

Guide to submitting a claim for reimbursement

Quick Start Guide

What you will need:

Electronic documents to upload:

-- Proof of completion --

(e.g. prescriptions, maps, photos, report, results submission for final milestone)

-- Invoices --

Information to enter

-- Actual start and completion dates --

-- Actual spend --

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1. Select the milestone

- a. Navigate to the Project Plan.
- b. Click on 'Planned Task'.
- c. Click on 'Go to Milestone & Task Completion Form'.
- d. Click on 'Select' for the desired milestone.

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2. Enter actuals

- a. Enter actual start and end dates.
- b. Enter actual expenditures for each category.

3

3. Upload evidence of completion and invoices

- a. Select 'Choose File' and identify the file for upload.
- b. Click on 'Upload'.
- c. Select 'Complete' when finished

4

4. Submit claim

- a. In the comments fields, provide an explanation for variances.
- b. Click on 'Submit Claim'

Navigate to your Project Plan

1. Log into the website: <https://fesims.outcome-plus.com/>
2. On the Home Page, click on 'Project Plan' in the menu bar at the top of the screen.

The screenshot shows the top navigation bar of the FESIMS website. The 'Project Plan' menu item is circled in orange. Below the navigation bar, there is a welcome message: "Welcome to the Forest Enhancement Society Information Management System (FESIMS)". A link "Click Here" is provided to navigate to the last activity page. On the left side, there is a sidebar with navigation options: "Call Notifications (0)", "Full Proposal (0)", "Project Plan (0)", and "Milestones-Claim (0)". The "Project Plan (0)" option is highlighted.

3. You will see your project plan in the list. Click on the project plan number to view the project plan.

The screenshot shows the "Project Plan" view. At the top right, there is a "Download Documents" button. Below the navigation bar, there are filter options for "Calls", "Project Type", "Project Status", and "Organization". A "Go to Project #" field with a "Go" button is also present. The main content is a table with the following columns: "Project Plan #", "Title", "Project Type", "Organization", and "Status". The first row is circled in orange and contains the following data: "WR0000099", "Test Application", "Wildfire Risk Reduction", "PwC", and "PP Cancelled". Below the table, there is a pagination control showing "Page 1 of 1" and a "Row Per Page" dropdown set to "10".

4. Once in the project plan view, click on the 'Planned Task' tab.

The screenshot shows the "Project Details" view for project "RB0000359". The "Project Status" is "PP Submitted". At the top right, there is a "Print" button. Below the navigation bar, there is a progress indicator with five steps: 1. Call, 2. FP, 3. IS, 4. PP, and 5. Claims. The "PP" step is highlighted in red. Below the progress indicator, there is a tabbed interface with the following tabs: "Project Information", "Project Details", "Planned Task", "Completed Task", "Accounting Details", "Advance Payment", "Audit Details", "Project Update", and "Change History". The "Planned Task" tab is circled in orange. Below the tabs, there is a table titled "Planned milestone & task" with the following columns: "Milestone", "Status", "Start Date", "End Date", "Proponent Funds", "FESBC Allocated Funds", and "Total Funds". The table contains the following data:

Milestone	Status	Start Date	End Date	Proponent Funds	FESBC Allocated Funds	Total Funds
K51203 Phase 1	Created	08/27/2018	09/02/2018	\$0.00	\$27,305.84	\$27,305.84
K51203 Final	Created	09/03/2018	09/12/2018	\$0.00	\$24,154.96	\$24,154.96
Total				\$0.00	\$51,460.80	\$51,460.80

Below the table, there is a button "Go to Milestone & Task Completion Forms". At the bottom left, there is a "Back" button.

Before you can submit a claim for reimbursement, you will first need to complete a corresponding activity milestone.

