eFeeConnect

User guide for service providers

UK Defence Club and **UK P&I Club**

Introduction

This document describes the eFeeConnect platform for the submission of invoices to the UK P&I Club and UK Defence Club.

Users submit their invoice, together with a completed electronic form that links the invoice to a claim on the eFeeConnect platform. Users can then track the approval, authorisation and payment progress on the platform.

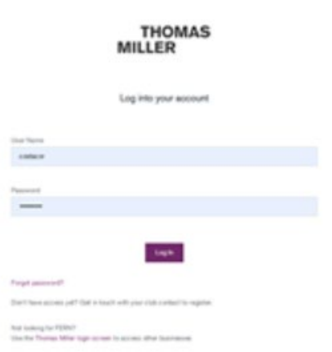
User Access to eFeeConnect

Users must hold personal login credentials which can be obtained by submitting their name, company and email address to **efee.helpdesk@thomasmiller.com**

A unique user ID and password will be issued to approved users who will also receive a link to the eFeeConnect platform. You will be asked to accept the Thomas Miller Terms and Conditions of Use before access to eFeeConnect.

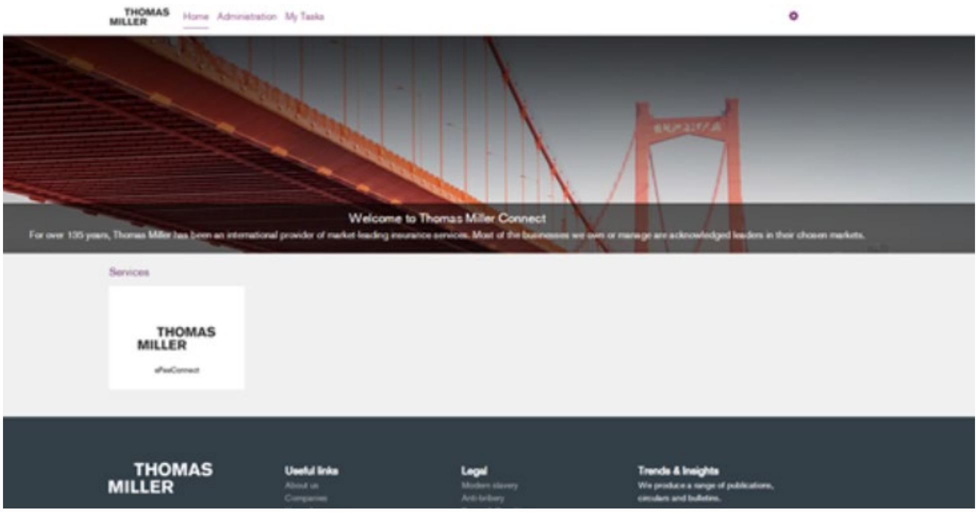
Once you have agreed access, you can then sign-in and create your invoice.

Sign-in Screen

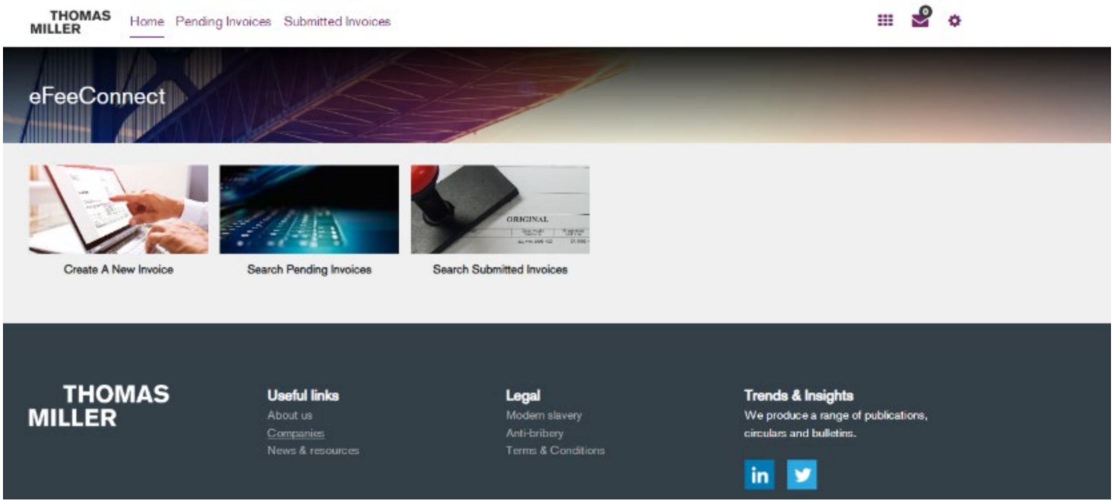


eFeeConnect For Service Providers

Once logged-in, users are taken to the Thomas Miller landing page with the eFeeConnect tile, which should then be clicked.



