Plug-in vehicle grant portal

User Guidance Manual
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1. Background

1.1 The plug-in vehicle grant scheme ('the PIVG scheme') is a technology-neutral consumer incentive scheme designed to support the uptake of zero and ultra-low emission vehicles (ULEVs) by providing grants for eligible plug-in vehicles ('grants'). It was launched in 2011 to support ultra-low emission cars as part of a package of government measures to achieve the UK’s carbon reduction target, by reducing upfront costs. The grants have since been extended to support eligible vans, trucks, motorcycles and taxis.

1.2 The PIVG scheme is a key policy measure to stimulate the demand and supply of ULEVs in the UK. It is administered by the Office for Zero Emission Vehicles (OZEV), formerly known as the Office for Low Emission Vehicles, a government unit which supports the transition to zero emission vehicles.

1.3 The PIVG scheme portal ('the portal') allows dealers to submit the required information about the vehicle for which a grant is being claimed, and the customer who is purchasing it, to be collected at the point of sale. It also allows all claims to subsequently be verified before any grant is paid out. OZEV then repays grant claims to vehicle manufacturers on a monthly basis.

1.4 The system has been designed and is managed by the Driver and Vehicle Licensing Agency (DVLA), hereafter referred to as the Scheme Administrators, on behalf of OZEV.

1.5 Under the PIVG scheme, consumers pay the discounted price automatically, and do not have to go through a separate application process. Only dealers and manufacturers need to access the portal directly.

What the scheme offers

1.6 The PIVG scheme offers grants off the price of eligible vehicles. The current grant rate available for each kind of vehicle can be found online here.

1.7 The PIVG scheme is available to all private individuals and businesses buying or leasing a vehicle at the point of purchase directly from the dealership or manufacturer.
2. Summary - Important Information

Per customer grant limits

2.1 There are limits on the total number of grants available to each business, organisation or individual through the Plug in Van and Truck grants per financial year (1 April to 31 March). **Limits apply to end customers and not to lease companies.**

2.2 It is the responsibility of the portal user to check with their customer how many grants they have already applied for in the relevant year (including orders for vehicles which they placed with other manufacturers or dealers) before committing to selling the vehicle with the grant included.

2.3 For lease orders, the lease company must check with their customer how many grants they have applied for in the relevant year to provide assurance to the portal user that their customer has not exceeded the order limit and is therefore eligible for the grant on orders being placed.

2.4 Orders in excess of the allowed limits will be cancelled or the grant rate amended to the applicable rate by the scheme administrators. These limits are as follows:

- Each business, organisation or individual may receive up to 1000 Plug in Van and/or Truck grants per financial year subject to the following limits:
  - **Small Truck Grant** - Each business, organisation or individual may receive up to 10 Small Truck grants per financial year at £16,000 (please note there are a total of 250 small truck grants available across the whole market per financial year). If either of these limits have been reached, the grant will be paid at the large van rate of £5000. Please email PluginGrants@dft.gov.uk to check how many of the total 250 small truck grants remain.
  - **Large Truck Grant** - Each business, organisation or individual may receive up to 5 Large Truck grants per financial year at £25,000 (please note there are a total of 100 large trucks grants available across the whole market per financial year). If either of these limits have been reached, the grant will be paid at £16,000. Each business, organisation or individual can get up to 10 grants at the £16,000 rate. There are 250 grants of up to £16,000 available. After that limit is reached, the maximum a company, organisation or individual can apply for is £5000 subject to the 1000 grants per customer limit. Please email PluginGrants@dft.gov.uk to check how many of the 100 total large truck grants remain.

2.5 To ensure that the 5 or 10 per customer limits are applied correctly, **the grant rate on the Plug in Grant portal for newly created Plug in Truck Grant Applications will default to £5000.** DVLA will manually amend to the grant to the correct rate after
the order has been created. This is to mitigate the risk that grants are paid at the higher rate in excess of the allowed limits.

2.6 Portal users should note that once grant rates have been adjusted to the £25,000 or £16,000 rate as applicable, any amendments to the order will cause the grant rate to automatically default back to the £5000 grant rate. If this occurs please contact the portal administrators at pluginvehiclegrant@dvla.gov.uk as soon as possible and the grant rate will be amended to the correct level.

2.7 A linked enterprise is one where a group of enterprises such as businesses or companies are sufficiently linked such that they should be treated as a single undertaking. Please note that we will treat linked enterprises as an ‘undertaking’ for the purpose of enforcing per company or organisation limits see clauses 3.20 to 3.26 for a definition of linked enterprise. Portal users must secure confirmation from their customers that they understand this definition when checking total orders already placed by the business in the relevant year. OZEV reserve the right to recoup grant funds if evidence shows that an end customer has exceeded the cap.

Wheelchair accessible vehicle grant limit

2.8 There are a total of 250 wheelchair accessible vehicle grants available at £2500 subject to a £35,000 price cap until 31 March 2022 and a further 1000 available between 1 April 2022 and 31 March 2023. Please email PluginGrants@dft.gov.uk to check how many grants remain.

