



CANEXPORT

Preparing your CanExport claim

Before You Begin

- Refer to the Applicant Guide for information on eligible and ineligible costs
(<http://international.gc.ca/canexport/>)
- If you are not already registered to direct deposit, you must apply as per the instructions on the form available at the following URL: http://www.nrc-cnrc.gc.ca/eng/direct_deposit/index.html
- Each claim must include all information outlined on the CanExport claim form.

Before You Begin

Claimed costs must have been incurred within the **Project Phase** of your contribution agreement, and incurred for activities included in the **Description of Activities**.

- Page 1 of your Contribution Agreement, section 1.1 or section 4.1 (depending on project approval date)

1. Key Contribution Agreement Dates

1.1 Project Phase

- Project Start Date: **XXXX-XX-XX** (yyyy/mm/dd)
- Project Completion Date: **XXXX-XX-XX** (yyyy/mm/dd)

1.2 Post-Project Phase

- The Post-Project Phase starts the day after the Project Completion Date and end on **XXXX-XX-XX** (yyyy/mm/dd)

- Page 2, section 3 of your Contribution Agreement

3. Description of Activities

TRADE EVENTS/MEETINGS/VISITS

- Travel to [target market] for international business meetings with potential clients or partners and/or participate in specialised trade event(s), including return airfare economy class from Canada to [target market], per diem and local transport for a maximum of 2 employees or owners of the firm
- Participation in specialised trade events in [target market] to meet with potential clients and partners, including if applicable, registration fees for a maximum of 2 employees or owners of the firm, and if applicable, space rental, booth, shipping and associated costs

PROMOTIONAL/MARKETING TOOLS

- Services for the translation and adaptation of marketing material for specific needs of the [target market] market

CanExport Project Number: 123456	
Project Start Date: XXXX-XX-XX	Project Completion Date: XXXX-XX-XX
Firm's Name and Address: Firm Name Address City, Province Postal code Attention: John Smith Email: John.Smith@email.com	Submit your claim to: NRC CanExport Office NRC – IRAP - Building M55 1200 Montreal Road, Ottawa, ON K1A 0R6 Attention: Denise Dziubaniuk Fax: 613-993-9302

- The top portion of your claim provides your CanExport project number. This is a unique identifier for your Contribution Agreement.
- Your firm information is displayed. Any changes to your firm's name or address should be indicated in the status report which is part of your claim template.
- Submit your claim by fax as indicated in the top portion of your claim. If you do not have a fax, mail your claim to the address provided.

Claim number: ____ (Sequential order, ex. 1, 2, 3, etc.)

- Enter the claim number in sequential order from your previous claim.

This claim covers the period:	from	2016	-	-	to	2016	-	-
		Year	Month	Day		Year	Month	Day

- The claiming period is an important part of your claim as it provides the timeframe in which you have incurred your costs.
- The “from” period should be on or after your contribution agreement start date OR after your previous claim.
- The “to” period must be on or before the date of your signature on the claim and before the Project Completion date.

Final Claim this federal government fiscal year: Yes: (X) No: ()

Final Claim for the project: Yes: (X) No: ()

(by checking 'yes' above, indicates an acknowledgement that no other funds are required)

- Allocation of funds are based on availability of funds by Government fiscal year. In order to fully allocate funds you must identify if you are planning to use all the funds allocated to your project.
- Enter an “x” on both “Yes” or “No” statements.
- By stating “yes” to either statement, you are indicating that no other funds are required for either the remainder of the project or for the remaining Government fiscal year.
- The Government fiscal year runs from April 1 to March 31.

Claiming for the following supported costs incurred under clause 1.1 of the Basis of Payment

- The Basis of Payment of your Contribution Agreement provides the details on the total contribution amount and approved cost categories.
- CanExport is a cost shared program. The program reimburses up to 50 per cent of the claimed amount.
- The contribution amount is the maximum amount you are eligible for under your contribution agreement.
- The supported cost categories are defined in the Applicant Guide on the CanExport website website (<http://international.gc.ca/canexport/>)
- Your contribution agreement may not include all cost categories. Only the cost categories appearing in the Basis of Payment of your contribution agreement can be claimed.

CLAIMING TRAVEL COSTS

Important to remember when claiming Travel Costs

- Remove all GST/HST/VAT from all your claimed amounts.
- All amounts must be in Canadian dollars

Note: Your claim may be subject to validation. If this is the case you will be required to provide copies of all receipts associated with your claim. Documentation must include:

- Summary of airfare costs (example is shown later)
- Hotel receipts, (proof of stay to claim your Per Diem)
- Invoices for visas, excess baggage, etc.
- Provide exchange rate on receipts, where applicable

*Meal receipts are not required as these amounts are covered by your Per diem rate.