The eFeeConnect tile directs users to the eFeeConnect landing page, which shows three options: (a) creating a new invoice for submission; (b) viewing/editing saved invoices, not yet submitted; and (c) monitoring invoices already submitted.

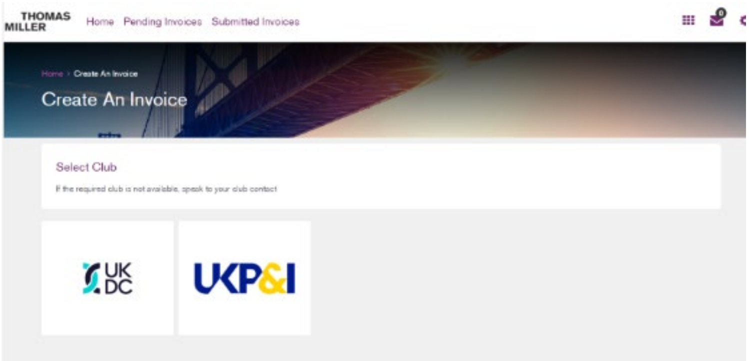


To Create A New Invoice:

Select the “Create A New Invoice” tile. You should have the invoice details and the Club’s claim file reference to hand.

Select a Club:

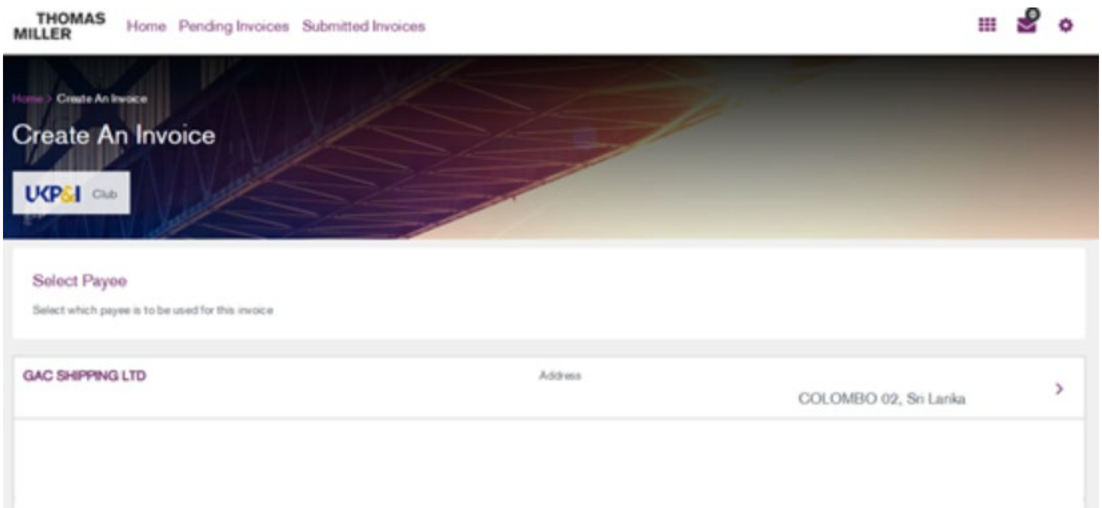
You will see the Clubs for which you are registered – either the **UK P&I Club** or the **UK Defence Club** or both.



Select a Payee:

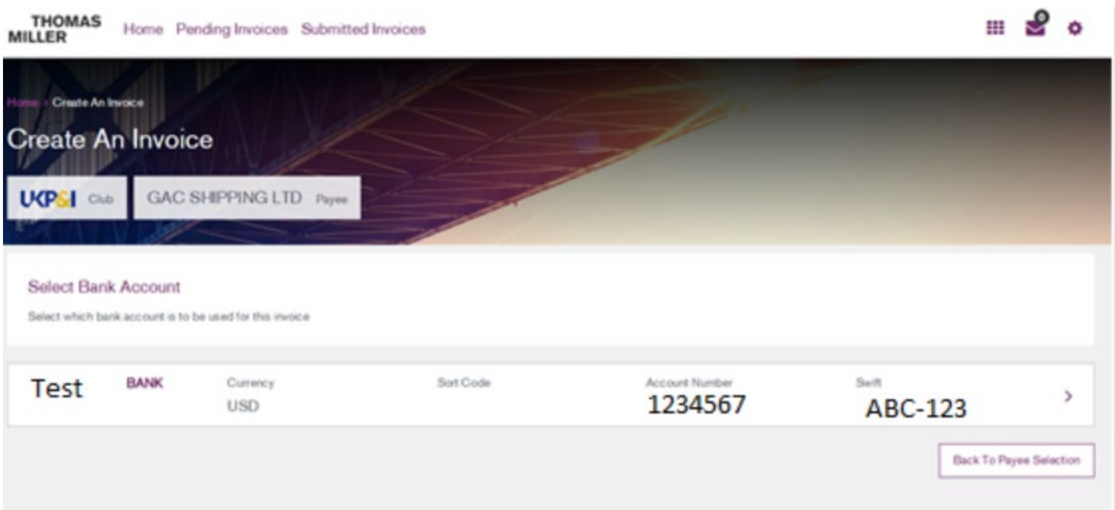
Your company should appear and should be selected as the invoice payee.

