PENNSYLVANIA PUBLIC UTILITY COMMISSION

INSTRUCTIONS FOR PREPARING 2020 ASSESSMENT REPORT FOR MOTOR CARRIERS

You have received this form because you currently hold a certificate of public convenience with the PA PUC. As such you must report your gross intrastate operating revenue for calendar year 2020 on the 2020 Assessment Report, which is enclosed. You are required to sign, notarize, and file the 2020 Assessment Report with the Commission on or before **March 31, 2021**. Please use the self-addressed return envelope enclosed. THE PUC WILL NOT GRANT AN EXTENSION OF TIME TO FILE THIS REPORT. **Failure to file this form could result in fines of up to $1,000 for each day it is late (66 Pa. C.S. §3301), revocation of your certificate of public convenience, and PennDOT will place registration suspensions on your vehicles. Revenue is estimated for all companies who fail to file an Assessment Report. Estimates are legally binding (66 Pa. C.S. §510(b)).**

WHO MUST FILE: All common carriers certificated by the Commission. Common Carriers include property carriers, passenger carriers, and household goods carriers. **Carriers subject to the UCR Act must file this report**, even though qualified UCR operations of carriers registered under the UCR Act will not be assessed if this report is filed timely. Failure to file timely, or pay the UCR fee timely, could subject you to paying an assessment.

WHAT YOU MUST FILE: The enclosed Assessment Report (AR-20-MC) must be completed in its entirety to be accepted as final. This includes signatures and notarization along with receipt in the Commission's Assessment Section on or before March 31, 2021. **This report form may not be modified.** Please be sure to include a valid telephone number for the contact person to answer questions, if necessary. The following are addresses for the Assessment Section of the PUC.

Regular Mail	**Express Mail**	**ASSESSMENT INQUIRIES**
Pa. Public Utility Commission	Pa. Public Utility Commission	Assessment Hotline: 717-265-7548
Fiscal Office	Fiscal Office	Email: pucassessments@pa.gov
Po Box 3265	400 North Street	**UCR INQUIRIES: (717) 783-3846**
Harrisburg, PA 17105	Harrisburg, PA 17120	**Website: www.ucr.gov**

NAME AND ADDRESS: Verify that the preprinted name and address are correct. If this is not correct, cross it out and print the correct information. Please provide an email address and the current telephone number.

LINE-BY-LINE INSTRUCTIONS

Line 1. *Pennsylvania Gross Intrastate Operating Revenue.*

Report Pennsylvania gross intrastate operating revenue here. This is earned gross revenue from your public utility operations within the boundaries of the Commonwealth of Pennsylvania, without deduction of expenses of any kind. Fuel surcharges must be included as revenue. Revenue must be reported in the appropriate column. For example, if all your revenue was from the transportation of property, you must report all revenue in the 'property' column. If your revenue was from 2 or more types of common carriage, you must report the amount of revenue received from each type, in the appropriate column.

Line 2. *Pennsylvania Exempt Intrastate Revenue Total.*

Report Exempt Intrastate Revenue here. You must itemize any exemptions on the "Exempt Intrastate Revenue" lines on the Report. Please see the list of allowable exemptions on page 2 of the instructions. **You must include the exemption number and amount. Attach additional sheets of paper as needed for explanation of exemptions. The PUC may disallow your exemptions if you fail to itemize**. Total all exempt revenue on Line 2.

Revenue earned from service under the jurisdiction of the Philadelphia Parking Authority must be reported as exempt revenue, you may use number 11 from the exemption list.

Line 3. *Pennsylvania Net Intrastate Operating Revenue.*

Subtract Line 2 from Line 1. This revenue is used to calculate your assessment. If this report is not filed or filed late, your net revenue will be estimated. This estimate is binding.

