

## BPIMS System Help Guide

### Process a Payment Claim

The following guide maps out the steps involved in using the Building Project Information Management System (BPIMS) to submit, receive and process claims for payment under contracts related to building construction projects.

Note if you are submitting a payment claim under the *Building and Construction Industry Security of Payment Act 2009*, please refer to the specific instructions for this process set out below under Claim for Payment (Security).

## Navigation Steps

### Claim for Payment (Standard)

#### Step 1 – Preparation of Claim for Payment

Complete the claim for payment using your own format/ICT software, sign and scan to create an electronic copy of your authorised claim.



Note: the contractor's claim cannot be a tax invoice. A recipient created tax invoice (RCTI) will be created by the Cost Manager Representative after the contractor's claim for payment has been submitted.

Contractors are responsible for uploading the completed claim for payment into the BPIMS Project Home page.

#### Step 2 – Add Claim for Payment to BPIMS and Send to Cost Manager Representative

If you are not in BPIMS you now need to [Login](#).

To submit a claim for payment, follow the step by step instructions, [Adding a file to BPIMS and Sending to a Team Member](#).

The following naming conventions and attributes should be applied when adding a claim for payment to BPIMS:

Attribute	Naming Convention
File Name	Claim for Payment #1
File Type	Claim
Author	Pick your name from droplist
Keyword 1	payment claim

The claim should be 'sent' to the following:

Cost Manager Representative – For comment  
DIT Project Risk Manager – For information  
DIT Budget Risk Adviser – For information

### Step 3 – Cost Manager Assessment

Once the email notification is received, the Cost Manager Representative will access BPIMS to process the claim for payment that has been referred by the contractor. The following steps outline the process the cost manager will follow to access, assess and recommend the contractor's claim.

- [Login](#) to BPIMS and browse to *My Action Items* for files referred by the contractor.
- For a list of *Action Items*, retrieve the file (see [Retrieving a file](#)) and acknowledge its receipt (see [Acknowledge Receipt](#)).
- Once the Cost Manager Representative has opened the *Claim for Payment #1*, a check is necessary to ensure the claim for payment is not a tax invoice. If the contractor has submitted a tax invoice, the cost manager is to reject the claim and request the contractor resubmit their claim. (This action is not required through BPIMS).
- If in agreement with the claim, the cost manager will create the RCTI and Payment Certificate in accordance with the Contract Type. Proformas for these documents are available from BPIMS (see [Accessing the RCTI Proforma](#)).

The following table lists the RCTI and a document description.

Document Name	Document Description
AS 2124 RCTI payment certificate	This RCTI and Payment Certificate should be used where the construction contract is AS 2124 - 1992 (traditional lump sum).
AS 4300 RCTI payment certificate	This RCTI and Payment Certificate should be used where the construction contract is AS 4300—1995 General conditions of contract for design and construct.
GC21 RCTI payment certificate	This RCTI and Payment Certificate should be used when the construction contract is GC21 (Edition 1 as amended).  The majority of high value and/or high risk DIT Building Projects construction projects are delivered using GC21 with the general building contractor in a managing contractor role.
AS 4122 payment certificate	This Payment Certificate should be used where the contract is a professional service contract under AS4122 – 2000 Conditions of contract for the engagement of consultants.

- Complete the RCTI and Payment Certificate proforma (where values are red), print and sign Payment Certificate (Certified).
- Scan the RCTI and Payment Certificate as one document, upload to BPIMS and send to the DIT Budget Risk Adviser and DIT Claims Officer (see [Adding a file to BPIMS and Sending to a Team Member](#)).

The following naming conventions and attributes should be applied when adding a RCTI to BPIMS:

Attribute	Naming Convention
File Name	Payment Claim Assessment #1
File Type	Claim
Author	Pick your name from droplist

Keyword 1	payment claim
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The certificate should be 'sent' to the following:

DIT Budget Risk Adviser – For comment  
DIT Claims Officer – For information

### Step 4 – Claim Processed and Added to BPIMS

Your authorised monthly RCTI and Payment Certificate will be placed into BPIMS by the DIT Claims Officer for you to open and print at your discretion. Please note these documents will not be emailed nor posted to you and will only be available electronically through BPIMS.