If your company is not listed as a payee, please contact efee.helpdesk@thomasmiller.com (Please note, newly created accounts take 24 - 48 hours to appear)



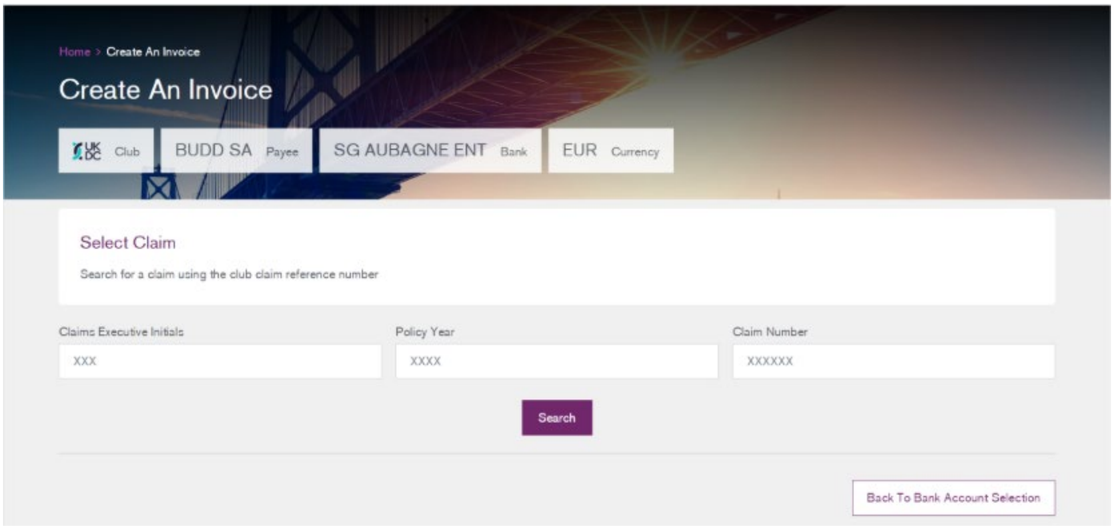
Select a Bank Account:

Select the bank account and currency for payment. These are automatically linked to your profile. (Some users may have more than one bank account.)



If your bank account is not listed, please send your full banking details to efee.helpdesk@thomasmiller.com . You will be telephoned for verbal verification before your bank account is set up on our payee system.

Select a Claim:



A claim reference has three parts:

- The Claims Executive's Initials
- The Policy Year
- The Claim Number

Defence Club claim references may have an abbreviated year in correspondence (e.g. "22" for 2022) in but the full date should be entered.

Note the Claim Number: -

- P&I Club claim numbers start with "0" (e.g. *ABC/2024/***0**00123)
- Defence Club claim numbers start with "2" (e.g. *ABC/2024/***2**00123)

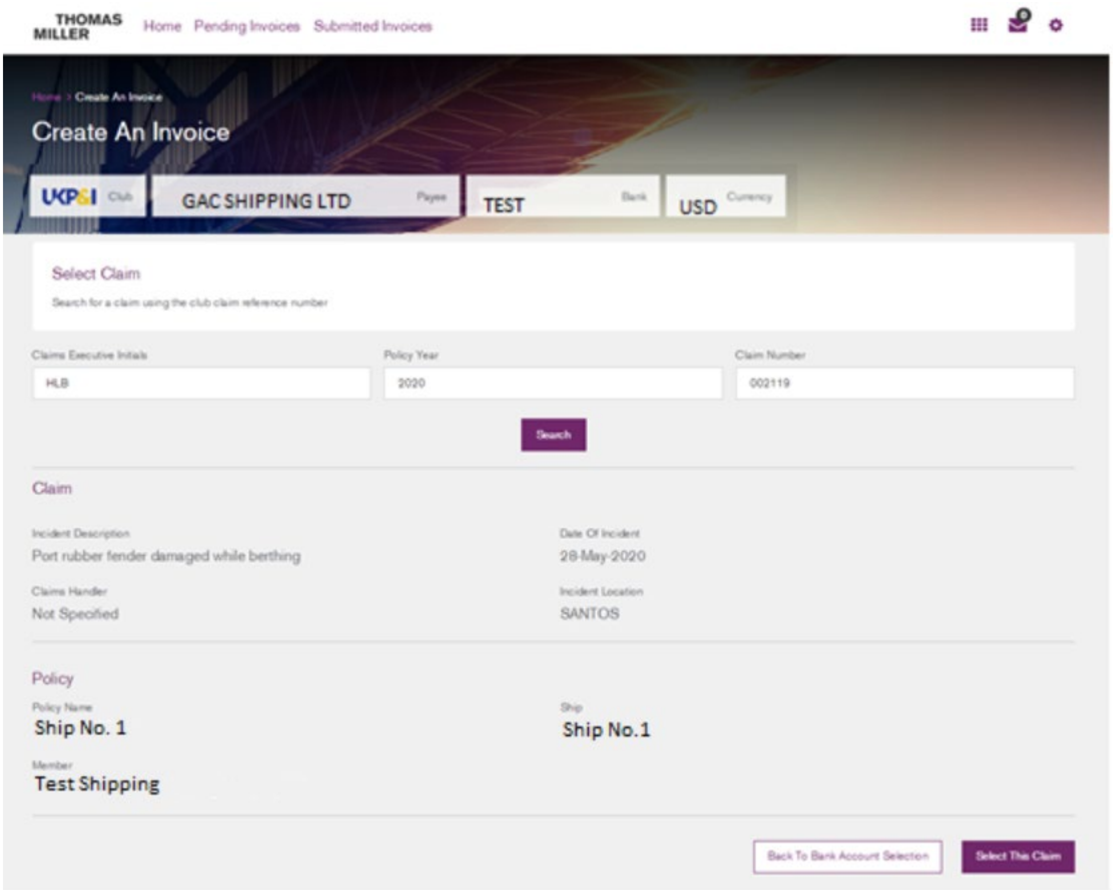
If the claim reference does not show the relevant claim, you should check: -

