**TPBI DEPARTMENT DASHBOARD VIEW BRANCH**

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**WHO CAN VIEW THE DASHBOARD**

1. The Directors
2. Managers at HQ level in charge of TPBI department
3. Accounts manager and accounts admin staff
4. Compliance staff – HQ & Branch
5. Branch Manager
6. Branch Admin Staff – TPBI
7. Branch Editors – No 8 only

**TPBI DEPARTMENT PROCESS FLOW - BRANCH**

1. **INCOMING CASE – CASES COMING IN FROM MERIMEN**

[Activator Merimen]

- Auto activation

1. **CANCELLED ASSIGNMENT**

[Activator Merimen]

- Auto activation

Branch Manager to approve and staff to cancel in AASB System

[Process 1 & 2 to be discussed and confirmed with merimen administrator if assignment specific to branch comes straight to branch or goes to HQ]

1. **NEW CASE (REGISTRATION)**

Admin staff will register the case from merimen or register the case from direct source such as email/fax/mail/etc. (AA Ref generated)

An acknowledgement letter for the insured will be generated by the system. The admin staff should be able to export the acknowledgement letter to merimen – Folder Assessment Reports.

The generated acknowledgement letter should be saved in the respective case folder.

Once the case registered the staff must assign it to documents clerk, to check and apply police reports/JPJ/other documents.

– Manual activation

1. **PENDING DOCUMENTS (DOCUMENTATION)**

Admin staff will apply for police documents/JPJ/etc, the documents must be uploaded to the system.

Once documents obtained and by instruction of the branch manager the admin staff will assign the case to the adjuster or will transfer the case to another branch or HQ.

The branch manager can instruct the staff to assign the case to the adjuster even without the documents.

Upon assigning the case an alert must go to the respective adjuster or the branch/HQ on the assignment. The alert can be of email and or text message.

– Auto activation

1. **TRANSFERRED CASES**

Cases transferred from other branches will stack here, the admin clerk will check on the location of accident, people involved are all at the locality and confirm, once confirmed the admin clerk will assign the case to an adjuster. If the case is not of the particular locality the clerk will transfer back the case to the correct branch.

1. **PENDING ACCEPTANCE**

Once the case assigned to the respective adjuster, the adjuster must acknowledge the assignment, if they fail to acknowledge, the case will remain at this stage.

– Manual activation

1. **UNDER INVESTIGATION**

Once the adjuster acknowledges his assignment, status will change from Pending Acceptance to Under Investigation. The adjuster will print out the case details together with the police reports and documents. The adjuster will open his own physical file and will proceed with his investigation.

Once the investigation is completed the adjuster will prepare his report in ms word format and will upload the investigation report into the system. The adjuster is also required to upload the insured statement together with other documents obtained during his investigation, ie police report, employment letters, medical report, JPJ searches, SD and etc.

Once the report uploaded into the system, an auto alert must go to the respective editor/manager. Alert can be of email or text message.

– Automatic activation

1. **EDITING**

The editor or the manager will download the investigation report to his computer and will edit the report. Upon editing, the editor/manager will upload the edited report into the system.

If the report was edited by a manager, the manager will be given rights to put a note on travelling/documents/miscellaneous charges for the admin clerk to create the invoice.

The manager will also approve the (1) claim, (2) typing and (3) 10% commission to the adjuster at this. It can be of a click of a button for each approval and the approval goes to the claims reimbursement.

If the report was edited by an editor, the editor will not have a right to put a note on charges to create the invoice. Editor will not have the right to approve the claims as well.

Once the report uploaded into the system by the editor, an auto alert must go to the respective manager. Alert can be of email or text message.

– Automatic activation

1. **APPROVAL - REPORT**

If the report was edited by an editor instead of a manager, the respective manager must give approval to the edited report. The manager should be able to download the edited report to re-edit, and upload back to the system.

The manager will put a note on travelling/documents/miscellaneous charges for the admin clerk to create the invoice.

The manager will also approve the (1) claim, (2) typing and (3) 10% commission to the adjuster at this. It can be of a click of a button for each approval and the approval goes to the claims reimbursement.

If the report was edited by a manager as per No.8, the system should be able to skip this stage and should go straight to Report Formatting.

– Manual activation

1. **REPORT FORMATTING**

Once the manager uploads the edited report or approves the edited report by the editor.

The admin staff will proceed to download the edited report to her pc, the report will be inspected and formatted as per insurer’s requirement.

Upon formatting the admin clerk will upload the document back into the system in pdf format.

At this stage can we upload the finalized report in ms word format and get the system to convert the ms word format into pdf format? During the conversion can the system include a last page, which contains the details of the manager and his signature?

– Manual activation

1. **INVOICING**

Upon finalization of the report, the admin clerk will proceed to generate the invoice; the extra charges note should appear here. The admin clerk will not be allowed to generate the invoice without the extra charges note.

The generated invoice details will be transferred to QNE accounting system

The generated invoice will be saved in the respective case folder.

– Manual activation

1. **APPROVAL – INVOICING**

A branch, department or a case might be deactivated from invoicing; however the admin clerk will be allowed to generate the invoice as mentioned earlier in step 11.

The generated invoice status will appear at stage 12 for approval. Approval will be provided by the HQ accounts manager, once approved, the admin clerk can proceed to save as per normal or to print.

For deactivated invoicing an auto alert must go to the HQ accounts manager. Alert can be of email or text message.

Once the accounts manager approves the invoice, an alert should go to admin clerk to proceed to finalization.

At the same time the generated invoice details will be transferred to QNE accounting system and the invoiced saved in the respective case folder.

1. **FINALIZATION**

Once invoice is generated or approved along with the investigation report, the admin clerk will proceed to upload the report and the invoice into merimen.

The clerk should be able to click upload in the system and the documents should be transferred automatically to merimen.

1. **CLOSED**

Once the case closed been finalized, the admin clerk will change the status to close and the case should remain here.