- Access BPIMS by [logging in](#) and download the RCTI and Payment Certificate (see [Retrieving a file](#)).
- Acknowledge the document by generating an acknowledgment receipt (see [Acknowledge Receipt](#)).

## Claim for Payment (Security)

### Step 1 – Preparation of Security of Payment Claim

Complete the claim for payment, identifying it as a "Security of Payment Claim", using your own format/ICT software, sign and scan to create an electronic copy of your authorised claim.



Note: the contractor's claim cannot be a tax invoice. A recipient created tax invoice (RCTI) will be created by the Principal Cost Manager after the contractor's claim for payment has been submitted.

Contractors are responsible for uploading the completed claim for payment into the BPIMS Project Home page.

### Step 2 – Add Claim for Payment to BPIMS and Send to Principal Cost Manager

If you are not in BPIMS you now need to [Login](#).

To submit a claim for payment, follow the step by step instructions, [Adding a file to BPIMS and Sending to a Team Member](#).

The following naming conventions and attributes must be applied when adding the claim to BPIMS in order for it to be appropriately identified:

Attribute	Naming Convention
File Name	Claim for Payment #1
File Type	Security of Payment Claim
Author	Pick your name from droplist
Keyword 1	payment claim
Keyword 2	security

The claim should be 'sent' to the following:

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Principal Cost Manager – For comment  
Cost Manager Representative – For information  
DIT Project Risk Manager – For information  
DIT Budget Risk Adviser – For information

### Step 3 – Principal Cost Manager

The Principal Cost Manager as the Principal's Representative will consider the claim and either undertake the assessment, or refer it to the Cost Manager Representative for actioning.

### Step 4 – Assessment

After assessing the claim, either the Principal Cost Manager or the Cost Manager Representative will create the RCTI and Payment Certificate in accordance with the Contract Type. Proformas for these documents are available from BPIMS (see [Accessing the RCTI Proforma](#)).

The completed RCTI and Payment Certificate should be printed, signed and scanned as one document, uploaded to BPIMS and sent to the DIT Budget Risk Adviser and the DIT Claims Officer (see [Adding a file to BPIMS and Sending to a Team Member](#)).

The following naming conventions and attributes should be applied when adding a RCTI to BPIMS:

Attribute	Contractor's claim
File Name	Payment Claim Assessment #1
File Type	Security of Payment Claim
Author	Pick your name from droplist
Keyword 1	payment claim
Keyword 2	security

The certificate should be 'sent' to the following:

DIT Budget Risk Adviser – For comment  
DIT Claims Officer – For information

### Step 5 – Claim Processed and Added to BPIMS


The authorised monthly RCTI and Payment Certificate will be placed into BPIMS by the DIT Claims Officer for opening and printing at the user's discretion. Please note these documents will not be emailed nor posted and will only be available electronically through BPIMS.

- Access BPIMS by [logging in](#) and download the RCTI and Payment Certificate (see [Retrieving a file](#)).
- Acknowledge the document by generating an acknowledgment receipt (see [Acknowledge Receipt](#)).

### Associated BPIMS Actions

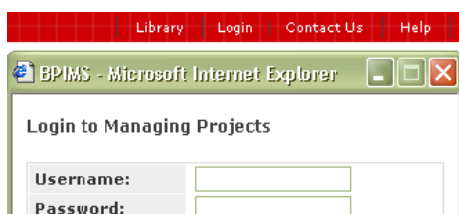
#### Login to BPIMS


- Open your internet browser
- Type the following URL into the address box:

Address  <http://www.bpims.sa.gov.au>



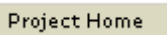
The BPIMS Home Page will open. The Login prompt is located in the upper right hand corner of the screen.

