

# **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   |  |  | Q Search                                   | 7 selected V Search | 10+ Français        |
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| 🛪 Move Planner 🗸   |  | The Statement of Account                     |  |                     |                     |
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| inps   | \$14,021.66 <b>9</b>   | TOTAL ESTIMATE                               |  |                     | \$21,445.64 🕚       |
| \$ Finances  | . ,  | TOTAL EXPENSES                               |  |                     | \$4.000.05 <b>A</b> |
| Suppliers  | PERSONALIZED FUNDING AVAILABLE                                   | PROCESSED                                    |  |                     | \$4,238.05          |
| Destination  | \$0.00 🛛   | TOTAL FUNDS PAID TO YOU                      |  |                     | \$2,015.70 🚺        |
| 👤 Communications 🗸   |  |  |  |                     |                     |
| Privacy Policy   |  |  |  |                     |                     |
| Copyright 2017 BGRS. 1.0.60631.13  | Expense Category: All   Funding:                                 | Al   |  |                     |                     |
| This website is optimized for the following browsers.<br>Geogle Chrome, Frefox, Safari, Internet Explorer and<br>Microsoft Edge. If you are running any other browser or<br>older browser wenton, you may/will encounter problems<br>with website functionality. | Please note that the Estimate figures on this page are estimates | and do not represent the exact amount of ent | tlements.                                  |                     |                     |
| Hide menu panel  | Expense Category~  |  | Funding Estimate                           | Actual              |                     |
|  |  |  |  |                     |                     |
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| Move To:<br>BURNABY, BC, Car   | BGRS Reference Number:<br>2879038256                             | Change of Strength/Rele<br>14 June, 2020     | ase Date:                                  |                     | Move Profile        |
| My Budget Advances   | Claims Payment History Final Statement                           | nt of Account                                |  |                     |                     |
| Expense Category~  |  | Funding                                      | Estimate                                   | Actual              |                     |
| Vehicle  |  |  |  |                     |                     |
| 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              |                     |
| Subtotal   |  |  | \$300.00                                   | \$0.00              |                     |
| Travel to New Location   |  |  |  |                     |                     |
| 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            |                     |
| Subtotal   |  |  | \$50.00                                    | \$210.65            |                     |
|  |  |  |  |                     |                     |
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| My Budget Advances   | Claims Payment History Final Stateme                             | nt of Account                                |  |                     |                     |
| Rental Expense   |  |  |  |                     |                     |
| Rental Search Assistance Fee   |  | Core   | \$735.00                                   | \$0.00              |                     |
| Cleaning at Destination  |  | Core   | \$200.00                                   | \$0.00              |                     |
| Subtotal   |  |  | \$935.00                                   | \$0.00              |                     |
| Interim Lodgings, Meals and M  | liscellaneous  |  |  |                     |                     |
| 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              |                     |
| Subtotal   |  |  | \$1,800.00                                 | \$2.012.30          |                     |
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|---|----------------|--|--|---|--|
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| ouse Hunting Trip   |                |  | 0  | 850.00  | 00.00  |
| ansportation - Faiking  |                |  | Core   | \$100.00  | \$0.00   |
| ansportation - Gas  |                |  | Core   | \$250.00  | \$0.00   |
| hone/Fax/Internet   |                |  | Core   | \$50.00   | \$0.00   |
|   |                |  | Core   | \$0.00  | \$649.60   |
| odaina - Commercial   |                |  | Core   | \$0.00  | \$1,000,00   |
| cidental Allowance  |                |  | Core   | \$0.00  | \$121.10   |
|   |                |  | Com  | \$0.00  | \$245.00   |
| ependant care   |                |  | COIE   | 30.00   | 0240.00  |
| ubtotal   |                |  |  | \$550.00  | \$2,015.70   |
| ome Sale  |                |  |  |   |  |
| eal Estate Commission   |                |  | Core   | \$11,025.00   | \$0.00   |
| lortgage Discharge Fee  |                |  | Core   | \$250.00  | \$0.00   |
| egal Fee - Sale   |                |  | Core   | \$420.00  | \$0.00   |
| egal Disbursements - Sale   |                |  | Core   | \$300.00  | \$0.00   |
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### 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.

