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# Network Support Grant Claim Form Guidance

Guidance for completing the NSG claim form for PSV Licence, Section 19 and Section 22 Permit operators

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### **General Information**

- The claim form must be completed and submitted electronically.
- The claim form must be submitted as an Excel file in a .xlsx file format.
- The claim form will be electronically processed Please do not modify the layout.
- Certified claims must be submitted no later than 3 months after the claim period ends.
- Estimate claims only apply to PSV operators, Section 19 and 22 Permit operators are not eligible for estimate claims.
- Accountant/Auditor Certification is not required for estimate claims but operators must complete the signature declaration.
- PSV operators are required to submit their estimate claim form as early as possible prior to the start of the financial year at 1 April.
- PSV operators are required to submit their final validation (certified) claim as soon as possible after the financial year end at 31 March.
- Section 19 & 22 Permit operators are required to submit 2 x certified claims (October and March) in line with the 13 x 4 weekly payment periods.
- If you cease trading, stop operating all services or wish to withdraw from NSG throughout the claim year, you will be required to submit your certified claim at that time.

#### **Important Information**

Since 1 April 2024, it is now one claim form for all operators and all claim types so there may be sections that are not relevant to you, however this is clearly indicated on the claim form and the guidance below details which areas apply to each operator type and how to complete them.

The new claim form was designed in line with developments in our NSG administration and validation processes which helps make claim processing and the budgeting and forecasting of this grant more efficient.

Operators will still submit claims in the same method as indicated below:

- PSV Licence Operators = Estimate (where applicable) at the start of the financial year and certified claim after the financial year ends
- S19 or/and S22 Operators = 2 x certified claims for the specified 4 weekly payment periods, Part 1 claim in October and Part 2 claim after the financial year ends.

There are new fields within the claim form that allow you to select the relevant year and claim type that is applicable to the claim you are submitting. Further information about this can be found in the claim form completion guidance below.

Please note the payment periods and period claim dates will auto-populate throughout the claim form once you have selected the relevant year on the Applicant Details tab.

#### What do I need to complete?

The claim form contains a total of 10 tabs (you may need to scroll along to see them all). Depending on whether you operate under a PSV licence, Section 22 permit or Section 19 permit will determine what tabs you must complete. The tabs relevant to each operator type are detailed below:

PSV Licence or Section 22 Permit operators should complete the following:

- Tabs 1 and 10 MUST be completed, all other tabs should be completed where applicable
  - Tab 1 Applicant Details
  - Tab 2 Non-DRT Service KMs Claim
  - Tab 3 DRT Service KMs Claim
  - Tab 4 Section 19 Service KM Claim (applies to Section 19 operators only)
  - Tab 5 Non-DRT LEB Vehicle Claim
  - Tab 6 DRT LEB Vehicle Claim
  - ✤— Tab 7 Flexi Claim (only to be completed if advised by Transport Scotland)
  - Tab 8 Additional Claim Detail (columns B-D only)
  - Tab 9 Registration Changes
  - Tab 10 Declaration

Section 19 Permit operators should complete the following:

- Tabs 1, 4, 8 and 10 **MUST** be completed, tabs 5 & 6 should be completed where applicable, all other tabs are not relevant to Section 19 operators.
  - Tab 1 Applicant Details
  - Tab 2 Non-DRT Service KMs Claim (applies to PSV & Section 22 operators only)
  - ✤— Tab 3 DRT Service KMs Claim (applies to PSV & Section 22 operators only)
  - Tab 4 Section 19 Service KM Claim
  - Tab 5 Non-DRT LEB Vehicle Claim
  - Tab 6 DRT LEB Vehicle Claim
  - ✤— Tab 7 Flexi Claim (only to be completed if advised by Transport Scotland)
  - Tab 8 Additional Claim Detail (columns F-P only)
  - Tab 9 Registration Changes (applies to PSV & Section 22 operators only)
  - Tab 10 Declaration Tab

### Tab 1 - Applicant Details Tab

All operators must complete this tab by providing their contact and claim details.

