



# ReloFact: Finances Guide

Please note that a revised Relocation Directive has taken effect as of April 1st, 2021. In order to determine your entitlements, please take note of the following:

- If the movement of your HG&E is on or after April 1st, 2021, see **Part A**
- If the movement of your HG&E is prior to April 1st, 2021, see **Part B**

## Part A – HG&E moved on or after April 1st, 2021

Members generally have a two-year time limit from the COS date or the date that Household Goods & Effects (HG&E) is authorized to be moved – whichever is later – to incur relocation expenses and make claims for reimbursement. Moves to an IPR have special time limit rules. Expenses incurred within the two-year time limit may be reimbursed like a regular posting, however, IPR moves may have a time limit extension if DCBA grants an extension due to any reasons listed in Article 14.2.05.

For more information on claims, expenses, and receipts, please review Section 2.9 of the Relocation Directive.

## Understanding Your Finances

The Finances tab on the Member Secure Website (MSW) is an important tool you will need to utilize throughout your relocation. You can request advances, create expense claims, view your **Budget** and estimates, **Payment History**, and **Final Statement of Account**. This document will explain the step-by-step instructions on how to do so on the MSW.

## Tracking your Expenses and Submitting Claims

Throughout your relocation, you are encouraged to keep track of all expenses, keep receipts, and request advances prior to incurring costs so that you will not be out of pocket.

The general steps related to your expenses include the following:

- Review the **My Budget** page on the **Finances** tab on your MSW. Based on your PRA and **Move Profile**, the **My Budget** page presents your budget and helps you gain an understanding of the estimates for various activities throughout your move. As claims are processed, you can compare your estimated and actual expenses.
- Information entered on your **Move Profile** should be kept up to date to ensure the most reliable information is generated on the MSW. Any updates to your **Move Profile** are automatically reflected on your **My Budget** page, giving BGRS the necessary information needed to process your claims.
- Prior to incurring an expense, you can request an advance of funds from BGRS so that you will not be out of pocket.
- Pay for relocation expenses and keep the necessary receipts.
- Submit a claim.
- Funds are sent to you based on your advance and claim submissions. Throughout your move, you can view what has been advanced to you and what you have claimed on the **Payment History** page. You will only receive funds when the total funds approved in your claims are greater than your outstanding advanced funds. At the end of your move, if you have an outstanding advance balance, you will need to return those funds to the Crown.
- At the end of your move, BGRS will send you an email asking you to confirm that you are at destination and to confirm your **Final Statement of Account**. If you have an outstanding balance that was advanced to you, you will be sent instructions on how to return those funds.



## My Budget

The **My Budget** tab shows you all the available funding in your Custom Account. Here, you can also view the estimate for various expenses you may encounter during your move, as well as the actual amounts claimed to date. Please note that estimates are based on common relocation scenarios.

**BGRS** | Search | 7 selected | Search | FR | Français

TRACY Spring14 | Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020 | Move Profile

My Budget | Advances | Claims | Payment History | Final Statement of Account

CUSTOM FUNDING AVAILABLE: \$14,021.66

PERSONALIZED FUNDING AVAILABLE: \$0.00

TOTAL ESTIMATE: \$21,445.64

TOTAL EXPENSES PROCESSED: \$4,238.65

TOTAL FUNDS PAID TO YOU: \$2,015.70

Expense Category: All | Funding: All

Please note that the Estimate figures on this page are estimates and do not represent the exact amount of entitlements.

Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020 | Move Profile

My Budget | Advances | Claims | Payment History | Final Statement of Account

Expense Category	Funding	Estimate	Actual
<b>Vehicle</b>			
Vehicle Safety Certificates	Core	\$125.00	\$0.00
Vehicle Registration	Core	\$100.00	\$0.00
Travel to PMV Depot	Core	\$50.00	\$0.00
Driver's License Plates/Fees	Core	\$25.00	\$0.00
<b>Subtotal</b>		\$300.00	\$0.00
<b>Travel to New Location</b>			
Transportation - Taxi	Core	\$0.00	\$8.35
Transportation - Parking	Core	\$50.00	\$0.00
Miscellaneous Allowance	Core	\$0.00	\$16.70
Meals	Core	\$0.00	\$185.60
<b>Subtotal</b>		\$50.00	\$210.65

Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020 | Move Profile

My Budget | Advances | Claims | Payment History | Final Statement of Account

Expense Category	Funding	Estimate	Actual
<b>Rental Expense</b>			
Rental Search Assistance Fee	Core	\$735.00	\$0.00
Cleaning at Destination	Core	\$200.00	\$0.00
<b>Subtotal</b>		\$935.00	\$0.00
<b>Interim Lodgings, Meals and Miscellaneous</b>			
Miscellaneous Allowance	Core	\$0.00	\$139.20
Meals	Core	\$0.00	\$1,473.10
Lodging - Private	Core	\$0.00	\$400.00
Lodging - Commercial	Core	\$1,500.00	\$0.00
Local Transportation - Rental	Core	\$250.00	\$0.00
Local Transportation - Parking	Core	\$50.00	\$0.00
<b>Subtotal</b>		\$1,800.00	\$2,012.30



Move To: **BURNABY, BC, Canada** |
 BGRS Reference Number: **2879038256** |
 Change of Strength/Release Date: **14 June, 2020**

[My Budget](#) |
 [Advances](#) |
 [Claims](#) |
 [Payment History](#) |
 [Final Statement of Account](#)

Category	Item	Core	Amount	Balance	
House Hunting Trip	Transportation - Parking	Core	\$50.00	\$0.00	
	Transportation - Gas	Core	\$100.00	\$0.00	
	Transportation - Car Rental	Core	\$350.00	\$0.00	
	Phone/Fax/Internet	Core	\$50.00	\$0.00	
	Meals	Core	\$0.00	\$649.60	
	Lodging - Commercial	Core	\$0.00	\$1,000.00	
	Incidental Allowance	Core	\$0.00	\$121.10	
	Dependant care	Core	\$0.00	\$245.00	
	Subtotal			\$550.00	\$2,015.70

Category	Item	Core	Amount	Balance
Home Sale	Real Estate Commission	Core	\$11,025.00	\$0.00
	Mortgage Discharge Fee	Core	\$250.00	\$0.00
	Legal Fee - Sale	Core	\$420.00	\$0.00
	Legal Disbursements - Sale	Core	\$300.00	\$0.00
	Cleaning at Origin	Core	\$200.00	\$0.00