| BURNABY, I                      | BC, Canada 👻   |   | BGRS Reference Number:<br>2879038256 | ë ø                 |                  |                      |                          | Move Profile        |
|---------------------------------|--|---|--------------------------------------|---------------------|------------------|----------------------|--------------------------|---------------------|
| My Budget Ad                    | lvances Clain  | is Payment H  | istory Final Statement o             | f Account           |                  |                      |                          |                     |
| Status Select an op             | tion 🔹   | Date Submitted: Fro   | m (DD Month, YYYY                    | To (DD Month, YYYY  |                  |                      | •                        | 🛓 Request Advance   |
| Date Created                    | c  | ategory   | Date Submitted                       | Date Processed      | Amount Requested | Amount Approved      | Status                   | Actions             |
| 11 June, 2020                   | 16:28 R  | eturn to Assist   | 11 June, 2020 16:28                  | 11 June, 2020 16:37 | \$1,000.00       | \$1,000.00           | Approved                 |                     |
| 11 June, 2020                   | 16:28 U  | tilities  | 11 June, 2020 16:28                  | 11 June, 2020 16:37 | \$340.00         | \$340.00             | Approved                 |                     |
| 11 June, 2020                   | 16:29 H  | ome Sale  | 11 June, 2020 16:29                  | 11 June, 2020 16:37 | \$12,000.00      | \$12,000.00          | Approved                 |                     |
| Finances >                      | Destinatio   | n Inspection Trip<br>osts<br>chase                              |                                      |                     |                  | Chango Category      | Cancol                   | Move Profile        |
| Finances >                      | Home Pur   | chase   |                                      |                     |                  | Change Category      | Cancol Se                | zvo Submit          |
|                                 | House Hu   | nting Trip  |                                      |                     |                  |                      |                          |                     |
| <ol> <li>Remaining E</li> </ol> | Interim Lo   | dgings, Meals and M   | Miscellaneous                        |                     |                  | View the Tot         | al Estimate View y       | our Deposit History |
| Advance of funds a              | Rental Exp   | oense   |                                      |                     |                  | here applicable, su  | pported by eligible rece | ipts. Please note   |
| in excess of eligible           | Return Tri   | to Finalize Sale  |                                      |                     |                  | Jomission. In the ev | ent that the total advan | ices provided are   |
|                                 | Return Tri   | to Long Term Stor   | age                                  |                     |                  |                      |                          |                     |
| TOTAL                           | RTDRA  |   |                                      |                     |                  |                      |                          |                     |
|                                 |  | moloyment Expense   | e                                    |                     |                  |                      |                          |                     |
|                                 | Spousal E  | inprogramme experies  |                                      |                     |                  |                      |                          |                     |
|                                 | Spousal E  | mployment Trip  |                                      |                     |                  |                      |                          |                     |
| COMMENTS                        | Spousal E<br>Spousal E<br>Sundry - S   | mployment Trip  |                                      |                     |                  |                      |                          |                     |
| COMMENTS                        | Spousal E<br>Spousal E<br>Sundry - S<br>TDRA   | mployment Trip<br>specialized                                   |                                      |                     |                  |                      |                          |                     |
|                                 | Spousal E<br>Sundry - S<br>TDRA<br>Travel to N                                       | mployment Trip<br>specialized<br>lew Location                   |                                      |                     |                  |                      |                          |                     |
|                                 | Spousal E<br>Spousal E<br>Sundry - S<br>TDRA<br>Travel to N<br>Un-Accon              | mployment Trip<br>specialized<br>lew Location<br>spanied Travel |                                      |                     |                  |                      |                          |                     |
| COMMENTS                        | Spousal E<br>Spousal E<br>Sundry - S<br>TDRA<br>Travel to N<br>Un-Accon<br>Utilities | mployment Trip<br>specialized<br>lew Location<br>spanied Travel |                                      |                     |                  |                      |                          |                     |
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| BURNABY, BC,  | Canada 👻   | BGRS Reference Number:<br>2879038256   | <b>—</b>  | Ø   |   |  |  | Move Profile         |
|---|--|--|---|---|---|--|--|----------------------|
| Finances > Advan  | ces > Create an  | Advance Request  |   |   | Char  | go Catogory Cancol   | Savo                                       | Submit               |
| 1 Remaining Estimate  | e: \$19,429.94   |  |   |   |   | View the Total Estimate                                      | View your Depo                             | sit History          |
| Advance of funds are provide<br>that an approved advance m<br>in excess of eligible expense | ed to help cover planned<br>ay not result in an appro<br>is outlined in the CAF Re | I relocation expenses. Once the exp<br>wed benefit/claim, based on the val<br>location Directive, those funds will | penses have been incur<br>idity of the provided rea<br>need to be returned to | red, an expense claim ne<br>ceipt, or the circumstance<br>the Receiver General of C | eds to be submitted and where a<br>as at the time of expense submis<br>Canada through BGRS. | pplicable, supported by eli<br>sion. In the event that the t | gible receipts. Plea<br>otal advances prov | ase note<br>ided are |
| Vehicle   |  |  |   |   |   |  | Û  | ~                    |
| Please ensure PMV storaç<br>Storage.  | ge quote is uploaded if y  | ou need to advance for PMV Comm  | ercial  |   |   |  |  |                      |
| - Requested Amount  |  |  |   |   |   |  |  |                      |
| - Comments  |  |  |   |   |   |  |  |                      |
|   |  |  |   |   |   |  |  |                      |
| Ocuments  |  |  |   |   |   |  |  |                      |
| TOTAL Re  | equested Amount  |  |   |   |   |  |  |                      |
| COMMENTS  |  |  |   |   |   |  |  |                      |
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|   |  |  |   |   |   |  |  |                      |
| Name  |  | Date   |   | Commen  | ts  |  |  |                      |

#### 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.



### Next, choose House Hunting Trip





| BGRS  | Q Search 7 selected • Search (Français   |
|---|--|
| TRACY Spring14  | Move To:         BGRS Reference Number:         Charge of Strength Release Date:         Charge of Strength Release Date:         Move Poste           BURNABY, BC, Canada ▼         Image: BGRS Reference Number:         2879038256         Image: Advance Number:         14 June, 2020         Image: Move Poste |
| Dashboard     Move Planner  | My Budget Advances Claims Payment History Final Statement of Account Select a claim category   |
| ✓ Tasks   | Please note that all fields in the claims process are mandatory, unless specifically marked as optional.   |
| Trips  Trips  Finances  Suppliers  Communications  Densicy.Palax  | House Hunting Trip.<br>The purpose of a HHT is to secure<br>perturbated at the more place of day,<br>and to coordinate the dailete of the<br>medicines to facilitate a door to door<br>move.   |
| ©Copyright 2017 BGRS. 1.0.30031.13<br>This websits scriptings for the following breakers.<br>Origo Drome, Fruit, Staffur, Honey Gerore and<br>Morsell Bigs. If you are surving any other theorems or<br>allow breaker werning you manyful Breakers problems<br>with website functionality.<br>Hide menu panel | Unaccompanied Travel If you are travellerg to destruction Mousthold Coopsis & Effects - OPICAZE - use this catacory to clean your travel General Additional Structure Coopsis A Effects - OPICAZE - use this catacory to clean your travel   |

