Guidance Note

UKSPF Export Support Fund – Claim Guidance Document

For Applicants – How to Complete Your Export Grant Claim Form

1. Before You Start Your Claim

You must complete the claim form in one session. You cannot save and return later.
To avoid delays and ensure your claim is processed quickly, please ensure:

1.1 Read the Full UKSPF Claims Guidance First

The rules for eligible expenditure, procurement, and evidence requirements apply to all claims.
Only activities approved in your Grant Funding Agreement (GFA) may be claimed.

1.2 Ensure All Activity Is Fully Completed

Before submitting a claim:

- All activities must be fully delivered.
- All invoices must be issued and paid (defrayed).
- Any services (e.g. website upgrades) must be live and operational.
- Any travel or trade mission activity must have taken place unless your GFA has a pre-agreed exception.

1.3 Have All Evidence Ready to Upload

You must prepare digital copies of:

- All invoices relating to approved activity
- Bank statements showing payment has left your account
- Procurement evidence (quotes and the Procurement Statement)
- Photos/screenshots proving activity has been completed
- Reports, links, or files demonstrating funded outputs (e.g. website pages, translated materials)

Claims missing evidence cannot be processed and may be returned for correction.

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2. Completing the Claim Form

Section 1 – Project & Organisation Details

Provide accurate business details exactly as shown on your GFA:

- Your **GFA reference number**
- Registered business name (must match the GFA)
- Company number or **UTR evidence** if not registered with Companies House
- Contact details for the authorised claim contact
- Trading address and registered address (if different)

Section 2 – Bank & Finance Details

To meet UK Government fraud-prevention requirements, you must provide:

- **Business bank account name** (must match the grant recipient)
- Account number & sort code (numbers only)
- **IBAN** (if available)
- Finance contact phone number (required for verification checks)
- VAT number, or enter **N/A** if not VAT registered

Bank details will be verified before any payment is made.

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3. Claim Summary

3.1 Total Eligible Project Cost

Enter the total defrayed project cost:

- If VAT registered → **exclude VAT**
- If not VAT registered → include VAT where paid

3.2 Grant Amount Claimed

This must not exceed:

- The amount awarded in your GFA
- The eligible proportion of the total project cost (typically 75%)

3.3 Private Match

Enter the amount you have contributed.
This must be **at least 25%** of total eligible costs.

4. Itemised Expenditure & Evidence

4.1 Itemised Activity

List each approved activity as shown in your GFA Funding Particulars:

- Approved activity (e.g. “Translation of Product Catalogue – German & Spanish”)
- Supplier name
- Amount claimed
- Invoice number(s)

Ensure:

- Each expenditure item appears on the invoices uploaded
- The activity matches what was approved in your GFA

4.2 Evidence Uploaded

List the exact file names you will upload (e.g. Invoice01_ABCTranslation.pdf).
You must upload:

- **Invoices**
- **Bank statements** showing payment (payer, payee, date, and value visible)
- Screenshots/photos demonstrating completion
- Website links where relevant

Bank statements must clearly show the payment leaving your account.
Online banking screenshots are acceptable if they show all required details.

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5. Procurement & Quotes Compliance

Before completing this section, read the Procurement Rules in your Claims Pack.
You must upload:

1. **Procurement Statement (2a)** – compulsory for all claims
2. **Three quotes** (if above the threshold)
3. **Value-for-Money Justification (2b)** – required only if you did **not** choose the lowest quote

If any expenditure differs from your GFA, you must:

- Explain the variance
- Confirm whether approval was obtained
- Understand that unapproved changes may be rejected

6. Outputs, Outcomes & Monitoring

This section reports what your business achieved **as a result of the funded project**.

6.1 Working Hours

State your normal full-time weekly working hours (e.g. 37.5 or 40).
This determines how FTE jobs are calculated.

6.2 Outputs and Outcomes

Select all that apply:

- **Jobs Created** – new posts created as a direct result of the project
- **Jobs Safeguarded** – roles previously at risk but now secured
- **Engaged in New Markets** – international or new product markets
- **Adopted New Technologies/Processes**
- **Increased Export Sales** – supported by evidence (invoice, PO, letter, or director declaration)

You will be asked for follow-up information:

6.3 Outputs Not Achieved

If you did not achieve an expected outcome:

- Explain why
- Provide an estimated date if it may still be achieved

7. Final Declarations

Before submitting, ensure:

- All information is true and accurate
- All expenditure has been paid (defrayed)
- No expenditure was ordered or paid before your GFA was signed
- All items are received and operational
- You understand payments may be subject to audit
- You understand that inaccurate or false claims may result in clawback

The declaration must be completed by an **authorised signatory**.

8. What Happens After Submission

Your claim will be:

1. **Checked for completeness**
2. **Reviewed for eligibility**
3. **Bank-verified**

4. **Approved for payment** (payments are usually made within 10 working days unless flagged for random bank checks)

If clarification is needed, you will be contacted by a Grant Claims Officer.

9. Need Support?

If you need help completing your claim form, please contact:

✉ **claims@teesglobal.co.uk**

Our Grant Claims Officers will be happy to assist.