

Active Travel – Quarterly Claim Forms (The Annexes):

Application Guidance for the completion & submission of the ATF Quarterly Claims Forms (The Annexes)

December 2022

A picture containing bicycle, outdoor

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This guidance has been prepared by Transport for Wales for Local Authorities. Its purpose is to provide Guidance for the completion & submission of the ATF Quarterly Claims Forms (The Annexes). For enquiries or any issues with access to our Portal please contact the TfW Grant Management team by emailing: [grants@tfw.wales](mailto:grants@tfw.wales)

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# **Logging into the Portal**

**To complete/ Upload your Quarterly Claim forms you will need to Log in to the Portal** [**here**](https://trcsrg.powerappsportals.com/SignIn?returnUrl=%2F)

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*If you are encountering problems or are unable to access your online account,*

*please contact the TfW Grant Management Team* [*grants@tfw.wales*](mailto:grants@tfw.wales)

**Click the Active Travel Quarterly Returns (All Applications) button**

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# **Annex A**

**In preparation for the completion of your Quarterly Returns, the** [**grants@tfw.wales**](mailto:grants@tfw.wales) **team will have created, populated, and posted your Annex As onto the portal for you based on the information provided in your previous claim.**

*Meaning you will no longer need to create these and will simply have to update the information provided in line with project progress.*

**Your pre-populated Annex A’s will be Live in the system for your review and editing on the 15th of the month before your quarterly submission deadline.**

|  |  |  |
| --- | --- | --- |
| **Quarter** | **GO -LIVE** | **Completion Deadline** |
| Q1 | 15th June | 15th July |
| Q2 | 15th September | 15th October |
| Q3 | 15th December | 15th January |
| Q4 | 15th March | 30th April |

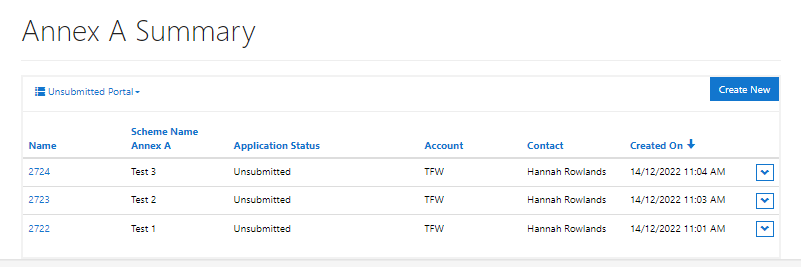
**If you have not already done so, please follow the steps to login into the portal.**

**Now select Annex A list as shown below**

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**On the next screen you will be taken to a list of ‘Unsubmitted’ Annex’s. Below are some examples.**



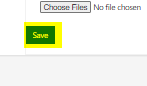
**Using the drop-down arrows on the right-hand side of each project you will be able to select to View/ Edit the Annex for that specific project.**

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**Make the necessary amendments to the Annex**

**Once you have finished completing or editing the form, scroll right down to the bottom of the Annex and click Save**



**You can go in & out of the Annex As to edit them as many times as you would like until you are ready to submit – at which point you will need to click the down arrow (as shown in Step 3c above) and select ‘Submit Application’**

*Note: Once you have selected ‘Submit Application’ – you will no longer be able to update the Annex yourselves. Email requests can be sent to* [*grants@tfw.gov.uk*](mailto:grants@tfw.gov.uk) *mailbox for amendments to be made on your behalf.*

# **Annex B**

**In preparation for the completion of your Quarterly Returns, you will receive an email from the** [**grants@tfw.wales**](mailto:grants@tfw.wales) **team containing your latest Annex B, C & a blank Annex E**

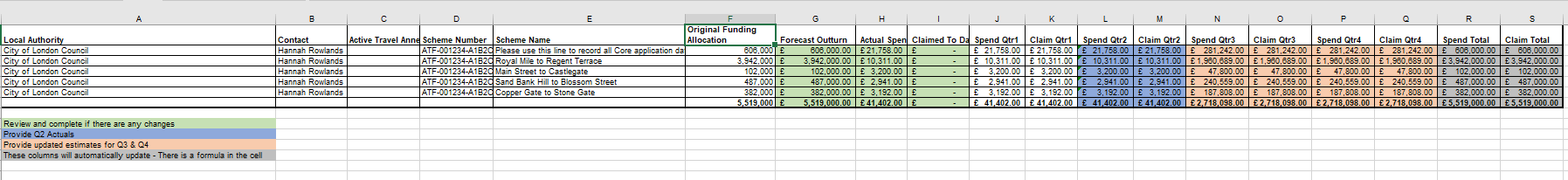
**For Annexes B & C there will be sections that are highlighted, along with a Key so that you can easily identify where your input is required.**

**Email Example:**

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**Annex B example:**



**Take a closer look at the key:**

Graphical user interface, text

Description automatically generated

**Once your amendments have been made, click to SAVE the file to your desktop and move to the Portal** [**here**](https://trcsrg.powerappsportals.com/SignIn?returnUrl=%2F)

*(For instructions on how to login to the Portal please go to Step 1. Logging in to the Portal)*