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

| BGRS   |  |   | Q Search  | 7 selected 🔻 Search 10+  | Français     |
|--|--|---|---|--------------------------|--------------|
| TRACY Spring14 0   | Move To:<br>BURNABY, BC, Canada →  | GIRS Reference Number:<br>879038256   | Change of Strength/Release Date:<br>14 June, 2020                             | c (                      | Move Profile |
| Dashboard     Move Planner   | My Budget Advances Claims Payment His  | tory Final Statement of Account   |   |                          |              |
| <ul> <li>Tasks</li> <li>Trips</li> </ul>   | Let's  | confirm a few thing   | gs about your HHT   |                          |              |
| \$ Finances  | Did you take an Extended HHT?  |   | Yes   | No                       |              |
| Destination     Communications   | Did you have any days of Temporary Dut   | y?  | Yes   | No                       |              |
| Privacy Policy      @Copyright 2017 BGRS. 1.0.50531.13  This website is optimized for the following browsers.                                    | Did you take leave in conjunction with yo  | Dur HHT?  | Yes   | No                       |              |
| Morasoft (light, if you are numling any other bowser or<br>older browser version, you may/will encounter problems<br>with website functionality. | Did you take your HHT after your COS D   | ate?  | Yes   | No                       |              |
| BGRS   |  |   | Q Search  | 7 selected 💌 Sourch (0)  | Français     |
| TRACY Spring14 <b>6</b>  | BURNABY, BC, Canada -  | 3RS Reference Number: 879038256   | Change of Strength/Release Date:<br>14 June, 2020                             | 8                        | Move Profile |
| Dashboard  | My Budget Advances Claims Payment His  | tory Final Statement of Account   |   |                          |              |
| Tasks     Trips  | Please answer a few questions to   | House Hunting Tr  | ip Overview<br>I did and what types of expense                                | es you will be claiming. |              |
|  | Please answer a few questions to Transportation How did you travel to destination? Commercial Transportation Perso   | House Hunting Tr<br>help us understand what you   | ip Overview<br>I did and what types of expense<br>Rental Car                  | es you will be claiming. |              |
|  | Please answer a few questions to<br>Transportation<br>How did you travel to destination?<br>Commercial Transportation<br>Pers<br>What modes of transportation did you use            | House Hunting Tr<br>help us understand what you<br>onal Motor Vehicle (PMV)   | ip Overview<br>I did and what types of expens<br>Rental Car                   | es you will be claiming. |              |
|  | Please answer a few questions to<br>Transportation<br>How did you travel to destination?<br>Commercial Transportation<br>What modes of transportation did you use<br>Rental Car Pers | House Hunting Tr<br>o help us understand what you<br>onal Motor Vehicle (PMV)<br>on-site? (Select all that apply)<br>onal Motor Vehicle (PMV) | ip Overview<br>I did and what types of expense<br>Rental Car<br>PMV Passenger | es you will be claiming. |              |





#### Lodging

| What type of lodging did you use? (Sele   | ect 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 mea | al allowance for all participants | for the duration of the trip? |                                    |
| Yes                                       | No                                |                               |                                    |
|   |                                   |                               |                                    |
|   |                                   |                               |                                    |
|   |                                   |                               |                                    |
| Others                                    |                                   |                               |                                    |
| Did you modify your travel dates?         |                                   |                               |                                    |
| Yes                                       | No                                |                               |                                    |
| D'd an and dama damb an an                |                                   |                               |                                    |
| Did you use dependant care?               |                                   |                               |                                    |
| Yes                                       | No                                |                               |                                    |
| Did you use pet boarding services?        |                                   |                               |                                    |
| Yes                                       | No                                |                               |                                    |
|   |                                   |                               |                                    |
| Did you use any phone/fax/internet se     | Irvices?                          |                               |                                    |
| Yes                                       | No                                |                               |                                    |
|   |                                   |                               |                                    |
|   |                                   |                               |                                    |
|   |                                   | ( Q Search                    | 7 selected 👻 Search 1000 (Français |

| BGRS   |  | Q Search 7 selected - Search (0) Français                     |
|--|--|---|
| TRACY Spring14 0   | Move To: BURNABY, BC, Canada - BGRS Reference Number: 2879038256   | Charge of Strength/Release Date: Move Profile 14 June, 2020   |
| Dashboard     Move Planner   | My Budget Advances Claims Peyment History Final Statement of /<br>Rental C   | rf Account<br>Car (On-site)                                   |
| <ul> <li>Inside</li> <li>Trips</li> <li>Finances</li> <li>Suppliers</li> <li>Destination</li> <li>Communications</li> </ul>  | Start Date         End Date           01 May, 2020         07 May, 2020           Amount (incluting tax)         GAD | PRese attach valid invoice or receipt. Rental Car Receipt.PNG |
| Phraser Pallor  CCopyright 2017 BGRS, 1.0.00031.13  This website is optimized for the following bioveses.  Gauge Dimense, Findels, Ellerk, thereat Equipment and  the website functionality.  The Midde menu panel | Rental Location           Destination           Return Location           Destination                                |   |





| BGRS  |  | Q Search 7 selected V Search (B) Français  |
|---|--|--|
| TRACY Spring14 6  | Move To:         BURNABY, BC, Canada ▼         BIRS Reference Number:         2879038256 | Change of StrengtlyRelease Date:<br>14 June, 2020  |
| Deshboard     Move Planner     Tasks     Trips     Finances     Suppliers     Communications     Communications     Communications     Communications     Communications     Communications   | My Budget Advances Claims Peyment History Final Statement of Account                     | ortation fees you incurred<br>apply.   |
| Bit opperture for the Money proversity opperture for the Money Provesity opperture for             | More To: BOTR Followers Number:  | Back Next<br>Q. Sauch 7 selected - Seach @ Français<br>Change of Strength Telesas Date: Kore Poste   |
| Dashboard     Move Planner  | BUHINABT, BU, Canada   | 14 June, 2020  |
| Tasks      Tasks      Trys      Trys      Trys      Trys      Finances      Supplers      Ordernation      Communications      Communications      Communications      Computed 2019 ABURS 1.0.5005113      The second provided and provid | Date of Expense 07 May, 2020 Amount (including tax) CAD \$12.00 Location Destination     | ✔ Less my receipt.<br>I soleronity declare that the above is a true and complete statement of my period sectors are subject to review by the Covernment of Caudat and at which time additional documentation may be requested. |
| Hide menu panel   | (+) Add Expense  |  |

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    |
|--|------------|--------|-----------|---------------|----------|
| Location   | Member     | Spouse | Meals     | Miscellaneous |          |
| Input for Alberta   Apply to entire trip                     |            |        |           |               |          |
| 10 May, 2020   |            |        | \$143.80  | \$16.70       | \$160.50 |
| Breakfast (Alberta V)<br>Lunch (N/A V)<br>Dinner (Alberta V) |            |        |           |               |          |





| My Budget Advances Claims Payment History Fina | al Statement | of Accou | nt       |         |          |
|--|--------------|----------|----------|---------|----------|
| 11 May, 2020                                   |              |          | \$71.90  | \$5.57  | \$77.47  |
| Breakfast (Alberta V                           |              |          |          |         |          |
| Lunch (N/A V)                                  |              |          |          |         |          |
| Dinner (Alberta 🗸                              |              |          |          |         |          |
| 12 May, 2020                                   |              |          | \$143.80 | \$16.70 | \$160.50 |
| Breakfast (Alberta V                           |              |          |          |         |          |
| Lunch N/A V                                    |              |          |          |         |          |
| Dinner (Alberta 🗸                              |              |          |          |         |          |
| 13 May, 2020                                   |              |          | \$185.60 | \$16.70 | \$202.30 |
| Breakfast (Alberta V                           |              |          |          |         |          |
| Lunch (Alberta V                               |              |          |          |         |          |
| Dinner (Alberta V)                             |              |          |          |         |          |
|  |              |          |          |         |          |