Notes which you may find helpful:

- Licence Number PSV operators should provide their company PM/PB/PC licence. Section 19 & 22 Permit operators can leave this field blank.
- Year Please select the year relevant to the end of the financial year for the claim you are submitting (e.g. 01/04/2025 31/03/2026 = Select Year 2026).
- Claim Type You must select your claim type from the list as advised below:
  - i) Request for Payment (Estimate) submission of your first estimate claim
  - ii) Request for Payment (Revised Estimate) submission of any revised estimate claims
  - iii) Final Validation (Certified) submission of your final certified claim

#### Tab 2 – Non-DRT Service KMs Claim

**PSV Licence and Section 22 Permit** operators should complete this tab if operating any regular, timetabled services (not demand responsive services).

Notes which you may find helpful:

- Non-DRT Service KMs refers to all local and long-distance services operating under a registered timetable.
- This tab is for standard kms only any incentive for low emission vehicles should be claimed on the non-DRT LEB vehicle claim tab.
- Your service number in column B should be the service number given during the registration with the Traffic Commissioner.
- Your service registration number in column C must be the full registration number including your licence number (e.g. PM1234567/1).
- Claim in respect of in column D must indicate whether the service operates under a PSV Licence or Section 22 Permit.
- KMs operated by period columns must state the total number of kilometres operated under each service, for each of the periods specified.
- Only provide details in the yellow fields all count fields will auto-populate.

### Tab 3 – DRT Service KMs Claim

**PSV Licence and Section 22 Permit** operators should complete this tab if operating any demand responsive or dial-a-ride services (not timetabled services).

Notes which you may find helpful:

- DRT Service KMs refers to all demand responsive or dial-a-ride services that do not operate to a specific timetable.
- Substantiating records of DRT kilometres operated must be provided failure to submit records will delay final calculation of your grant entitlement.
- DRT kilometres cannot be claimed on estimate and should only be included in your year-end Final Validation (Certified) Claim.
- This tab is for standard DRT kms only any incentive for low emission vehicles should be claimed on the DRT LEB vehicle claim tab.
- If your DRT service operates under more than one registration, you must provide the total KMs for each registration separately, where this is not possible only record one registration number and provide the cumulative total for all registrations.
- Only provide details in the yellow fields all count fields will auto-populate.

#### Tab 4 – Section 19 Service KMs Claim

**Section 19 Permit** operators should complete this tab to provide the total kilometres operated by all services during the specified periods.

Notes which you may find helpful:

- Section 19 Permit operators are required to submit 2 x certified claims in line with the 13 x 4 weekly payment periods throughout the claim year:
  - i. Part 1 Claim Covering periods 1 7 (Apr-Oct) (complete columns C I)
  - ii. Part 2 Claim Covering periods 8 13 (Oct-Mar) (complete columns J O)
- Provide the total kilometres operated by all services for each of the specified time periods against Section 19 Kilometres (top row row 9).
- Only provide details in the yellow fields all count fields will auto-populate.

#### Tab 5 – Non-DRT LEB (Low Emission Bus) Vehicle Claim

**All operators** should complete this tab **only** if they operate any low emission or low carbon vehicles in line with the conditions below:

- Only vehicles in operation prior to 1 April 2022 are eligible to claim the incentive vehicles introduced after this date must not be included.
- A Low Emission/Carbon Bus certificate must be provided for each vehicle claimed.
- For vehicles in service prior to 01/04/2022 that were not previously claimed in the 2020/2021 BSOG estimate claim, and were not in receipt of emergency Covid payments, the 5 year incentive start date will be 01/04/2022. Where the period emergency Covid payments included these vehicles, this will generally count towards the total entitlement period. Exceptions to this may occur, such as those buses purchased through the SULEB scheme.
- The kilometres being recorded represent only when the vehicle was used to operate a standard, scheduled or timetabled service (not demand responsive).
- Only provide information in the yellow fields all count fields will auto-populate.