Ensuring validation of orders (and grant payment):

2.9 Orders can only be validated if ALL of the vehicles within the order:

- Have a VIN (Vehicle Identification Number) listed. Dealers should check this has the correct transposition of numbers and letters (e.g. Z instead of 2 or 7).
- Have been registered with the DVLA
- Have the correct vehicle registration number (cherished plate details should be entered if they are going to be used when the vehicle is registered)
- Have a correct date of registration (which matches data on the DVLA database)

2.10 Reasons why orders may not progress to ‘orders awaiting payment’ (ie are currently have either ‘awaiting validation’ or ‘failed validation’ status):

- One or more of the vehicles within the order have not yet been registered with the DVLA. The order validation process uses the DVLA registration database, so this source can be consulted by dealerships if in any doubt
- The correct registration number may have been entered at time of purchase, but the customer may since have registered the vehicle using a cherished plate. Dealerships can ask at the point of sale whether a cherished plate is going to be used
- An incorrect Registration number has been entered
- An incorrect Date of Registration has been entered
- The fuel type does not match
- Incorrect model variant selected which has differing CO₂ emission values
Supplementary evidence

2.11 Orders for certain types of vehicle will require supplementary evidence to be provided before the grant can be paid. The evidence below should be provided on or before registration details are added to the portal. We will place orders in these categories into On Hold status if this information is not provided. Vehicle requiring supplementary evidence are as follows:

Multi Stage Build Vehicles

Please provide a completed stage two form (see Plug-in Van Grant application guidance) confirming the range of the vehicle to ozev.support@vca.gov.uk including the grant portal Order ID in the subject of your email.

Wheelchair Accessible Vehicles

Portal users must provide evidence of that the vehicle has been converted to wheelchair accessible for the order to progress to payment. Vehicles must be converted before first registration. Accepted documentation is either:

- A copy of the UK Individual Vehicle Approval (IVA) certificate, whereby its Class Code confirms the vehicle is a WAV;

OR

- A copy of the EC or UK/NI or GB Certificate of Conformity (CoC), whereby sections relating to Bodywork and Special Purpose Vehicles confirm the vehicle is a WAV.

AND

Photographs of each completed vehicle as evidence of the conversion. This should clearly show the following:

- The registration plate
- The vehicle identification number
- That it has been converted to wheelchair accessible

The above documentation should be sent to pluginvehiclegrant@dvla.gov.uk with the grant portal Order ID in the subject of the email.

It is the dealer’s responsibility to liaise with vehicle converters, and supply the required evidence to DVLA, when claiming the wheelchair accessible vehicle grant.

Retrospective claims

2.12 Grants must be claimed before registration. This means that the order must have been successfully saved on to the portal before the vehicle is registered with the DVLA. This applies for all vehicles, including demonstration models.

2.13 The grant can only be claimed retrospectively (i.e. after a vehicle has been registered) in exceptional circumstances. Allowing retrospective claims is at OZEV’s discretion. We will not consider claims older than 6 months. Claims not deemed to be caused by exceptional circumstances will not be allowed from a single dealership more than once. This position can be updated at any time at OZEV’s discretion.
Grant level and lead times

2.14 To secure the grant, an order should be started as soon as a ‘contract’ has been signed with the customer.

2.15 A grant is not guaranteed until the vehicle has been validated through the portal. However, provided that the vehicle is registered, delivered to the customer and the order reaches "completed", "awaiting payment" or "awaiting audit" status on the grant portal within 9 months of the date the order is made, any order placed on the system for a specific customer is guaranteed the grant at the level advertised at the time the order was placed on the grant portal.

2.16 It is the dealer's responsibility to track orders and ensure they are progressing through the system by completing orders correctly. Orders that have been in the system for more than 9 months and have not reached "completed", "awaiting payment" or "awaiting audit" status will be cancelled by the portal administrators. Such orders will normally enter "on hold" status once they have been in the system for more than 9 months. Such orders will not be reinstated except in exceptional circumstances and at OZEV's discretion.

2.17 Orders in "awaiting audit" status will only proceed to payment when the audit checks are completed and passed. The documents requested for audit purposes should be provided within 28 days of the request. If documents are not provided for audit within the 28 consecutive days of the request and the order has exceeded the 9 month completion deadline by more than 28 consecutive days, the order will be cancelled.

2.18 The claim cannot be added to the portal before the contract with the customer has been entered into or after the vehicle has been registered.

Who to Contact

2.19 Dealerships should contact their manufacturers in the first instance and then the Scheme Administrators at PluginVehicleGrant@dvla.gov.uk. They should not contact OZEV directly.

2.20 Manufacturers should contact OZEV with any queries that can’t be answered by the Scheme Administrators at pluggingrants@dtf.gov.uk.
3. General information on claiming plug-in grants

3.1 PIVGs are available to all private individuals and businesses buying or leasing a new vehicle at the point of purchase directly from a dealership or manufacturer in the UK.

Definition of price

3.2 The PIVG will be taken off the purchase price of the vehicle (please note that the plug-in car grant price cap is different and is applied on the basis of RRP including VAT. Please see our Plug in Car Grant Application Guidance for a full definition). For private, business, fleet or demonstration models the purchase price means the actual price paid by the customer, including any discount, not the recommended retail price. This definition of purchase price includes:

- Number plates
- Vehicle excise duty (as applicable)
- VAT (as applicable)
- Any discount (including rebates and manufacturer discounts)

And excludes:

- Any optional extras
- Delivery charges
- First registration fee.

3.3 Any discount (including rebates) offered on the vehicle to the customer by either the dealer or the company must be applied to the price before the application of the grant. For internal manufacturer sales, where a vehicle is retained by the company (e.g. loaned to companies or organisations for trial purposes or for own use), purchase price refers to the Recommended Retail Price (RRP) of the vehicle, including and excluding the items referred to above.