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

| BGRS   |  |  | Q Search   | 7 selected 👻 Se         | arch 10+ Français  |
|--|--|--|--|-------------------------|--------------------|
| TRACY Spring14 0   | <ul> <li>Move To:<br/>BURNABY, BC, Canada →</li> </ul> | BGRS Reference Number:<br>2879038256   | Change of Strength/Release Date:<br>14 June, 2020      | ß                       | Move Profile       |
| Dashboard  | My Budget Advances Claims Payme                        | ent History Final Statement of         | Account  |                         |                    |
| <ul> <li>Move Planner</li> <li>Tasks</li> </ul>  |  | Transportation Lodging                 | Maala & Others Review                                  |                         |                    |
| Trips     Finances   | Since you are travelling within North                  | Meals 8<br>America (excl. Yukon, Alask | a <b>Incidentals</b><br>a, NWT and Nunavut), all meals | s have the same allowan | ice rate. For your |
| Suppliers  | CONVE  | enience, the summary below             | is the full allowance for all par                      | ticipants.              |                    |
| Destination     Communications   | Meals/Incid  | entals Number o<br>Individua           | f Number of Days<br>s                                  | Total                   |                    |
| •  | Breakfast (\$  | 20.65) 2 people                        | 7 days   | \$289.10                |                    |
| Privacy Policy   | Lunch (\$20.5  | 90) 2 people                           | 7 days   | \$292.60                |                    |
| DCopyright 2017 BGHS: 1.0.50531.13   | Dinner (\$51.  | 25) 2 people                           | 7 days   | \$717.50                |                    |
| Boogle Otrome, Firefox, Safari, Internet Explorer and<br>Vicrosoft Edge. If you are running any other browser or | Incidentals (  | \$17.30) 2 people                      | 7 days   | \$121.10                |                    |
| older browser version, you may/will encounter problems<br>with website functionality.                            |  |  |  | \$1,420.30              |                    |
| Hide menu panel  |  |  |  |                         |                    |

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

| BGRS   | Q Search 7 selected • Search 🙆 (Fargues)  |
|--|---|
| TRACY Spring14 ()  | Move for<br>BURNABY, BC, Canada ▼         B0959 Reference Number:<br>2879038256         Charge of Strength Felesse Date:<br>14 June, 2020         Charge of Strength Felesse Date:         Course of Strength Felesse Date: |
| Dashboard     Move Planner     Varks   | My Budget Advances Claims Payment History Final Statement of Account  |
| Trips  Finances  | HHT Claim Summary   |
| Suppliers  | Dorgin Location     Destination Location       LANCASTER PARK, AB     →     BURNABY, BC       Travel Start     Travel End   |
| Copyright 2017 BGRS.10.0003113     Copyright 2017 BGRS.10.0003113     This weakshi septimized for the Molecular borearer Advanced Science (Section 2017), and an annual section and Molecular BGRs.10.0000, south and Molecular borearer endowed for the section and the | 01 May, 2020 → 07 May, 2020<br>Dd you take an Extended HHT?<br>No<br>Dd you have any days of Temporary Duty?<br>No<br>Dd you take laave in consurction with your HHT?   |



| What modes of transporta | tion did you use on-site? (Select all th  |
|--------------------------|---|
| Rental Car               |   |
| Start Date               | End Date  |
| 01 May, 2020             | 07 May, 2020  |
| Origin Location          | Destination Location  |
| Destination              | Destination   |
| Amount (Including tax)   |   |
| \$456.78                 |   |
|                          |   |
| Taxi / Ride Sharing      | Service   |
| Date                     |   |
| 07 June, 2020            |   |
| Amount (Including tax)   |   |
| \$25.00                  |   |
|                          |   |
|                          | Taxi / Ride Sharing<br>Date<br>07 June, 2020<br>Amount (Including tax)<br>\$25.00 |

### **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.





| Hove To:<br>BURN      | ABY, BC, Canad        | la 🗸 🗎                 | BGRS Ref<br>287903 | erence Number:<br>38256 | 8                | Change of<br>14 Jun | Strength/Release Date:<br>e, 2020 | Ø                 |            | Mo               |
|-----------------------|-----------------------|------------------------|--------------------|-------------------------|------------------|---------------------|-----------------------------------|-------------------|------------|------------------|
| My Budget             | Advances (            | Claims Payment         | History            | Final Statem            | ent of Account   |                     |                                   |                   |            |                  |
|                       |                       |                        |                    |                         |                  |                     |                                   |                   |            |                  |
| Process Date          | Transaction Type      | Claim Name             |                    |                         | Category         |                     |                                   | Submitted         | Date       | Amount Submitted |
| 05 June, 2020 19:00   | Claim                 | HHT - old site         |                    |                         | House Hunting T  | rip                 |                                   | 04 June, 20       | 020 19:43  | \$2,015.70       |
| 09 June, 2020 16:13   | Claim                 | Move To Destination (  | 05/10/2020         | - 05/19/2020            | Interim Lodgings | Meals and           | d Miscellaneous Expe              | enses 09 June, 20 | 020 15:59  | \$2,066.84       |
| 09 June, 2020 16:13   | Claim                 | Move To Destination (  | 05/10/2020         | - 05/19/2020            | Travel to New Lo | cation              |                                   | 09 June, 20       | 020 15:59  | \$210.65         |
|                       |                       |                        |                    |                         |                  |                     |                                   |                   |            |                  |
|                       |                       |                        |                    |                         |                  |                     |                                   |                   |            |                  |
| Claim Name            |                       | Category               |                    |                         | Submitted        | Date                | Amount Submitted                  | Amount Approved   | Paid       | Advance Balance  |
| HHT - old site        |                       | House Hunting Trip     |                    |                         | 04 June, 2       | 020 19:43           | \$2,015.70                        | \$2,015.70        | \$2,015.70 | \$0.00           |
| Move To Destination 0 | 5/10/2020 - 05/19/202 | 20 Interim Lodgings Me | als and Mis        | cellaneous Expe         | inses 09 June, 2 | 020 15:59           | \$2,066.84                        | \$2,012.30        | \$2,012.30 | \$0.00           |
| Move To Destination 0 | 5/10/2020 - 05/19/202 | 20 Travel to New Locat | ion                |                         | 09 June, 21      | 020 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.

