



ICE Business System

Mobile Connections - Claims

(Version – 2.0)

Learning Unit Guide

Legal Notice:

The information herein (intellectual property) has been compiled by and is owned by Signature Software for the explicit use by clients and staff of Signature Software.

No part of this information may be re-sold, re-used in a professional capacity by a third party or reproduced in any way without written permission from an authorised representative of Signature Software.

While the information contained herein has been formulated with all due care, Signature Software does not warrant or represent that the information is free from errors or omission, or that it is exhaustive and fit for specific purpose other than general information.

Modifications to this material may also occur without notice.

Table of Contents

I : INTRODUCTION	4
II : OBJECTIVES	4
III : TARGET AUDIENCE	4
IV : PREREQUISITES	4
V : SCENARIOS	5
V.1 : Processing a Claim for Outstanding Mobile Payments	5
V.2 : Resubmitting a Claim	11



I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning.

It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

To provide detail on work instructions for processing claims for Mobile Connections in the ICE Business System.

III : Target Audience

Back of house administrators and accounts staff required to submit claims for Mobile Connections with outstanding balances.

IV : Prerequisites

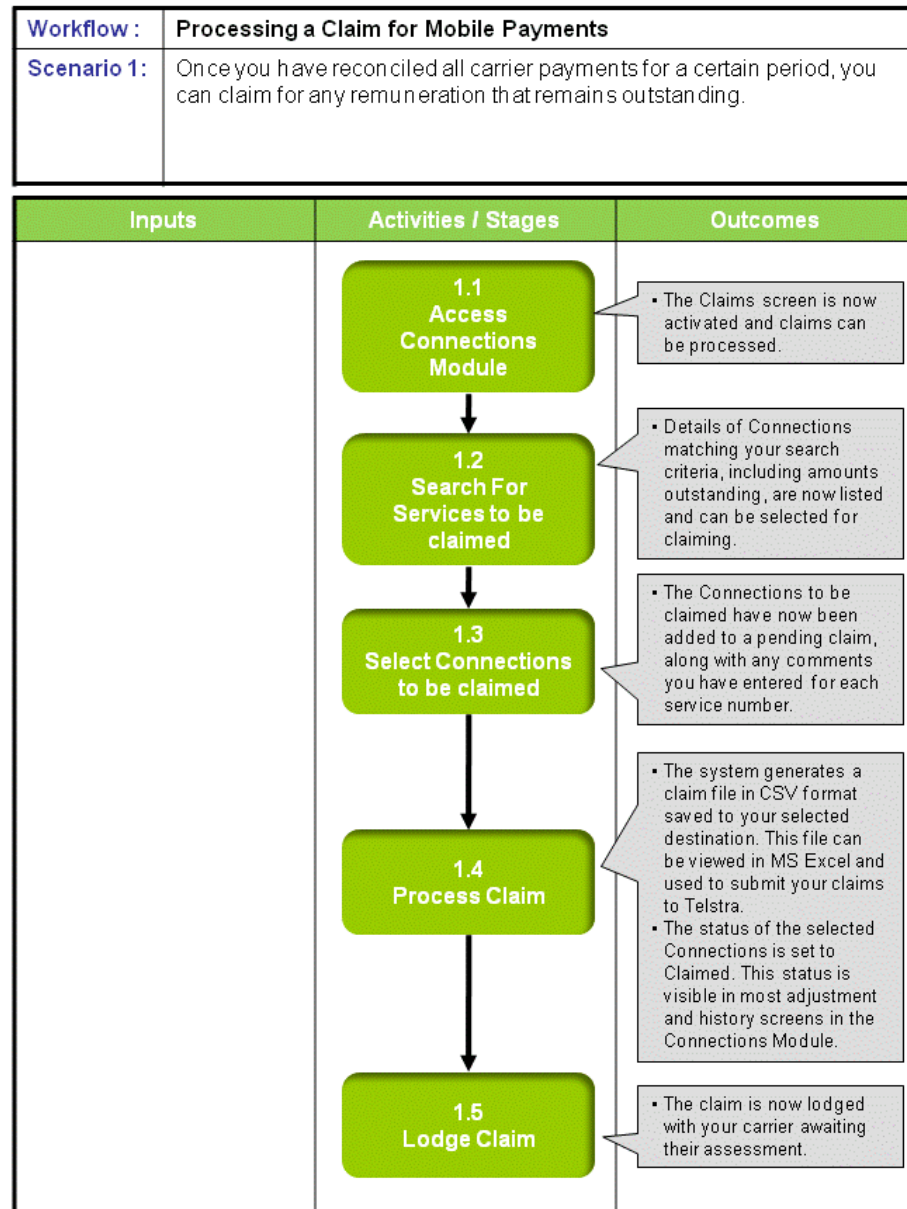
- Mobile Connections Processing Activities – Adjustments & Claims

