

# Guide to submitting a claim for reimbursement

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## 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.

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### **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

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### **4. Submit claim**

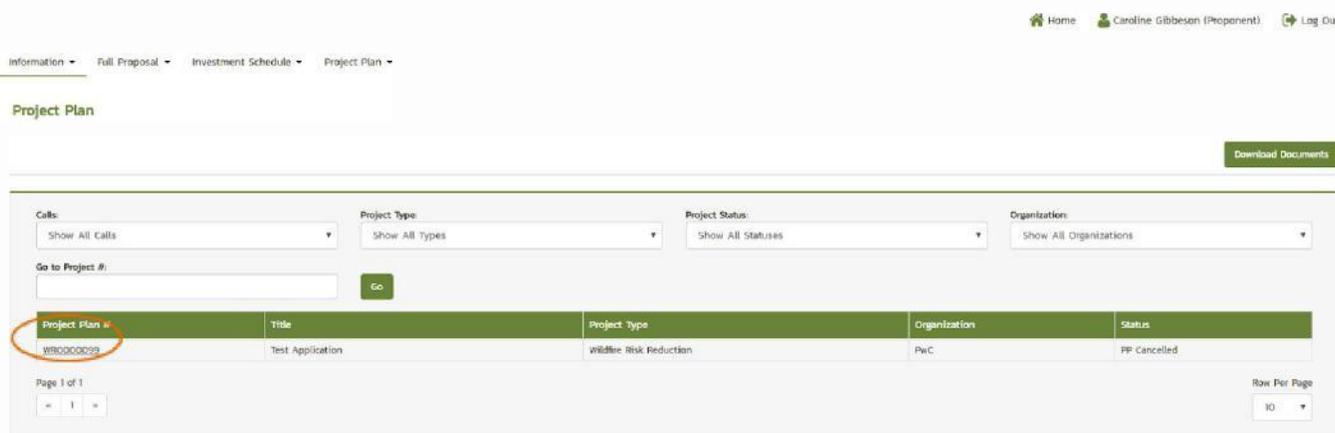
- a. In the comments fields, provide an explanation for variances.
- b. Click on 'Submit Claim'

## 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.



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



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



**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 I	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
<b>Total</b>				\$0.00	\$51,460.80	\$51,460.80

**Go to Milestone & Task Completion Forms**

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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
<b>Select</b>	K51203 Phase I	Created	08/27/2018	09/02/2018	\$0.00
Select	K51203 Final	Created	09/03/2018	09/12/2018	\$0.00
<b>Total</b>					\$0.00

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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.

- 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 (showing 'No file chosen') and an 'Upload' button. Below it is a file name 'WLA Allocations for LBI for 2016\_17.pdf'. The second section is 'Attach Milestone Invoice' with a similar 'Choose File' button and 'Upload' button, also showing the same file name. 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.

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

The screenshot shows the 'Claim Funds' form for Project ID: INQ200096. It features a progress bar with three steps: 'PP', 'Milestone', and 'Claims'. The main content area includes a 'Fund Claim Form' with fields for Milestone, Status, Project Progress, and Milestone Invoice. Below this are two summary tables:

Planned Start Date	Planned End Date	Planned Proposed Funds	Planned Requested Funds	Total Funds
02/01/2017	02/05/2017		\$1,526.50	\$3,585.50

Actual Start Date	Actual End Date	Actual Proposed Funds	Actual Requested Funds	Total Funds
04/19/2017	04/07/2017		\$1,526.50	\$3,585.50

Below these tables is an 'Output Analysis' table:

Output Category	Planned	Actual	Variance	Variance %	Comments
Number of Farms		0.00	0.00	0.00	0.0

There are three analysis tables with 'Comments' columns circled in orange:

Planned Funds	Actual Funds	Variance	Variance %	Comments
1,526.00	1,526.50	0.50	0.0	

Planned Funds	Actual Funds	Variance	Variance %	Comments
3,585.00	3,585.50	0.50	0.0	

Total Planned Funds	Total Actual Funds	Variance	Variance %	Comments
3,585.00	3,585.00	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](#)