Move To: **BURNABY, BC, Canada** |
 BGRS Reference Number: **2879038256** |
 Change of Strength/Release Date: **14 June, 2020**

[My Budget](#) |
 [Advances](#) |
 [Claims](#) |
 [Payment History](#) |
 [Final Statement of Account](#)

Category	Item	Core	Amount	Balance
Home Sale	Real Estate Commission	Core	\$11,025.00	\$0.00
	Mortgage Discharge Fee	Core	\$250.00	\$0.00
	Legal Fee - Sale	Core	\$420.00	\$0.00
	Legal Disbursements - Sale	Core	\$300.00	\$0.00
	Cleaning at Origin	Core	\$200.00	\$0.00
	Appraisals	Core	\$420.00	\$0.00
Subtotal			\$12,615.00	\$0.00

Category	Item	Core	Amount	Balance
Administrative	Movement Grant/Non-Accountable incidentals	Core	\$650.00	\$0.00
Subtotal			\$650.00	\$0.00
Total			\$16,000.00	\$4,238.65

## What are advances?

Start your move by requesting advances for anticipated expenses. The purpose of requesting an advance is to have the appropriate amount of funds available to you as needed, throughout your relocation. **Advances will need to be substantiated by claims.** At the end of your move, if you have an outstanding advance balance, you will need to return those funds to the Crown.

## How do I submit an advance request?

Step 1: On the MSW, under **Move Planner** select **Finances**.

Step 2: From the top menu, select the **Advances** tab.

Step 3: Click on **Request Advance**.

Step 4: Choose the appropriate expense category for the advance you are requesting.

Step 5: Click on **Select** to finish.

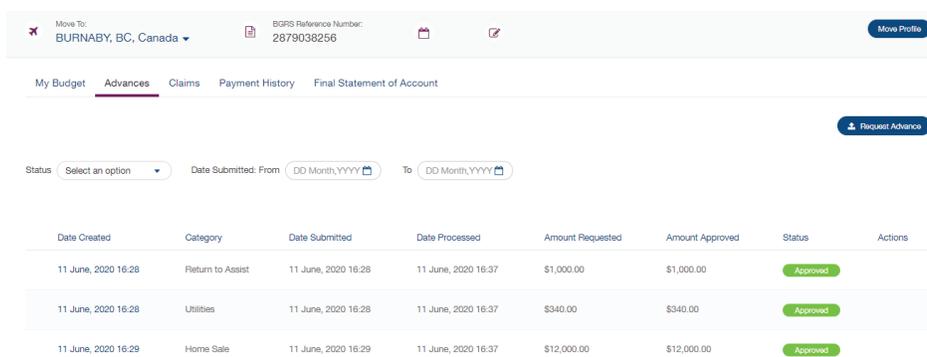


Step 6: Fill in the required information. Note: You will find a list of estimated amounts under the **My Budget** tab.

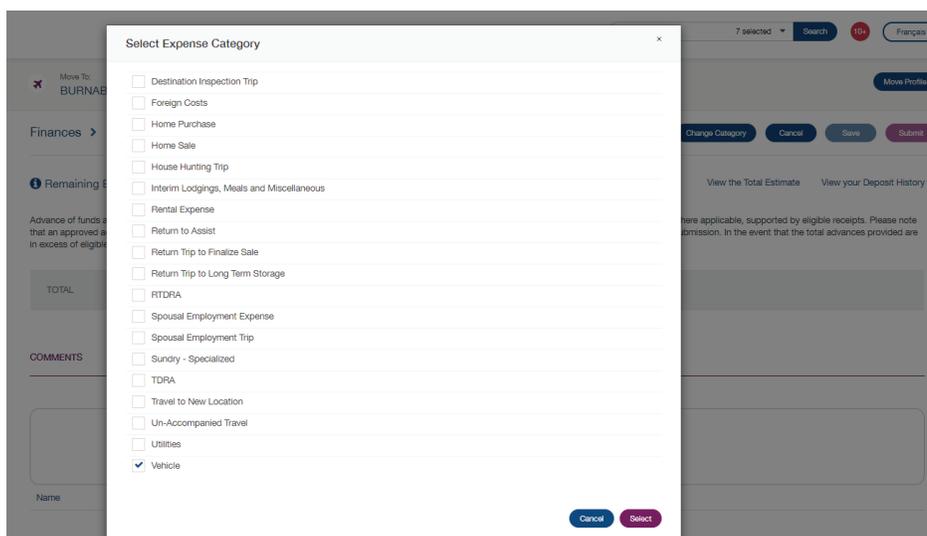
Step 7: Select either **Save** (to save as a draft) or **Submit** (when ready to do so).

\*Note: We have included screen shots to help you better understand the process.

Once an advance request has been made to BGRS, it will be reviewed and either approved or rejected. If approved, BGRS will make a request to have the amount paid to you via Electronic Funds Transfer (EFT) to be available prior to incurring relocation expenses. If rejected, you will receive notification from BGRS indicating the reason(s) why.



Date Created	Category	Date Submitted	Date Processed	Amount Requested	Amount Approved	Status	Actions
11 June, 2020 16:28	Return to Assist	11 June, 2020 16:28	11 June, 2020 16:37	\$1,000.00	\$1,000.00	Approved	
11 June, 2020 16:28	Utilities	11 June, 2020 16:28	11 June, 2020 16:37	\$340.00	\$340.00	Approved	
11 June, 2020 16:29	Home Sale	11 June, 2020 16:29	11 June, 2020 16:37	\$12,000.00	\$12,000.00	Approved	



**Select Expense Category**

- Destination Inspection Trip
- Foreign Costs
- Home Purchase
- Home Sale
- House Hunting Trip
- Interim Lodgings, Meals and Miscellaneous
- Rental Expense
- Return to Assist
- Return Trip to Finalize Sale
- Return Trip to Long Term Storage
- RTDRA
- Spousal Employment Expense
- Spousal Employment Trip
- Sundry - Specialized
- TDRA
- Travel to New Location
- Un-Accompanied Travel
- Utilities
- Vehicle



Move To: BURNABY, BC, Canada

BGRS Reference Number: 2679038256

[Move Profile](#)

[Change Category](#)

[Cancel](#)

[Save](#)

[Submit](#)

[Finances](#) > [Advances](#) > Create an Advance Request

**Remaining Estimate: \$19,429.94** [View the Total Estimate](#) [View your Deposit History](#)

Advance of funds are provided to help cover planned relocation expenses. Once the expenses have been incurred, an expense claim needs to be submitted and where applicable, supported by eligible receipts. Please note that an approved advance may not result in an approved benefit claim, based on the validity of the provided receipt, or the circumstances at the time of expense submission. In the event that the total advances provided are in excess of eligible expenses outlined in the CAF Relocation Directive, those funds will need to be returned to the Receiver General of Canada through BGRS.