- The reference is for Club you chose at the "Select a Club" stage earlier (see above);
- You have the correct reference
- You have the correct claims executive's initials

Please contact the **Claims Executive** in the first instance if you need further clarification on the Claims File reference.

Claim Details

If the claim reference is correct, the claim details will display



Select This Claim Choose this option only if the claim details are correct.

Invoice Details

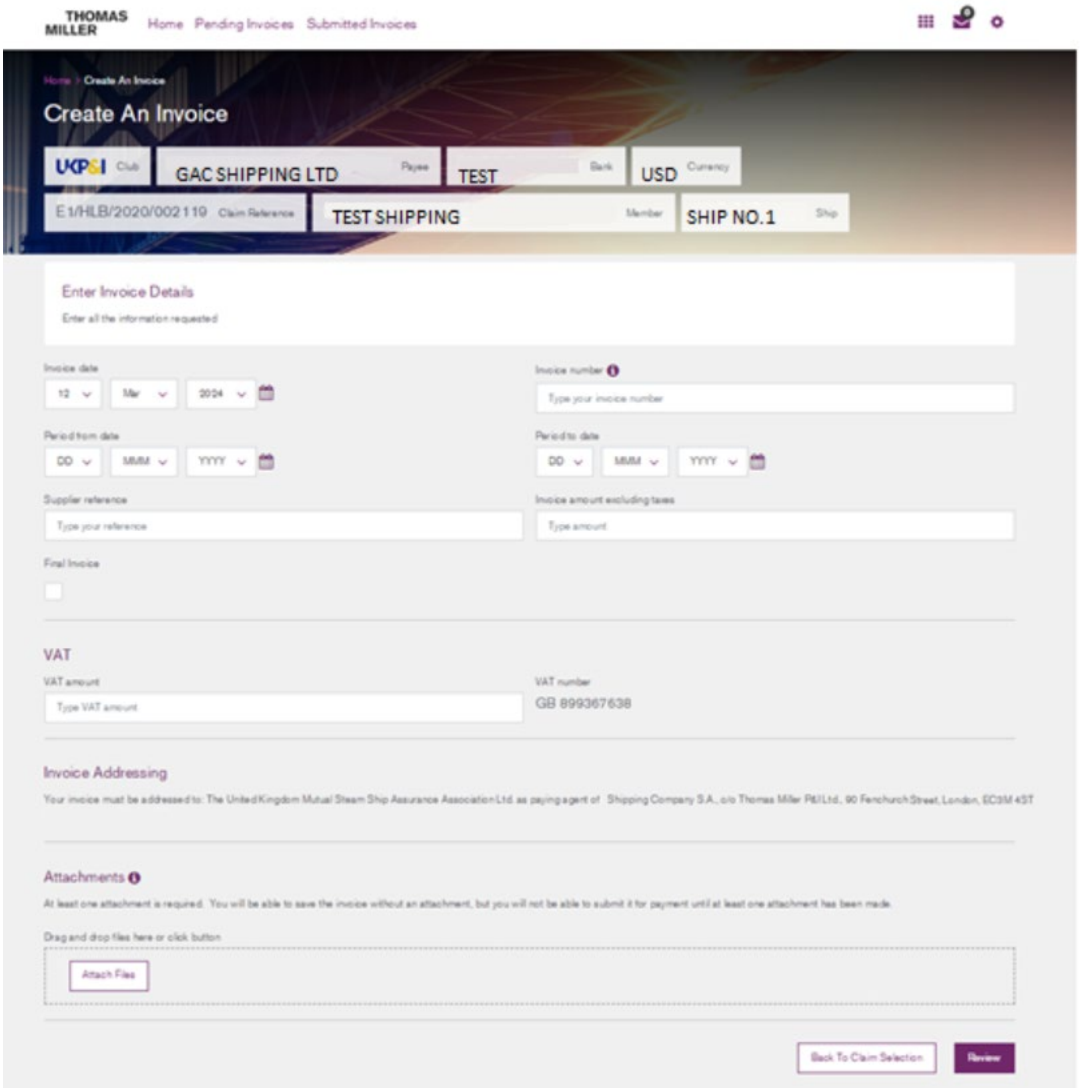
Users must enter summary details about the invoice that will be submitted, which includes:

- The Invoice Date
- The supplier’s Invoice Number (Max length 12 characters)

The invoice number can only be used once (You may find it useful to add an extra digit or letter to the number, if you are re-submitting an invoice that has been corrected.)

Note: *if the invoice has been rejected or deleted you may use the same invoice number.*

- The Period “from” and “to” showing period of billing
- The Supplier Reference (Your own reference if applicable)
- The net amount of the invoice, excluding any VAT or taxes. (Invoice Amount Excluding Taxes). **In no circumstances should VAT be included in the net invoice amount.**
- The VAT amount (if requested)
- An indication of whether this is the Final Invoice (checkbox)



VAT

If VAT applies, the user is requested to enter the VAT amount. The system will define the treatment of VAT. For P&I Club claims on EU policies, and all Defence Club claims the relevant Club will pay the **net amount** of the fee. Any VAT or other local taxes must be settled directly from the Primary Assured (Member).

- For **P&I Club** claims on **non-EU policies**, VAT applies if the Payee bank account is in Sterling (GBP).
- For **P&I Club** claims on **EU policies**, and all **Defence Club** claims, the VAT amount cannot be added.

If you choose not to include VAT, when requested, you will be asked to explain the reason why VAT was not applied.

VAT number

- **For P&I Club claims on non-EU policies, the VAT number for the UK P&I Club will show.**
- **For P&I Club claims on EU policies, and for all Defence Club claims, the VAT number for the Primary Assured (i.e. the Member) will show.**

Invoice addressing

The system will display the details of address that **must** also appear on your invoice. Invoices addressed in a different manner will be returned for correction.

UK P&I Club

If the case concerns **a non-EU Member**, eFeeConnect will advise the invoice to be addressed to the “UK P&I Club as paying agents of the Primary Assured on the policy, c/o Thomas Miller”. For **EU based Members**, the Primary Assured’s details will appear to whom the invoice must be addressed.

Defence Club

eFeeConnect will provide details of the Primary Assured, to whom the invoice must be addressed.