**On the Homepage you’ll need to click the ‘Active Travel Quarterly Returns (All Applications)’ button.**

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**Click Annex B Upload**

Graphical user interface, text, application

Description automatically generated

**On the next page click the ‘Choose file’ button ready for your file to be uploaded**

Graphical user interface, text, application, email

Description automatically generated

**Select the relevant file for upload > Click Open**

Graphical user interface, text, application

Description automatically generated

**Make sure that the file has been uploaded by reviewing the file name that appears under the Attach File heading. If the correct file has been uploaded, click Submit**

Graphical user interface, text, application, email

Description automatically generated

**You have now successfully uploaded your Annex B**

# **Annex C**

**In preparation for the completion of your Quarterly Returns, you will receive an email from the** [**grants@tfw.wales**](mailto:grants@tfw.wales) **team containing your latest Annex B, C & a blank Annex E**

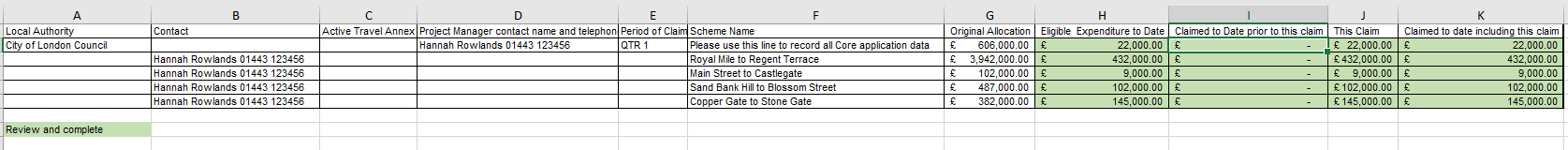
**For Annexes B & C there will be sections that are highlighted, along with a Key so that you can easily identify where your input is required.**

**Email Example:**

Graphical user interface, text, application, email

Description automatically generated

**Annex C example:**



**Take a closer look at the key:**

Table

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**Once your amendments have been made, click to SAVE the file to your desktop and move to the Portal** [**here**](https://trcsrg.powerappsportals.com/SignIn?returnUrl=%2F)

*(For instructions on how to login to the Portal please go to Step 1. Logging in to the Portal)*

**On the Homepage you’ll need to click the ‘Active Travel Quarterly Returns (All Applications)’ button.**

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**Click Annex C Upload**

Graphical user interface, text, application

Description automatically generated

**On the next page read the declaration and select Yes**

**Click the ‘Choose file’ button ready for your file to be uploaded**

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Description automatically generated

**Select the relevant file for upload > Click Open**

Graphical user interface, text, application

Description automatically generated

**Make sure that the file has been uploaded by reviewing the file name that appears under the Attach File heading. If the correct file has been uploaded, click Submit**

Graphical user interface, text, application, email

Description automatically generated

**You have now successfully uploaded your Annex C**

# **Annex E**

**In preparation for the completion of your Quarterly Returns, you will receive an email from the** [**grants@tfw.wales**](mailto:grants@tfw.wales) **team containing your latest Annex B, C & a blank Annex E.**

**As mentioned above, unlike Annexes B & C, the Annex E will be blank.**

**It is in the Annex E that you will be required to list your expenditures.**

*Note: If a nil claim is to be submitted – No Annex E is required (but an Annex C will still be required)*

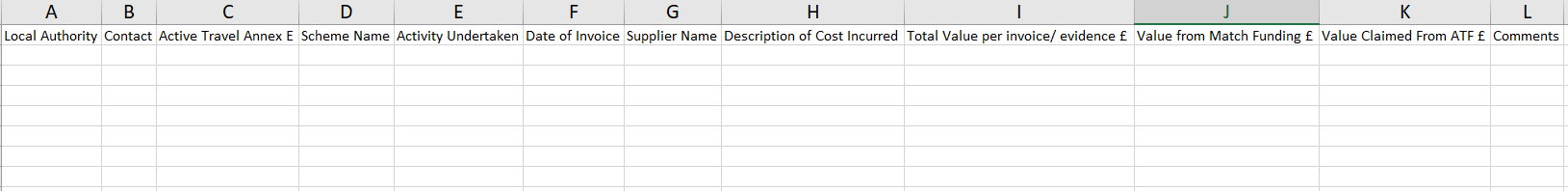
*Copies of Invoices must be provided for any invoices over 40k.*

**Example Email:**

Graphical user interface, text, application, email

Description automatically generated

**Example Annex E:**



**Once your amendments have been made, click to SAVE the file to your desktop and move to the Portal** [**here**](https://trcsrg.powerappsportals.com/SignIn?returnUrl=%2F)

*(For instructions on how to login to the Portal please go to Step 1. Logging in to the Portal)*

**On the Homepage you’ll need to click the ‘Active Travel Quarterly Returns (All Applications)’ button.**

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**Click Annex E Upload**

Graphical user interface, text, application, email

Description automatically generated

**Select the relevant file for upload > Click Open**

Graphical user interface, application

Description automatically generated

**Make sure that the file has been uploaded by reviewing the file name that appears under the Attach File heading. If the correct file has been uploaded, click Submit**

Graphical user interface, text, application, email

Description automatically generated

**You have now successfully uploaded your Annex E**