Vehicle 🗑️ ▼

Please ensure PMV storage quote is uploaded if you need to advance for PMV Commercial Storage.

- Requested Amount

- Comments

**Documents**

TOTAL	Requested Amount

**COMMENTS**

Name	Date	Comments

## What are Claims?

A claim is a request for reimbursement of expenses in accordance with the Relocation Directive. All claims must be submitted through the MSW or through the mobile app. Claims, once approved, will go towards any outstanding advances on your file until the balance is cleared.

Claims can be submitted throughout the steps of your relocation. For example, once you have finished your House Hunting Trip (HHT), submit a claim for all expenses incurred during your HHT. Explore the **Claims** section of the **Finances** tab on the MSW to help you understand the types of claims you may create.

## How do I submit a claim?

When you login to the MSW, click on **Finances** under the **Move Planner** section. From the top menu, select **Claims**, and then **Start a Claim**. You will then be asked to choose the appropriate claim type.

## What type of claim would you like to start?

You are given the option of six claim types. Choose the type you wish to submit:

- Travel
  - Includes House Hunting Trip, Destination Inspection Trip, Move to Destination, Unaccompanied Travel, Spousal Employment Trip



- Return Trips
  - Includes Return Trip to Assist, Return Trip to Finalize Sale, Return Trip to Long-Term Storage
- Home Expenses
  - Includes Home Purchase, Home Sale, Reverse Temporary Dual Residence Assistance, Temporary Dual Residence Assistance
- Rental Expenses
- Miscellaneous / Others
  - Includes Foreign Costs, Real Estate Incentive, Spousal Employment Services, Sundry & Specialized, Utilities, Vehicle
- Movement Grant

Throughout the claim submission process, you will be asked a series of targeted questions to customize your claim to your individual situation. Optimized to make your experience more efficient, our user-friendly interface includes several features to help you understand what we need to see from you as you are creating your claim in real time. Depending on the expenses you select, we will specify which documents we need you to upload in order to successfully process your claim.

## Example: Submitting an HHT Claim

For the purposes of this guide, we will show you an example to help get you started – an HHT claim.

Start by selecting **Travel**.

The screenshot shows the BGRS web application interface. At the top, there is a navigation bar with the user's name 'TRACY Spring14', a dropdown menu for 'Move To: BURNABY, BC, Canada', a 'BGRS Reference Number: 2879038256', and a 'Change of Strength/Release Date: 14 June, 2020'. Below this is a 'Move Profile' button. The main content area is titled 'What type of claim would you like to start?' and features six buttons: 'Travel' (highlighted in dark blue), 'Return Trips', 'Home Expenses', 'Rental Expenses', 'Miscellaneous / Others', and 'Movement Grant'. At the bottom right, there are 'Back' and 'Next' buttons. A sidebar on the left contains a navigation menu with options like 'Dashboard', 'Move Planner', 'Tasks', 'Trips', 'Finances', 'Suppliers', 'Destination', and 'Communications'. At the bottom left of the sidebar, there is a 'Hide menu panel' button and some copyright information.

Next, choose **House Hunting Trip**



**BGRS** TRACY Spring14

Move To: **BURNABY, BC, Canada** | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### Select a claim category

Please note that all fields in the claims process are mandatory, unless specifically marked as optional.

**House Hunting Trip**

The purpose of a HHT is to secure permanent accommodations (rent or purchase) at the new place of duty; and to coordinate the dates of the disposal and acquisition of your residences to facilitate a door to door move.

**Destination Inspection Trip**

If you have already secured accommodations at your new place of duty, you may be entitled to a Destination Inspection Trip (DIT) in order to inspect the replacement residence.

**Move To Destination**

Use this claim category to capture all the expenses incurred during your Pacific Load, Clean, Unload, Unpack, extra interim Lodging, Meals and Miscellaneous expenses (LMM), and travel to destination dates.

**Unaccompanied Travel**

If you are travelling to destination without your Dependents and Household Goods & Effects - (D/HG&E) - use this category to claim your travel.

**Spousal Employment Trip**

If your spouse travelled to destination to attend a job interview, use this category to claim their travel.

Here, you will be asked a series of questions to help us better understand the specifics of your claim.

**BGRS** TRACY Spring14

Move To: **BURNABY, BC, Canada** | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### Let's confirm a few things about your HHT

Did you take an Extended HHT?  Yes  No

Did you have any days of Temporary Duty?  Yes  No

Did you take leave in conjunction with your HHT?  Yes  No

Did you take your HHT after your COS Date?  Yes  No

**BGRS** TRACY Spring14

Move To: **BURNABY, BC, Canada** | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### House Hunting Trip Overview

Please answer a few questions to help us understand what you did and what types of expenses you will be claiming.

**Transportation**

How did you travel to destination?

Commercial Transportation
 Personal Motor Vehicle (PMV)
 Rental Car

What modes of transportation did you use on-site? (Select all that apply)

Rental Car
 Personal Motor Vehicle (PMV)
 PMV Passenger

Taxi / Ride Sharing Service
 Public Transportation
 Other



**Lodging**

What type of lodging did you use? (Select all that apply)

Commercial
  RV
  Private

I did not use any lodging during my trip.

**Meals & Incidentals**

Do you wish to receive the full daily meal allowance for all participants for the duration of the trip?

Yes
  No

**Others**

Did you modify your travel dates?

Yes
  No

Did you use dependant care?

Yes
  No

Did you use pet boarding services?

Yes
  No

Did you use any phone/fax/internet services?

Yes
  No

BGRS

TRACY Spring 14

Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### Rental Car (On-site)

Start Date	End Date
01 May, 2020	07 May, 2020

Amount (including tax): CAD \$456.78

Rental Location: Destination

Return Location: Destination

Please attach valid invoice or receipt.