3.4 In this case, where the actual purchase price of the vehicle is lowered for internal transaction purposes the grant should be applied on the RRP of the vehicle. For all these types of sales OZEV will require notification of when an order has been put into the system, in the form of an email with a list of the vehicles, and will need sight of an example invoice before the first transaction is made (see Annex A for sample invoice).

Purchase price calculation:

\[
\text{Purchase Price (inclusive of VAT)} = \text{Basic Rate} + \text{VED} + \text{Number Plates} - \text{New vehicle discounts}
\]
Which vehicles are eligible for the grant

3.5 All vehicles must have been confirmed by OZEV as eligible under the rules of the PIVG scheme in order to receive the grant. If a vehicle does not appear on the list of eligible vehicles on the portal then portal users should query this with the manufacturer. Orders created for the wrong vehicle will fail validation and will be cancelled except in exceptional circumstances at OZEV’s discretion.

3.6 A list of the vehicle that are currently eligible for the grant, and the category into which they fall, is available at the following link: www.gov.uk/plug-in-car-van-grants/eligibility.

3.7 This list is frequently updated as new vehicles come to market and older vehicles are withdrawn from sale.

Portal user responsibilities

3.8 Users must read, understand and comply with the terms and conditions/legal notices associated with the use of this system. All users should be aware that:

- It is the dealer’s responsibility to reduce the price of the vehicle by the appropriate grant amount and ensure the price paid by the customer reflects their full entitlement.

- It is the dealer’s responsibility to promptly provide true and accurate information as required by the system, to enable manufacturers to make their grant claim. Dealers are also expected to provide any necessary documents as further evidence for audit as and when required.

- It is the dealer’s responsibility to review the status of their orders using the filter functionality on the grant portal and progress orders promptly where required.

- It is the dealer’s responsibility to ensure that their end customer has not exceeded the 1000 order annual limit which applies to orders for the Plug in Van and Truck grants. Dealers must also check that end customers have not exceeded the 5 and 10 per customer limits which apply to the large and small truck grants. Any claims made in excess of these limits will be cancelled by the portal administrators or amended to the correct grant rate as applicable.

- It is the dealer’s responsibility to ensure that end customer details have been provided for all lease company orders (Private and business users). This should be the confirmed end customer and not the lease company. Any claims made without this information or found to contain the wrong customer details will be cancelled.

- Arrangements for the reimbursement of the grant amount to dealers are the responsibility of the vehicle manufacturer and the dealer – neither OZEV nor the portal administrators have any responsibility for this process.

- Manufacturers will have full view of orders for all of their vehicles - dealers should therefore expect to discuss claims with their manufacturers.

- Where a model straddles the plug-in car or motorcycle grant price caps each model with a variant or trim with RRP below the cap will be listed separately on the list of eligible vehicles in the OZEV grant portal. It is the responsibility of dealers and
manufacturers to ensure that where a grant eligible vehicle model straddles the plug-in car or motorcycle grant price cap, orders for variants or trims of the model which are priced above the cap and are therefore ineligible for the grant are not created on the grant portal. Any order placed for a vehicle found to be priced above the cap will be cancelled.

- Manufacturers are responsible for checking monthly claims to ensure that all vehicles are eligible for the grant and that the grant value is correct. OZEV will ensure that vehicles claiming the grant are eligible through our audit process.

- It is the dealer’s responsibility to liaise with wheelchair accessible vehicle converters, and supply the required evidence to DVLA, when claiming the wheelchair accessible vehicle grant.

**Lease Orders/Vehicles**

3.9 It is the dealer's responsibility to ensure that end customer (the customer of the lease company not the lease company themselves) details have been provided for all lease company orders whether private or business purchases. Any claims made without this information or found to contain the wrong customer details will be cancelled. The end customer name may not be changed once the order has been created.

**Export Vehicles**

3.10 To be eligible for the grant, vehicles must be registered in the UK and the customer must have paid UK Value Added Tax (VAT) on the vehicle. This excludes claims from vehicles registered under the personal export, new means of transport and direct export schemes.

3.11 For these purposes, registration is defined as referred to in section 21 of the Vehicle Excise and Registration Act 1994 and licensed for use on UK roads, or registered under the terms of the Diplomatic Privileges Act 1964 and licensed for use on UK roads. Members of the British Armed forces living abroad will still be eligible to claim for the PIVG and can use their BFPO postcode. British diplomats living abroad or foreign diplomats living in the UK are also still eligible to claim for the PIVG.

**Diplomatic Vehicles**

3.12 Diplomatic vehicles and vehicles with export plates will not validate automatically with the DVLA vehicle records database and will need to be manually validated by the scheme administrators. If you are claiming for a diplomatic vehicle then please contact PluginVehicleGrant@dvla.gov.uk to make them aware.

**Grant Payment**

3.13 Grants are paid by OZEV directly to vehicle manufacturers or their UK representative. OZEV conduct the payment run on a monthly basis, usually on the eighth day of the month or the nearest working day. On the day of the payment run, OZEV will contact manufacturers to set out the grant claims expected to be made. Manufacturers are responsible for submitting claims for payment to OZEV within five working days following the payment run. Any discrepancies with orders must be reconciled before
OZEV pay claims. Manufacturers will push back any incorrect claims to “In Pipeline” at this stage. Manufacturers will push the status of claims back if any of the order details entered into the portal differ from the manufacturer’s internal system. This could be vehicle model, VIN, registration number or pricing issues. The manufacturer will normally receive payment for claims within fifteen working days from when the claims have been approved. The manufacturer is responsible for arranging payment to individual dealers.