Attachments

The invoice **must** be uploaded, and should show: -

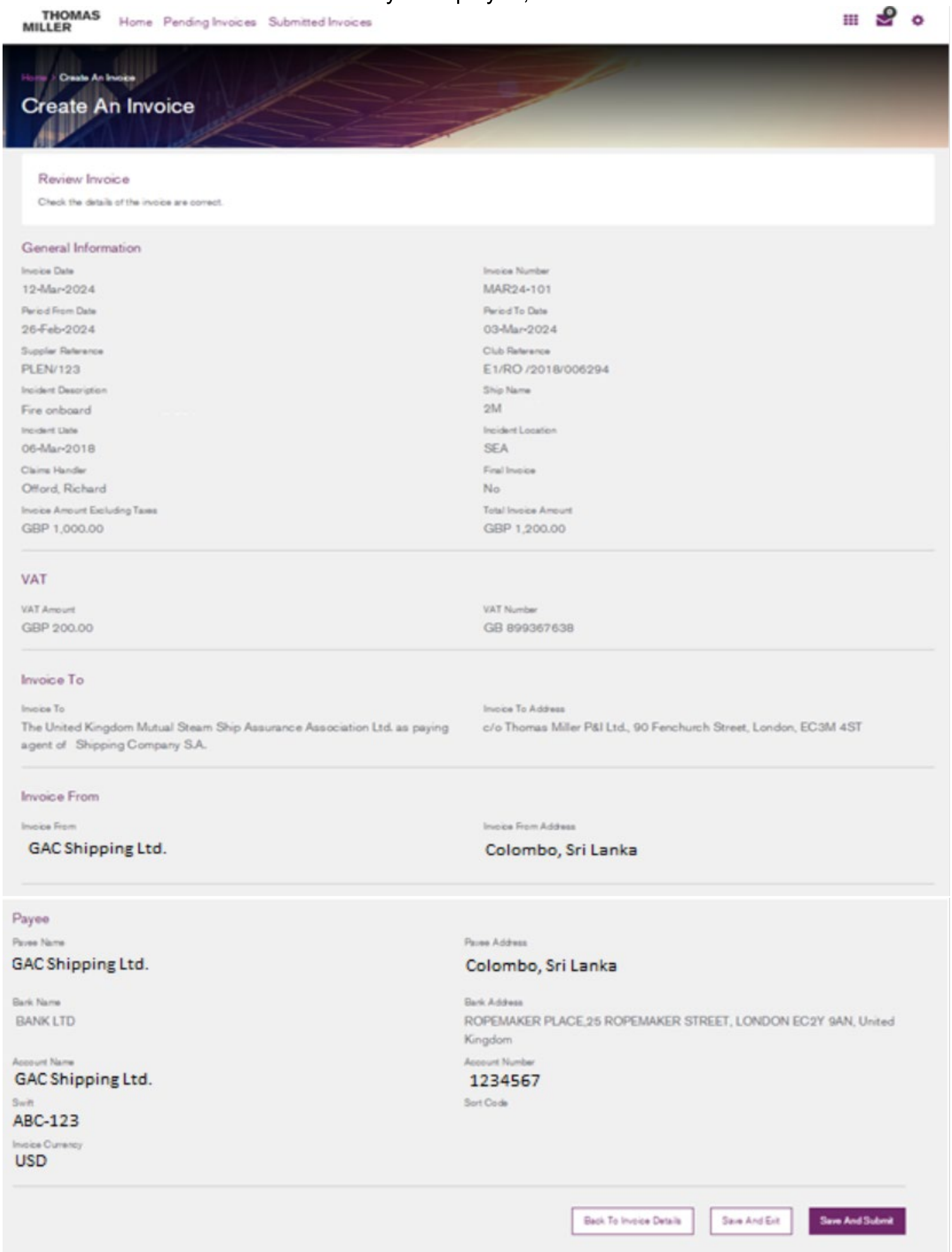
- The Payee Details
- The Addressee details (which must match those advised by eFeeConnect)
- Amount Payable
- A breakdown of fees, including the individual who acted; their role; the hours charged; the hourly rate and any totals.
- Disbursements and taxes.

Any number of additional attachments may be added, although the maximum file size is 5MB per attachment. The attachments must be of format .pdf, .doc, .docx, .jpg, .png, .xlsx

If a file name contains invalid characters, an error message will be displayed.

Review an Invoice

The invoice details and claim summary is displayed, which can be amended as needed.



Select the required next action:

Save and Exit

This will save the invoice but **not** submit the Invoice to Thomas Miller for payment. The invoice can still be updated or amended (using the 'Pending Invoices' function, on the home screen.)

Save and Submit

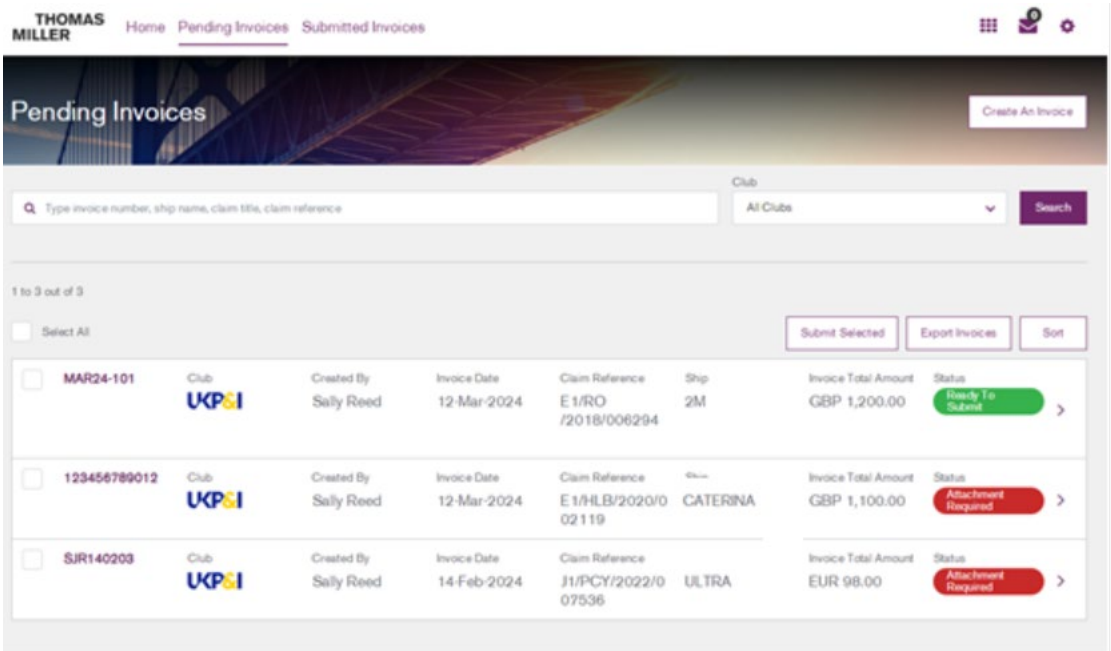
This submits the invoice to Thomas Miller and they cannot be changed. The progress of the invoice can be tracked via the “Submitted Invoices” screen.