Rental Car Receipt.PNG

Attach from: My Computer | My Receipts

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Hide menu panel



**BGRS** Search 7 selected Search 10+ Français

TRACY Spring14 Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances **Claims** Payment History Final Statement of Account

Transportation  Lodging   Meals & Incidentals   Other   Review

**Please select additional transportation fees you incurred**  
Select all that apply.

Parking
  Tolls
  Gas

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**BGRS** Search 7 selected Search 10+ Français

TRACY Spring14 Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances **Claims** Payment History Final Statement of Account

**Parking**

**Date of Expense**  
07 May, 2020

**Amount (including tax)**  
CAD \$12.00

**Location**  
Destination

I lost my receipt.  
I solemnly declare that the above is a true and complete statement of my personal expenses. I understand that amounts reimbursed as part of the CAF Relocation Program based on this declaration are subject to review by the Government of Canada and at which time additional documentation may be requested.

[Add Expense](#)

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Hide menu panel

In the **Meals & Incidentals** section, you are able to customize your meal selection, OR...

### Meals & Incidentals

Please select the dates and travellers you wish to claim meals & incidentals for below.

Location Information	Travellers		Subtotals		Total
	Member	Spouse	Meals	Miscellaneous	
Input for entire trip: <input type="text" value="Alberta"/> <input type="button" value="Apply to entire trip"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
10 May, 2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$143.80	\$16.70	\$160.50
Breakfast: <input type="text" value="Alberta"/>					
Lunch: <input type="text" value="N/A"/>					
Dinner: <input type="text" value="Alberta"/>					



My Budget	Advances	Claims	Payment History	Final Statement of Account	
11 May, 2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$71.90	\$5.57	\$77.47
Breakfast	Alberta				
Lunch	N/A				
Dinner	Alberta				
12 May, 2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$143.60	\$16.70	\$160.50
Breakfast	Alberta				
Lunch	N/A				
Dinner	Alberta				
13 May, 2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$165.60	\$16.70	\$202.30
Breakfast	Alberta				
Lunch	Alberta				
Dinner	Alberta				

...you can select the **simplified Meals & Incidentals** that are pre-determined based on your previous selections.

Meals/Incidentals	Number of Individuals	Number of Days	Total
Breakfast (\$20.65)	2 people	7 days	\$289.10
Lunch (\$20.90)	2 people	7 days	\$292.60
Dinner (\$51.25)	2 people	7 days	\$717.50
Incidentals (\$17.30)	2 people	7 days	\$121.10
			<b>\$1,420.30</b>

Review your claim before submission on the **HHT Claim Summary** page.

**HHT Claim Summary**

**Trip Details**

Origin Location: LANCASTER PARK, AB → Destination Location: BURNABY, BC

Travel Start: 01 May, 2020 → Travel End: 07 May, 2020

Documents & Attachments: 5 Attachment(s)

Did you take an Extended HHT? **No**

Did you have any days of Temporary Duty? **No**

Did you take leave in conjunction with your HHT?



My Budget   Advances   **Claims**   Payment History   Final Statement of Account

Did you take leave in conjunction with your HHT?  
**No**

Did you take your HHT after your COS Date?  
**No**

---

**Travellers**

1 Member - TRACY Spring14  
 2 Spouse - spouse Spring14

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**Travel Details - Transportation**

How did you travel to destination?  
**Commercial Transportation**

What type of commercial carrier did you use?  
**Air**

How did you get to and from commercial carrier?

**Taxi / Ride Sharing Service (to and from Carrier)**

Date  
**01 May, 2020**

Amount (Including tax)  
**\$15.00**

Location  
**Origin**

---

**Taxi / Ride Sharing Service (to and from Carrier)**

Date  
**07 May, 2020**

Amount (Including tax)  
**\$16.55**

Location  
**Origin**

What modes of transportation did you use on-site? (Select all that apply)

**Rental Car**

Start Date	End Date
<b>01 May, 2020</b>	<b>07 May, 2020</b>
Origin Location	Destination Location
<b>Destination</b>	<b>Destination</b>
Amount (Including tax)	
<b>\$456.78</b>	

---

**Taxi / Ride Sharing Service**

Date  
**07 June, 2020**

Amount (Including tax)  
**\$25.00**

Location  
**Destination**

## Payment History

The **Payment History** tab shows you advances and claims that have been processed by BGRS, including the amounts that have been approved for processing. You can keep track of funds that have been sent to your bank account, as advances and offsetting claims are processed throughout your move.

Claims related to Home Equity Assistance (HEA) and Real Estate Incentive (REI) are reimbursed to you by the CAF. When the balance of outstanding funds advanced to you is greater than your approved claims, you will not receive any funds for your current claim. The amount of funds sent to you is offset by the amount already provided in your approved advances. When a claim is processed the amount sent to your bank will depend on the total funds advanced to you in the past. You can view your outstanding balance in the **Advance Balance** section highlighted below.

For example:

- If you submit an advance for \$100 and then a claim for \$100, BGRS will have sent you \$100 and you have an **Advance Balance** of \$0.
- If the order was reversed and you submitted a claim for \$100 and then later an advance for \$100, BGRS will have sent you \$200, resulting in an advance balance of \$100.
- If you submit an advance for \$500, and then a claim for \$800, the approved expenses from your claim will clear the advance balance and you will receive the difference for \$300.



Move To: **BURNABY, BC, Canada** | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020

My Budget | Advances | Claims | **Payment History** | Final Statement of Account

Process Date	Transaction Type	Claim Name	Category	Submitted Date	Amount Submitted
05 June, 2020 18:00	Claim	HHT - old site	House Hunting Trip	04 June, 2020 18:43	\$2,015.70
09 June, 2020 16:13	Claim	Move To Destination 05/10/2020 - 05/19/2020	Interim Lodgings Meals and Miscellaneous Expenses	09 June, 2020 15:59	\$2,066.84
09 June, 2020 16:13	Claim	Move To Destination 05/10/2020 - 05/19/2020	Travel to New Location	09 June, 2020 15:59	\$210.65

Claim Name	Category	Submitted Date	Amount Submitted	Amount Approved	Paid	Advance Balance
HHT - old site	House Hunting Trip	04 June, 2020 18:43	\$2,015.70	\$2,015.70	\$2,015.70	\$0.00
Move To Destination 05/10/2020 - 05/19/2020	Interim Lodgings Meals and Miscellaneous Expenses	09 June, 2020 15:59	\$2,066.84	\$2,012.30	\$2,012.30	\$0.00
Move To Destination 05/10/2020 - 05/19/2020	Travel to New Location	09 June, 2020 15:59	\$210.65	\$210.65	\$210.65	\$0.00

At the end of your move, if you have an outstanding advance balance, you will need to return those funds to the Crown.