1. Click on 'Go to Milestone & Task Completion Forms'.

Information ▾ Full Proposal ▾ Investment Schedule ▾ Project Plan ▾

Project Details

Project #: RB0000359
Project Status: PP Submitted Print

Project Information | Project Details | **Planned Task** | Completed Task | Accounting Details | Advance Payment | Audit Details | Project Update | Change History

Planned milestone & task

Milestone	Status	Start Date	End Date	Proponent Funds	FESBC Allocated Funds	Total Funds
K51203 Phase 1	Created	08/27/2018	09/02/2018		\$0.00	\$27,305.84
K51203 Final	Created	09/03/2018	09/12/2018		\$0.00	\$24,154.96
Total					\$0.00	\$51,460.80

Go to Milestone & Task Completion Forms

Back

2. Select a milestone you want to complete by clicking on 'select'.

Information ▾ Full Proposal ▾ Investment Schedule ▾ Project Plan ▾

Milestones & Tasks Completion Form

Project #: RB0000359

Select a task and fill out the information to update the task

Planned milestone & task

Action	Milestone	Status	Start Date	End Date	Proponent Fund
Select	K51203 Phase 1	Created	08/27/2018	09/02/2018	\$0.00
Select	K51203 Final	Created	09/03/2018	09/12/2018	\$0.00
Total					\$0.00

Back

3. Fill out 'Milestone & Tasks Completion Form' by entering actual start and end dates. Enter the actual output and project expenditures.
4. To attach deliverables in the 'Proof of Milestone Completion', click on 'Choose File', select your document and click 'Upload'. Invoices associated with the milestone activity you are working on are uploaded the same way in the 'Milestone Invoice' line.

5. Once you are ready to submit the milestone completion form click on the 'Complete' button.

The screenshot shows a form with two main sections for file uploads. The first section is 'Attach Proof of Milestone Completion' with a 'Choose File' button (no file chosen) and an 'Upload' button. Below it is the text 'WLA Allocations for LBI for 2016_17.pdf'. The second section is 'Attach Milestone Invoice' with a 'Choose File' button (no file chosen) and an 'Upload' button, also followed by 'WLA Allocations for LBI for 2016_17.pdf'. At the bottom of the form, there are three buttons: 'Save As Draft', 'Complete' (circled in orange), and 'Back'.

Note: You can save at any point without completing by clicking on 'Save as Draft'. The next time you go into your project, it will be as you left it.

6. When you complete a milestone by clicking on the 'Complete' button you will be taken to the 'Claim Funds' form. You can also find the 'Claim Funds' form in the 'Completed Tasks' tab of your project plan.

7. In the comments fields, provide an explanation for any variances between planned and actual outputs, funds and milestone completion dates.

Claim Funds
Project #: INZ0000006

1 → 2 → 3
 PP → Milestone → Claims

Fund Claim Form

Milestone	3b. Traceability Implementation
Status	Process Payment
Project Progress	WLA Allocations for LBI for 2016_17.pdf
Milestone Invoice	WLA Allocations for LBI for 2016_17.pdf

Planned Start Date	Planned End Date	Planned Proponent Funds	Planned Requested Funds	Total Funds
02/01/2017	02/28/2017		\$1,528.50	\$3,596.50
				\$5,095.00

Actual Start Date	Actual End Date	Actual Proponent Funds	Actual Requested Funds	Total Funds
04/19/2017	04/30/2017		\$1,528.50	\$3,596.50
				\$5,095.00

[Show Milestone Details](#)

Output Analysis

Output Category	Planned	Actual	Variance	Variance %	Comments
Number of Farms	0.00	0.00	0.00	0.00	

Proponent Funds cost analysis

Planned Funds	Actual Funds	Variance	Variance %	Comments
1,528.00	1,528.50	0.50	0.0	

Requested Funds cost analysis

Planned Funds	Actual Funds	Variance	Variance %	Comments
3,596.50	3,596.50	0.00	0.0	

Total Cost analysis

Total Planned Funds	Total Actual Funds	Variance	Variance %	Comments
5,095.00	5,095.00	0.00	0.0	

8. Once the required information has been entered, click on 'Save as Draft'. When ready to submit a claim, click on 'Submit Claim'.

Funds Requested

Total Funds Requested	Suggested Holdback Amount	Suggested Amount to be Paid	Amount Paid
2,100.00	420.00	1,680.00	0.00

[Back](#) [Save As Draft](#) [Submit Claim](#)

9. You can see the status of all claims by using the 'Completed Task' tab. The claim status is shown in the 'Status' column.

Project Information | Project Details | Project Attributes | Planned Task | **Completed Task**

Completed milestone & task

Milestone	Status	Actual Start Date	Ac
Initiation	Fully Paid	02/01/2018	04
Research	Fund Recommended	04/01/2018	04
Report	Completed	04/01/2018	04
Total			

[Go to Fund Claims](#)