3.14 If you have an order that has reached ‘Completed’ status and have not yet received payment, please contact your manufacturer to find out when payment will be made. The scheme administrators are not in the ‘OZEV to manufacturer’ or ‘manufacturer to dealership’ payment process and will be unable to assist in payment queries.

3.15 If you have an order that has reached ‘Awaiting Payment’ status, the order must be included in a monthly pay run to reach ‘Completed’ status before a payment is pending. Orders will need to enter ‘Awaiting Payment’ by the end of the previous month to catch the next scheduled pay run.

Audit

3.16 The portal will select 5% of orders which have been validated for audit. When an order has been selected for audit the status will change to ‘Awaiting Audit’, the dealer is require to send corresponding invoices to PluginVehicleGrant@dvla.gov.uk to review the information that has been entered into the portal.

3.17 If an order is selected for audit, dealers must respond within 28 consecutive days. Dealers should provide an invoice on headed paper which includes the following information:

- retailer information, name and address, VAT number and company registration number
- The baseline price itemised to show the VAT, number plates, less any discount offered to the customer
  The grant amount shown separately

3.18 These audit requirements apply to demonstrator vehicles. Invoices must be provided for these vehicles and consignment notes are not acceptable.

3.19 The audit check is to confirm that:

- Vehicle and customer details match the online system and DVLA Vehicle record database
- The price of the vehicle stated on the customer invoice matches the order on the portal
- The correct grant amount has been applied
- Optional extras have been itemised separately and do not feature in the pre-grant amount
- The vehicle is eligible for the grant - where a car or motorcycle model has variants or trims which straddle the price cap
Linked Enterprise Definition for Applying Plug in Van and Truck Grant Limits

3.20 To ensure fair distribution there are limits on the total number of grants available to each business, organisation or individual through the Plug in Van and Truck grants per financial year (1 April to 31 March). Limits apply to end customers and not to lease companies.

3.21 Where a number of enterprises are sufficiently linked that they meet the linked enterprise definition of a 'single undertaking' below we will treat them as one business for the purpose of applying the cap. Portal users should ensure that their customers understand the definition below when checking that their orders do not exceed the annual cap:

3.22 A group of linked enterprises will be treated as a ‘single undertaking’ when either:

(a) one enterprise has a majority of the shareholders’ or members’ voting rights in another enterprise

(b) one enterprise has the right to appoint or remove a majority of the members of the administrative, management or supervisory body of another enterprise

(c) one enterprise has the right to exercise a dominant influence over another enterprise pursuant to a contract entered into with that enterprise or to a provision in its memorandum or articles of association

(d) one enterprise, which is a shareholder in or member of another enterprise, controls alone, pursuant to an agreement with other shareholders in or members of that enterprise, a majority of shareholders’ or members’ voting rights in that enterprise

3.23 Enterprises having any of the relationships referred to in points (a) to (d) through one or more other enterprises will also be considered to be a single undertaking.

3.24 Enterprises which have one or other of such relationships through an natural person or group of natural persons acting jointly are also considered linked enterprises if they engage in their activity or in part of their activity in the same relevant market or in adjacent markets.

3.25 For applicants that are part of a single undertaking, the maximum annual limit of 1000 Plug in Van Grant orders per end customer and the per customer Plug-in Truck Grant limits apply to the entire single undertaking.

3.26 Where considered necessary, OZEV reserves the right to request further information or documentary evidence from relevant parties to verify whether orders arose from a single undertaking and therefore check that claims are eligible for the grant. OZEV reserve the right to recoup grant funds if evidence shows that an end customer has exceeded the cap.
Overview of Process

- Order vehicle from the dealership
- Dealership checks whether end customer orders exceed annual Plug in Van/Truck Grant per customer limits (if applicable)
- Receive grant in the form of a reduced purchase price
- Create an order including end customer details and vehicle details
- Administer the portal on behalf of OZEV
- Undertake casework activities related to a grant order
- Liaise with dealerships to resolve issues with orders
- Check order numbers per end customer – cancelling any orders made over annual limits.
- Check valid end customer details provided and per customer limits not exceeded and adjust grant rates or cancel orders where necessary
- Undertake audit activities
- Reinstate orders upon instruction from OZEV
- Remove orders from ‘On Hold’ status upon instruction from OZEV
- Generate monthly payment run from orders in ‘awaiting payment’ status
- Send vehicle order details to manufacturers to check
- Grant payments to manufacturers after orders have been checked
- Check vehicle order details raised via dealerships
- Distribute grant payments to dealerships once received from OZEV
Dealer takes formal order from customer and creates a new order through the portal.

Order created on portal and attributed to dealer worklist.

Vehicle Identification Number (VIN) added to order details.

Vehicle Registration Mark (VRM) and date of first registration added to order details.

Vehicle order details automatically checked against DVLA Vehicle Enquiries Service.

5% of orders automatically selected for audit.

Orders successfully checked against DVLA Vehicle Enquiry Service.

Actual delivery date added to order.

Payment file downloaded by OZEV.

Message Displayed on Portal

IN PIPELINE

AWAITING REGISTRATION

AWAITING VALIDATION

PASSED VALIDATION

FAILED TO CASEWORK

FAILED VALIDATION

AWAITING AUDIT DOCUMENTATION

AUDIT IN PROGRESS

AUDIT SUCCESS

AUDIT REJECTED

VALIDATED PENDING DELIVERY

AWAITING PAYMENT

COMPLETED
4. Using the PIVG Portal

System access

4.1 The portal is part of a secure website, developed and managed with a high level of security and data protection. Existing dealerships and manufacturers will be able to logon to the portal using current usernames. Upon first logon, users will be prompted to choose a new password to use for the portal.

