Create Task (for Disbursement)

Disbursement Details → **Create Task**

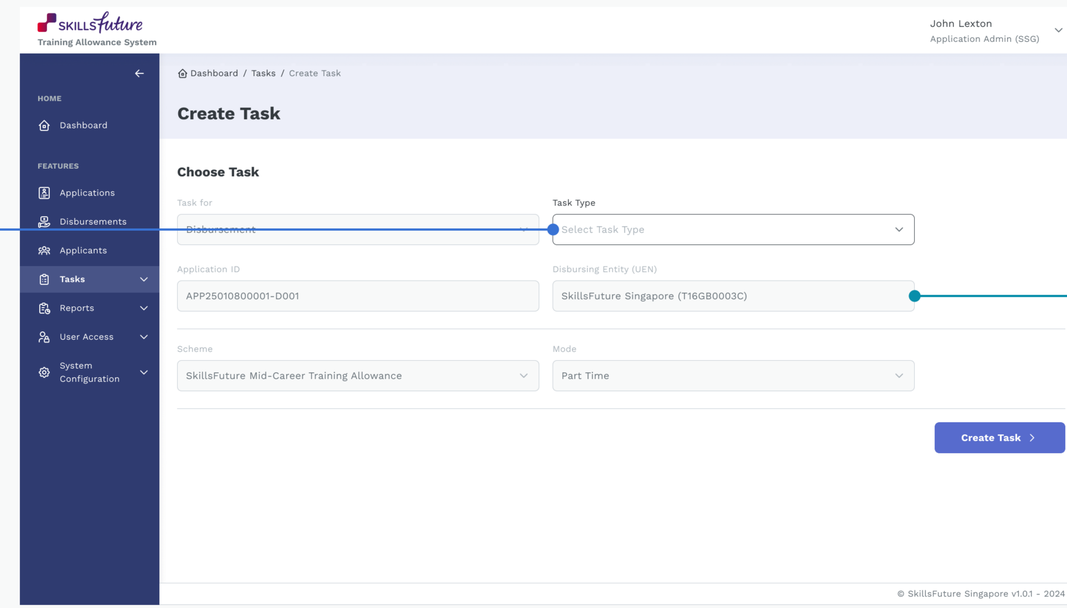
Tasks List Tab > — Click "Create Task" → Default | For Review

Documentation

Create Task from Disbursement Details

- For disbursement tasks:
  - Status Change - Disbursed (Manual) can only be created if the Disbursement Status is "Pending Disbursement (Manual)".
  - Status Change - Refund Waived can only be created if the Disbursement Status is "Pending Refund".
- Hence, the Task Type will only show one available task at any one time (whichever is relevant based on Disbursement Status).

Chu Yi



NEW 06/05/2025

New Field for Disbursement Tasks

- Disbursing Entity (UEN)
- Scheme
- Mode

Chu Yi

Task for	Task Type	Object ID
Disbursement	Status Change - Disbursed (Manual)	✓
	Status Change - Refund Waived	✓

Task Type

Select Task Type

Status Change - Disbursed (Manual)

Task Type

Select Task Type

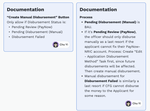
Status Change - Refund Waived

Create Task (Status Change - Disbursed (Manual))

Disbursement Details

Disbursement Status is “Pending Disbursement (Manual)”

Click “Update Manual Disbursement Record”

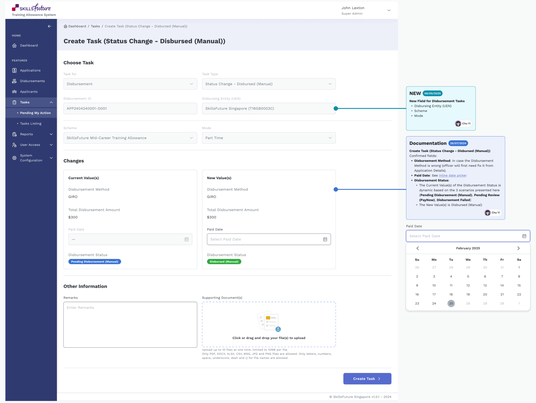


Create Task (Status Change - Disbursed (Manual))