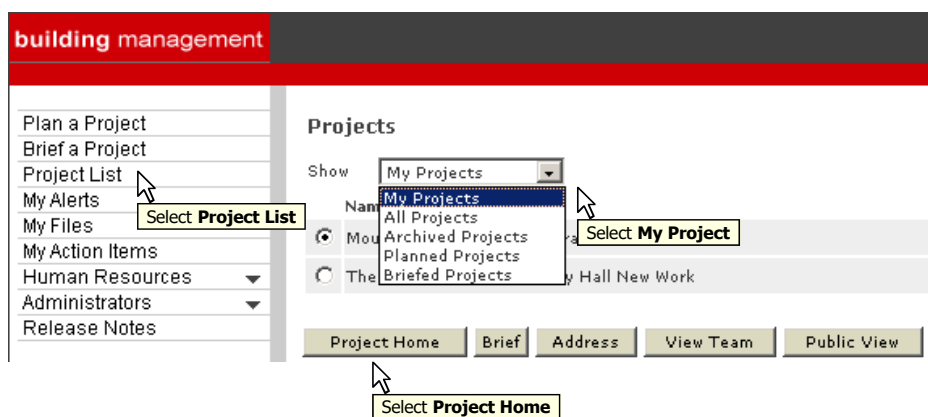
- Select *Login* and the Login dialogue box appears.



 **Enter your user name and password.** If you do not know your user name and password contact the Business Systems service Desk for assistance. When you log in to BPIMS for the first time, you will be prompted to enter a new password. It must be at least 8 characters and contain one capital and one numeral.

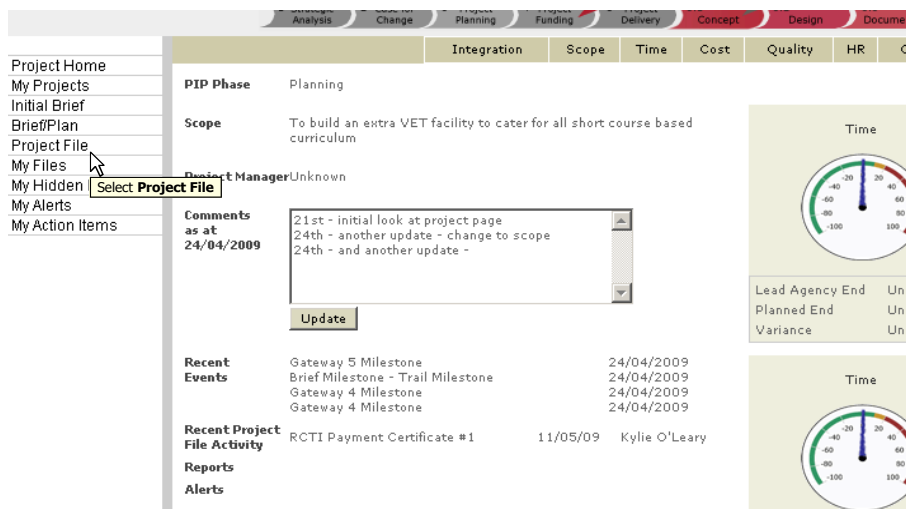
#### Adding a file to BPIMS and Sending to a Team Member

- Select *Project List* from the main menu - left hand pane
- Select *My Projects* from the dropdown list 
- Select required project by clicking the radio button 
- Select 



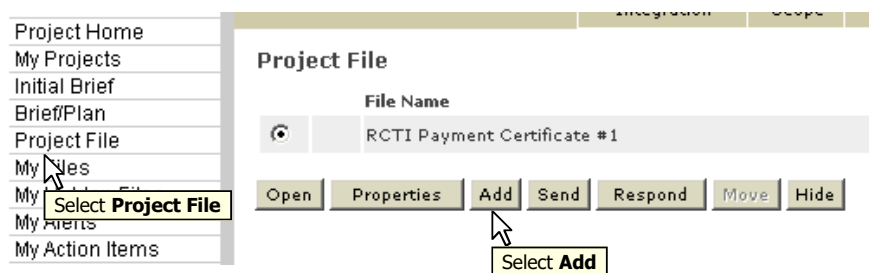
## BPIMS System Help Guide: Process a Payment Claim

The project home page will appear



- Select *Project File* from the left hand pane

Select **Add**



Browse to location where you have saved the file (your PC or network) and upload designated files

- Enter the following attributes as indicated earlier in this document:

File Name (free text). File Name :

File Type (droplist). File Type:

Author (droplist). Author:

Keywords (droplist). Keywords:

- Select **Save**

Add a New Document to Project File & Create an Official Record

Mount Barker Campus Upgrade

Document Location

File Name :

