



# **BC Traceability Funding Programs**

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## Claim Submission Guide

# Claim submission process overview

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## What you will need to submit your claim:

-- Proof of completion --

Photos of all installed hardware and software

*and/or*

Training completion report

-- Invoices --

Copy of invoice

-- Proof of payment and receipt --

Receipt

*or*

Copy of cashed cheque

## Timeline:

Your project is required to be completed within 6 months from the date of your approval letter. All claims must be submitted within 2 months of the completion of your project.

## How to submit your claim:

### Using the website:

Outlined in this document.

### Via email, fax or mail:

Please send all of the above documents .

# Guide to submitting a claim online

1

## Access your project plan

- a. Go to [bctraceability.ca](https://bctraceability.ca) and select 'Go to application portal'. Log in, or register. **If you need to register, please contact us to assign you to your project plan.**
- b. Click 'Project Plan' at the top of the page and click into your Project Plan
- c. Click on the 'Planned Task' tab
- d. Click on 'Go to Milestone & Task Completion Form' button
- e. Click on 'Select' to open the milestone

2

## Enter actuals

- a. Enter actual start and end dates
- b. Enter actual outputs (number of items received)
- c. Enter actual costs, pre-tax, for each category. Proponent funds are costs covered by you as the applicant. Requested funds are costs requested to be covered by the program.

3

## Upload evidence of completion and invoices

- a. Select 'Choose File' and identify the file for upload
- b. Click on 'Upload'
- c. Continue uploading all required documents. Upload photos or reports as proof of completion to 'Attach Proof of Milestone Completion'. Upload invoices and receipts to 'Attach Milestone Invoice'
- d. Select 'Complete' when finished

4

## Submit claim

- a. In the comments fields, provide an explanation for the differences between the approved amounts (Planned) and the actual amounts.
- b. Click on 'Submit Claim'.
- c. You will receive an email confirming that your claim has been submitted. The claim is now in review and the team will reach out to you with any questions as needed.

1. Go to the website: [www.bctraceability.ca](http://www.bctraceability.ca) and click 'Go to application portal' on the home page to access the portal. If you haven't already created a user account, please register and enter your organization information via the steps below. You may need to contact PwC (604-484-3490, [bctraceability@ca.pwc.com](mailto:bctraceability@ca.pwc.com)) and ask for your project plan to be assigned to your user account once you are registered. Once logged in, select 'Project Plans' under the 'Project Plan' drop down menu on the top navigation bar.

### Registering for the first time? Please follow these steps:

- Step 1: Click "Register" in the top right hand corner.
- Step 2: Enter your Email Address.
- Step 3: Click "Send Verification Code" button. An email containing a verification code will be sent to the email address entered above.
- Step 4: Go to your email inbox and copy the verification code.
- Step 5: Return to the Registration page. Enter or paste the code in the Verification Code box. Then click the "Verify code" button. The page will refresh.
- Step 6: Enter a password in the "New Password" box and again in the "Confirm New Password" box.
- Step 7: Click the "Create" button. A message will display indicating your information account has been created.



Information ▾

## Welcome to the BC Traceability Funding Programs Website

▶ New to site? Get the details



Accepting applications

Useful Websites

2. Once logged in, select 'Project Plans' under the 'Project Plan' drop down menu on the top navigation bar. You will see your project plan in the list. **Click on the project plan number to open the project plan.**



Home Jennifer McIntyre (Project Advisor) Log Out

Information ▾ Templates ▾ Investment Schedule ▾ **Project Plan ▾**

## Welcome to the BC Traceability Funding Programs Website

[Click Here](#) to navigate to last activity page

Call Notifications (0)	Call Notifications (0)
Project Plan (43)	No Notifications Available
Milestones-Claim (8)	

3. To submit a claim for reimbursement, you will need to **first complete the milestone for the activity you have completed**. You can then submit a Payment Claim. To complete a milestone open your approved project plan and click on 'Planned Task' tab. Click on 'Go to Milestone & Task Completion Forms' button. Select the milestone you want to complete by clicking on 'Select'.

Project Details

Project #: IN20000006  
Project Status: PP Approved Print

1 Call → 
 2 FP → 
 3 PP → 
 4 Claims

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

Planned milestone & task

Milestone	Status	Start Date	End Date	Applicant Contribution (\$)	Program Contribution (\$)	Total Funds
1. Assessment and Workplan	Created	03/21/2017	03/21/2017	\$0.00	\$0.00	\$0.00
2. Training	Created	03/21/2017	03/21/2017	\$0.00	\$0.00	\$0.00
3a. Food Safety Implementation	Created	03/21/2017	03/21/2017	\$0.00	\$0.00	\$0.00
3b. Traceability Implementation	Process Payment	02/01/2017	02/29/2017	\$1,528.50	\$3,566.50	\$5,095.00
4. HACCP Audit	Created	03/21/2017	03/29/2017	\$0.00	\$0.00	\$0.00
<b>Total</b>				<b>\$1,528.50</b>	<b>\$3,566.50</b>	<b>\$5,095.00</b>

[Go to Milestones & Task Completion Forms](#)