4.2 New manufacturers will need to contact OZEV via plugingrants@dft.gov.uk in order to have portal credentials and permissions created. New dealerships should speak to their manufacturer in the first instance in order to have appropriate access created for them to logon to the portal. All new user account requests must be received directly from manufacturers. There is no limit to the number of administrative users can be linked to one dealer account. Dealers should ensure that there are sufficient staff with access to and knowledge of how to use the portal to enable management of orders at all times.

Alt text: Plug-in vehicle grant portal log-in page.

4.3 Users will be asked to read and accept the Terms and Conditions of use of the system upon first logon and whenever any subsequent changes are made to the Terms and Conditions.

4.4 If you have any issues with logon, please contact: PlugInVehicleGrant@dvla.gov.uk
Logging-in to the portal

4.5 When connected to the internet, enter the portal web address:
https://www.gov.uk/guidance/apply-for-a-plug-in-vehicle-grant Click ‘Log in to the plug-in grant service’ enter your Username and Password and click ‘Login’

4.6 Your ‘Username’ is your email address and to set a password click ‘Forgotten password’ and follow the instructions in order to do so for first time log-ins

4.7 Each portal administrator must have their own individual user account, usernames and passwords should not be shared as this a breach of security and Data Protection.

4.8 Please note user accounts can only be linked to one dealer account at a time; there is no facility to create multi-dealer access. Users that require access to more than one dealer account are required to provide additional e-mail addresses to create new user accounts.

Queries

4.9 In order to communicate with administrators of the system please email PlugInVehicleGrant@dvla.gov.uk who will respond to your query within 5 working days for enquiries and 10 days for audits. The claim system email address is monitored daily excluding weekends and bank holidays.

4.10 Please contact your manufacturer if your dealership is not registered on the system or if you are unsure what information to put into the fields relating to make / model of the vehicle.

Plug-in vehicle grant dashboard

4.11 Please note for the best experience of the service please ensure that Javascript is enabled on your web browser.

4.12 After successful logon to the portal, dealers will be presented with a dashboard overview. The dashboard provides a summary of the status of all orders and claims made by the dealership. Dealerships outside your business group will not be able to see your orders.

Locking out of the system

4.13 If your login details are not recognised after a number of attempts, the system will automatically lock you out. After a time lapse of 30 minutes you will be able to attempt login again. During this time you will not be able to reset your password. If after the time-lapse you are still not able to login, please email PlugInVehicleGrant@dvla.gov.uk to have your account unlocked.
Plug-in vehicle grants overview

Start a new grant application:
Allows users to create a new order for a grant application.

Download applications list:
Allows users to download a .csv file of all orders shown on the dealership dashboard. The file download is limited to 2000 rows. Dealerships are advised to facilitate regular downloads if a longer-term view of orders is required.

Order ID:
Allows users to search the dashboard for a particular order ID.

Status:
Allows users to select and view orders attributed to a particular status.

Date filter:
Allows users to search for orders within a particular date range.
4.14 The portal attributes a status to vehicle orders depending upon where they are within the order process. An explanation of each status is as follows:

- **In Pipeline** – the order has been created but before the Vehicle Identification Number (VIN) has been attributed to the order.

- **Awaiting Registration** – the order has had the VIN assigned but is currently waiting for the Vehicle Registrations Mark (VRM) and the date of first registration to be attributed. Orders should remain in this status until registration with DVLA is complete.

- **Awaiting Validation** – once vehicles are registered with DVLA, the vehicle details given in the order are checked against the DVLA vehicles record database.

- **Failed Validation** – the order has failed validation checks against the DVLA vehicles record database. The dealer will be notified with reasons explaining why the order failed validation. Orders containing up to three vehicles will undergo real-time validation. Orders of over three vehicles will undergo an overnight check against DVLA’s Vehicles Enquiry Service (VES). Orders will not progress to the next status until ALL vehicles within the order have been successfully validated.

- **Passed Validation** – a transient state where the order has passed validation and before it moves on to ‘Pending Delivery’

- **Pending Delivery** – occurs after the vehicle(s) order has been validated against the DVLA vehicles record database but before an actual delivery date has been assigned to the order.

- **Awaiting Casework** – occurs where an order has failed validation several times, requires review or the order has been submitted prior to the completion of vehicle registration with DVLA. Orders cannot be checked against the DVLA vehicles record database to progress to passed validation over the weekend. Therefore, if the vehicle is registered and details provided on a Friday, Saturday or Sunday the vehicle may fall to ‘Awaiting Casework’ status by the Monday. The portal administrators regularly review orders in ‘Awaiting Casework’ and will provide instructions to dealers on any required amendments.

- **Awaiting Payment** – all required information needed to facilitate grant payments has now been entered successfully onto the portal (VIN, VRM, date of first registration and actual delivery date). The order has now moved into a state waiting for the payment process to be actioned.

- **Completed** – the payment file has been generated and is awaiting action by DfT finance in order to pay manufacturers.

- **Awaiting Audit** – the order has been selected for audit and is waiting for the dealership to email invoices to the Scheme Administrators. Invoices must be submitted within 28 days of reaching this status. The email address is: PlugInVehicleGrant@dvla.gov.uk.

- **Audit In Progress** – the Scheme Administrators have received the required invoice documentation and are in the process of auditing the order.