Travel Costs (up to 2 employees)	
Cost Type	Cost (\$)
Airfare for John Doe and Jane Smith to Amsterdam (4-6 March 2016)	\$1,149.01
Per diem for John Doe and Jane Smith (2 days @ \$400 x 2)	\$1,600
Ground transportation	\$225
Excess baggage fee	\$45
Subtotal	\$3,019.01

- Enter Airfare, including name of traveller, dates and destination. Enter the amount of the airfare (economy class), excluding GST/HST
- Enter “Per Diem” (includes accommodation, meals and incidentals) by providing the name of the traveller, number of days (must correspond to the travels dates provided with airfare)
- Enter any ground transportation (taxis, parking, bus, train, etc.)
- Enter any visa fees, excess baggage fees, if applicable (one line per item)
- Calculate the subtotal of all your travel costs

Sample airfare costs

Purchase Summary

Fare Summary	
Passenger Type	Adult
Air Transportation Charges	
Base Fare	589.99
Surcharges	15.01
Carrier surcharges	456.00
Taxes, Fees and Charges	
Canada Airport Improvement Fee	27.00
Netherlands Arpt. Security Charge	15.38
Canada Harmonized Sales Tax (GST/HST #10009-2287 RT0001)	3.51
Netherlands Noise Isolation Charge	0.73
Air Travellers Security Charge (ATSC)	25.91
Netherlands Intl. Psgr. Service Charge	18.99
Total before options (per passenger)	1152.52
	- 3.51
	1149.01

- Find GST/HST line item
- Remove all GST/HST from total invoice
- Enter total amount on your claim

CLAIMING CONTRACTOR FEES

Important to remember when claiming Contractor Fees

- Remove all GST/HST/VAT from all your claimed amounts.
- All amounts must be in Canadian dollars. Please ensure to keep proof of the exchange rate for that particular date.

Note: Your claim may be subject to validation. If this is the case you will be required to provide copies of all receipts associated to your claim. Documentation must include:

- Invoices
- Provide exchange rate on receipts, where applicable

Contractor Fees	
Contractor Name	Cost (\$)
Contractor ABC (Translation services)	\$750
Print-R-Ups (Brochures)	\$1,500
Event ABC (trade show in Amsterdam 5 March 2016)	\$2,500
Build-a-booth (Booth and setup)	\$6,000
Subtotal	\$10,750

- Enter the name of the contractor and the service provided. Enter the amount excluding GST/HST
 - Enter one line per contractor
- Calculate the subtotal of all your contractor fees

CLAIMING CONSULTANT FEES

Important to remember when claiming Consultant Fees

- Remove all GST/HST/VAT from all your claimed amounts.
- All amounts must be in Canadian dollars.
- Consultant Fees cannot exceed 25% of your total approved project costs.

Nota: Your claim may be subject to validation. If this is the case you will be required to provide copies of all receipts associated to your claim. Documentation must include:

- Invoices
- Provide exchange rate on receipts, where applicable

How to calculate your maximum eligible Consultant Fees

Total Contribution Amount	\$25,000
Multiply by 2 to get Total Eligible Project Costs	\$50,000
Multiply by 25% to get total eligible consultant fees	\$12,500

Each time you claim consultant fees, subtract that amount from Total eligible consultant fees until you deplete that amount

		Balance
Total eligible consultant fees		\$12,500
Claim 1	\$7,000	\$5,500
Claim 2	\$2,000	\$3,500
Claim 4	\$3,500	\$0

Consultant Fees	
Cost Type	Cost (\$)
Consultant XYZ (business to business meetings, market study)	\$2,500
Lawyers Inc. (legal advice on conducting business in the Netherlands)	\$4,500
Subtotal	\$7,000

- Enter the name of the consultant and the service provided. Enter the amount excluding GST/HST
 - Enter one line per consultant
- Calculate the subtotal of all your consultant fees

	Percent of support	Costs incurred for this claim	Claimed Amount
Travel Costs	50% of	\$3,019.01	\$1,509.51
Contractor Fees	50% of	\$10,750	\$5,375.00
Consultant Fees	50% of	\$7,000	\$3,500.00
Total of this claim			\$10,384.51

- Enter the amounts from the subtotal of each cost category under the “Costs Incurred for this Claim” column
- Multiply that amount by 50% and enter that amount under the “Claimed Amounts” column
- Add the “Claimed Amounts” to obtain the “Total of this claim”

	AMOUNT 2016/2017
	\$25,000
Less: Previous Claims (this fiscal year)	\$0
Less: This Claim	\$10,384.51
Unclaimed Balance	\$14,615.49

- Your claim is prepopulated with allocations by fiscal year
- Enter the cumulative amount of any past claims. If this is your first claim enter “0”
- Enter the Total of This Claim from the previous section
- Subtract “previous claims” and “this claim” from your total contribution amount for this fiscal year. This is the balance of funds for this fiscal year.