#### Tab 6 – DRT LEB (Low Emission Bus) Vehicle Claim

**All operators** should complete this tab **only** if they operate any low emission or low carbon vehicles in line with the conditions below:

- Only vehicles in operation prior to 1 April 2022 are eligible to claim the incentive vehicles introduced after this date must not be included.
- A Low Emission/Carbon Bus certificate must be provided for each vehicle claimed.
- For vehicles in service prior to 01/04/2022 that were not previously claimed in the 2020/2021 BSOG estimate claim, and were not in receipt of emergency Covid payments, the 5 year incentive start date will be 01/04/2022. Where the period emergency Covid payments included these vehicles, this will generally count towards the total entitlement period. Exceptions to this may occur, such as those buses purchased through the SULEB scheme.
- The kilometres being recorded represent only when the vehicle was used to operate a demand responsive or dial-a-ride service (not scheduled/timetabled)
- Only provide information in the yellow fields all count fields will auto-populate.

Should you have any queries about the low emission vehicles incentive, please email us at <a href="mailto:schemesandgrants@transport.gov.scot">schemesandgrants@transport.gov.scot</a>

## Tab 7 – Flexi Claim

This tab is for our internal use only, you do not need to complete this unless asked to by us.

#### Tab 8 – Additional Claim Detail

This tab is divided into two sections – Subsidised & Support Services and Section 19 Additional Claim Information and should be actioned as follows:

- Subsidised & Supported Services **PSV & Section 22 operators** should complete columns B D if they operate any subsidised or supported services.
- Section 19 Additional Claim Information **Section 19 Permit** operators must complete columns F P.

#### Subsidised or Supported Services:

- The same service number and service registration number as previously given should be used to provide details for each subsidised or supported service you operate.
- Please specify the full name of the Public Body you operate the service on behalf of or in partnership with.

#### Section 19: Additional Claim Information:

Permit Info:

- You must hold a valid Section 19 permit for the full period which you are claiming.
- You must provide the permit number (commonly starts with SP) and the valid from and valid to dates for each Section 19 permit you hold.
- You must confirm the issuing authority from who you received your permit(s).

#### Passenger Type:

- You must specify the category of passengers you carry on your services to the best of your knowledge.
- You must give an estimate of the percentage of persons carried for each category.

### Tab 9 – Registration Changes

**PSV Licence and Section 22 Permit** operators should complete this tab if any service registration changes have occurred throughout the claim period. Please provide as much detail as possible in the relevant section where your service changes are applicable.

Notes which you may find helpful:

- Change of Registration or Service Number (columns N to R) where an existing service has been re-registered with the Traffic Commissioner under a new registration or service number.
- Services Operating Across Depots (columns T to Z) where total kms for one service are split and claimed across depots and not claimed as total kms for the whole route.

#### Tab 10 – Declaration

This tab is divided into two sections – Operator Declaration and Accountant/Auditor Certification and should be actioned as follows:

Operator Declaration:

- All operators must complete the declaration.
- You must complete all of the green fields in column C.
- Your form must be signed by a witness, this person does not have to be a member of your company, a family member or friend can complete this.
- Signatures do not have to be original, we can accept an electronic signature or a typed name in this field.

Accountant/Auditor Certification:

- All PSV licence operators must have their final claim certified by a registered and qualified accountant or auditor (this is not required for estimate claims).
- Section 19 & 22 Permit operators must have their claim certified by a registered and qualified accountant where their claim is for 20,000 kms or more, for claims less than 20,000 kms this can be self-certified by completing the Operator Declaration.
- Where the claim is certified by an accountant or auditor, confirmation of audit checks completed must be provided in cell F10.
- Claims must be certified by an accountant who is independent to your organisation with the exception of local authorities where the accountancy department is independent to that which is submitting the claim.



Network Support Grant provided by the Concessionary Travel and Integrated Ticketing Unit, Transport Scotland.

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For any queries or assistance please email the team at schemesandgrants@transport.gov.scot

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