- **Audit Success** – the order has successfully passed audit and may proceed to entering remaining information to complete the order.
• **Audit Rejected** – the order has failed audit. Dealers will receive email notification explaining the reasons for failure and the required action.

• **On Hold** – the order has not had VRM or date of first registration details entered within 9 months of the order being created. Orders will normally enter "on hold" status once they have been in the system for more than 9 months. Such orders will not be reinstated except in exceptional circumstances and at OZEV's discretion or if an extension to the usual 9 month deadline has been granted. Dealers will need to email the Scheme Administrators to request the order is taken off 'hold'. The email address is: PlugInVehicleGrant@dvla.gov.uk.

• **Cancelled** – the dealer has cancelled the order, or the order has been cancelled by OZEV.

**Creating a new order**

4.15 A new order should be started as soon as a ‘contract’ has been signed with the customer. The order should correlate with the invoice details. Therefore, it is important that a final price, after the grant has been applied, will have already been agreed. The claim cannot be added to the portal before the contract with customer has been signed.

4.16 Creating an order to claim for grants must be done on the portal **before** the vehicle is registered with the DVLA. This applies for all vehicles, including demonstration models.

4.17 The grant cannot be claimed retrospectively (i.e. after a vehicle has been registered) except in exceptional circumstances, e.g. the portal being offline or delay caused by OZEV or by the portal administrators. Allowing retrospective claims is at OZEV’s discretion. We will not consider claims older than 6 months. This position can be updated at any time, and we will amend this guidance document as necessary.

**Step-by-step guide - creating a new order**

1  From the dashboard click the ‘Start a new grant application’ button on the top left-hand side of the page.
2. Users will then be presented with a screen that asks whether the vehicle is a lease purchase and can select options for ‘Yes’ or ‘No’. Please note that only dealers and manufacturers have access to the portal. Dealers must place Motability orders on the portal as lease purchases with a valid end customer if they are to be eligible to claim the grant.

Alt text: Page to answer question "Is this a lease purchase?"

*Please note users should ensure that the ‘Yes’ option is selected if the vehicle(s) are intended for lease purposes. Details of the company should then be entered on the next page.*
3 If the user selects ‘Yes’ they will be presented with a screen to enter the name and address details of the lease company.
After completing the lease company name and address, the user is then taken to the next page, which asks whether the vehicle will be purchased on finance. The available options are ‘Yes’ or ‘No’.

Please note users having selected ‘No’ to the lease purchase question will be directed automatically to this page.

If the user selects ‘Yes’ they will be presented with a screen to enter the name and address details of the finance company.
6 After completing the finance company name and address, the user is then taken to the next page, which asks what type of sale is being made. The available options are ‘Private’, ‘Business’ or ‘Demonstrator’.

- Please note users having selected ‘No’ to the finance purchase question will be directed automatically to this page.

Alt text: Page to answer question "What type of sale is this?"

Users should ensure that the ‘Business/fleet’ option is selected for lease purchases unless the vehicle is to be leased to an individual for private use.
If the user selects ‘Private’ they will be presented with a screen to enter the name and address of the individual purchasing the vehicle. Please ensure that the correct details are added as the portal administrators cannot change the keeper name once the order is saved. If the customer cancels the order the dealer should cancel the order and begin a new one.

Please note a private purchase is where an individual has purchased the vehicle for private use.

Alt text: Page to enter details of the individual purchasing the vehicle
If the user selects ‘Business’ they will be presented with a screen to enter the name and address of the business (end customer) purchasing the vehicle. In the case of a lease order this must be the name of the business leasing the vehicle from the lease company NOT the lease company themselves. Orders with a lease company or other invalid end customer name in this field will be cancelled. These details cannot be amended once the order has been placed. If a customer cancels an order, the order should be cancelled and cannot be transferred to another customer.

Please note that a ‘Business purchase’ is where a business customer has purchased the vehicle for business use.
If the user selects ‘Demonstrator’ they will be presented with a screen to enter the name and address of the business purchasing the vehicle.

Please note that a demonstrator is a vehicle sold (wholesale) to either an independent dealer or a dealer owned by the manufacturer. The purpose of these vehicles is to allow potential customers to experience test drives.

Alt text: Page to enter details of the company purchasing the demonstrator vehicle
Once the name and address details have been entered for the type of sale, the user is then presented with the ‘vehicle details’ page. Here the user should select the make, model, purchase price and expected delivery date.
After the vehicle details have been entered and the user has clicked upon the 'continue' button, they will be presented with the 'vehicle order summary page'.

The vehicle order summary page allows the user to see the following details:

• Make, model and purchase price of the vehicle.
• Grant amount for each vehicle and total grant amount (if multiple vehicles are on the order). It is the dealer's responsibility to review the grant value returned to ensure the correct amount has been returned.

From this screen the user is able to undertake a number of actions:

• ‘Edit’ the vehicle details – the user is taken back to the ‘vehicle details’ page.
• ‘Remove’ a vehicle – will delete the vehicle from the order.
• Add further vehicles – by selecting ‘Yes’ to the question asking ‘would you like to add another vehicle?’. This will take the user back to the ‘vehicle details’ page to that they can enter another vehicle.

If the user selects ‘No’ to the ‘Would you like to enter another vehicle’ prompt, they are taken to the ‘Add your own reference number’ page. Here dealerships can enter their own reference number, which allows the user to locate the vehicle more easily if they choose to search on this reference when coming back to the dashboard.
Add your own reference number

The order reference that you will use for internal reporting (Optional):

Continue
After selecting ‘continue’ the user is taken to the ‘confirm your answers before submitting’ page. This page plays back all of the information that the user has entered and provides a final opportunity to correct or amend any details before generating the order number.