Milestones & Tasks Completion Form

Project #: IN20000006

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

Planned milestone & task

Action	Milestone	Status	Start Date	End Date	Proponent Fund	Requested Funds	Total Funds
<b>Select</b>	1. Assessment and Workplan	Created	03/21/2017	03/21/2017	\$0.00	\$0.00	\$0.00
<b>Select</b>	2. Training	Created	03/21/2017	03/21/2017	\$0.00	\$0.00	\$0.00
<b>Select</b>	3a. Food Safety Implementation	Created	03/21/2017	03/21/2017	\$0.00	\$0.00	\$0.00
<b>Select</b>	3b. Traceability Implementation	Process Payment	02/01/2017	02/29/2017	\$1,528.50	\$3,566.50	\$5,095.00
<b>Select</b>	4. HACCP Audit	Created	03/21/2017	03/29/2017	\$0.00	\$0.00	\$0.00
<b>Total</b>					<b>\$1,528.50</b>	<b>\$3,566.50</b>	<b>\$5,095.00</b>

[Back](#)

4. Fill out 'Milestone & Tasks Completion Form' by entering actual start and end dates (End date being when the project was completed), outputs (number of items received), actual project expenditures for your contribution (Proponent Funds), the amount you are requesting for reimbursement from the Program (Requested Funds). Only *pre-tax* amounts are eligible for reimbursement, so please make sure these amounts are entered on the form. **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.

Actual Start Date:

Actual End Date:

Outputs

Output Category	Planned	Actual	Variance
Number of Farms	0	0	0.00

Proponent Funds

Cost Category	Planned	Actual	Variance
Planned Cost	1528.5	1528.5	0.00
<b>Total Proponent Fund</b>	<b>1528.5</b>	<b>1528.50</b>	

Requested Funds

Cost Category	Planned	Actual	Variance
Planned Cost	3566.5	3566.5	0.00
<b>Total Requested Fund</b>	<b>3566.50</b>	<b>3566.50</b>	

Total Proponent Funds + Total Requested Funds:

Attach Proof of Milestone Completion

WLA Allocations for LBI for 2016\_17.pdf

Attach Milestone Invoice

WLA Allocations for LBI for 2016\_17.pdf

## Cost share and eligible items funded by the program include:

- 70% Consultant fees for assessing and/or implementing projects
- 70% Purchase and installation of hardware for traceability systems
- 70% Purchase and installation of software and servers for traceability systems
- 70% Staff training by vendor (preferred) or approved consultant
- 50% Lease / rental / purchase of a multi-use computer terminal to support traceability systems
- 50% Multi-use handheld electronic devices to support traceability systems

### 5. Attach proof of completion documents.

This should include photos of the completed work or item purchased, a screenshot of installed software, or the completed report and workplan. Attach any invoices received and proof of payment (e.g. receipt of payment showing PAID, electronic fund transfer, bank statement etc) associated with the milestone activity.

### 6. Once you are ready to submit the milestone claim form, click the 'Complete' button.

Total Proponent Funds + Total Requested Funds: 5095.00

Attach Proof of Milestone Completion: Choose File No file chosen Upload

Attach Milestone Invoice: Choose File No file chosen Upload

Save As Draft Complete Back

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

Claim Funds

Project #: CR0000087

1 2 3  
PP Milestone Claims

Fund Claim Form

Milestone	r
Status	Completed
Project Progress	
Milestone Invoice	

Planned Start Date	Planned End Date	Planned Requested Funds	Total Funds
05/26/2017	05/31/2017		\$11,364.00

Actual Start Date	Actual End Date	Actual Requested Funds	Total Funds
05/26/2017	05/31/2017	\$8,523.00	\$8,523.00

Show Milestone Details

8. In the comments fields, **provide an explanation for any variances** between planned and actual outputs (number of items approved vs. implemented), funds (approved vs. spent) and milestone completion dates. These will be considered by PwC in approving your claim.

Claim Funds  
Project #: IN20000006

1 → 2 → 3  
PP Milestone Claims

Fund Claim Form

Milestone	36 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	02/29/2017		\$1,528.50	\$3,566.50
				\$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	\$3,566.50
				\$5,095.00

Show Milestone Details

Output Analyse

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

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
3,566.50	3,566.50	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	

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

Funds Requested

Total Funds Requested	Suggested Holdback Amount	Suggested Amount to be Paid	Comments (Project Advisor - please indicate amount to be paid)
3,632.71	0.00	3,632.71	

Back Save As Draft **Submit Claim**

10. When a claim is submitted an automatic e-mail notification is sent to PwC. We will review your milestone completion and claim submission and contact you if we need further information. You will receive an e-mail notification informing you about PwC review decision. Once approved PwC will process your fund claim request and issue a payment by direct deposit.
11. Note, once the milestone is completed, approved and paid, your project will transition to Completion Approved and no further editing will be allowed.

**Please don't hesitate to reach out with any questions. We are happy to help you through the claim process.**

**Phone:** 604 484 3490

**Email:** [bctraceability@ca.pwc.com](mailto:bctraceability@ca.pwc.com)