

All Project Submission for Customers in the *Rebate Center – Product View* User Guide

Prepared for:

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Overview

This document instructs Customers how to use the **Rebate Center – Product View** website to submit applications for **EE Deemed – Customer**, **Auto DR Calculated**, and **Auto DR Express** projects.

Using the Rebate Center – Product View Site

The **Rebate Center – Product View** allows you to apply for rebates on eligible equipment, or products. For each product, you will fill out a form with customer, site, and equipment details, then add the product to a shopping cart. A form can only include one installation site.

Applying for Multiple Rebates

If you are applying for multiple rebates at one time, you will fill out a form for each product/installation site combination. However, after the first form, fields that are common between the submissions will be pre-populated based on the values entered in the first submission – for example, if two products are being installed at the same site, site details will be pre-populated in the second application, and can be edited if needed.

If you are applying for rebates on the same equipment at multiple sites, the process is the same.

You can select which forms in the cart you want to include on an application.

Single Payment for Multiple Rebates

If you want to receive a single payment for multiple rebates, contact SCE after submitting your application. SCE can group applications together for payment. In this case, payment will be sent only after all products in a group are installed, reviewed, and approved.

Which program?

Note: You will not see any Programs listed unless you have at least one commercial account with SCE.

- ◆ The **EE Deemed – Customer** program allow customers to apply for rebates from a predefined list of specific Energy Efficient equipment
- ◆ **Demand Response (DR) programs** offer incentives to non-residential customers who reduce their electricity use when demand for electricity is high. Automated Demand Response (Auto DR) is an energy-saving technology that automatically reduces the amount of energy your business uses during a Demand Response (DR) event

- Depending on the product you select, you will either see Auto DR Express or Auto DR Calculated indicated on the UI. Throughout this document we will note any variances that you can expect to see between the two programs.
 - The **Auto DR Express** Program reduces or completely covers the purchase and installation costs of qualifying equipment to become Auto DR enabled. SCE will calculate your eligible reduction based on the customer's Facility Type, climate zone, and annual max demand. The incentive will cover up to 100% of the cost of the project or \$300/kW, whichever is less
 - The **Auto DR Calculated** program allows customers to apply for rebates from a predefined list for specific equipment installation

Are you applying for On Bill Financing (OBF)?

OBF allows you to procure a loan from SCE to cover the project costs. This loan will be repaid in installments on your utility bill. **Only available for EE Deemed projects.**

If you are applying for OBF, you must submit the application before the equipment is installed (see below).

Is the Equipment Installed?

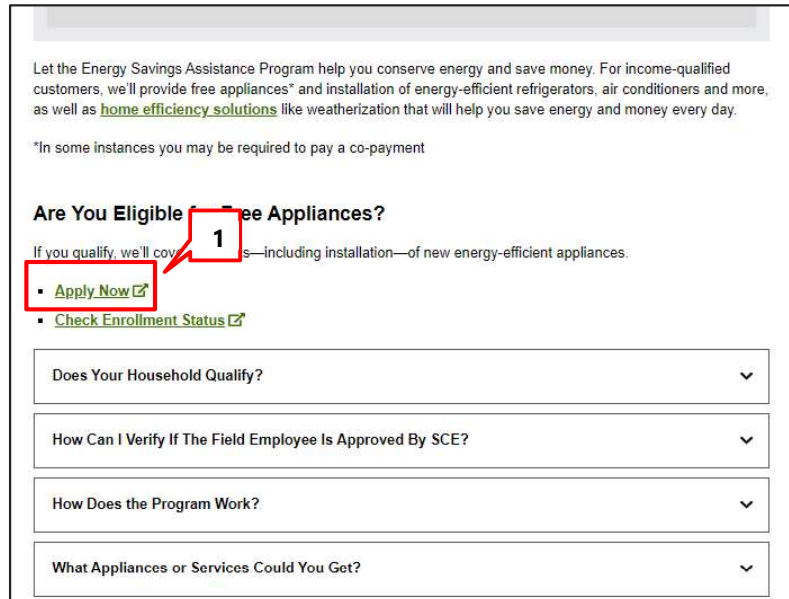
Product Not Yet Installed: If you are submitting an application before equipment installation, you will submit a **Reservation Request**. SCE will review and approve a reservation of funds. After installation you will return and enter information about the installation and payment. SCE will review and approve the payment (or return the application for revisions.) **All Auto DR projects begin with a Reservation Request.**

Product Installed: If you are submitting an application after product installation you will submit an **Incentive Request**, which includes installation and payment information. **Only available for EE Deemed projects.**

Access the Rebate Center

SCE Customers can access the Rebate Center website to submit and manage rebate applications by logging into *My Account* on sce.com.