File Type: -- select type -- Select **Browse**

Owner:

Author:

Other author:

Keywords: --select a keyword to add--

--select a keyword to add--

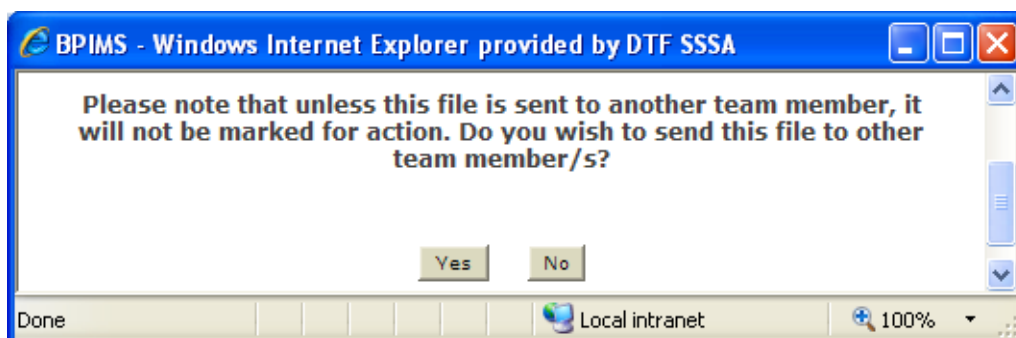
--select keywords to add -- to select multiple keywords hold the 'ctrl' key & click

Description:

Document for restricted viewing only: ☐

Select **Save**

After clicking Save a pop-up will appear asking if you wish to send the file to another team member.



Click Yes and the pop-up will be refreshed to display the Send To page, listing all Project Team Members.

BPIMS Project - Microsoft Internet Explorer

Date: 09/04/2009

Description:

Team Member	Role	Action	Action by Date	Approval to Forward
Aaron Wong	Cost Manager Representative	<input type="button" value="v"/>	<input type="text"/> 20	No <input type="button" value="v"/>
Adam Galpin	DTEI Project Administrator	For Approval	<input type="text"/> 20	No <input type="button" value="v"/>
Brian Carr	DTEI Construction Adviser	For Comment	<input type="text"/> 20	No <input type="button" value="v"/>
Brian Simms	Cost Manager Representative	For Information	<input type="text"/> 20	No <input type="button" value="v"/>

- Find the team member required e.g. Cost Manager Representative
- Select\*\* *For Information* from the Action droplist.



\*\*Note: DO NOT select *For Approval*. Action by Date need not be selected.

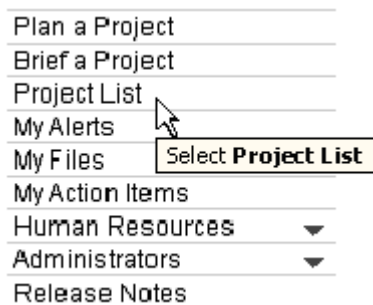
- Select **Send**. You may need to scroll down to the bottom of the screen to see this option

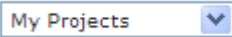

You have now added a file to the Project File in your project's Home Page in BPIMS and sent an action item to another team member.

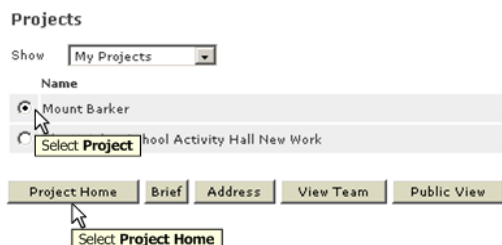
## Sending a File Previously Added to the Project File

If you are not in the Project Home Page, follow these steps to reach the file you wish to send from the Project File.


- Select *Project List* from main menu – left hand pane



- Select *My Projects* from the dropdown list 
- Select required project by clicking the radio button 
- Select **Project Home**



The following steps describe how to identify the file and to refer it to a team member.

- Select *Project File* from the left hand menu once you are in the *Project Home* Page and the Project File screen should open.
- Select  alongside the file you wish to send
- Select **Send**
- Find the team member required e.g. Cost Manager Representative
- Select\*\* *For Information* from the drop Action droplist.




