

Create and Submit Claims for TA Contracts Online

Consultants can now submit claims and the corresponding supporting documents for their lumpsum contracts online through the TA Claims Partner.

Steps in Creating a Claims Request

1. Click on the **[Create Claim]** 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. Enter the **[Invoice Number]**. Make sure it does not go beyond 12 characters should be unique from previous claims. 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 claim.

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

The screenshot shows the main interface with four sections: REMUNERATION/PROGRESS PAYMENT, PER DIEM, INTERNATIONAL AND DOMESTIC AIR TRAVEL, and OTHER REIMBURSABLE EXPENSES. Each section has a table with columns for details and a '+ Add' button. The '+ Add Progress Payment' button is highlighted with a red circle and the number 3.

Tip

Have a copy of the contract when creating the claim 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.

4. Attach files that will support the amount of each expense line item being claimed.

The screenshot shows the 'Supporting Documents' section with an 'Add' button and a table with columns for 'Filename', 'Delete', and 'Status'. A file upload dialog is open, showing the file path 'C:\Users\92\Documents\'. The 'Add' button and the upload dialog are highlighted with a red circle and the number 4.

Note

A maximum of **three (3)** files may be attached to the 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](#).

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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

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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 claim does not require supporting documents. Refer to [Guide to Supporting Documents](#) for more information.

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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		Upload File 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 Claim 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 Claims]** 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 claim.

Step 5 of 6: Verify information in Summary of Claims and provide information under Consultant's Certification.

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

List of Warnings and Errors

Item No.	Type	Description
1	Warning	Total claim amount for 1182 Misc. Travel Expenses (lump-sum) exceeded the undisbursed balance of USD 8.00.

SUMMARY OF CLAIMS

NOTE: Any outstanding advance will be recovered from your claim based on the conditions of your contract provision.

Total Unliquidated Advance	USD 0.00	Remuneration/Progress Payment	USD 10,000.00
		Total Per Diem	USD 100.00
		Total Air Travel	USD 1,000.00
		Total Other Reimbursable Expenses	USD 100.00
		Total Amount Requested	USD 11,200.00

CONSULTANT'S CERTIFICATION

I certify the following:

- That the information provided herein and the amount being claimed are correct and there are no overlapping claims with the other concurrent assignments. I have attached or submitted the required documentation in support of the claimed amounts.
- That the above statement of expenses were incurred during the performance of my tasks on bank's official business and that I have not received and will not claim reimbursement of these expenses from any other source.
- That all deliverables are submitted within the contract's terms of engagement.
- That the payment information indicated above is correct and up-to-date.
- That failure to provide Intermediary/Correspondent Bank details for cross border transactions may result to delay in processing of payments and in some cases can lead to unapplied or returned payments due to incorrect information. I hereby authorize ADB to assist me on the selection of an Intermediary/Correspondent Bank, provided that any such assistance is provided by ADB for convenience only and without representation or warranty of any kind. I acknowledge that I am solely responsible for providing correct bank information and any potential costs for the payment transactions remains my responsibility.
- That I am/the firm is not in the sanction lists of ADB, African Development Bank, European Bank for Reconstruction and Development, Inter-American Development Bank or the World Bank.
- That the above amounts have been paid for the proper execution of the TA activities, all within the terms and conditions of the Contract. All documentation substantiating these expenditures including original receipts, invoices and other supporting documents evidencing payments under the Contract will be made available upon request by ADB and will be maintained during the period of Services and for a period of 5 years after the expiration or termination of the Contract.

Buttons: Back, Cancel, Save as Draft, **Submit**

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.