## Final Statement of Account

Once your move is complete, you will be prompted to go to the **Final Statement of Account (FSA)** tab in the **Finances** section of the MSW, where you will need to confirm that you are at destination. In the **FSA**, you can review a summary of your finances and click the checkbox to confirm that your relocation is complete.

If you have certified that your FSA is correct, but still have claims to submit, you can still do so after.

Move To: **PETAWAWA, ON, Canada** | BGRS Reference Number: 3266643826 | Change of Strength/Release Date: 16 December, 2019

My Budget | Advances | Receipts | Expenses | Claims | Payment History | **Final Statement of Account**

TOTAL TO DATE		Core	Custom	Personalized
Total Funding Envelope			\$1,241.57	\$650.00
Expenses Claimed	\$0.00			\$650.00
Balance Available			\$1,241.57	\$0.00
Relocation Advance Balance	\$750.00			

Please certify that your FSA is accurate by checking the box below.

I have relocated to destination and certify that my FSA is accurate.

Agree



## We're here to help

Whether you are requesting an advance of funds, submitting a claim, or notifying us that your move is complete, the MSW provides you with all the resources you need to successfully complete a door-to-door move.

Should you require any help, just send us an email at [info@bgrs.ca](mailto:info@bgrs.ca). We're happy to help.

## Part B – HG&E moved prior to April 1st, 2021

### Understanding Your Finances

The Finances tab on your Member Secure Website (MSW) is an important tool you will need to utilize throughout your relocation. You will be able to request advances, create expense claims, view your budget and estimated costs, payment history, and final statement of account. This document will help to explain step-by-step instructions on how to do so on your MSW.

### Your Move – Tracking your Expenses and Submitting Claims

Throughout your relocation, you are encouraged to keep track of all expenses incurred and to request advances so that you will not be out of pocket.

The general steps related to your expenses include the following:

- Review the **My Budget** page on the **Finances** tab on your MSW. Based on your PRA and Move Profile, the **My Budget** page presents your budget and helps you gain an understanding of the estimated costs for various activities throughout your move. As claims are processed, you can compare your estimates and actual expenses.
- Information entered on your **Move Profile** should be kept up to date to ensure the most reliable information is generated on your MSW. Any updates to your **Move Profile** are automatically reflected on your **My Budget** page, giving us the information we need to process your claims.
- Prior to incurring an expense, you can request an advance of funds from BGRS so that you will not be out of pocket.
- Pay for relocation expenses and keep the necessary receipts.
- Submit a claim.
- Funds are sent to you based on your advance and claim submissions. Throughout your move, we track what has been advanced to you and what you have claimed on the **Payment History** page. You will only receive funds when the total funds approved in your claims are greater than your outstanding advanced funds. At the end of your move, if you have an outstanding advance balance, you will need to return those funds to the Crown.
- Continue the above process as you move throughout the relocation process and incur related expenses.
- When it looks like you are at the end of your move, we will send you an email asking you to confirm that you are at destination and to confirm your **Final Statement of Account**. If you have an outstanding balance that was advanced to you, we will send instructions on how to return those funds.

### My Budget

The **My Budget** page shows you all the available funding in you Custom and Personalized components. Here, you can also view the estimate for various expenses you may incur on your move as well as the actual amounts claimed to date.



**BGRS** Search 7 selected Search Filter

TRACY Spring 14 Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances Claims Payment History Final Statement of Account Print

CUSTOM FUNDING AVAILABLE: **\$14,021.66**

PERSONALIZED FUNDING AVAILABLE: **\$0.00**

TOTAL ESTIMATE: **\$21,445.64**

TOTAL EXPENSES PROCESSED: **\$4,238.65**

TOTAL FUNDS PAID TO YOU: **\$2,015.70**

Expense Category: All Funding: All

Please note that the Estimate figures on this page are estimates and do not represent the exact amount of entitlements.

Expense Category~ Funding Estimate Actual

Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances Claims Payment History Final Statement of Account

Expense Category~	Funding	Estimate	Actual
<b>Vehicle</b>			
Vehicle Safety Certificates	Core	\$125.00	\$0.00
Vehicle Registration	Core	\$100.00	\$0.00
Travel to PMV Depot	Core	\$50.00	\$0.00
Driver's License Plates/Fees	Core	\$25.00	\$0.00
<b>Subtotal</b>		<b>\$300.00</b>	<b>\$0.00</b>
<b>Travel to New Location</b>			
Transportation - Taxi	Core	\$0.00	\$8.35
Transportation - Parking	Core	\$50.00	\$0.00
Miscellaneous Allowance	Core	\$0.00	\$16.70
Meals	Core	\$0.00	\$185.60
<b>Subtotal</b>		<b>\$50.00</b>	<b>\$210.65</b>

Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances Claims Payment History Final Statement of Account

Expense Category~	Funding	Estimate	Actual
<b>Rental Expense</b>			
Rental Search Assistance Fee	Core	\$735.00	\$0.00
Cleaning at Destination	Core	\$200.00	\$0.00
<b>Subtotal</b>		<b>\$935.00</b>	<b>\$0.00</b>
<b>Interim Lodgings, Meals and Miscellaneous</b>			
Miscellaneous Allowance	Core	\$0.00	\$139.20
Meals	Core	\$0.00	\$1,473.10
Lodging - Private	Core	\$0.00	\$400.00
Lodging - Commercial	Core	\$1,500.00	\$0.00
Local Transportation - Rental	Core	\$250.00	\$0.00
Local Transportation - Parking	Core	\$50.00	\$0.00
<b>Subtotal</b>		<b>\$1,800.00</b>	<b>\$2,012.30</b>



Move To: BURNABY, BC, Canada
BGRS Reference Number: 2879038256
Change of Strength/Release Date: 14 June, 2020
Move Profile

[My Budget](#)
[Advances](#)
[Claims](#)
[Payment History](#)
[Final Statement of Account](#)

Category	Item	Core	Amount	Balance	
House Hunting Trip	Transportation - Parking	Core	\$50.00	\$0.00	
	Transportation - Gas	Core	\$100.00	\$0.00	
	Transportation - Car Rental	Core	\$350.00	\$0.00	
	Phone/Fax/Internet	Core	\$50.00	\$0.00	
	Meals	Core	\$0.00	\$649.60	
	Lodging - Commercial	Core	\$0.00	\$1,000.00	
	Incidental Allowance	Core	\$0.00	\$121.10	
	Dependant care	Core	\$0.00	\$245.00	
	Subtotal			\$550.00	\$2,015.70
	Home Sale	Real Estate Commission	Core	\$11,025.00	\$0.00
Mortgage Discharge Fee		Core	\$250.00	\$0.00	
Legal Fee - Sale		Core	\$420.00	\$0.00	
Legal Disbursements - Sale		Core	\$300.00	\$0.00	
Cleaning at Origin		Core	\$200.00	\$0.00	
Subtotal			\$12,200.00	\$0.00	