\*\*Note: DO NOT select *For Approval*. *Action by Date* need not be selected.



- Select **Send**. You may need to scroll down to the bottom of the screen to see this option



 \*\*If you wish to confirm that this action has been sent, Select **Properties** on the Project File screen. A document properties Pop-up will appear

- Click on *Actions Tab* and view.

File Name: Claim for Payment #1

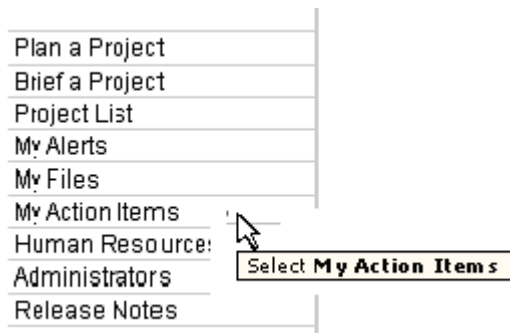
General		Actions	Viewed By	Related Documents	Keywords
From	To	Sent	Action Req'd	Response	Response Date
Trevor Bown	A Currie & Brown	10/07/2009	For Information		
Close					


### Retrieving a file

#### Retrieving Files that have been Referred to You (as an Action Item)

Files that have been sent to you can be found through My Action Items on the Main Menu.

- Select *My Action Items* from Main Menu - left hand pane

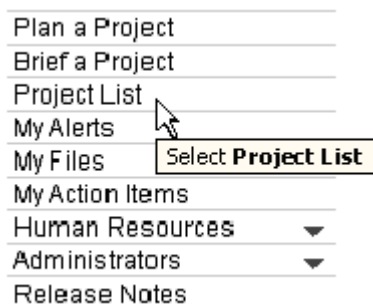


- In the right hand pane select  for the desired Action notice
- Click **Select** to access the Action Item in the Project Home Page.
- Click **Open** to open the item.

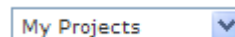
#### Retrieving Files from Project File


Project files that have not been forwarded to you via My Action Items can be accessed via the *Project Home Page*

- Select *Project List* from main menu – left hand pane



- Select *My Projects* from the dropdown list



- Select required project by clicking the radio button 

- Select **Project Home**

Projects

Show

Name

☒ Mount Barker

☐ School Activity Hall New Work

Select Project

Project Home Brief Address View Team Public View

Select Project Home

- Select *Project File*, once you are in the Project Home Page.

Alberton Primary School Classroom Refurbishment [NS] Concept 6175922

5 STEP FRAMEWORK

1 Strategic Analysis 2 Case for Change 3 Plan

Project Home My Projects Initial Brief Brief/Plan Project File My Files My Hidden Files My Action Items

PIP Phase Concept

Scope

Project Manager Unknown

Comments as at -

Select Project File

Select the desired project file 

Select **Open**

### Project File

File Name

☒ RCTI Payment Certificate #1

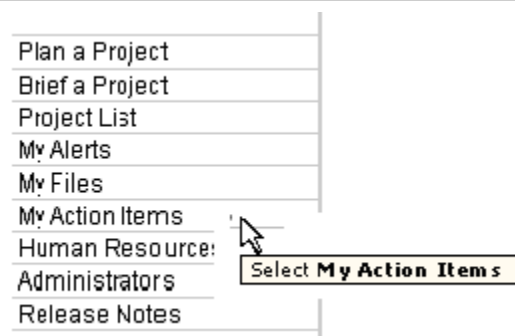
Open Properties Add Send Respond Move



Select Open

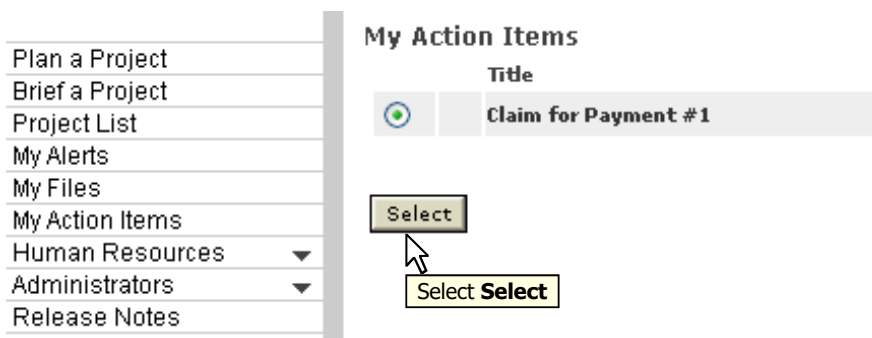
## Acknowledge a 'My Action Item'

All My Action Items need to be responded to for them to be closed off. Failure to do so will result in the My Action Item remaining on the user's list. Additionally by doing this, an audit trail is created ensuring that a step-by-step record can be traced and that a requested action has been received.

