| A black background with a sun and text  AI-generated content may be incorrect. |  | **Project Charter**  **Template** |
| --- | --- | --- |

# Project Overview

The **SmartClaim Reimbursement Manager** is a custom-built ServiceNow application designed to **streamline and automate the business expense reimbursement process**. It enables employees to easily submit claims, managers to validate them based on pre-set policies, and finance teams to seamlessly add approved amounts to payroll. The app emphasizes transparency, compliance, and operational efficiency.

**Technology Stack:**

* **Platform:** ServiceNow (App Engine Studio)
* **Core Features:** Record Producers, Flow Designer, Custom Tables, Notifications, Client Scripts, GlideRecord
* **User Interface Elements:** Dynamic Forms, Conditional Fields, Validations
* **Dashboards & Reporting:** Embedded Reporting Engine, UI Builder

# Business Case / Justification

# Problem Addressed:

# Manual claim processing often results in errors, delays, policy violations, and lack of audit trails. Employees and finance teams struggle with inconsistent submissions, missing receipts, and opaque approval chains.

# Expected Impact:

# Increased operational efficiency with automation

# Policy enforcement through built-in logic

# Reduced processing time by eliminating manual routing

# Enhanced employee experience with a user-friendly interface

# Transparent tracking of claims and approvals for audit readiness

# Scope of Work

# Objectives

# Automate and validate claim submissions through a smart approval workflow.

# Integrate approval flows based on amount, date, and cumulative total.

# Provide insightful dashboards to HR and Admin for tracking reimbursements.

* Enforce robust data validation rules to ensure policy compliance and reduce manual errors

# Modules & Features

# Claim Submission Module

# Objective: Simplify and structure the submission process.

# Features:

# Auto-filled Employee Info

# Expense Date Picker

# Category Selector (Stationary, Equipment, Food, Fuel/Uber)

# Conditional Attachment Upload

# Client-side Validations

# Approval Workflow

# Objective: Enforce rules and route claims accordingly.

# Features:

# Multi-branch Flow Designer logic

# Auto-reject rules for policy violations

# Escalation for high-value or outdated claims

# Approval or rejection notifications

# Payroll Integration

# Objective: Ensure smooth handoff to finance for approved claims.

# Features:

# Task generation to HR post-approval

# Status update automation

# Email triggers to finance and employee

# Reporting Dashboard

# Objective: Monitor claims and compliance.

# Features:

# Category-wise summary

# Overdue claims

# Approvals vs. rejections

# Year-to-date threshold alerts

# Pending HR action list

# Project Timelines

| Phase | Duration | Key Deliverables |
| --- | --- | --- |
| Planning & Setup | Week 1 | Forms, Custom Tables, Validation Rules,Flow Setup |
| Workflows &Automation | Week 2 | Approval Logic, Notifications,Testing Begins |
| Testing & Launch | Week 3 | Dashboard, UAT, User Training, Go-Liveon Employee Center |

# Roles and Responsibilities

| **Role** | **Name** | **Responsibilities** |
| --- | --- | --- |
| Project Manager | Sweta Sonulkar | Coordinate tasks, monitor progress,  stakeholder alignment, risk management |
| Business Analyst | Mercy Emuobosa | Requirement gathering, user stories, process documentation, stakeholder liaison |
| Developer | Mannat Kaur | Build forms, configure Flow Designer, write scripts |
| Developer | Arlesha Moore | Implement approval logic, dashboard setup |
| Developer | Prashant Gupta | Handle backend logic, validations, and integration |
| Quality Assurance | Melvin Ejiogu | Test all modules, regression checks, log issues |

# Scrum Cadence

* **Frequency:** Daily
* **Duration:** 15 minutes
* **Agenda:**
* Yesterday’s Progress
* Today’s Plan
* Blockers Discussion

# Communication Plan

* **Daily Standups** – 15-minute sync among team members
* **Weekly Executive Reports** – Summarized progress to stakeholders
* **Communication Channels:** Slack (team), Cliq chat, Email (weekly updates), Google Meet or MS Teams for calls

# Internship Excellence Commitment

* This project supports a culture of **learning and mentorship**:
* Encouraging interns to participate in design and demo sessions
* Providing weekly feedback
* Recognizing contributions publicly
* Delivering real-world, portfolio-worthy outcomes

# Success Criteria

* 90%+ **user adoption** rate within 30 days post-launch
* **Zero policy violations** in approved claims
* **Seamless** task tracking
* High **user satisfaction** based on post-launch surveys
* **Intern learning growth** reflected in retrospective evaluations

# Risks and Assumptions

* Assumptions and Risks with Mitigation Plans

| **Risk** | **Mitigation Plan** |
| --- | --- |
| * Users bypassing form validations | Strengthen front-end and backend validations |
| Missed notifications or approval delays | Test all flow paths thoroughly and send reminders |
| HR overload with manual task creation | Automate post-approval task routing completely |
| Duplication of submission | Date Validation rules |

**Assumptions:**

* Stakeholders are available for approvals and testing.
* Dev instance access is available throughout the project.
* Submission volumes are within manageable limits during pilot.

# Change Management Plan

* All change requests must be logged in the **Change Tracker Sheet**.
* Weekly **review meetings** to discuss requested changes.
* Scope changes require **PM and sponsor sign-off** before implementation.

# Issue Escalation Path

* Define contact persons and response times for issues.

| | **Issue Level** | **Contact Person** | **Response**  **Time** | | --- | --- | --- | | Functional Issue | Business Analyst | 24 hours | | Technical Issue | Assigned Developer | 24 hours | | Major Blocker | Project Manager | Same day | | Executive Issue | Program Sponsor | 48 hours | |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |

# Post Go-Live Support Plan

* **First 2 Weeks:** Daily monitoring by development and QA teams
* **Support Channels:** Dedicated Slack thread and support email
* **Ownership Transition:** After stabilization, Admin team assumes responsibility

# Project Closure and Handover

* Final report, documentation handover, feedback session.
* Final sprint review and retrospective
* Documentation archive: user guide, workflows, logic charts
* Feedback survey to all stakeholders
* Close-out presentation and lessons learned

# Approval Signatures

| **Name** | **Role** | **Signature** | **Date** |
| --- | --- | --- | --- |
| Sweta Sonulkar | Project Manager | SS | 05/14/2025 |
| Mercy Emuobosa | Business Analyst | ME | 05/14/2025 |
| Stakeholder Name | Program Sponsor | SN | 05/15/2025 |
| HR Contact Name | End-User (HR) | HR | 05/15/2025 |

**Instance details and account details**

* Instance: [https://dev183614.service-now.com](https://dev183614.service-now.com/login.do?user_name=admin&sys_action=sysverb_login&user_password=1C%3DpxXyN2Rp%3D)
* Gmail: sninnovators@gmail.com