UCR REGISTRATION INFORMATION

You must check the appropriate box. If you are an interstate carrier and required to register under the UCR Program, you must check 'yes' and provide your U.S. DOT number. For the purposes of this report - INTERSTATE operating revenue refers to revenue earned from the transportation of property or persons between points of origin and destination, either or both of which are outside Pennsylvania. Further information on the UCR Program may be found at **WWW.UCR.GOV**. You must also provide the date on which you paid the current year UCR fee.

AUTHORIZATION FOR ABANDONMENT

If you are no longer in business or desire to cease operations, you may direct the Commission to cancel your certificate of public convenience. You must state the reason for the abandonment and sign in the assigned block on the back of the report. If you have questions regarding your CPC, please contact our Motor Carrier compliance department at 717-787-1168.

EXEMPT REVENUE

The following is a description of Exempt Revenue you may deduct on Line 2, as provided by 66 Pa.C.S. §102:

1. **LEASE REVENUE** – You may deduct lease revenue. Lease revenue is revenue a certificated carrier (lessor) receives when it leases its equipment to another certificated carrier (lessee). The lessor carrier cannot retain any responsibility for the maintenance, supervision, or control of the vehicle. The leasing arrangement must follow the Commission's leasing regulations, which are found at 52 Pa. Code §29.101 (passenger carrier leasing) and §31.32 (property and household carrier leasing). The **lessor must include in its assessment report the name(s) of the carrier(s) and the certificate of public convenience number to which it leases its equipment and the amount of revenue received from the carrier**. Lessees cannot use rental/lease fees paid to the lessor to offset operating revenue and must report, for assessment purposes, all revenues earned under their certificate of public convenience.

2. **TRANSPORTATION OF K-12 SCHOOL CHILDREN** – You may deduct revenue you received from a kindergarten through 12th grade public, private or parochial school for the transportation of school children for school purposes or school sponsored extra-curricular activities, under a bona fide transportation contract with a public, private, or parochial school.

3. **TRANSPORTATION OF AGRICULTURE PRODUCTS** – Farm owners and operators may deduct revenue from transporting their own agricultural products from, or farm supplies to, their farm. In addition, independent contractors, or cooperative agricultural associations, transporting agricultural products or farm supplies exclusively for one or more farm owner(s) or operator(s), may deduct that revenue.

4. **WASTE, EXCAVATED, AND ROAD CONSTRUCTION MATERIALS** – You may deduct revenue you received from transporting ashes (including anti-skid, flue dust and fly ash), rubbish and waste for disposal. The PUC also allows the exemption/deduction of any revenue you received for transporting excavated materials in dump trucks. The purpose of the excavation is to create a hole or cavity. Removing material of value for use elsewhere is NOT exempt. The PUC also allows the exemption/deduction of any revenue you received for transporting road construction materials if a dump truck is used, and the materials hauled are used solely in a private or public road project including driveways (but NOT parking lots), and the materials are hauled directly to road construction sites or stockpiles. Carriers may **not** claim a revenue exemption for waste, excavated and road construction material when those materials were transported in five-axle tractor-trailers.

5. **TRANSPORTATION OF YOUR OWN PROPERTY-** You may deduct revenue you received from transporting your own property to yourself or to those that buy directly from you.

6. **VOTING MACHINES –** You may deduct revenue you received from transporting voting machines to and from polling places on behalf of any political subdivision of the Commonwealth for use in any primary, general, or special election.

7. **TRANSPORTATION OF WOOD PRODUCTS FROM WOODLOTS**- You may deduct revenue you received from transporting pulpwood, chemical wood, saw logs, wood chips, or veneer logs solely from woodlots. A woodlot is an area devoted to growing forest trees. Any revenue received from transportation performed from sources other than the woodlots is subject to assessment and may not be deducted.

8. **TRANSPORTATION OF WRECKED OR DISABLED VEHICLES** – You may deduct revenue you received from the transportation of wrecked or disabled motor vehicles from an accident, breakdown, or a place the vehicle was transported after the accident or breakdown, if it is subsequently transported for repair. Revenue from transportation of wrecked or disabled vehicles to or from auctions is NOT exempt.