Here users can undertake the following actions:

- **Edit the order details**: Change the dealer reference number and type of sale (the user will be taken back to the relevant page to change the details and then return to the ‘confirm your answers’ page).
- **Change the keeper name and address details**: the user will be taken back to the relevant page to change the details and then return to the ‘confirm your answers’ page.
- **Remove a vehicle from the order**: deletes the vehicle details.
- **Add a vehicle to the order**: the user will be taken back to ‘vehicle details’ page to enter a new vehicle and then returned to the ‘confirm your answers’ page.
- **Edit vehicle details**: the user will be taken back to ‘vehicle details’ page to amend the vehicle information and then returned to the ‘confirm your answers’ page.

If the user is satisfied that the details entered are correct, the dealer must read the statement on the page to the customer and then select ‘Confirm and submit order’.

**Alt text: Declaration statement**
Once the user has selected the ‘Confirm and submit order’ button they will be presented with the ‘Order successfully submitted’ page. At this point, the customer details cannot be changed. If the customer cancels please cancel the order and start a new order for a new customer. Most orders will temporarily finish at this point unless the vehicle VIN, VRM or date of first registration details are known.

The user is presented with the following information at this point in the process:

- **The order number**: A unique number specific to the vehicle order that has been placed within the portal. This number will allow dealers to search for the order and continue an order from the dashboard.

- **Details of what information is required to proceed with the order**: Explains that the order can only be progressed beyond this point if the VIN, VRM, date of first registration and date of delivery are known.

- **Two options to continue**:
  
  i. ‘Continue to grant application overview’: Allows the user to proceed with processing the order.
  
  ii. ‘Exit’: Returns the user to the dashboard.
Creating a new taxi order

Users wishing to create an order for a Plug in Taxi Grant eligible taxi should follow the steps outlined in section (Creating a new order). Follow points 1 through to 3.

There are a different set of screens that need to be populated after this point:

1. Once the taxi vehicle details and purchase price have been entered, the user needs to select the operating area within which the vehicle will be used:

Alt text: Page to answer question "What area will this taxi be operating in?"

2. Any options selected, other than for the London area, will present the user with a further set of choices:

Alt text: Page to answer question "What town or city will this taxi be operating in?"

The user should select the most appropriate town or city or are able to enter free text if their town or city isn’t shown, by using the ‘other’ option. Users also have the option to change their selection if they accidentally choose the wrong area.

3. The remaining steps in the order process are the same as outlined above.
Continue or updating an existing order

Once a vehicle order has been registered on the portal, it will need to be updated as soon as the VIN, VRM, date of first registration and actual delivery date details are known. This can be done in one of several ways:

1. **Search for the order ID**: If the user knows the order ID they can enter it in the ‘Order ID’ box to locate the exact order.

![Alt text: Section of overview page, with Order ID search box highlighted]

2. **Select an order status**: The user can choose to select all orders within a particular status in order to narrow down their search.

![Alt text: Section of overview page, with 'Status' filter highlighted]

3. **Select from the dashboard list**: Users can scroll through the list of orders on the dashboard until they locate the required order.
4. **Select a date range**: Users can choose a range of dates to search for, within which the order would have originally been created.

![Date Filter Highlighted](image)

Alt text: Section of overview page, with Date filter highlighted

**Step-by-step guide to updating an existing order**

1. Once the order has been located, the user should click on the order ID hyperlink in order to access the vehicle order details.

![Order ID Link Highlighted](image)

Alt text: Section of overview page, with an order ID link highlighted
2. The user will then be presented with the ‘Grant application overview’ page. The screen will illustrate the status that the order is in and also the next set of details that need to be entered so that the order can progress.

![Grant application overview page](image1)

Alt text: Grant application overview page, with Order status and next details required for the order highlighted

3. The user should click on the ‘open all’ hyperlink in order to display the field within which the additional information needs to be entered. - see above image

![Grant application overview page](image2)

Alt text: Grant application overview page with 'open all' (vehicle details) button highlighted
4. In order to enter the VIN details, users should click on the ‘Assign a VIN’ button, which will take them to an additional page so that the details can be added to the order. Here they should enter the VIN details and click on the ‘Save and continue button’, which will return the user to the grant application overview page.

Alt text: Grant application overview page, with vehicle details section expanded and ‘Assign a VIN’ link highlighted

Alt text: 'Assign a VIN' page, with field to enter VIN and 'Save and Continue' button highlighted
5. Once the user has been returned to the grant application overview page they are able to do one of two things:

- If the registration number and date of first registration are known, they can continue with the order by selecting the 'Add registration details' button.
- If these details are not yet known, the user can return to the dashboard by selecting the 'Save and return to dashboard' button.

6. If the registration details are known and the user chooses the 'Add registration details' button, they are taken to the 'Registration details' page. Here the user should enter the appropriate details and click on the 'Save and continue' button.
7. The user is then taken back to the grant application overview page where they will have to validate the registration details that have been entered. This is done by clicking on the ‘Validate order now’ button.

8. Clicking on the ‘Validate order now’ button will check the vehicle registration details against DVLA’s vehicles record database in order to ensure that a valid vehicle has been entered, which is suitable for the scheme. The user will be presented with one of several responses:

**Validation successful**: A check of the vehicle records database was successful and the order may progress to the next stage (‘Pending delivery’). Confirmation that validation has been successful occurs automatically. The user can check whether the order has successfully passed validation because the order status will have moved to ‘Pending delivery’.
Validation failed: A check of the vehicle records database was unsuccessful. Users will be presented with a message explaining what they need to do next. If the order fails validation several times the order will fail to casework.