As an authorized officer of the Firm, I solemnly declare that the amounts claimed as Costs Incurred herewith under the Contribution Agreement are accurate. I also understand that any false or misleading declaration may have severe consequences as stated in the conditions of the Contribution Agreement.

Signature:

John Doe

Title:

President

Date:

2016 _ 08 _ 30

Year - Month - Day
(on or after claim period end date)

- Sign your claim in the section provided. You must be an authorized officer of the firm to sign the claim.
- Enter your title.
- Date your claim (make sure the date is not prior to your claim period end date).

STATUS REPORT

- You must complete the report attached to the claim template
- If this is not your last claim for the project, complete questions 1-4
- If this is your last claim for the project, also complete question 5

1. Project timeline

Is the project on schedule? Yes () No ()

If you answered “NO”, provide a brief explanation for delays

- If your project is not on schedule, provide a reason as a significant delay may impact the duration of your project

2. Activities and outcomes (minimum 2 paragraphs)

Provide a brief description of activities related to the project objectives and approved activities as per the Contribution Agreement. Include objectives met or progressed during the reporting period.

- Provide sufficient information to link the activities and outcomes to the cost claimed
- For example: Travel to Amsterdam to attend Event ABC where we have made contact with a number of potential customers. The business to business meetings set up by Consultant XYZ allowed our firm to gain significant knowledge on the needs for the Netherlands market.

3. Project budget

Did you receive other government funding (federal, provincial, territorial or municipal) for the project since your last claim? Yes () No ()

If you answered “yes”, provide the name of organization and the amount provided

- Government assistance cannot exceed 50% of the total approved activities for your project.
- If you received any government funding during the course of the claiming period, provide the name of the government program along with the amount received. This may result in a reduction of your reimbursement amount.

3. Project budget

Do you intend to claim the entire approved contribution amount for this fiscal year (ending March 31)? Yes () No ()

If no, briefly explain new challenges encountered during the activities completed in this reporting period. Describe any budget variation.

- If you do not anticipate using all the funds provided for the current fiscal year, provide a reason for the deviation from the estimated budget.
- This may result in an amendment to your total contribution amount or amount by fiscal year.

4. Information on the Firm

Has your firm's address changed? Yes () No ()

If you answered "yes", provide new address

- If you have moved, please provide your new address to update our records.

4. Information on the Firm

Has your firm's name changed? Yes () No ()

If you answered "yes", provide new name

If you answered "yes", does this result in a change of ownership? Yes () No ()

- If your firm has changed its name, please provide the new name.
- You will need to provide NRC with a certificate of name change
- A change of ownership may have an impact of your firm's eligibility

5. If this is the final claim for the project, please complete the following questions:

Identify project results in concrete terms measured against the project's objectives.

- Only complete this section if this is your **final** claim
- Provide information on the overall project's results against the objectives of your contribution agreement

5. If this is the final claim for the project, please complete the following questions:

Describe the achievements and difficulties encountered.

- Provide information on the overall project's achievements
- If you encountered difficulties during the course of the project, provide details

5. If this is the final claim for the project, please complete the following questions:

Identify the project's impact as of project completion date and forecast for the next twelve months based on the benefits to Canada outcomes you identified in your CanExport application (e.g., job creation, sales, increased of R&D in Canada, increased investments in Canada, exports open a new market, adoption or development of new technology in Canada, etc.).

- Provide information on the benefits to Canada identified in your application
- Provide a forecast of the benefits to Canada for the next twelve (12) months
- You will be asked to provide performance results for three (3) years following your Project Completion Date. This is gathered through the Snapshot which you will need to complete six (6) months after your firm's fiscal year end and is based on your firm's latest financial statements

5. If this is the final claim for the project, please complete the following questions:

How have your export plans changed as a result of this project?

- The objective of the CanExport program is to increase competitiveness of Canadian companies in developing new export opportunities
- The information provided in this section will assist the Government of Canada measure the impact of the CanExport program on Canadian firms
- Provide information on how the funding helped your firm become more export ready

5. If this is the final claim for the project, please complete the following questions:

Has your firm's knowledge of opportunities improved as a result of this project?

Yes () No ()

If you answered "yes", provide additional details.

- Provide information on how the funding helped your firm be more knowledgeable about the opportunities available in your target market

SUBMIT YOUR CLAIM

- After you have completed your claim, save a copy for your records
- You do not need to submit receipts, unless requested
- Keep copies of your CanExport project expenses segregated from your regular business expenses
 - This provides traceability in case of validations and/or audits
- Fax your claim at (613) 993-9302
 - If you do not have a fax machine, mail your claim at the address shown on the top right corner of your claim
- If you have any questions regarding claim, please contact us by email at nrc.canexport.cnrc@nrc-cnrc.gc.ca

OTHER RESOURCES

- Consult the Applicant Guide available on the CanExport website
 - <http://international.gc.ca/canexport/>
- Understanding your Contribution Agreement
 - [Understanding your Contribution Agreement](#)