Move To: BURNABY, BC, Canada
BGRS Reference Number: 2879038256
Change of Strength/Release Date: 14 June, 2020
Move Profile

[My Budget](#)
[Advances](#)
[Claims](#)
[Payment History](#)
[Final Statement of Account](#)

Category	Item	Core	Amount	Balance
Home Sale	Real Estate Commission	Core	\$11,025.00	\$0.00
	Mortgage Discharge Fee	Core	\$250.00	\$0.00
	Legal Fee - Sale	Core	\$420.00	\$0.00
	Legal Disbursements - Sale	Core	\$300.00	\$0.00
	Cleaning at Origin	Core	\$200.00	\$0.00
	Appraisals	Core	\$420.00	\$0.00
Subtotal			\$12,615.00	\$0.00
Administrative	Movement Grant/Non-Accountable incidentals	Core	\$650.00	\$0.00
	Subtotal			\$650.00
Total			\$16,000.00	\$4,238.65

## What is an advance?

Start your move by requesting advances for anticipated expenses. An advance is funds requested prior to incurring an expense. The purpose of requesting an advance is to have the appropriate amount of funds available to you as needed, throughout your relocation.

## How do I submit an advance request?

Step 1: On the MSW, under **Move Planner** select **Finances**.

Step 2: From the top menu, select **Advances**.

Step 3: Click on **Request Advance**.

Step 4: Choose the appropriate expense category for the advance you are requesting.

Step 5: Click on **Select** to finish.



Step 6: Fill in the required information. Note: You will find a list of estimated amounts on the **My Budget** tab.

Step 7: Select either **Save** (to save as a draft) or **Submit** (when ready to do so).

Note: We have included screen shots to help you better understand the process.

Once an advance request has been made to BGRS, it will be reviewed and either approved or returned. If approved, BGRS will make a request to have the amount paid to you via Electronic Funds Transfer (EFT) to be available prior to incurring relocation expenses. If returned, you will receive notification from BGRS indicating the reason for being returned.

Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Move Profile

My Budget | **Advances** | Claims | Payment History | Final Statement of Account

Request Advance

Status: Select an option | Date Submitted: From DD Month,YYYY To DD Month,YYYY

Date Created	Category	Date Submitted	Date Processed	Amount Requested	Amount Approved	Status	Actions
11 June, 2020 16:28	Return to Assist	11 June, 2020 16:28	11 June, 2020 16:37	\$1,000.00	\$1,000.00	Approved	
11 June, 2020 16:28	Utilities	11 June, 2020 16:28	11 June, 2020 16:37	\$340.00	\$340.00	Approved	
11 June, 2020 16:29	Home Sale	11 June, 2020 16:29	11 June, 2020 16:37	\$12,000.00	\$12,000.00	Approved	

Select Expense Category

- Destination Inspection Trip
- Foreign Costs
- Home Purchase
- Home Sale
- House Hunting Trip
- Interim Lodgings, Meals and Miscellaneous
- Rental Expense
- Return to Assist
- Return Trip to Finalize Sale
- Return Trip to Long Term Storage
- RTDRA
- Spousal Employment Expense
- Spousal Employment Trip
- Sundry - Specialized
- TDRA
- Travel to New Location
- Un-Accompanied Travel
- Utilities
- Vehicle

Cancel | Select



Move To: BURNABY, BC, Canada
BGRS Reference Number: 2679036256
Move Profile

Finances > Advances > Create an Advance Request

Change Category
Cancel
Save
Submit

**Remaining Estimate: \$19,429.94** View the Total Estimate View your Deposit History

Advance of funds are provided to help cover planned relocation expenses. Once the expenses have been incurred, an expense claim needs to be submitted and where applicable, supported by eligible receipts. Please note that an approved advance may not result in an approved benefit/claim, based on the validity of the provided receipt, or the circumstances at the time of expense submission. In the event that the total advances provided are in excess of eligible expenses outlined in the CAF Relocation Directive, those funds will need to be returned to the Receiver General of Canada through BGRS.

Vehicle 🗑️ ▼

Please ensure PMV storage quote is uploaded if you need to advance for PMV Commercial Storage.

- Requested Amount

- Comments

Documents

TOTAL	Requested Amount

COMMENTS

Name	Date	Comments

## What is a claim?

A claim is a request for reimbursement of expenses in accordance with the Relocation Directive. All claims are to be submitted through the MSW or through your mobile app.

Claims can be submitted throughout the steps of your relocation. For example, once you have finished your House Hunting Trip (HHT), you will submit a claim for all expenses incurred during your HHT. You can explore the claims tab on the MSW to understand the types of claims you may make.

## How do I submit a claim?

On the MSW, under Move Planner select Finances. From the top menu select Claims.

## What type of claim would you like to start?

Here, you are given the option of six claim categories. Choose the type you wish to submit:

- Travel
  - Includes House Hunting Trip, Destination Inspection Trip, Move to Destination, Unaccompanied Travel,
  - Spousal Employment Trip
- Return Trips o Includes Return Trip to Assist, Return Trip to Finalize Sale, Return Trip to Long-Term Storage
- Home Expenses
  - Includes Home Purchase, Home Sale, Reverse Temporary Dual Residence Assistance, Temporary Dual Residence Assistance
- Rental Expenses