| BGRS   |  |  |  |                                 |  | Q Search       | 7 selected • Search | 4 Français   |
|--|--|--|--|---------------------------------|--|----------------|---------------------|--------------|
| TANNER Smith O   | 5  | PETAWAWA, ON, Canada -                         | BGR<br>320                                       | IS Reference Number<br>66643826 | Change of Strength Release<br>16 December, 201 | e Date:<br>9 Ø |                     | Move Profile |
| Dashboard     Move Plann   | e v  | My Budget Advances Receipts                    | Expenses Cl                                      | aims Payment History            | Final Statement of Accour                      | <u></u>        |                     |              |
| <ul> <li>Tasks</li> <li>Trips</li> </ul>   |  | Total Funding Envelope                         | Core   | Custom<br>\$1,241.57            | Personalized<br>\$650.00                       |                |                     |              |
| S Finan  | iers   | Balance Available                              |  | \$1,241.57                      | \$0.00   |                |                     |              |
| Communica  | nation<br>tions v  | Relocation Advance Balance                     | \$750.00   |                                 |  |                |                     |              |
| Envacy Policy<br>@Copyright 2017 BGRS, 1   | 0.50531.13   |  |  |                                 |  |                |                     |              |
| This website is apprecised by the<br>Google Chrome, Fiendor, Salar,<br>Microsoft Edge, If you are nomin-<br>ables tensorse version, you enay-<br>with website functionality. | t folgering broosses.<br>Interest Explorer and<br>gany other brooser or<br>full encounter problems | Please certify that your FSA is accurate by cl | hecking the box below.<br>that my FSA is accurat | 0                               |  |                |                     |              |





#### 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. 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.



Move Profile



#### Q Search 7 selected - Search (9) Français BGRS Move To: DigRN ABY, BC, Canada ▼ BIGRS Reference Number: Charge of Strength/Release Date: Charge of Stre Move Profile Dashboard My Budget Advances Claims Payment History Final Statement of Account X Move Planner ~ + Print 🗸 Tasks 🔇 Trips CUSTOM FUNDING AVAILABLE TOTAL ESTIMATE \$21,445.64 🚯 \$14,021.66 🛛 \$ Finances TOTAL EXPENSES PROCESSED \$4,238.65 () Suppliers PERSONALIZED FUNDING AVAILABLE \$0.00 o Destination TOTAL FUNDS PAID TO YOU \$2,015.70 🗙 Communications 🗸 Privacy Policy @Copyright 2017 BGRS. 1.0.80831.13 Expense Category: All Funding: All This website is optimized for the following browsers. Google Chrome, Finders, Bater, Internet Experience and Microsoft Edge. If you are running any other browser or alider browser version, you may/will encounter problems with website functionality. Please note that the Estimate figures on this page are estimates and do not represent the exact amount of entitlements. Hide menu panel Expense Category~ Funding Estimate

| Move To:     BOR® Reference Number:     Change of Strength/Release Date:       BURNABY, BC, Canada ▼     E     2879038256     Image: Change of Strength/Release Date: | × | <sup>Move To:</sup><br>BURNABY, BC, Canada ▼ |  | BGRS Reference Number:<br>2879038256 | ۳ | Change of Strength/Release Date:<br>14 June, 2020 | ß |  |
|---|---|--|--|--------------------------------------|---|---|---|--|
|---|---|--|--|--------------------------------------|---|---|---|--|

| My Budget        | Advances      | Claims | Payment History | Final Statement of Account |         |          |          |
|------------------|---------------|--------|-----------------|----------------------------|---------|----------|----------|
| Expense Categ    | ory~          |        |                 |                            | Funding | Estimate | Actual   |
| Vehicle          |               |        |                 |                            |         |          |          |
| Vehicle Safety ( | Certificates  |        |                 |                            | Core    | \$125.00 | \$0.00   |
| Vehicle Registra | ation         |        |                 |                            | Core    | \$100.00 | \$0.00   |
| Travel to PMV E  | Depot         |        |                 |                            | Core    | \$50.00  | \$0.00   |
| Driver's License | e Plates/Fees |        |                 |                            | Core    | \$25.00  | \$0.00   |
| Subtotal         |               |        |                 |                            |         | \$300.00 | \$0.00   |
| Travel to New L  | ocation       |        |                 |                            |         |          |          |
| 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 |
| Subtotal         |               |        |                 |                            |         | \$50.00  | \$210.65 |

| ₩ove To:     BURNABY, BC, Canada ▼                | umber: Change of Strength/Release I<br>14 June, 2020 | Date:      | Move Profile |
|---|--|------------|--------------|
| My Budget Advances Claims Payment History Final S | Statement of Account                                 |            |              |
| Rental Expense                                    |  |            |              |
| Rental Search Assistance Fee                      | Core   | \$735.00   | \$0.00       |
| Cleaning at Destination                           | Core   | \$200.00   | \$0.00       |
| Subtotal  |  | \$935.00   | \$0.00       |
| Interim Lodgings, Meals and Miscellaneous         |  |            |              |
| 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       |
| Subtotal  |  | \$1,800.00 | \$2,012.30   |





| BURNABY, BC, Canada -   | 287             | 9038256   | 14 June, 2020   | erease Date.   | Move P  |
|---|-----------------|---|---|--|---|
| My Budget Advances Claims   | Payment History | Final Statement of                                    | f Account   |  |   |
| House Hunting Trip  |                 |   |   |  |   |
| ransportation - Parking   |                 |   | Core  | \$50.00  | \$0.00  |
| ransportation - Gas   |                 |   | Core  | \$100.00   | \$0.00  |
| ransportation - Car Rental  |                 |   | Core  | \$350.00   | \$0.00  |
| hone/Fax/Internet   |                 |   | Core  | \$50.00  | \$0.00  |
| leals   |                 |   | Core  | \$0.00   | \$649.60  |
| odging - Commercial   |                 |   | Core  | \$0.00   | \$1,000.00  |
| ncidental Allowance   |                 |   | Core  | \$0.00   | \$121.10  |
| Dependant care  |                 |   | Core  | \$0.00   | \$245.00  |
| iubtotal  |                 |   |   | \$550.00   | \$2,015.70  |
| fome Sale   |                 |   |   |  |   |
| Real Estate Commission  |                 |   | Core  | \$11,025.00  | \$0.00  |
| Nortgage Discharge Fee  |                 |   | Core  | \$250.00   | \$0.00  |
| egal Fee - Sale   |                 |   | Core  | \$420.00   | \$0.00  |
| egal Disbursements - Sale   |                 |   | Core  | \$300.00   | \$0.00  |
| Sleaning at Origin  |                 |   | Core  | \$200.00   | \$0.00  |
|   |                 |   |   |  |   |
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### 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.