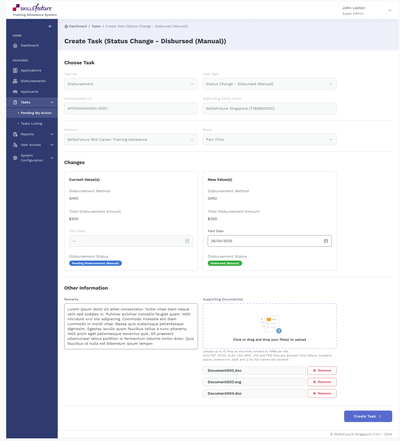
For Review

Default

Fill in Form



Fill in Form



Click “Create Task”

Create Task? Dialog (for Approval)

Click “Yes, Create Task”

Supporting Documents Process

Disbursement Details

Tasks List Tab

Disbursement Status is “Pending Review (PayNow)”

Disbursement Status is “Disbursement Failed”

Click “Edit Disbursement Method”

Create Task (Edit - Application Disbursement Method)

These statuses only occur if the Disbursement Method is originally PayNow-NRIC.

Create Status (Status Change - Refund Waived)

Disbursement Details

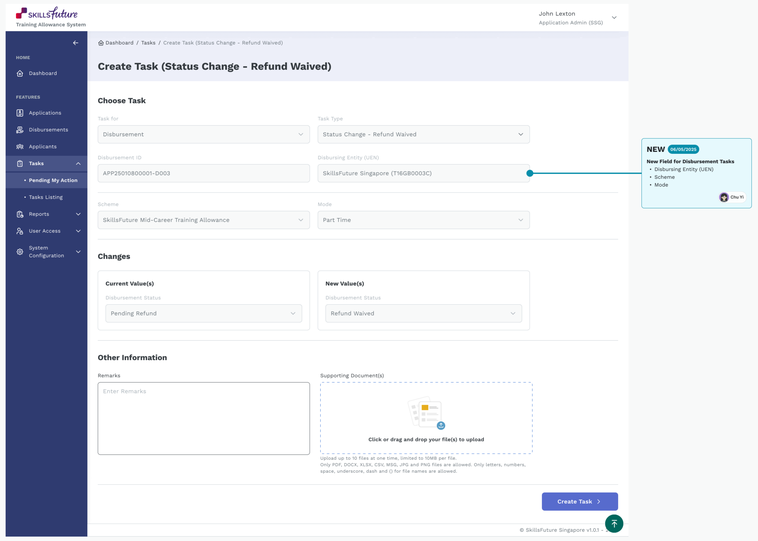
Disbursement Status is “Pending Refund” ›

Click “Waive Refund”

Create Task (Status Change - Refund Waived)

Default

Fill in Form and Click “Create Task”



NEW 02/05/2025
New Field for Disbursement Tasks
- Disbursing Entity (UEN)
- Scheme
- Mode

Cho Yi

For Review

Create Task? Dialog (for Approval)

Click “Yes, Create Task”

Supporting Documents Process

Disbursement Details

Tasks List Tab

Task Details (for Disbursements)