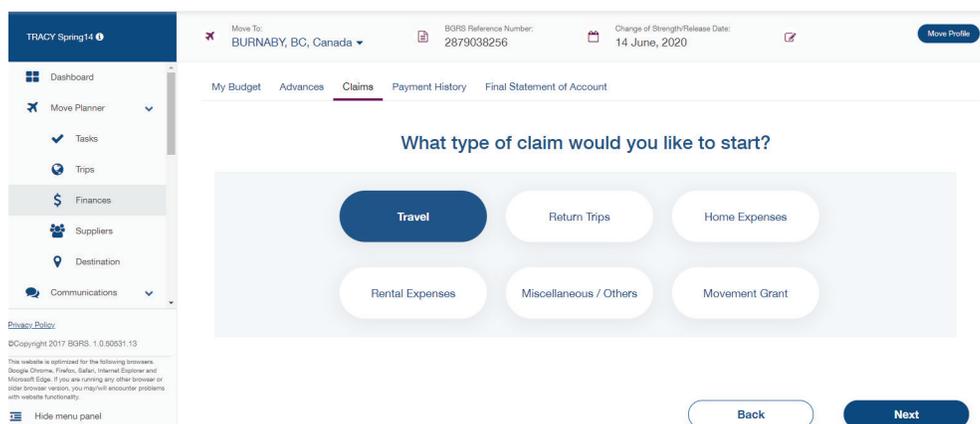
- Miscellaneous / Others
  - Includes Foreign Costs, Real Estate Incentive, Spousal Employment Services, Sundry & Specialized, Utilities, Vehicle
- Movement Grant

Throughout the claim submission process, you will be asked a series of targeted question to customize your claim to your individual situation. Optimized to make your experience more efficient, our user-friendly interface includes several features to help you understand what we need to see from you as you are creating your claim in real time. Depending on the expenses you select, we will specify exactly which documents we need you to upload in order to successfully process your claim.

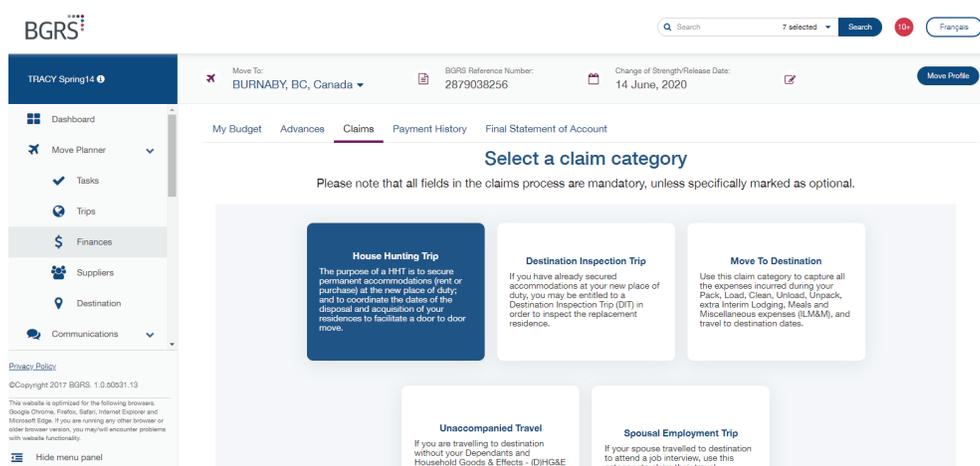
### Example: Submitting an HHT Claim

For the purposes of this guide, we will show you an example to help you get started – an HHT claim.

Start by selecting **Travel**.



Next, choose **House Hunting Trip**.





Here, you will be asked a series of questions to help us better understand the specifics of your claim.

**BGRS** | 7 selected | Search | 10+ | Français

TRACY Spring14 | Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020 | Move Profile

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### Let's confirm a few things about your HHT

Did you take an Extended HHT?  Yes  No

Did you have any days of Temporary Duty?  Yes  No

Did you take leave in conjunction with your HHT?  Yes  No

Did you take your HHT after your COS Date?  Yes  No

**BGRS** | 7 selected | Search | 10+ | Français

TRACY Spring14 | Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020 | Move Profile

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### House Hunting Trip Overview

Please answer a few questions to help us understand what you did and what types of expenses you will be claiming.

**Transportation**

How did you travel to destination?

Commercial Transportation  Personal Motor Vehicle (PMV)  Rental Car

What modes of transportation did you use on-site? (Select all that apply)

Rental Car  Personal Motor Vehicle (PMV)  PMV Passenger

Taxi / Ride Sharing Service  Public Transportation  Other

**Lodging**

What type of lodging did you use? (Select all that apply)

Commercial  RV  Private

I did not use any lodging during my trip.

**Meals & Incidentals**

Do you wish to receive the full daily meal allowance for all participants for the duration of the trip?

Yes  No



**Others**

**Did you modify your travel dates?**

**Did you use dependant care?**

**Did you use pet boarding services?**

**Did you use any phone/fax/internet services?**

**BGRS** 7 selected Search 10+ Français

TRACY Spring14 Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances **Claims** Payment History Final Statement of Account

**Rental Car (On-site)**

Start Date: 01 May, 2020 End Date: 07 May, 2020

Amount (including tax): CAD \$456.78

Rental Location: Destination

Return Location: Destination

Please attach valid invoice or receipt.

Rental Car Receipt.PNG

Attach from:

**BGRS** 7 selected Search 10+ Français

TRACY Spring14 Move To: BURNABY, BC, Canada BGRS Reference Number: 2879038256 Change of Strength/Release Date: 14 June, 2020 Move Profile

My Budget Advances **Claims** Payment History Final Statement of Account

Transportation  Lodging  Meals & Incidentals  Others  Review

**Please select additional transportation fees you incurred**

Select all that apply.



BGRS

TRACY Spring14

Move To: BURNABY, BC, Canada | BGRS Reference Number: 2879038256 | Change of Strength/Release Date: 14 June, 2020

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

### Parking

Date of Expense: 07 May, 2020

Amount (including tax): CAD \$12.00

Location: Destination

I lost my receipt.

I solemnly declare that the above is a true and complete statement of my personal expenses. I understand that amounts reimbursed as part of the CAF Relocation Program based on this declaration are subject to review by the Government of Canada and at which time additional documentation may be requested.

[Add Expense](#)

In the **Meals & Incidentals** section, you are able to customize your meal selection, OR...

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

Date	Breakfast	Lunch	Dinner	Amount	Tax	Total
11 May, 2020	Alberta	N/A	Alberta	\$71.90	\$5.57	\$77.47
12 May, 2020	Alberta	N/A	Alberta	\$143.80	\$16.70	\$160.50
13 May, 2020	Alberta	Alberta	Alberta	\$185.60	\$16.70	\$202.30

My Budget | Advances | **Claims** | Payment History | Final Statement of Account

Date	Breakfast	Lunch	Dinner	Amount	Tax	Total
11 May, 2020	Alberta	N/A	Alberta	\$71.90	\$5.57	\$77.47
12 May, 2020	Alberta	N/A	Alberta	\$143.80	\$16.70	\$160.50
13 May, 2020	Alberta	Alberta	Alberta	\$185.60	\$16.70	\$202.30



...you can select the simplified **Meal & Incidentals** that are pre-determined based on your previous selections.