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|--|---|--------------------------------------|---------------------|------------------|---|--------------------|---|
| My Budget Ad   | Ivances Claims Payment  | History Final Statement o            | fAccount            |                  |   |                    |   |
| Status Select an op  | tion  | From (DD Month, YYYY                 | To (DD Month, YYYY  |                  |   | e                  | Request Advance   |
| 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   |                                      |                     |                  | × 7 selec   | ted 💌 Search       | 0+ Français   |
| More To-<br>BURNAE     BURNAE     Finances >     O Remaining E     Advance of funds is     that an approved b     in excess of eighth     TOTAL     COMMENTS | Destination Inspection Trip Foreign Costs Home Purchase Home Sale Home Sale Home Sale House Hunting Trip Interim Lodgings, Meals an Pertrat Expense Petrum to Assist Return Trip to Finalize Sale Petrum Trip to Long Term S FITDRA Spousal Employment Trip Sundy - Specialized TDRA Travel to New Location Unit-Accompanied Travel Utilities | d Miscellaneous<br>Iorage            |                     |                  | Change Calingory<br>View the Toto<br>here applicable, sug<br>britasion, in the ex | Concel Concellence | Lione Profile Cutrent |
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|---|---|---|--|--|---|
| Finances > Advances   | > Create an Advance Request   |   | Ch   | ango Catogory Cancel   | Savo Submit   |
| Remaining Estimate: \$1   | 9,429.94  |   |  | View the Total Estimate  | View your Deposit History                                 |
| Advance of funds are provided to h<br>that an approved advance may not<br>in excess of eligible expenses outlin | elp cover planned relocation expenses. Once the experesult in an approved benefit/claim, based on the valid<br>ned in the CAF Relocation Directive, those funds will ne | nses have been incurred, an ex<br>ity of the provided receipt, or the<br>sed to be returned to the Receiv | pense claim needs to be submitted and where<br>e circumstances at the time of expense subm<br>er General of Canada through BGRS. | applicable, supported by eli<br>ission. In the event that the to | gible receipts. Please note<br>otal advances provided are |
| Vehicle   |   |   |  |  | <b>i</b> ~  |
| Please ensure PMV storage quot<br>Storage.  | te is uploaded if you need to advance for PMV Comme   | rcial   |  |  |   |
| Requested Amount  |   |   |  |  |   |
| - Comments  |   |   |  |  |   |
| _   |   |   |  |  |   |
| Ocuments  |   |   |  |  |   |
| TOTAL Request   | ed 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.

| TRACY Spring14  | ★ Move To:<br>BURNABY, BC, Canada ◄ | BGRS Reference<br>287903825 | e Number: Change of Strer<br>56 14 June, 2 | gth/Release Date:<br>020 | Move Profile |
|---|-------------------------------------|-----------------------------|--|--------------------------|--------------|
| Dashboard     Move Planner  | My Budget Advances Claims           | Payment History Fin         | al Statement of Account                    |                          |              |
| Tasks     Trips   |                                     | What type o                 | of claim would you l                       | ike to start?            |              |
| \$ Finances           Suppliers   |                                     | Travel                      | Return Trips                               | Home Expenses            |              |
| Destination     Communications  |                                     | Rental Expenses             | Miscellaneous / Others                     | Movement Grant           |              |
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### Next, choose House Hunting Trip.







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

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| <ul> <li>ズ Move Planner</li> <li>✓ Tasks</li> </ul>  | Let's confirm  | n a few things a       | about your HHT                             |                        |              |
| C Trips  |  |                        |  |                        |              |
| Suppliers  | Did you take an Extended HHT?  |                        | Yes  |                        | 0            |
| Destination     Communications   | Did you have any days of Temporary Duty?                             |                        | Yes  |                        | lo           |
| Privacy. Policy.<br>@Copyright 2017 BGRS. 1.0.50631.13   | Did you take leave in conjunction with your HHT?                     |                        | Yes  |                        | 10           |
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| 🛪 Move Planner 🗸   |  | Statement of Account   |  |                        |              |
| ✓ Tasks  | Hous   | e Hunting Trip         | Overview                                   |                        |              |
| C Trips  | Please answer a few questions to help us u                           | nderstand what you did | and what types of expension                | ses you will be claimi | ng.          |
| Suppliers  | Transportation   |                        |  |                        |              |
| Destination  | How did you travel to destination?                                   |                        |  |                        |              |
| 👷 Communications 🗸   | Commercial Transportation Personal Motor                             | Vehicle (PMV)          | Rental Car                                 |                        |              |
| Privacy Policy   | What modes of transportation did you use on-site? (S                 | elect all that apply)  |  |                        |              |
| ©Copyright 2017 BGRS. 1.0.50531.13<br>This website is optimized for the following browsers.<br>Geogle Chrome, Firefox, Estari, Internet Explorer and   | Rental Car Personal Motor  | Vehicle (PMV)          | PMV Passenger                              |                        |              |
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|  |  |                        |  |                        |              |
| Lodging  |  |                        |  |                        |              |
| What type of lodging di  | id you use? (Select all that apply)                                  |                        |  |                        |              |
| Commercial   | RV   | Privat                 | te   |                        |              |
| I did not use any lodgi  | ng during my trip.   |                        |  |                        |              |
| Meals & Incidentals  |  |                        |  |                        |              |
| Do you wish to receive t   | he full daily meal allowance for all participants                    | for the duration of t  | he 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 s | ervices? |
| Yes                                  | No       |
|                                      |          |

