Claims FAQ Export Development Program



1. How do I submit my claim?

Claims are submitted online. Please access the Export Development Program webpage on the Invest Nova Scotia website. You will find the "Submit a Claim" button at the bottom of the webpage. (See scree capture below.) Choose the correct Stream for your project (found in the subject line of the Agreement). If you have not submitted the Client Engagement Survey, you must complete this now before moving on to submit your claim.

Once ready to begin your claim, you will be guided by screen prompts to answer a series of questions relating to your project. When you have answered all the questions, a claim form will appear on your screen for signature, followed by instructions to upload all supporting documents. Finalize and submit your complete claim.

Please note: You will need your Invest Nova Scotia Customer number and project number (stated in your Agreement).

Supporting documents

Stream 1

• EDP Stream 1 Activity Claim Worksheet

Stream 2

Company Declaration Form

Submit Claim Online

STREAM 1 CLAIM

STREAM 2 CLAIM

2. Where do I find my customer number and project number?

The customer number is found page 1 of your Agreement, under the subject line. The project number(s) are stated in Appendix A of the Agreement.

3. When do I submit my claim?

A complete claim package must be submitted within 30 days of your Project end date (you can find the date in your Agreement, Appendix A). Failure to adhere to this timeline will result in the project claim being denied with no further notice. Reference the <u>EDP Guidelines</u> and Agreement for further information.

4. What documents do I submit with my claim?

The Client Engagement Survey must be submitted prior to making a claim. The survey will appear at the beginning of the online claim process.

Stream 1: the online Activity Claim Form an electronic Excel Worksheet, boarding passes or a hotel invoice (to validate the per diem), a detailed flight itinerary and/or invoice (to validate the airfare stipend), invoices and proof of payment. For tradeshow and conference projects, if no attendance fee was required, proof of attendance to the trade show/conference must be provided (i.e., photo of show badge, photo of booth, etc.).

Stream 2: the online Activity Claim Form, a signed Invest Nova Scotia Company Declaration Form (found on the website) confirming project completion, invoices, and proof of payment.

Note: The invoices and proof of payment documents must be made to/ paid by the Company that holds the Agreement. Please refer to the <u>EDP Guidelines</u> and the Agreement for eligible expenses.

5. Can I claim the invoice that I received from Invest Nova Scotia for a workshop or a Invest Nova Scotia-led trade show or trade mission?

No. Any invoices from Invest Nova Scotia are not an eligible expense.

6. What is sufficient proof of payment?

A credit card statement, wire, or e-transfer receipt, which shows the status of the payment as "confirmed" or "complete," are sufficient proof of payment. If payment was made by cheque, send a copy of the front and back of a cheque showing it has been cashed at a financial institution. Payment of costs must be made by the Company that holds the Agreement. Screen shots, photos or "snippets" of statement item lines only are not sufficient proof of payment. We require a full statement page including the document and account information usually found at the top of the page.

Note: Booking confirmations quoting prices, cheque stubs, and invoices stamped "Paid" are not considered proof of payment.

7. How do I claim the flight Stipend?

Please refer to the <u>EDP Guidelines</u> for travel destinations and amount to be claimed. The flight stipend is only eligible for return airfare to and from Nova Scotia. Only one stipend per representative per project is eligible, regardless of if there are multiple destinations. A maximum of two (2) representatives that are reside in Nova Scotia are eligible per project.

If the project has multiple destinations, claim the highest value destination for the claim. If two (2) representatives have participated in the project, they must both claim the same destination.

Please submit the flight itinerary and/or invoices to validate the flight stipend. Flight stipends are not eligible for travel to New Brunswick or Prince Edward Island.

- 8. How do I claim the per diem rates for accommodations and ground transportation? For the per diem rate to be an eligible expense, you must provide proof of travel in the form of the airline boarding passes or hotel invoices to validate the per diem calculation. The eligible rate of \$200 per night is calculated by the number of nights (and not the number of days) to a maximum of seven (7) nights. The per diem includes accommodation and all inmarket ground transportation expenses. All accommodation and ground transportation invoices and proof of payment should be kept for five (5) years if required in the event of an audit. Personal travel days and travel of a personal nature are not eligible.
- 9. I cannot attend a Stream 1 approved trip. When should I notify Invest Nova Scotia? The Company must notify Invest Nova Scotia if there is a Project listed in Appendix "A" that will not be undertaken by the Company, no later than the approved start date of that Project. Failure to notify Invest Nova Scotia that a Project will not be undertaken may affect any future applications and funding.
- 10. Can I change one of the approved Stream 1 travel projects listed in my Agreement? Yes. If the Company wishes to change the location and/or date for a Project listed in Appendix "A" of the Agreement, a request in writing must be sent to Invest Nova Scotia prior to the approved start date of the Project, as per the Agreement. If approved, written confirmation will be provided by Invest Nova Scotia. Please contact the Export Development Program Administrator.
- 11. Can I change an approved consultant for my Stream 2 Project?

As per the Agreement, no changes can be made unless you have prior written consent from Invest Nova Scotia. Please contact the Export Development Program Administrator to discuss as soon as possible, and before you engage a consultant that has not been approved.

- **12.** Are subscription fees eligible for my Stream 2 Project?

 No. Only subscription fees that are included in the consultant SOW and invoice are eligible.
- 13. I have an invoice from my travel agent for my flights. Does this invoice meet the criteria for a supporting document for the flight stipend?
 Yes. In order for the stipend to be an eligible project cost, a detailed itinerary or invoice are sufficient supporting documents.
- **14. Can I claim the charge from the airline for the baggage and seat selection fees?**No. The stipend includes all airline-related fees, flight and change fees, baggage fees, and seat selection fees.
- 15. What happens if my application is approved, but plans for an eligible project change? If you wish to change the travel location for a project, you must notify Invest Nova Scotia in writing requesting a change in travel location prior to the start date of travel. The travel location can only be changed upon written approval from Invest Nova Scotia.

If the dates for an approved trip change but the location remains the same, you must notify Invest Nova Scotia in writing before the approved dates of travel on the Agreement, Schedule "A." Failure to make this request before the approved travel dates will result in the funding for this trip being withdrawn. Please refer to the EDP Guidelines and Agreement. If your Stream 2 project (that involves working with a consultant) will not be completed by the project end date in the Agreement, you must contact the Export Development Program Administrator, before the project end date. Invoices from approved consultants for approved projects as per the Agreement are eligible.

16. How is the incentive paid to me?

The incentive is only payable against eligible project costs as outlined in the Agreement. Reimbursement will occur upon receipt of the Activity Claim Form and supporting documents including copies of detailed invoices, receipts, proof of payment and Company Declaration form (if applicable) as outlined in the Guidelines and Agreement.

For additional information, please refer to the <u>Export Development Program Guidelines</u> or contact the Program Claims Assistant via email <u>claims@investnovascotia.ca</u> or by phone 902.424.5922.