**Meals & Incidentals**

Since you are travelling within North America (excl. Yukon, Alaska, NWT and Nunavut), all meals have the same allowance rate. For your convenience, the summary below is the full allowance for all participants.

Meals/Incidentals	Number of Individuals	Number of Days	Total
Breakfast (\$20.65)	2 people	7 days	\$289.10
Lunch (\$20.90)	2 people	7 days	\$292.60
Dinner (\$51.25)	2 people	7 days	\$717.50
Incidentals (\$17.30)	2 people	7 days	\$121.10
			<b>\$1,420.30</b>

Review your claim before submission on the **HHT Claim Summary** page.

**HHT Claim Summary**

**Trip Details**

Origin Location: LANCASTER PARK, AB → Destination Location: BURNABY, BC

Travel Start: 01 May, 2020 → Travel End: 07 May, 2020

Documents & Attachments: 5 Attachment(s)

Did you take an Extended HHT? **No**

Did you have any days of Temporary Duty? **No**

Did you take leave in conjunction with your HHT? **No**

## Payment History

The **Payment History** tab shows you advances and claims that have been processed by BGRS, and the amounts that have been approved for processing. Here you can see how the flow of funds to your bank account, as advances and offsetting claims are processed throughout your move.

Certain claims will not appear in this section. For example, **Home Equity Assistance (HEA)** and **Real Estate Incentive (REI)** are reimbursed to you by the CAF.

Please note that when the outstanding funds advanced to you is greater than your approved claims, you will not receive any further funds. The amount of your approved claims is offset by the amount already provided in your approved advances. When a claim is processed the amount sent to your bank will depend on the total funds advanced to you in the past. You can view your outstanding balance on the in the Advance Balance section highlighted below.

At the end of your move, if you have an outstanding advance balance, you will need to return those funds to the Crown.



✈ Move To: BURNABY, BC, Canada ▼
📄 BGRS Reference Number: 2879038256
📅 Change of Strength/Release Date: 14 June, 2020
📧
🔍

[My Budget](#)
[Advances](#)
[Claims](#)
[Payment History](#)
[Final Statement of Account](#)

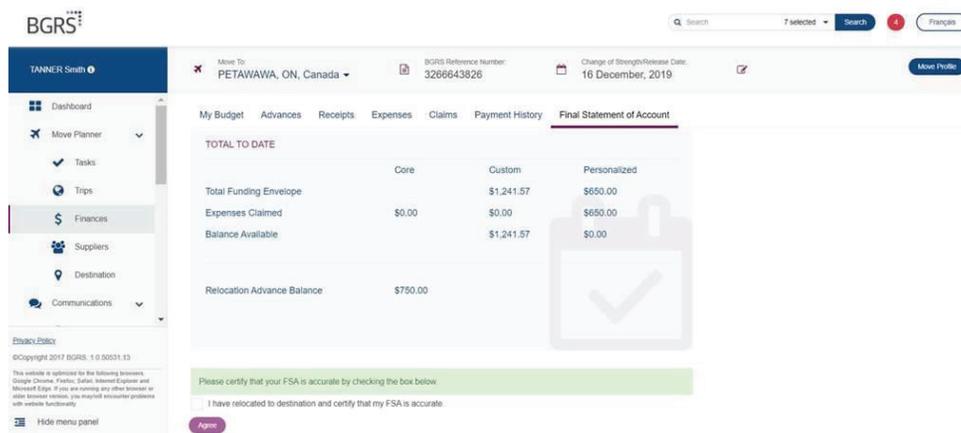
Process Date	Transaction Type	Claim Name	Category	Submitted Date	Amount Submitted
05 June, 2020 19:00	Claim	HHT - old site	House Hunting Trip	04 June, 2020 19:43	\$2,015.70
09 June, 2020 16:13	Claim	Move To Destination 05/10/2020 - 05/19/2020	Interim Lodgings Meals and Miscellaneous Expenses	09 June, 2020 15:59	\$2,066.84
09 June, 2020 16:13	Claim	Move To Destination 05/10/2020 - 05/19/2020	Travel to New Location	09 June, 2020 15:59	\$210.65

Claim Name	Category	Submitted Date	Amount Submitted	Amount Approved	Paid	Advance Balance
HHT - old site	House Hunting Trip	04 June, 2020 19:43	\$2,015.70	\$2,015.70	\$2,015.70	\$0.00
Move To Destination 05/10/2020 - 05/19/2020	Interim Lodgings Meals and Miscellaneous Expenses	09 June, 2020 15:59	\$2,066.84	\$2,012.30	\$2,012.30	\$0.00
Move To Destination 05/10/2020 - 05/19/2020	Travel to New Location	09 June, 2020 15:59	\$210.65	\$210.65	\$210.65	\$0.00

## Final Statement of Account

Once your move is complete, you will be prompted to go to your Final Statement of Account. Here, you will need to confirm that you are at destination. In this section you can review a summary of your finances and click the checkbox to confirm that your relocation is complete.

It is important to note that once you click this checkbox, it cannot be unclicked without contacting BGRS.

**TANNER Smith** | Move To: **PETAWAWA, ON, Canada** | BGRS Reference Number: **3266643826** | Change of Strength/Release Date: **16 December, 2019**

My Budget | Advances | Receipts | Expenses | Claims | Payment History | **Final Statement of Account**

TOTAL TO DATE	Core	Custom	Personalized
Total Funding Envelope		\$1,241.57	\$650.00
Expenses Claimed	\$0.00	\$0.00	\$650.00
Balance Available		\$1,241.57	\$0.00
Relocation Advance Balance	\$750.00		

Please certify that your FSA is accurate by checking the box below

I have relocated to destination and certify that my FSA is accurate.

**Agree**

Don't worry – if you incur future eligible expenses, you may still submit a claim which will be processed in accordance with the Relocation Directive.

## We're here to help

Whether you are requesting an advance of funds, submitting a claim, or notifying us that your move is complete, the MSW provides you with all the resources you will need to successfully complete a door-to-door move.

Should you require any help, just send us an email at [info@bgrs.ca](mailto:info@bgrs.ca). We're happy to help.

This ReloFact is a general guide, meant for informative purposes only. The Relocation Directive remains the authority for the reimbursement of relocation expenses and referring to it for eligibility prior to incurring expenses is encouraged.