Your sneak peek at what's coming

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1 **Work Expense types**
Simplifying how you select Work Expense types and categories for office claims.

2 **Copying office claims**
Save time by copying office claims from any status.

3 **Search and Filter**
Enhanced search and filter functions make it easier to find what you need quickly.

4 **Dashboard updates**
Updated Standard Dashboard columns and new predefined views to help you perform key tasks.

5 **Group Certify claims**
Parliamentarians can certify up to 10 Office claims at once.

6 **Edit claims**
Greater ability to edit and delete claims created by other staff members to reduce processing delays.

7 **Adjusted paid claims**
Status updates for paid claims being adjusted by MaPS Admins will provide better accuracy and clear visibility.
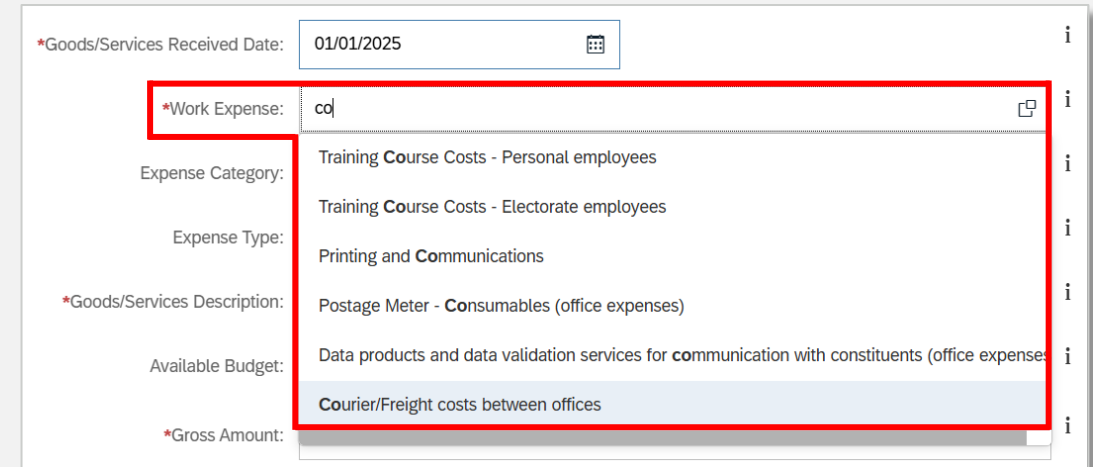
8 **Return Reason**
Easily see the Return Reason on a claim and in the email notification.

1) Work Expense Types

- You told us that selecting Work Expenses was confusing and time consuming.

- In the new release you will no longer need to select an Expense Category and Expense Type before selecting the Work Expense.

- Simply start typing into the Work Expense field to search for the relevant item or click the ⧉ icon to see all Work Expense items.

- Once you select a Work Expense item, the Expense Category and Expense Type fields will populate automatically.

The Work Expense field will automatically show the available options containing the text you've entered.

Selecting a Work Expense item automatically populates the Expense Category and Expense Type fields.

2) Copying Office Claims

- Previously, only office claims in a status of Draft could be copied.

- In the new release you will be able to copy an office claim from any status.

- This will help save you time and reduce the likelihood of claims being returned for correction.

3) Search and Filter (1 of 2)

In the new release the search and filter fields will look for matches anywhere in the text, not just at the beginning, making it easier to find what you're looking for.

Note: Dates and dollar amounts continue to use exact match searching for accuracy.

- The default filters showing on the dashboard will be updated to better reflect common tasks.

- You can further customise the filters to display using the View Setting options (⚙ cog icon).

- The 'Status' and 'Assigned To' filters will use checkboxes, making it faster and easier to apply the filters you need.

- You can also type into these filter fields to quickly narrow the list to relevant options.

New default filters on the Office Dashboard.

Checkbox filters for 'Status' and 'Assigned To'.

Type into the filter to refine the options.

- The Standard Dashboard columns have been updated to better reflect the information you need to see most often.

- Additional fields are available for display and filtering:
  - Work Expense
  - Goods/Services Description
  - Goods/Services Received Date

- The 'Vendor Name' field has been renamed to 'Supplier Name' for clarity and consistency.

We have worked with the Helpdesk Teams to create new dashboard views to help perform key tasks:

- **All draft claims (incomplete/staff review)** – Draft claims that are not yet complete or need review from another staff member.

- **Review for Certification** – Claims for your Parliamentarian to certify.

- **Claims Awaiting Action** – Claims at Draft, Awaiting Certification, or Returned.

- **Claims created by Department of Finance**

- **Claims Created by My Office**

Note: When available with the new release, you will need to favourite these view/s for them to appear in the 'My Views' drop-down. Refer to the '*Personalise my claims dashboard*' guide for further assistance.

Favourite the new views to show them in the "My Views" drop-down.

5) Group Certify Office Claims

- Previously, the only way for Parliamentarians to certify multiple Office claims at the same time was via an offline, manual process.

- In the new release, Parliamentarians will be able to certify groups of up to 10 Office claims at once, which will greatly improving efficiency.

- Parliamentarians can access the new group certification function from the "Approve Expense Claims" tile, then click the "Office Group Certification" button at the bottom-right of the screen.

- Simply tick the claims to certify (up to 10), accept the Privacy Collection Notice at the bottom of the screen, and click "Certify".

- Note: Parliamentarians must still review the details of each claim before certifying.

6) Edit claims created by other people

- We understand the challenges that arise when the original claim creator of a claim is on leave or has moved on.

- In the new release, staff with 'View Senator or Member Budgets' authorisation will be able to recall, edit and delete claims created by another staff member in their office, reducing processing delays.

- This is available for claims at a status of **Draft** or **Returned**.

- Note: Clicking 'Recall' will navigate you back to the Office Dashboard. Remember to copy the claim number to find the appropriate claim for editing.

- Previously when MaPS Administrators made adjustments to a paid claim, the status reverted to "Certified" causing confusion and making it difficult for offices to reconcile their budgets.

- In the new release, paid claims being adjusted by MaPS Admins will change to a status of "Under Adjustment". Once verified by the MaPS Admins, the claim will return to a status of "Paid", providing clear visibility throughout the process.

Original claim: Status is "Paid" and Goods/Services Description states a "monochrome" printer.

MaPS Admins adjust the paid claim: Status is "Under Adjustment" and Goods/Services Description updated to a "colour copy" printer.

Final claim: After MaPS verification, Status returns to "Paid" with the updated Goods/Services Description stating a "colour copy" printer.

8) Return Reason

- Previously the Return Reason was only visible inside the Action Log (after clicking "Show Status History").

- This is now prominently displayed in a banner on returned claims to help you quickly understand what needs attention.

- The banner remains visible while the claim status is 'Returned' and disappears once the status changes (ie: is recalled by a staff member).

- The reason for return is also now included in the email notification, so you don't need to open the claim to identify the issue.

Thank you

This document was created by the Ministerial and Parliamentary Services Division.

For questions about this release or to provide PEMS feedback, please contact the **PEMS Project Support Team**.

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