Search pending invoices

Invoices saved but not yet submitted can be accessed by:

- Clicking the “**Search pending invoices**” tile on the landing page
- Selecting the Pending Invoices option from the top bar

Invoices can be searched by invoice number, ship name, claim title and claim reference.



Tick “Select All “or individual rows for one of the following actions:

Submit Selected

Click the “Submit Selected” button to invoke submission of the chosen invoices.

If the selection includes a row with status ‘Attachment Required’, an error message will be returned. None of the selected invoices will have been submitted.

Export Invoices

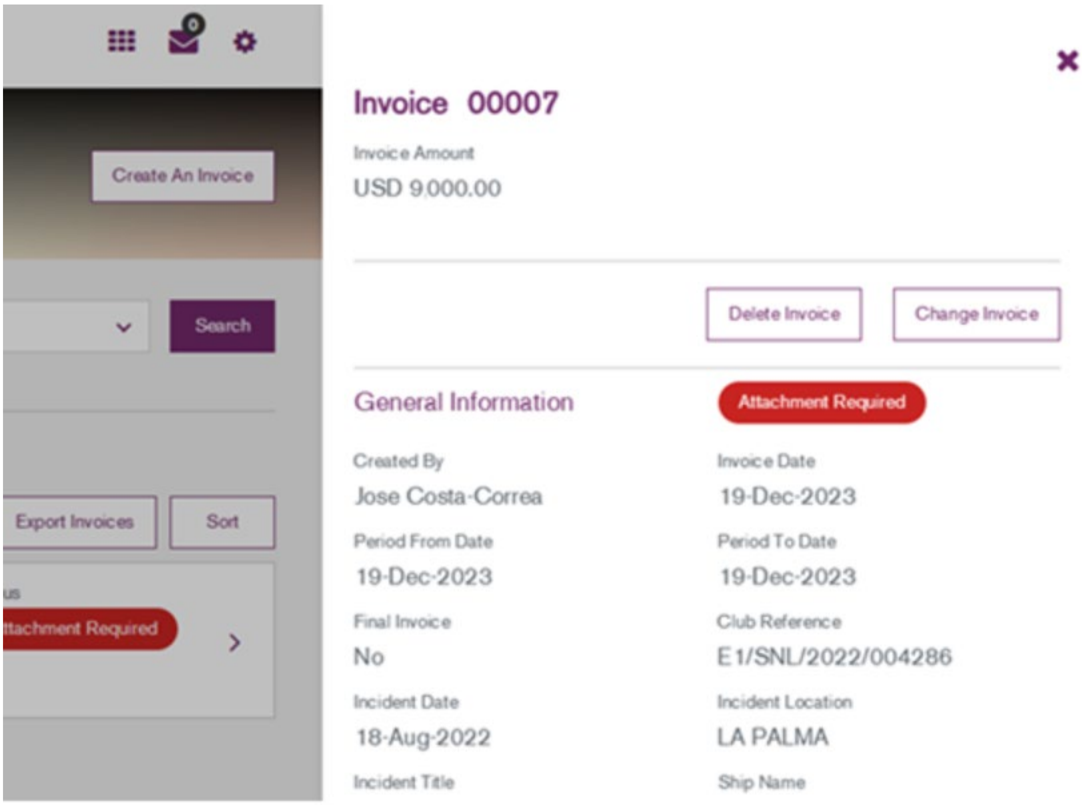
Clicking this button will produce a spreadsheet of the current selection of invoices.

Sort

Click this button to change the order that the invoices are displayed. A side-panel will open showing all available Sort options.

Viewing an Invoice

Clicking an invoice will open a sidebar showing the details of the invoice together with action buttons appropriate to the status of the invoice.



Delete Invoice

This will delete the invoice from the system.

Change Invoice

This will bring up an edit screen where the main invoice details can be changed.

