escalation to level 1, within 90mins the escalation should happen to Level 2).