Failed to casework: If an order fails validation several times it will be sent to casework for closer review. Users will receive an email explaining what they need to do next if casework investigations are unsuccessful in validating the order.

9. If an order is successfully validated, the user can take one of two actions:
   - If the date of delivery for each of the vehicles within the order is known, the user can choose to enter the details by selecting the 'Add actual delivery date' button.
   - If these details are not yet known, the user can return to the dashboard by selecting the 'Save and return to dashboard' button.

10. Five percent of all successfully validated orders will be selected for audit. Users can check if the order has been selected for audit by checking the status of the order on the dashboard or on the grant application overview page. If an order has been chosen for audit it will have been attributed with the 'Awaiting audit documents' status.

   For orders chosen for audit, the invoices for each vehicle must be emailed to the Scheme Administrators for review. The email address is: PlugInVehicleGrant@dvla.gov.uk. An example of the invoice format may be seen in Appendix A.

   The results of the audit will lead to the order being attributed with one of two statuses:

   **Audit successful**: The invoice details matched the order details on the grant application overview and the order can proceed to the next stage.

   **Audit rejected**: The invoice details did not match the order details on the grant application overview. The user will receive an email explaining the reasons for rejection. The order cannot continue until these issues are resolved.
11. If an order has been successful validated or successfully passed audit it may proceed to the next stage. This requires the actual delivery date of the vehicle(s) to be populated. This can be done by clicking on the ‘Add actual delivery date’ button on the grant application overview screen. The user is then presented with the ‘Actual delivery date’ page, where the delivery date of the vehicle(s) should be entered:

Alt text: ‘Add actual delivery date’ page with fields to be completed highlighted

12. Once these details have been entered the user should click on the ‘Save and continue’ button to return to the ‘Grant application overview’ page. If all of the delivery dates have been entered, the ‘Vehicle details’ section of the page will now show ‘Complete’ and the user can return to the dashboard by clicking on the ‘Return to dashboard’ button.

Alt text: Grant application overview page with Complete' order status and 'Return to dashboard' button highlighted

13. Once all vehicle details have been entered the status of the order will change to ‘Awaiting payment’. At the end of each month OZEV will check with manufacturers that order details are correct. If there are any discrepancies a manufacturer may push orders back to an earlier status and dealers should confer with their manufacturer in order to check and resolve issues.
Once any issues have been resolved OZEV will process respective payments in order that dealers may be reimbursed for grant payments.

**Continuing or updating a taxi order**

Users wishing to continue or update an order for a Plug in Grant eligible taxi should follow the steps outlined in section (‘Continuing or updating an existing order’). Follow points 1 through to 9.

There are additional details that then need to be populated on the ‘actual delivery date’ screen:

![Image of actual delivery date screen]

Alt text: 'Add actual delivery date and taxi licence number' page with 'taxi licence number' field to be completed highlighted

Users need to ensure that the **Taxi licence number** is entered before selecting **save and continue**. This is the taxi plate number displayed on Hackney Carriage or Private Hire vehicles:

![Image of taxi licence plate]

Alt text: Example taxi licence plate

Please note orders for demonstrator vehicles should enter ‘Demo’ in this field.

For more information about vehicle licences for taxis or private hire vehicles please visit GOV.UK via the following link: [www.gov.uk/taxi-vehicle-licence](http://www.gov.uk/taxi-vehicle-licence)
# Appendix A - Sample invoice

## Invoice to: Deliver to:

<table>
<thead>
<tr>
<th>Order No.:</th>
<th>Order Date:</th>
<th>Salesperson:</th>
<th>Delivery Date:</th>
<th>Tax Point:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle: [Car Model]</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VIN No.:</td>
<td>Trim:</td>
<td>Registration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engine No.:</td>
<td>Key No.:</td>
<td>Registration</td>
<td>Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
<th>Vat (@20%)</th>
<th>Total (inc VAT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle price</td>
<td>£24,568</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Licence Plates</td>
<td>£23.63</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vehicle Discount¹</td>
<td>-£2,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal:</strong></td>
<td>£22,591.63</td>
<td>£4,518.33</td>
<td>£27,109.96</td>
</tr>
<tr>
<td>Plug in Car Grant (@ 35% of baseline price of vehicle (capped at £1500) (purchase price: £27,109.96)</td>
<td>-£1500</td>
<td>-</td>
<td>-£1500</td>
</tr>
<tr>
<td><strong>Subtotal:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Summary</strong></td>
<td></td>
<td><strong>£4,518.33</strong></td>
<td><strong>£26,109.96</strong></td>
</tr>
<tr>
<td>Invoice total: £26,109.96</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Part payment received: £5,000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Please note, this is an example invoice – Your systems and invoice structure may be different, however it is essential that any invoice shows:

- Headed paper which includes retailer information, name and address, VAT number and company registration number, finance/lease details if applicable and end customer/business details
- The baseline price itemised to show the VAT, number plates, less any discount offered to the customer
  The grant amount shown separately

Glossary

- **DfT** Department for Transport
- **DVLA** Driver and Vehicle Licensing Agency
- **OZEV** Office for Zero Emission Vehicles
- **PIVG** Plug-in vehicle grant
- **VAT** Value Added Tax
- **VIN** Vehicle Identification Number
- **ULEV** Ultra low emission vehicles