- Click *My Action Items* from main menu - left hand pane

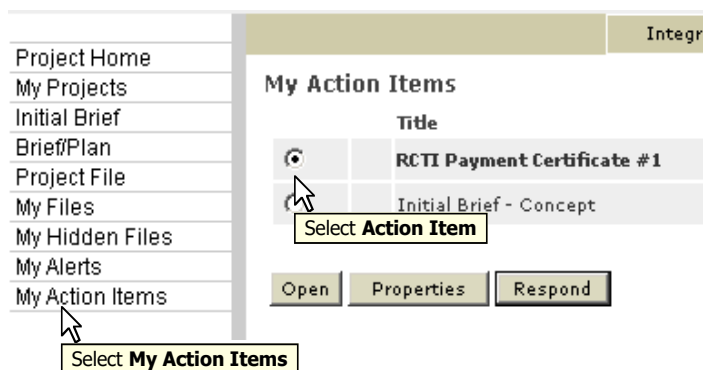


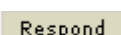
- In the right hand pane select  for the desired Action notice
- Select 



You have now been taken to the My Action Items page for the specific project and if there are multiple items displayed, the item selected above should have the radio button next to it selected.

- Select 



- Type the following text into the comments box (see below) "This document has been received"
- Select 

### Respond

#### Alberton Primary School Classroom Refurbishment [NS]

**File Name:** Claim for Payment #1  
**File Type:**  
**Owner:** Trevor Bown  
**Author:** Not Provided  
**Date Added:** 25/06/2009  
**Description:**

**Action:** For Information

**Response:** Noted ▼

**Comment:** This document has been received

Attach a Related Document ▼

Enter **Comments**

Respond

Cancel

Select **Respond**

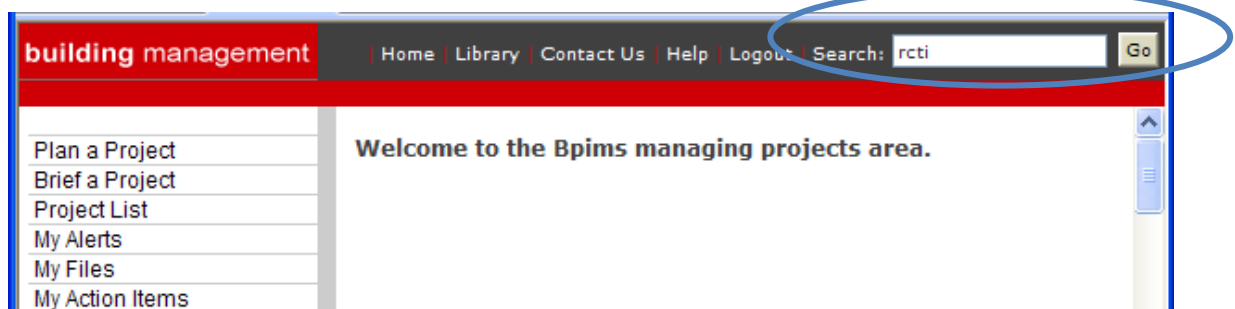
### Accessing the RCTI proforma from BPIMS

The RCTI proforma can easily be accessed direct from the BPIMS library, or from the Proforma link in the footer of all BPIMS pages.

#### Access from the Library

Users can access this proforma from any page after logging in to BPIMS.


- Type rcti into the search box in the header menu and **Go**.