9. **TRANSPORTATION OF STOLEN OR REPOSSESSED VEHICLES**- You may deduct revenue you received from the transportation of stolen or repossessed vehicles. Revenue from transportation of stolen or repossessed vehicles to or from auctions is NOT exempt.

10. **TRANSPORTATION OF INJURED, ILL OR DECEASED PERSONS –** You may deduct revenue you received from transporting an injured or ill person to a health care facility, when that transportation is performed in an ambulance or a medically equipped vehicle containing portable oxygen. **A medical attendant must be in the vehicle in addition to the driver.** A health care facility includes a hospital, clinic, dialysis center, nursing care institution, home health agency, infirmary, or behavioral service provider. A doctor's office is **NOT** a health care facility. In addition, you may deduct revenue you received from transporting deceased persons.

11. **TRANSPORTATION UNDER CONTRACT WITH MUNICIPAL CORPORATIONS -** You may deduct revenue you received from passenger transportation performed under contract with a municipal corporation, provided that: (1) the municipal corporation actively regulates your rates, routes and services; and (2) the transportation is limited to municipal residents. This deduction does not apply to contracts with state agencies. **Philadelphia Parking Authority regulated trips fall under this exemption.**

COMMONWEALTH OF PENNSYLVANIA
PUBLIC UTILITY COMMISSION
PO BOX 3265
HARRISBURG, PA 17105-3265

2020 ASSESSMENT REPORT-MOTOR CARRIERS

This Report **MUST BE FILED** no later than **March 31, 2021.** Failure to file may result in fines up to $1,000 for each day a violation continues (66 Pa. C.S. §3301), revocation of your Certificate of Public Convenience, and PennDOT will place registration suspensions on your vehicles.

TRADE OR CORPORATE NAME OF UTILITY:	UTILITY CODE:
CONTACT NAME:	EMAIL:
ADDRESS 1:	ADDRESS 2 (Floor, Suite, etc.):
CITY, STATE, ZIP:	PHONE NO.:

OPERATING REVENUE FOR CALENDAR YEAR 2020 (January 1, 2020-December 31, 2020)

(Enter WHOLE dollars only)

	PROPERTY	HOUSEHOLD GOODS	PASSENGER	
			Group and Party 16 or more	Passenger 15 and Under
1. PA INTRASTATE OPERATING REVENUE				
PA EXEMPT INTRASTATE REVENUE				
Exemption #				
Exemption #				
Exemption #				
Exemption #				
2. TOTAL Exempt Revenue				
3. PA NET INTRASTATE OPERATING REVENUE (Subtract Line 2 from Line 1)				

UCR REGISTRATION INFORMATION

2021 UCR Registered: ☐ **YES** ☐ **NO** **US DOT #:**_____

Date 2021 UCR fee was paid:_____

Internal Use Only

☐ A-1 ☐ C-1 ☐ AB-1

AUTHORIZATION FOR RELEASE OF STATE TAX RECORDS

In accordance with Sections 505 and 506 of the Public Utility Code, to verify the accuracy of financial information supplied to the Public Utility Commission, I hereby authorize the Pennsylvania Department of Revenue to release to the Public Utility Commission, any tax records filed or compiled regarding the below-listed utility and/or individual.

_____
Utility Name

_____
Signature

_____ _____ _____
Date Name (Printed) Title

AUTHORIZATION FOR ABANDONMENT

Approval of the abandonment is necessary or proper for the following reasons:

_____
Reason(s)

_____
Signature

AFFIDAVIT

I affirm that the information reported herein is complete, true and correct.

_____
(Signature of Individual or Officer)

_____
(Date)

READABLE (PRINT OR TYPE) NAME OF INDIVIDUAL or OFFICER ABOVE:

TELEPHONE NO.:

Office:

Cell:

Other:

NOTARIZATION

(Required)

Subscribed and sworn to before me this

_____day of _____2021

_____
NOTARY SIGNATURE

_____
OFFICIAL TITLE

OFFICIAL SEAL

(Date My Commission Expires)