

Create and Submit Advances for TA Contracts Online

Consultants can now request advances based on the reimbursable amount provisions listed in the time-based or partial lump-sum contracts online through the TA Claims Partner.

Steps in Creating an Advance Request

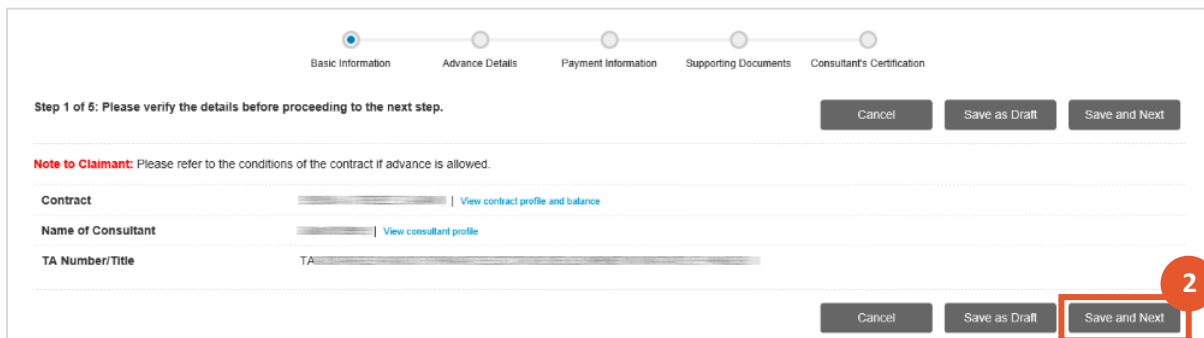
1. Click on the **[Create Advance]** link. You will be led to the **[Basic Information]** screen.



Note

For consultants with multiple TA contracts, select the contract number in the **[Contract Selector]** screen.

2. Review the details in the page. Click on **[Save and Next]** to move to the next page.



Tip

Clicking on **[Save as Draft]** will save entries made to the pages and allow you to log out of the system. Clicking on **[Save and Next]** will lead you to the next steps in creating the advance.

- Click on the **[Add Per Diem]**, **[Add Air Fare]** and **[Add Reimbursable Expenses]**. Pop-up windows will appear to guide you on which details are needed for each expense line item.

Step 2 of 5: Input advance details. Advance can only be made against Out-of-pocket expenses.

Legend: Warning (Yellow), Error (Red)

Note: Hover on the identified row to view the warning/error

Instruction: Click on the row to edit the line item. Click on the delete icon (🗑️) to remove the line item from the details.

PER DIEM + Add Per Diem

Details/Files	Category	City	Period From	Period To	No. of Days	Cost Currency	Daily Rate	Exchange Rate	Contract Currency	Total in Contract Currency
No Records Found										

INTERNATIONAL AND DOMESTIC AIR TRAVEL (please do not claim for tickets paid by ADB) + Add Air Fare

Details/Files	Category	Route	Period From	Period To	No. of Route	Cost Currency	Amount	Exchange Rate	Contract Currency	Total in Contract Currency
No Records Found										

OTHER REIMBURSABLE EXPENSES + Add Reimbursable Expenses

Details/Files	Category	Period From	Period To	Activity Description	Cost Currency	Amount	Exchange Rate	Contract Currency	Total in Contract Currency
No Records Found									

Tip

Have a copy of the contract when creating the advance as reference on the dates, amounts and additional details that needs to be in the request.

If the amount claimed is in local currency, select the (a.) **Cost Currency**, (b.) enter the **Exchange Rate** and select the (c.) **Contract Currency** in the expense pop-up screens.

- Attach files that will support the amount of each expense line item being advanced.

Legend: Warning (Yellow), Error (Red)

Note: Hover on the identified row to view the warning/error

Instruction: Click on the row to edit the line item. Click on the delete icon (🗑️) to remove the line item from the details.

PER DIEM + Add Per Diem

Details/Files	Category	City	Period From	Period To	No. of Days	Cost Currency	Daily Rate	Exchange Rate	Contract Currency	Total in Contract Currency
Hide	1156 - Per Diem Allowance	PHILIPPINES - Manila	01-Aug-2019	04-Aug-2019	2	USD	150.00	1.0000000000	USD	300.00

Supporting Documents

Add

Filename	Delete	Status
C:\Users\92\Documents\ Browse...	🗑️	Upload

Note

A maximum of **three (3)** files may be attached to each expense line item. Each file for upload should not go beyond **10 MB** in size.

- The entry of **Payment Information** will only be required for first-time transactions and will be re-used for succeeding claims and advances.

Step 3 of 5: Verify Payment Information. Contract variation should be issued if there is a change in bank details. For inquiries, click on [Guide to Payment Information](#).

Consultant Name: _____
 Contract: _____ TA Number/Title: _____

Instruction: Click on the row to view the payment information details. Click on the pencil icon (✎) to edit the payment information details.

	Currency	Account Name	Bank	Account Number	SWIFT/BIC	Payment Method	Updated Payment Info
✎	USD	TESTNAMR1 TESTNAMR1	ADB	6789034567889	56756745345	Electronic	No

Note

Changing payment information is highly discouraged in the middle of the consulting engagement. If the change is unavoidable, ensure an offline contract variation for the adjustment has been approved before changing the bank information in the system.

- Upload **Supporting Documents** related to the claim or advance request that are not related to any of the expense/advance items. Make sure to tick which **Document Type(s)** is/are applicable for each file.

Step 4 of 5: You may click on Save and Next to skip this step if your advance does not require supporting documents. Refer to [Guide to Supporting Documents](#) for more information.

Consultant Name: _____
 Contract: _____ TA Number/Title: _____

+ Add files.

Instruction: Click on Upload File button to upload one attachment at a time. Characters such as ~ " # % & * : < > ? / \ { } are not allowed in the filename. Please rename your file before uploading. Maximum file size per attachment is 10 MB. Maximum of twenty (20) files may be attached to the Claim/Advance Request.

Item No.	Filename	Document Type	Description	File Size	Status	Action
1	Supporting Document.pdf	<input checked="" type="checkbox"/> Travel Documents <input type="checkbox"/> Evidence of Payment <input type="checkbox"/> Certificate of Turnover <input type="checkbox"/> Service Agreement/Contract <input type="checkbox"/> Signed Attendance Sheet/s <input type="checkbox"/> Others		30.3 KB		<input type="button" value="Upload File"/> <input type="button" value="Remove"/>

Note

When uploading zipped files, select **[Others]** under the Document Type and identify the documents in the Description field. Also, a maximum of **twenty (20)** files may be attached to the Advance Request. Note that each file for upload should not go beyond 10 MB in size.

- Review the **[List of Warnings and Errors]** and the **[Summary of Advances]** for correctness. Also, review the **[Consultant’s Certification]** and click on the tick box to signify agreement to the list.
- Click **[Submit]** to start the processing of the advance.

Tip

The **[Submit]** button will only appear after clicking on the **[Consultant’s Certification]** tick box. Error messages must be addressed to enable the **[Submit]** button.



For guides and learning videos, visit <http://consultanttutor.adb.org> or in your TACP Dashboard>Reference link. For more information, email adbtaclaims@adb.org.