V : Scenarios

V.1 : Processing a Claim for Outstanding Mobile Payments



Workflow



Scenario 1: Processing a Claim for Mobile Payments

Once you have reconciled all carrier payments for a certain period, you can claim for any remuneration that remains outstanding.

Note:

You can only lodge claims if all Banking in the Connections Module has been fully allocated. This way you can be sure that you have not already been paid for services you plan to claim.



1.1: Access Connections Module

Objectives:

- Log in to the Connections Module in order to process Claims.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims

Work Instructions

Screen: ICE Main

1. Access **Connections**.

Select menu path:

Operations > Connections > Mobile Connections

or

The **Mobile Connections** icon.

Screen: Enter Access Code

2. Enter your **Access Code** and press **OK**.

Screen: Select Branch

3. Select the appropriate branch from the drop-down menu.
4. Press **OK**.

Note:

If your system has only one branch set up, you will not be required to select a branch.

Screen: Connections Main

5. Click the **Claims** icon on the left of screen.

Outcomes:

- The Claims screen is now activated and claims can be processed.

Notes:

- Access to areas within the Connections Module is set by your system administrator. If you do not have access to required areas see your system administrator.
- You can only lodge claims if all Banking in the Connections Module has been fully allocated. This way you can be sure that you have not already been paid for services you plan to claim.



1.2: Search For Services to be claimed

Objectives:

- Search for Connections from your database to be claimed.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims.

Work Instructions

Screen: Claims

1. From the drop down box labeled **Show Items Where**, select **All Outstanding Connections**.
2. From the drop down box labeled **Payment Program**, select the payment program that applies to you.
3. Select the **Date Range** to claim for.

Note:

In the "From" field, select the oldest date you wish to claim from.
In the "To" field select the most recent date you wish to claim to.
You should only prepare and lodge claims for periods that you have already been paid for. As a guide, you can claim outstanding rebates and reimbursements one month after Connection and other revenue types two months after Connection.

4. If you want to claim only a certain type of remuneration, select it from the drop down box labeled **Remuneration Type**. Selecting **All** in this field will claim all outstanding payment types.

Outcomes:

- Details of Connections matching your search criteria, including amounts outstanding, are now listed and can be selected for claiming.

Notes:

- N/A

1.3: Select Connections to be claimed

Objectives:

- To select Connections to add to a claim.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims



Work Instructions

Screen: Claims – Claim Selection Tab

1. Select the **checkbox** next to the service that you wish to claim.
2. Enter comments for the selected service by typing in the box labeled **Claim comment for currently highlighted item**.
3. Select the **Update Claim Comment** button.
4. Repeat steps 1-3 for all services you wish to claim.
5. Select the **Add to Claim** button.

Outcomes:

- The Connections to be claimed have now been added to a pending claim, along with any comments you have entered for each service number.

Notes:

- You can display details of Connections you wish to claim by right-clicking that line on the screen and clicking Connection Details.



1.4: Process Claim

Objectives:

- To process the pending claim and adjust the status of claimed services.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims.



Work Instructions

Screen: Claims – Claim Selection Tab

1. Click the **Selected for Claim** tab.

Screen: Claims – Selected For Claim Tab

2. Review all entries listed on the screen.

These are the services that will be included when the claim is processed.

Note:

To remove a Connection from being included, ensure Connection highlighted and select the **Remove from Claim** button.