Submit Selected

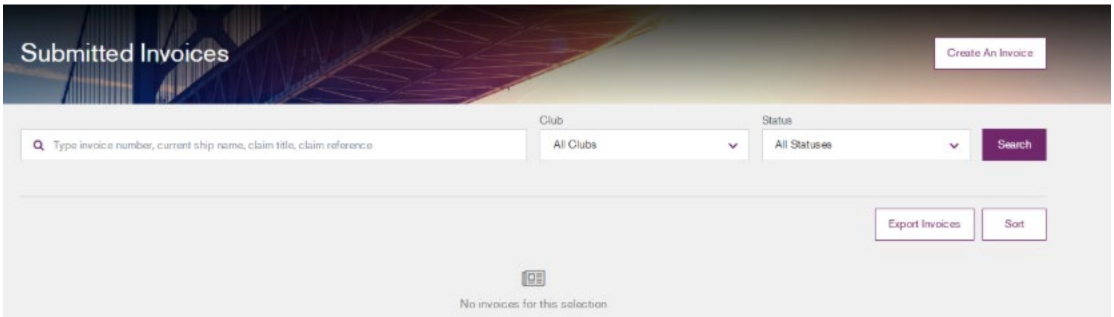
Only shown if the invoice has the status “Ready To Submit” and the invoice has been selected. This button will invoke the submission process for this invoice.

Search submitted invoices

This list can be invoked by:

- Clicking the Search submitted invoices tile on the landing page
- Selecting the Submitted Invoices option from the top bar

Invoices can be searched by invoice number, ship name, claim title and claim reference.
You can select the Club UKP&I or UKDC
You can also check the status of your invoice: Approved, Paid, Pending Payment, Rejected, Submitted, Under Review



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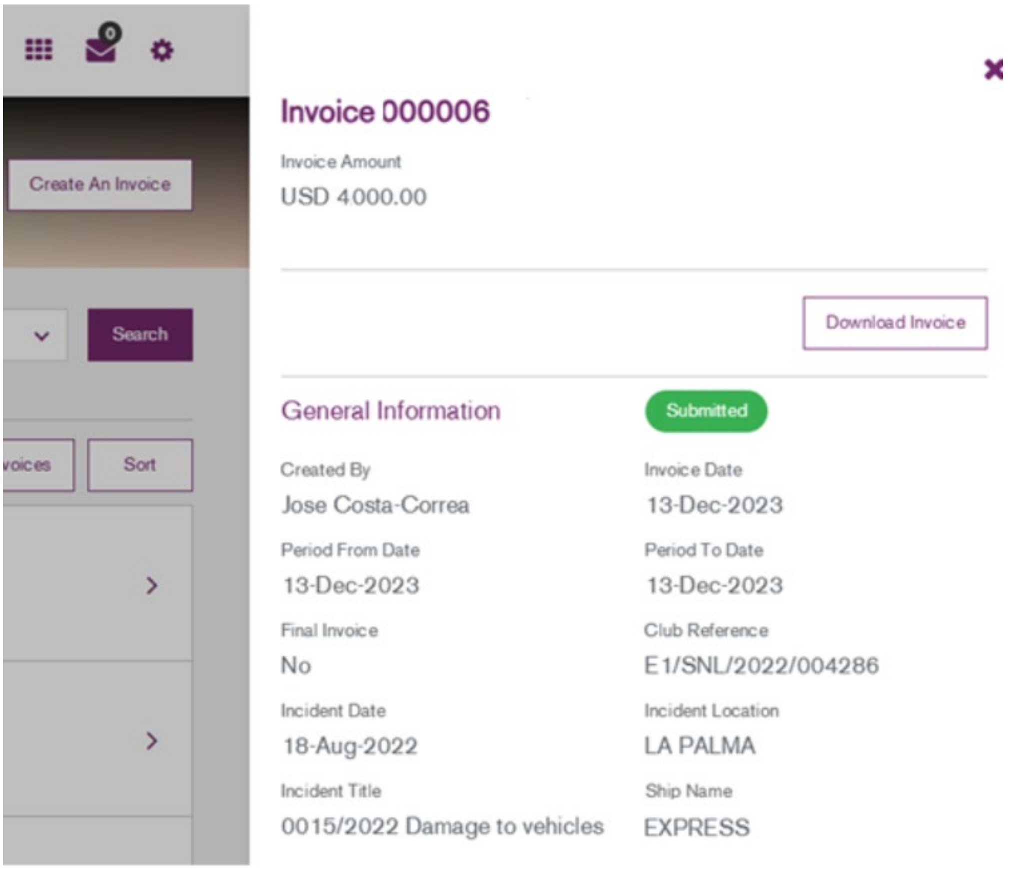
Clicking this button will produce a spreadsheet of the current selection of invoices.

Sort

Click this button to change the order that the invoices are displayed. A side-panel will open showing all available Sort options.

Download Invoice

Clicking this button will produce a PDF version of the eFeeConnect invoice.



Payment Status Tracking:

The TM Connect eFees portal displays the following stages in the payment journey:

- Submitted
- Under Review
- Pending Payment
- Paid
- Rejected (a rejection reason will appear)

Please see below example

Should you have any questions about payment status or eFees connect account, please contact our Helpdesk efee.helpdesk@thomasmiller.com