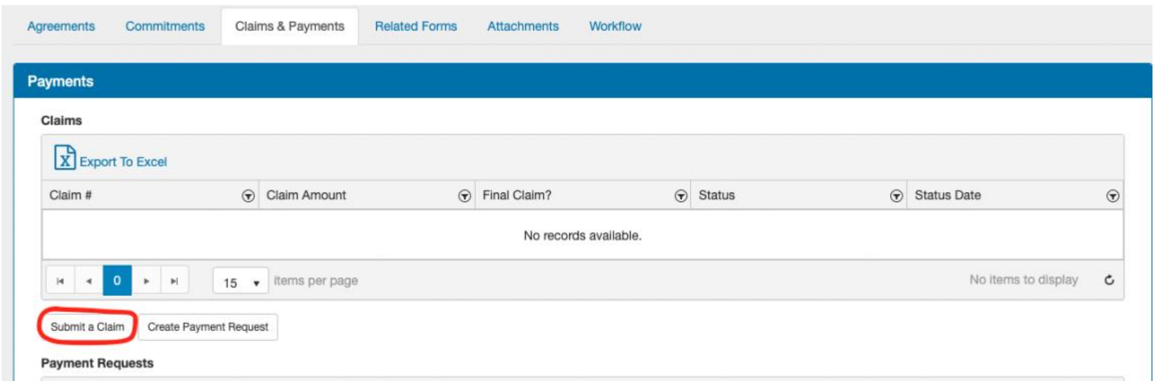
Submitting a Claim

To access PIMs, please click [here]

- To start a claim, navigate to the project and then click "Edit" at the bottom
- Click on the "Claims & Payments" tab and click the "Submit a Claim" button



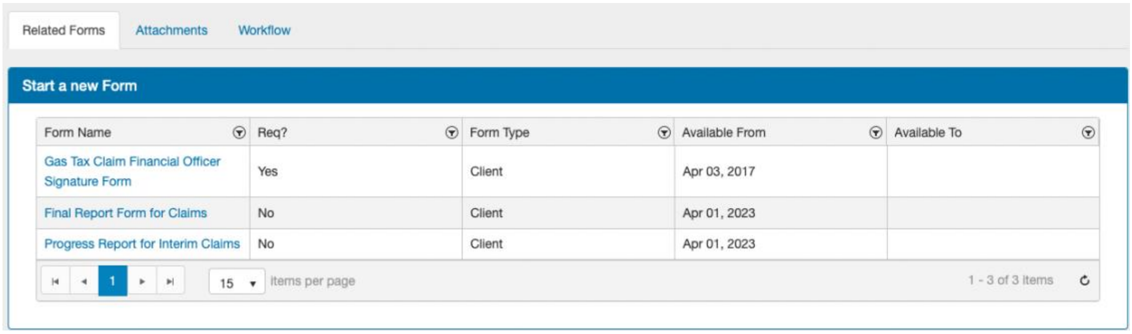
- You will now be on Create Regular Claim page.
    - Claim Template = SPF Claim
    - Enter in the claim period start and end date
    - Final claim? = yes or no

Once you click "Save", you will be taken to the claim screen.

Starting at the top:
- Complete the "Claim Contact Information"
- "Claim Period" can be adjusted if needed
- "Eligible Costs Incurred"
    - This is where you will enter the amount of funds being claimed by year. Start with clicking on the paper icon with the pencil (on the right), key in the funds, then click the "Save" icon
- "Percent of Project Complete" is where you indicate what percentage of the project is complete. For final claims, it needs to be 100%
- "Actual Project Completion Date" is only completed on the final claim
- "Notes" can be any relevant information about the claim or where UBCM may leave a note about the claim

***You can always click "Save" at the bottom of the screen if you wish to stop and work on the claim later. We recommend saving so information is not lost in error.

At this point you will see three tabs Related Forms / Attachments / Workflow



Form Name	Req?	Form Type	Available From	Available To
Gas Tax Claim Financial Officer Signature Form	Yes	Client	Apr 03, 2017	
Final Report Form for Claims	No	Client	Apr 01, 2023	
Progress Report for Interim Claims	No	Client	Apr 01, 2023	

- Every claim will need a "Gas Tax Claim Financial Officer Signature Form" completed. You can either:
    - print this form off and save it to "Attachments" once all the information is complete, or
    - save the form to your desktop, complete with an editing software and then save to "Attachments"
- Then, either a "Final Report Form for Claims" or "Progress Report for Interim Claims" form is completed. These forms can be started and completed later, but please save your work by clicking "Save" at the bottom of the form before your close. Once it is finished, click "Change Status" at the bottom and change the status to "Submitted," then click "Update".

Once all that is completed, you will be ready to submit your claim. Click "Change Status" at the bottom on the claim and update to "Submit", then "Save" on the main screen.

If your project was a capacity project, please include a copy of the report or plan that was created on the attachments tab

Receipts and/or invoices do not need to be attached to the claim. However, please retain them should you be selected for an audit.

If you have any questions, please email us at ccbf@ubcm.ca