3. Select the **Process Claims** button.

Screen: Funds Provider Claims

4. Enter a **Contact name** for this claim.
5. Enter a **Contact number** for this claim.



6. Enter a Contact e-mail for this claim.
7. Select the Ellipsis (...) button to nominate a location to save an electronic copy of your claim file.
Screen: Browse for Folder
8. Select a folder in to which you wish the claim file to be saved.
9. Select the OK button.
Screen: Funds Provider Claims
10. Select the Process button.
Screen: Output Options
11. Select OK to preview the claim report.
Note: <i>If you wish to change the destination printer for this report, you can do so by clicking the "Setup" button and selecting a printer from the drop down box.</i>
Screen: Report Preview
12. Review the details of the claim report.
13. Print the report by selecting File > Print or selecting the Printer icon near the top left of screen.
Screen: Output Options
14. Select OK to print the claim report.
Screen: Report Preview
15. Select File > Exit or select the Door icon to exit the report preview.
Screen: Claim Completed?
16. If you are satisfied with all details of the claim, select Yes to flag all items as claimed.
Note: <i>This is your last opportunity to cancel the claim if you are not satisfied with its contents. Click "No" if you wish to return and modify any details.</i>

Outcomes:
<ul style="list-style-type: none"> The system generates a claim file in CSV format saved to your selected destination. This file can be viewed in MS Excel and used to submit your claims to Telstra. The status of the selected Connections is set to Claimed. This status is visible in most adjustment and history screens in the Connections Module.
Notes:
<ul style="list-style-type: none"> N/A



1.5: Lodge Claim

Objectives:

- To lodge the completed claim with your carrier for their assessment.

SLC Reference:

- N/A

Work Instructions

Off Screen

1. Follow the advised instructions from your carrier for the lodgement of claims.

Outcomes:

- The claim is now lodged with your carrier awaiting their assessment.

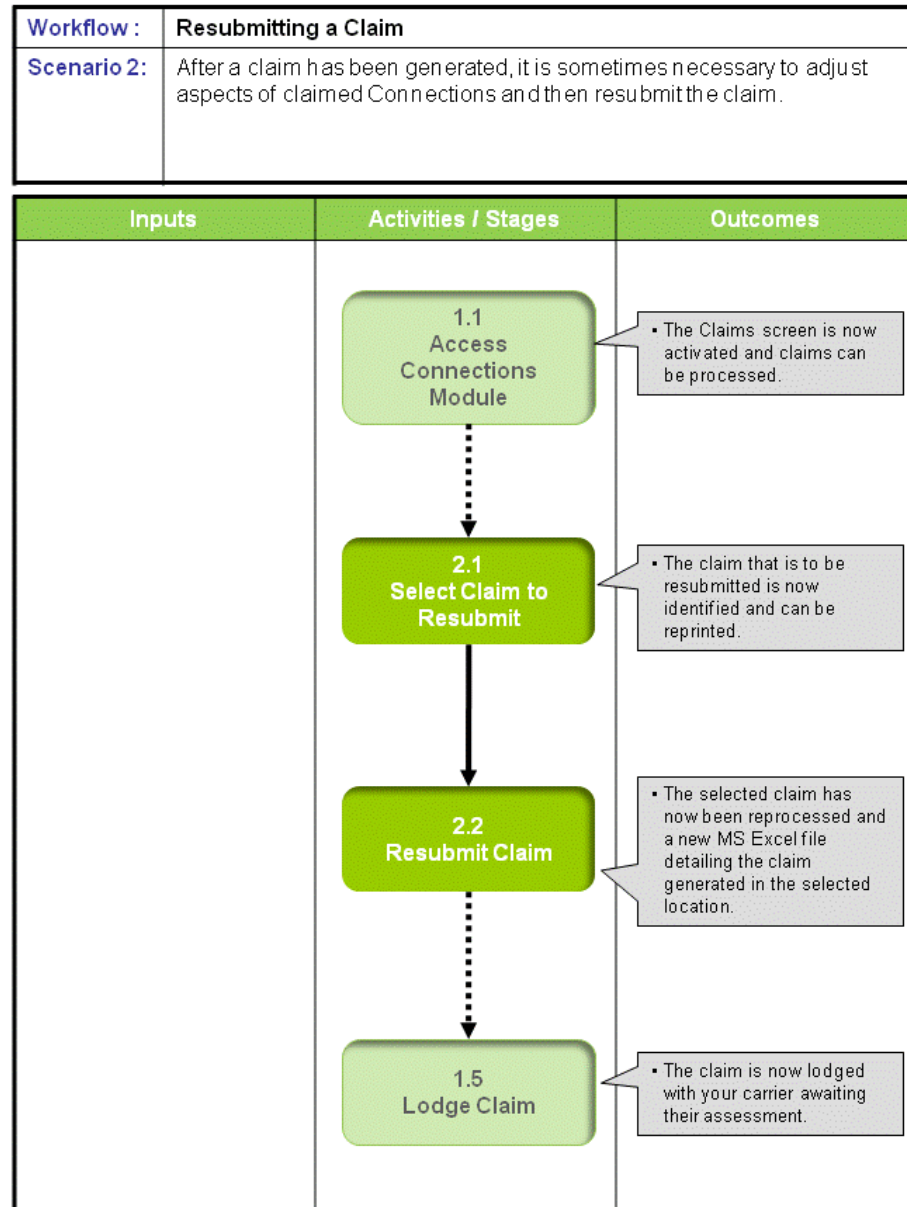
Notes:

- N/A

V.2 : Resubmitting a Claim

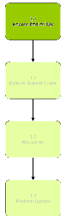


Workflow



Scenario 2: Resubmitting a Claim

After a claim has been generated, it is sometimes necessary to adjust aspects of claimed Connections and then resubmit the claim.



1.1: Access Connections Module

Objectives:

- Log in to the Connections Module in order to process Claims.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims

Work Instructions

Action: Log in to Connections Module

1. Complete Scenario "Processing a Claim for Mobile Payments" Stage 1.1.

Outcomes:

- The Claims screen is now activated and claims can be processed.

Notes:

- Access to areas within the Connections Module is set by your system administrator. If you do not have access to required areas see your system administrator.



2.1: Select Claim to Resubmit

Objectives:

- Select an existing claim to resubmit.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims

Work Instructions

Screen: Claims – Claim Selection

1. Click the **Reprint Claims** tab.

Screen: Claims – Reprint Claims Tab



2. Select a **Date Range** to search for previously submitted claims.

Note:

The date range selected here refers to the lodgment date of the original claim, not the Connection date of services on that claim.

3. Tick the **checkbox** to the left of the claim you wish to resubmit.

Outcomes:

- The claim that is to be resubmitted is now identified and can be reprinted.

Notes:

- N/A



2.2: Resubmit Claim

Objectives:

- To resubmit the selected claim.

SLC Reference:

- ICE Business Systems > Mobile Connections > Processing Activities > Adjustments and Claims



Work Instructions

Screen: Claims – Reprint Claims Tab

1. Select the **Reprint Claim** button.

Screen: Funds Provider Claims

2. Select the **Ellipsis (...)** button to nominate a location to save an electronic copy of your claim file.

Screen: Browse for Folder

3. Select a folder in to which you wish the claim file to be saved.
4. Select the **OK** button.

Screen: Funds Provider Claims

5. Select the **Reprint** button.

Screen: Output Options

6. Select **OK** to preview the claim report.

Note:

If you wish to change the destination printer for this report, you can do so by clicking the "Setup" button and selecting a printer from the drop down box.

Screen: Report Preview

7. Review the details of the claim report.
8. Select **File > Print** or select the **Printer** icon near the top left of screen.

Screen: Output Options



9. Select **OK** to print the claim report.

Screen: Report Preview

10. Select **File > Exit** or select the **Door** icon to exit the report preview.

Screen: Funds Provider Claims

11. Select the **Close** button to return to the **Claims** screen,

Outcomes:

- The selected claim has now been reprocessed and a new MS Excel file detailing the claim generated in the selected location.

Notes:

- Any adjustments that have been made to previously claimed Connections will now be reflected in the new claim report and MS Excel file.



1.5: Lodge Claim

Objectives:

- To lodge the resubmitted claim with your carrier for their assessment.

SLC Reference:

- N/A

Work Instructions

Off Screen

1. Complete Scenario **Processing a Claim for Mobile Payments** Stage 1.5.

Outcomes:

- The claim is now lodged with your carrier awaiting their assessment.

Notes:

- N/A