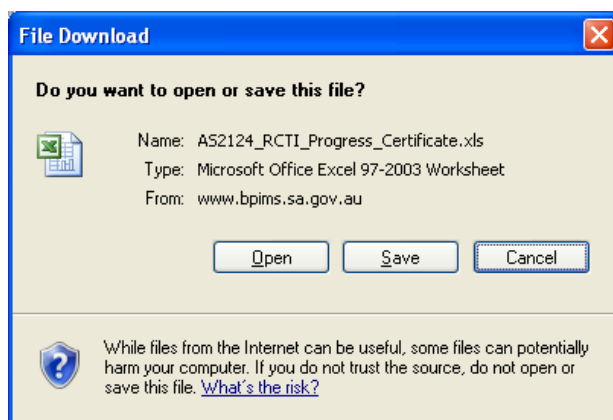


- The BPIMS Library will open in a new window and display all documents in the Library matching the rcti search criteria.



- Click on the desired rcti document and from the File Download dialogue box 




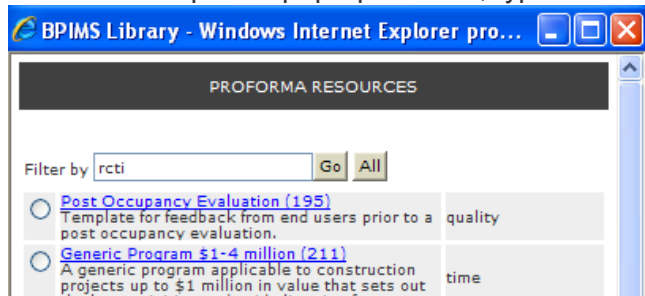


### Access from the Proforma Link

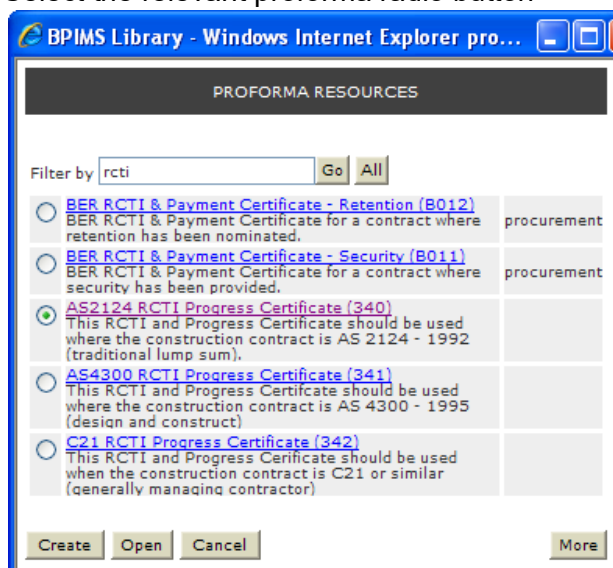
- Select *Proformas* from the footer menu at the bottom of the screen



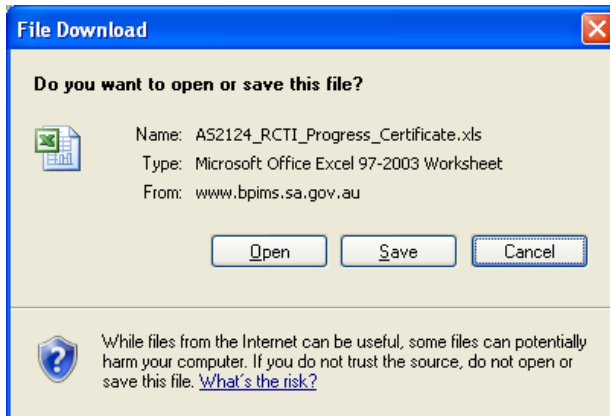
- In the separate pop-up window, type rcti and select 



- Select the relevant proforma radio button



- Select  at the bottom of the pop-up window.  
Note: if the proforma listing does not include RCTI documents select , type in rcti and select .



- From the File Download dialogue box click  and proforma will appear.
- Browse and save file to a specified folder on your computer e.g.: C:\My documents

## Contact

For further information during business hours contact:

### Business Process Issues:

#### Director, Building Projects

Phone: 08 8343 2273

Email: [DIT.BPIMSProjectSupport@sa.gov.au](mailto:DIT.BPIMSProjectSupport@sa.gov.au)