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| 🛪 Move Planner 🗸   |                             | Rent                                 | al Car (On-site)                                  |        |              |
| ✓ Tasks  |                             |                                      |   |        |              |
| Trips  | Start Date Er               | nd Date                              | Please attach valid invoice or receipt.           |        |              |
| \$ Finances  | 01 May, 2020 (              | 07 May, 2020                         | Rental Car Receipt.PNG                            | ⊗      |              |
| Suppliers  | Amount (Including tax)      |                                      | Attach from: My Computer My Rec                   | ceipta |              |
| ODestination   | CAD \$456.78                |                                      |   |        |              |
| 🔍 Communications 🗸 🗸   |                             |                                      |   |        |              |
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| @Copyright 2017 BGRS. 1.0.50531.13   | Destination                 |                                      |   |        |              |
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| Communication     Communi | Parking  | lls Gas   | Next                             |





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|   | Date of Expense     I/or May, 2020       Amount (including tax)     I/or May 2020       CAD     \$12.00       Location   |
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In the Meals & Incidentals section, you are able to customize your meal selection, OR...

|   | Advances   | Claims | Payment History | Final | Statement    | of Accou       | nt                                    |                              |                                 |
|---|--|--------|-----------------|-------|--------------|----------------|---------------------------------------|------------------------------|---------------------------------|
| 11 May, 2020  | )  |        |                 |       |              |                | \$71.90                               | \$5.57                       | \$77.47                         |
| Breakfast   | Alberta  | ~      |                 |       |              |                |                                       |                              |                                 |
| Lunch   | (N/A   | ~      |                 |       |              |                |                                       |                              |                                 |
| Dinner  | Alberta  | ~      |                 |       |              |                |                                       |                              |                                 |
| 12 May, 2020  | 0  |        |                 |       |              |                | \$143.80                              | \$16.70                      | \$160.50                        |
| Breakfast   | Alberta  | ~      |                 |       |              |                |                                       |                              |                                 |
| Lunch   | N/A  | ~      |                 |       |              |                |                                       |                              |                                 |
| Dinner  | Alberta  | ~      |                 |       |              |                |                                       |                              |                                 |
| 13 May, 2020  | )  |        |                 |       |              |                | \$185.60                              | \$16.70                      | \$202.30                        |
| Breakfast   | Alberta  | ~      |                 |       |              |                |                                       |                              |                                 |
| Lunch   | Alberta  | ~      |                 |       |              |                |                                       |                              |                                 |
| Dinner  | Alberta  | ~)     |                 |       |              |                |                                       |                              |                                 |
|   |  |        |                 |       |              |                |                                       |                              |                                 |
|   |  |        |                 |       |              |                |                                       |                              |                                 |
|   |  |        |                 |       |              |                |                                       |                              |                                 |
| My Budget   | Advances   | Claims | Payment History | Final | Statement    | of Accour      | nt                                    |                              |                                 |
| My Budget<br>11 May, 2020   | Advances   | Claims | Payment History | Final | Statement    | of Accour      | nt<br>\$71.90                         | \$5.57                       | \$77.47                         |
| My Budget<br>11 May, 2020<br>Breakfast  | Advances   | Claims | Payment History | Final | Statement    | of Accourt     | nt<br>\$71.90                         | \$6.57                       | \$77.47                         |
| My Budget<br>11 May, 2020<br>Breakfast  | Advances<br>Alberta<br>N/A   | Claims | Payment History | Final | Statement (  | of Accourt     | nt<br>\$71.90                         | \$5.57                       | \$77.47                         |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>Dinner   | Advances<br>Alberta<br>N/A<br>Alberta  | Claims | Payment History | Final | Statement    | of Account     | rt<br>\$71.80                         | \$5.57                       | \$77.47                         |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>12 May, 2020   | Advances<br>Alberta<br>N/A<br>Alberta  | Claims | Payment History | Final | Statement (  |                | nt<br>\$71.90<br>\$145.80             | \$5.57<br>\$16.70            | \$77.47<br>\$160.50             |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>12 May, 2020<br>Breakfast  | Advances<br>Alberta  | Claims | Payment History | Final | Statement    | of Account     | s143,80                               | \$5.57<br>\$16.70            | \$77.47<br>\$160.50             |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>12 May, 2020<br>Breakfast<br>Lunch   | Advances<br>Alberta<br>N/A<br>Alberta<br>Alberta   | Claims | Payment History | Final | Statement (  | of Account     | sti43.80                              | \$16.70                      | \$160.50                        |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>12 May, 2020<br>Breakfast<br>Lunch<br>Dinner   | Advances<br>Alberta<br>N/A<br>Alberta<br>Alberta<br>N/A<br>Alberta                       | Claims | Payment History | Final | Statement of | of Account     | rt<br>\$71.90<br>\$143.80             | \$6.57<br>\$16.70            | \$77.47<br>\$160.50             |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>12 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>13 May, 2020                       | Advances<br>Alberta<br>N/A<br>Alberta<br>N/A<br>Alberta                                  | Claims | Payment History | Final | Statement    |                | nt<br>\$71.90<br>\$143.80<br>\$165.60 | \$5.57<br>\$16.70<br>\$16.70 | \$77.47<br>\$160.50<br>\$202.30 |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>12 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>13 May, 2020<br>Breakfast          | Advances<br>Alberta<br>N/A<br>Alberta<br>N/A<br>Alberta<br>Alberta                       | Claims | Payment History | Final | Statement    |                | 1t<br>571.90<br>5143.80<br>5185.60    | \$5.57<br>\$16.70<br>\$16.70 | \$77.47<br>\$160.50<br>\$202.30 |
| My Budget<br>11 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>12 May, 2020<br>Breakfast<br>Lunch<br>Dinner<br>13 May, 2020<br>Breakfast<br>Lunch | Advances<br>Alberta<br>N/A<br>Alberta<br>Alberta<br>N/A<br>Alberta<br>Alberta<br>Alberta | Claims | Payment History | Final | Statement of | Second Account | 1<br>5143.00<br>5165.60               | \$5.57<br>\$16.70<br>\$16.70 | \$77.47<br>\$180.50<br>\$202.30 |





