How to submit Grant claims

1. Overview

The Technology Strategy Board uses an online Grant Claim System. This allows each participant within a project to submit their own costs and claims online.

The purpose of this document is to take you through the steps that are required to submit your initial forecasts and future claims.

It is assumed that you have already registered as a user on the _connect web portal and know your login email address and password.
2. Where to find help and support if I have any problems

If you are experiencing problems with any aspects of the _connect web portal then you can contact the Technology Strategy Board’s dedicated Business Support Group by:

- Email at support@innovateuk.org (please include your name, organisation and a description of your problem including URLs and screenshots were appropriate.)
- Phone on (0300) 3214357.

Note that these contact details for the Business Support Group are available at any time by clicking on the “Help & Support” link that is at the bottom right of every web page. The help and support section also has Frequently Asked Questions (FAQs) and short videos that will help answer the most common issues or queries.

3. Logging into the _connect web portal

To login into _connect:

2. Click the Sign-In button to open the login window.
3. Enter your login email address and password that you registered with.
4. Click the Sign-In button
If you experience any problems logging in then you can click on the “Forgot Password?” link on the login window and follow the instructions. This will send you, via email, your password reminder that you setup when you registered. If the reminder still does not help then there is additional information in the email that will allow you to reset your password.

Alternatively, you can contact the Business Support Group for assistance (see section 2).

4. Finding your Project in the Grants section

The screen below indicates the position of the ‘My Grants’ link which you will need to click in order to gain access to projects that you are linked to. Once logged in, simply click this link which will be located in the top right hand side of your Home page.
5. Submitting a project’s initial forecast

The following sections show how to submit your initial forecasts costs for the duration of the project.

5.1 The Project Dashboard

The Project Dashboard displays a list of all the projects that you are a participant in. In the example below the participant organisation “Tee’s Tea Limited” is only involved in one project 101930 “Test Project for Participant Guide”.

To see more details about the claims history for any project, to submit an initial forecast or to submit a new claim just click on the project title. This will take you to the Project Claims Overview for that project.
5.2 The Project Claims Overview

The Project Claims Overview displays:

- **Project Participant Details** – Basic identification information for the project, MO and participant.

- **Claims Dashboard** – This allows you to see the progress of previously submitted claims as they pass through the approval process from submission to being paid by Finance. Initially this will be empty as you will not have submitted any claims.

- **Due Claims** – This lists all the claim periods that are due and are awaiting you to input your claims and costs. Claims will not appear here until the day after the claim period has ended. Therefore until the end of claim period 1 there will be no due claims displayed. Prior to this there will be a Forecast button to allow you to input your initial forecast.

Prior to making your first claim you must click on the Forecast button to input a complete forecast for the duration of the project. This will take you to the Review Claim screen to enter your forecast.
5.3 Input an initial forecast

The Create Claim screen allows you to input your initial forecast costs for the project.

After inputting your forecast, click Recalculate to recalculate the column/row totals in the table.

When the forecast data is correct click Save or Save & Exit to save the data.

Include any comments about the forecast that you want the Monitoring Officer and the Technology Strategy Board to be aware of.
6. Submitting a project claim

The following sections show how to submit a claim for the project.

6.1 The Project Dashboard

At the end of each claim period you will be able to input your claim costs for that period. In this situation the Project Dashboard will show that there is a claim due for the project.

To see more details about the claims history for any project, to submit an initial forecast or to submit a new claim just click on the project title. This will take you to the Project Claims Overview for that project.
6.2 The Project Claims Overview

The Project Claims Overview will show in the Due Claims section which claim periods are due. In the example below claim period 1 is due.

Click the Create link alongside that claim period to input a claim for that period. This will take you to the Claim screen to input your claim.
6.3 Input a claim

The Claim screen allows you to input your claim costs for a specific claim period and a revised forecast for all the remaining claim periods.
The process of submitting a claim is as follows:

1. Check that the Current Claim Period displayed is correct. If it is not, select the correct one from the ‘Current Claim Period’ drop down list and Click ‘Change’ next to it.

2. Input your claim costs (in the green section) and your revised forecast costs (in the blue section). Note that initially the forecast section will contain your previous periods forecast but you are required to revise it if it is no longer accurate.

3. After inputting your claim and forecast, click Recalculate to recalculate the column/row totals in the table.

4. Include any comments about the claim that you want the Monitoring Officer and Technology Strategy Board to be aware of when they process the claim.

5. If your claim is not ready to be submitted to the Monitoring Officer yet click the Save or Save & Exit button to save the claim. When your claim is complete click the ‘Submit to Monitoring Officer’ button to submit the claim. Once submitted the MO will be notified that your claim is awaiting approval and you will not be able to make any further changes to the claim.
7. Tracking a project claim

Once a claim has been submitted it is possible to follow its progress through the system via the Project Claims Overview screen. The Claims Dashboard section of this screen shows the progress of a claim using a number of status columns (from Claim Submitted to Finance).

![Progress of claim over time](image)

The different claim statuses and their meanings are shown in the following table:

<table>
<thead>
<tr>
<th>Claim Status columns on Project Claim screen</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Claim Submitted</td>
<td>PMO</td>
</tr>
<tr>
<td>Empty</td>
<td></td>
</tr>
<tr>
<td>14/01/13</td>
<td>Pending</td>
</tr>
<tr>
<td>Approved</td>
<td>Pending</td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td>Payment Pending</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The PMO is the Project Monitoring Officer. The Delivery team, Head of Delivery and Finance are all teams within the Technology Strategy Board who collectively process and pay your claims.