

# Create and Submit Claims for TA Contracts Online

Consultants can now submit claims and the corresponding supporting documents for their time-based 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.

- Click on the **[Add Time Sheet]** button. A pop-up window will appear for you to enter the activities done for the day being claimed.

**Tip**

Repeat **Step 3** until all days for the claim have been entered. You can also enter a set of activities for a series of dates.

If work was done during the weekend, enter the details in the **[Justification]** field.

**Note**

Dates can no longer be selected in the **[Calendar]** if both WD and Per Diem has been previously claimed.

- When claiming **[Per Diem]** allowance, click on the **[Daily Rate]** column and enter the amount in the pop-up window.
- Click on the **[Add Air Fare]** and **[Add Reimbursable Expenses]**. Pop-up windows will appear to guide you on which details are needed for each expense line.

Basic Information Timesheet Claim Details Payment Information Supporting Documents Consultant's Certification

Step 3 of 6: Input your claim details. For reference on exchange rates, [click here for ADB Book Rate](#)

Consultant Name: \_\_\_\_\_  
 Contract: \_\_\_\_\_ TA Number/Title: \_\_\_\_\_

Legend

Warning
  Error

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

**REMUNERATION**

Details/Files	Category	Period From	Period To	No. of Days	Currency	Daily Rate	Total
Show	1150 - Remuneration	10-Jun-2019	12-Jun-2019	3.00	USD	985.00	2,955.00
<b>Total Remuneration (USD)</b>							<b>2,955.00</b>

**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
Show		PHILIPPINES - Manila	10-Jun-2019	10-Jun-2019	1	USD		1.0000000000	USD	
<b>Total Per Diem (USD)</b>										<b>0.00</b>

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

**INTERNATIONAL AND DOMESTIC AIR TRAVEL (please do not claim for tickets paid by ADB)**

Details/Files	Category	Actual Route Taken	Period From	Period To	Route/s Taken	Cost Currency	Amount	Exchange Rate	Contract Currency	Total in Contract Currency
No Records Found										

**OTHER 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									

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

**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	18-Jun-2019	18-Jun-2019	1	USD	100.00	1.0000000000	USD	100.00

**Supporting Documents**

Add

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

**Total Per Diem (USD) 100.00**

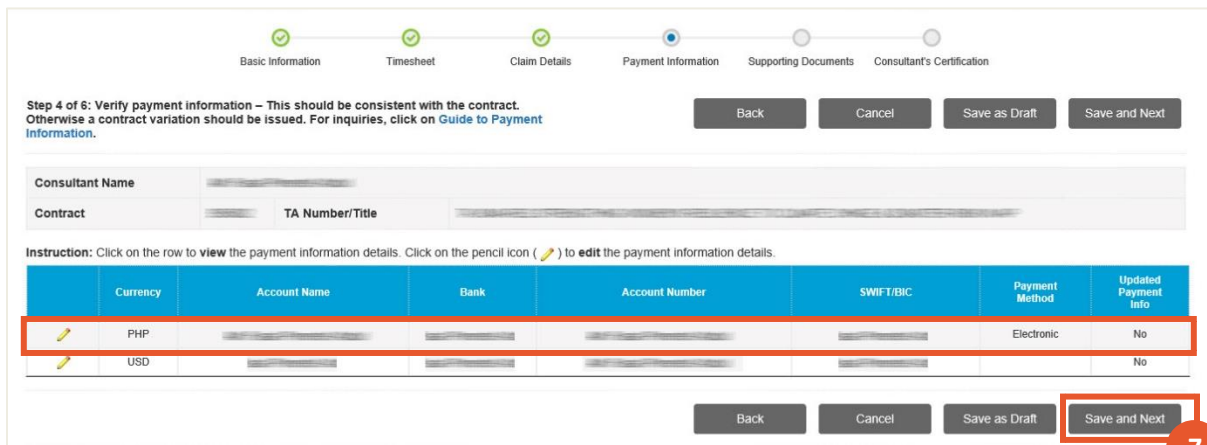
**Note**

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.

**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.

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





Step 4 of 6: Verify payment information – This should be consistent with the contract. Otherwise a contract variation should be issued. For inquiries, click on [Guide to Payment Information](#).

Back Cancel Save as Draft Save and Next

Consultant Name [Redacted]  
Contract [Redacted] TA Number/Title [Redacted]

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
	PHP	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Electronic	No
	USD	[Redacted]	[Redacted]	[Redacted]	[Redacted]		No

Back Cancel Save as Draft Save and Next

**Note**

Changing payment information is highly discouraged in the middle of the consulting engagement. If the change is unavoidable, ensure a 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.

Progress: Basic Information (✓) Timesheet (✓) Claim Details (✓) Payment Information (✓) Supporting Documents (●) Consultant's Certification (○)

Step 5 of 6: 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.

Buttons: Back, Cancel, Save as Draft, Save and Next

Fields: Consultant Name, Contract, TA Number/Title

+ Add files...

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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"/>

Buttons: Back, Cancel, Save as Draft, Save and Next

**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.

Progress: Basic Information (✓) Timesheet (✓) Claim Details (✓) Payment Information (✓) Supporting Documents (✓) Consultant's Certification (●)

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

Buttons: Back, Cancel, Save as Draft

Fields: Consultant Name, Contract, TA Number/Title

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List of Warnings and Errors

Item No.	Type	Description
1	Warning	Total claim amount for 1156 Per Diem Allowance exceeded the undisbursed balance of USD 0.00.
2	Warning	Total claim amount for 1182 Misc. Travel Expenses (lump-sum) exceeded the undisbursed balance of USD 83.12.

**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	USD 2,955.00
		Total Per Diem	USD 25.00
		Total Air Travel	USD 1,000.00
		Total Other Reimbursable Expenses	USD 100.00
		<b>Total Amount Requested</b>	<b>USD 4,080.00</b>

CONSULTANT'S CERTIFICATION

I certify the following:

1. 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.
2. 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.
3. That all deliverables are submitted within the contract's terms of engagement.
4. That the payment information indicated above is correct and up-to-date.
5. 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.
6. 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.
7. 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.

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.



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