Tasks Listing >

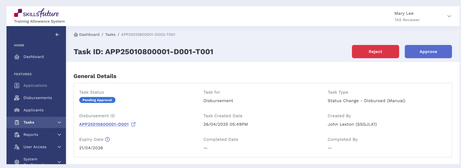
Disbursement Details

Tasks List Tab >

Click Task ID → **Task Details**

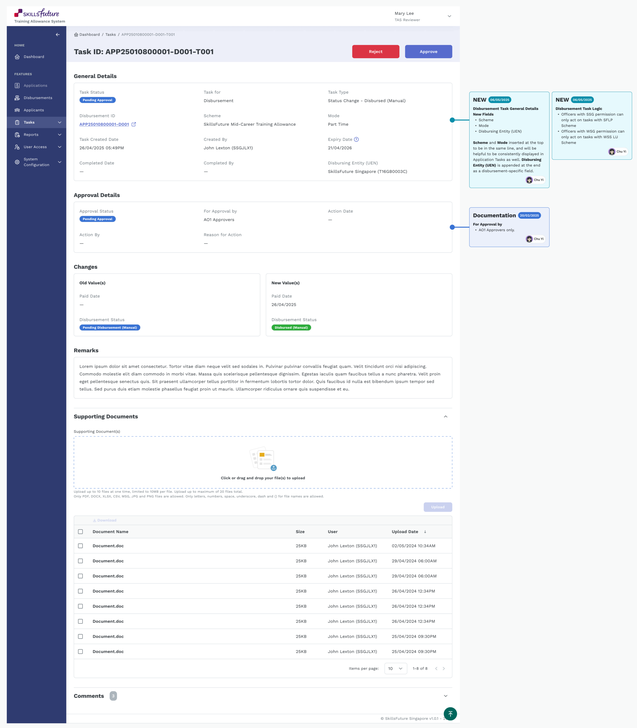
Pending Approval

Approval Workflow



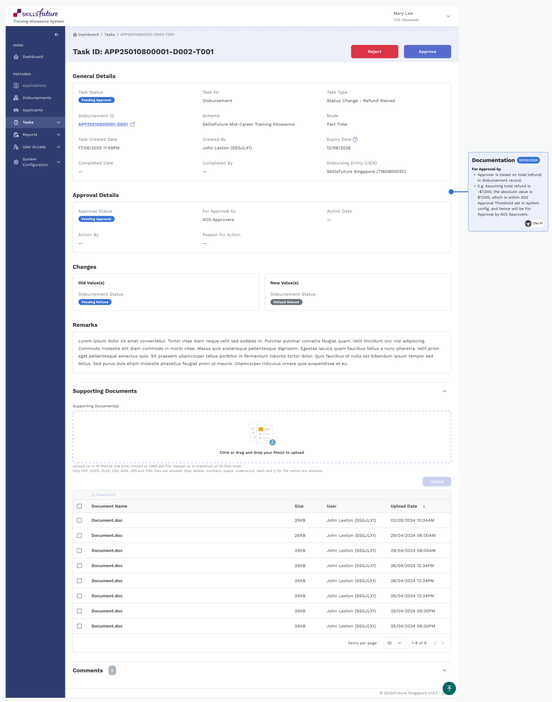
Status Change - Disbursed (Manual)

For Review



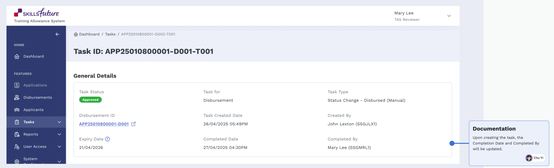
Status Change - Refund Waived

For Review



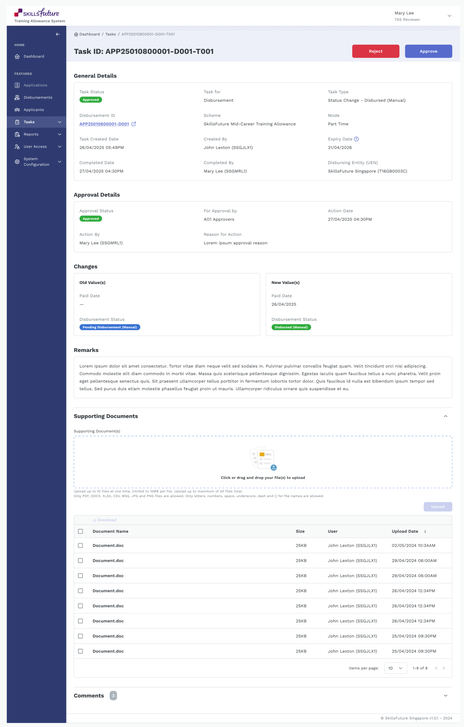
Approved

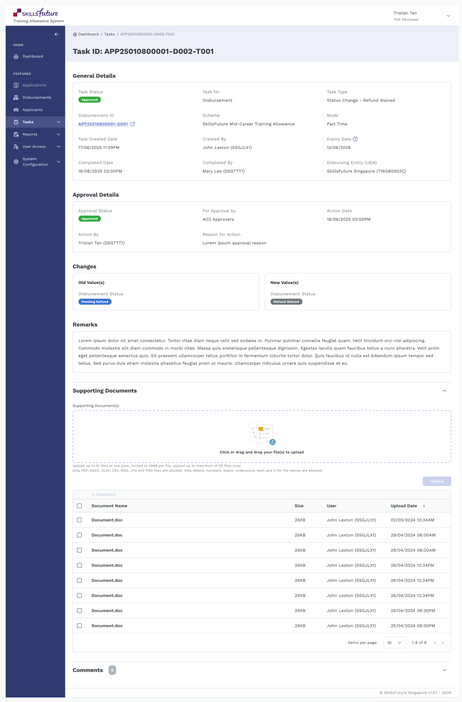
Approval Workflow



Status Change - Disbursed (Manual)

For Review



Status Change - Refund Waived

For Review