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

| BGRS   |                                   |   |   | Q Search   | 7 selected 👻 S                   | earch 10+ Français |
|--|-----------------------------------|---|---|--|----------------------------------|--------------------|
| TRACY Spring14   | Move To:<br>BURNABY, BC, Canada ▼ | BGRS Reference 28790382                   | ce Number:<br>156                         | Change of Strength/Release Date:<br>14 June, 2020          | C                                | Move Profile       |
| Dashboard  | My Budget Advances Claims         | Payment History Fi                        | nal Statement of Account                  | t  |                                  |                    |
| <ul> <li>Move Planner</li> <li>Tasks</li> </ul>  |                                   | 0   | Lodging Meals &                           | Chers Review   |                                  |                    |
| 😧 Trips  |                                   |   | Meals & Inci                              | identals   |                                  |                    |
| <ul><li>\$ Finances</li><li>Suppliers</li></ul>  | Since you are travelling within   | North America (excl<br>convenience, the s | Yukon, Alaska, NWT<br>ummary below is the | and Nunavut), all meals f<br>full allowance for all partic | nave the same allowa<br>cipants. | nce rate. For your |
| Destination     Communications   | Meal                              | s/Incidentals                             | Number of<br>Individuals                  | Number of Days   | Total                            |                    |
| *  | Breat                             | kfast (\$20.65)                           | 2 people                                  | 7 days   | \$289.10                         |                    |
| Privacy Policy   | Lunc                              | h (\$20.90)                               | 2 people                                  | 7 days   | \$292.60                         |                    |
| This website is optimized for the following browsers.  | Dinne                             | ər (\$51.25)                              | 2 people                                  | 7 days   | \$717.50                         |                    |
| 3oogle Chrome, Firefox, Safari, Internet Explorer and<br>Vicrosoft Edge. If you are running any other browser or | Incid                             | entals (\$17.30)                          | 2 people                                  | 7 days   | \$121.10                         |                    |
| sider browser version, you may/will encounter problems<br>with website functionality.                            |                                   |   |   |  | \$1,420.30                       |                    |
| Hide menu panel  |                                   |   |   |  |                                  |                    |

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

| BGRS  | Q launh 7 selected + Saunh 🙆 (Fangas  |
|---|---|
| TRACY Spring14 0  | Move for<br>BURNABY, BC, Canada ▼         BBRS Reference Number:<br>2879038256         Ounge of Strength Referese Date:<br>14 June, 2020         Ounge of Strength Referese Date:         Move Reference  |
| Dashboard     Move Planner     Tasks  | My Budget Advances Claims Payment History Final Statement of Account  |
| Trips  Finances   | HHT Claim Summary   |
| Suppliers  Destination  Communications  | Trip Details       Origin Location       LANCASTER PARK, AB → BURNABY, BC       Documents & Attachments       Example 1       Complexity       Complexity <t< th=""></t<> |
| Ether Paler  Coopyoid Paler | Irravel start Irravel start Irravel start O<br>O1 May, 2020 — 07 May, 2020<br>Did you take an Extended HHT?<br>No<br>Did you have any days of Temporary Duty?<br>No<br>Did you take leave in conjunction with your HHT?   |

### **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:<br>BURN/ | ABY, BC, Canad        | a 🕶 🗎                  | BGRS Reference Number:<br>2879038256 | Change o<br>14 Jur        | f Strength/Release Date:<br>1e, 2020 | ß                 |            | Mo               |
|------------|-------------------|-----------------------|------------------------|--------------------------------------|---------------------------|--------------------------------------|-------------------|------------|------------------|
| N          | ly Budget         | Advances (            | Claims Payment H       | History Final Statem                 | nent of Account           |                                      |                   |            |                  |
| Process E  | Date              | Transaction Type      | Claim Name             |                                      | Category                  |                                      | Submitted [       | Date       | Amount Submitted |
| 05 June, 2 | 2020 19:00        | Claim                 | HHT - old site         |                                      | House Hunting Trip        |                                      | 04 June, 20       | 20 19:43   | \$2,015.70       |
| 09 June, 2 | 2020 16:13        | Claim                 | Move To Destination 0  | 5/10/2020 - 05/19/2020               | Interim Lodgings Meals an | d Miscellaneous Expe                 | enses 09 June, 20 | 20 15:59   | \$2,066.84       |
| 09 June, 2 | 2020 16:13        | Claim                 | Move To Destination 0  | 5/10/2020 - 05/19/2020               | Travel to New Location    |                                      | 09 June, 20       | 20 15:59   | \$210.65         |
|            |                   |                       |                        |                                      |                           |                                      |                   |            |                  |
|            |                   |                       |                        |                                      |                           |                                      |                   |            |                  |
| Claim Nan  | ne                |                       | 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 E  | Destination 05    | i/10/2020 - 05/19/202 | 0 Interim Lodgings Me  | als and Miscellaneous Expe           | enses 09 June, 2020 15:59 | \$2,066.84                           | \$2,012.30        | \$2,012.30 | \$0.00           |
| Move To D  | Destination 05    | /10/2020 - 05/19/202  | 0 Travel to New Locati | on                                   | 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.





| BGRS   |   |   |                                |  | Q Search | 7 selected • Search | Prançais     |
|--|---|---|--------------------------------|--|----------|---------------------|--------------|
| TANNER Smith O   | Move To:<br>PETAWAWA, ON, Canada -  | BGRS Reter<br>3266643                         | ence Number:<br>826            | Change of StrengtlyRelease<br>16 December, 201 | 9 Parte  |                     | Move Profile |
| ■ Dashboard  | My Budget Advances Receipts<br>TOTAL TO DATE  | Expenses Claims                               | Payment History                | Final Statement of Accoun                      | t        |                     |              |
| Tasks Trips  | Total Funding Envelope<br>Expenses Claimed  | Core<br>\$0.00                                | Custom<br>\$1,241.57<br>\$0.00 | Personalized<br>\$650.00<br>\$650.00           |          |                     |              |
| Supplers Destination   | Balance Available   |   | \$1,241.57                     | \$0.00   |          |                     |              |
| Communications   | Relocation Advance Balance  | \$750.00                                      |                                |  |          |                     |              |
| ECopyright 2017 BGRS 1.0.50531.13  |   |   |                                |  |          |                     |              |
| This exitially is splinized for the following browses.<br>Google Christen, Fanlor, Salar, Interest Explorer and<br>Microsoft Edge If you enzymed any other browser or<br>other tomoser version, you enzymed inconsister problems<br>with vehicle inconsenty. | Please certify that your FSA is accurate by che<br>I have relocated to destination and certify th | acking the box below<br>at my FSA is accurate |                                |  |          |                     |              |
| III Hide menu panel  | 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. 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.