1. On SCE.com, log into **My Account** and click **Apply Now**.





Let the Energy Savings Assistance Program help you conserve energy and save money. For income-qualified customers, we'll provide free appliances* and installation of energy-efficient refrigerators, air conditioners and more, as well as [home efficiency solutions](#) like weatherization that will help you save energy and money every day.

*In some instances you may be required to pay a co-payment

Are You Eligible for Free Appliances?

If you qualify, we'll cover **1**—including installation—of new energy-efficient appliances.

- [Apply Now](#) 
- [Check Enrollment Status](#) 

Does Your Household Qualify? ▼

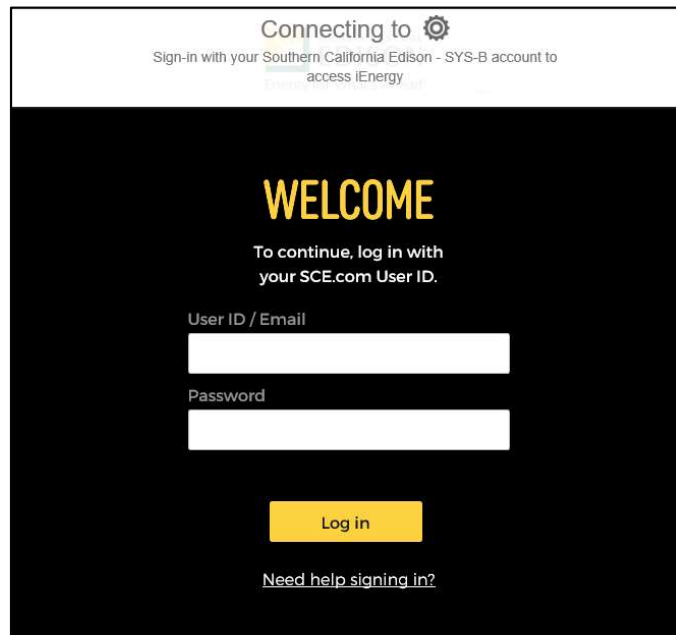
How Can I Verify If The Field Employee Is Approved By SCE? ▼


How Does the Program Work? ▼

What Appliances or Services Could You Get? ▼

2. If you are not logged in, you will be prompted to log in when you click **Apply Now**. When login is completed, you will be automatically directed to the Rebate Center home page.

The Rebate Center home page displays.



Connecting to 

Sign-in with your Southern California Edison - SYS-B account to
access iEnergy

WELCOME

To continue, log in with
your SCE.com User ID.

User ID / Email

Password

Log in

[Need help signing in?](#)

Rebate Center – Product View Home Page

The screenshot shows the Rebate Center interface. At the top left is the Southern California Edison logo with the tagline "Energy for What's Ahead". To the right is a search bar labeled "Find a rebate" and a user profile icon. Below the logo is the text "Rebate Center" with a red callout box labeled "1" pointing to it. A dropdown menu is open, showing "Viewing eligible products for IMAGINE" and a site ID "16100011004". Below this is a filter section with the heading "Please enter data in the filters and choose a category". It contains four fields: "Market Sector" (Commercial), "Application Date" (07/21/2020), "Building Type for EE" (OFFICE - SMALL), and "Annual Demand" (22.00). A red callout box labeled "2" points to this filter section. At the bottom, there are two product category images: a lightbulb icon and a photo of a man adjusting a thermostat. A red callout box labeled "3" points to the lightbulb icon.

The Rebate Center home page displays product categories for which the selected customer site is eligible. Available products may vary by site.

1. **Site selection** – If you have more than one site, select from the dropdown.
2. **Data filters** – Use the data filters to refine results. The following table details which filters are available for each program.
 - **Market Sector** – Defaults to Commercial. Can update if needed
 - **Application Date** – Auto-populates with current date
 - **Climate Zone** – Derived from customer site information
 - **Building Type for EE** – Derived from customer site information
 - **Annual Demand** – Derived from customer site information
3. **Product selection** – Click on the product category you want to apply for.

Filter	Available for Program		
	Deemed - Customer	Auto DR Express	Auto DR Calculated
Market Sector	✓	✗	✗
Application Date	✓	✓	✓
Climate Zone	✓	✓	✗
Building Type for EE	✓	✓	✗
Annual Demand	✗	✓	✗

Select A Product

The next screen shows a list of products eligible for rebates.

The screenshot shows a web interface for selecting products. At the top left, there is a navigation link '< Back to Categories' and a section for 'Qualifying rebates for:' with a home icon and a red box labeled '1' pointing to the filter area. The filter area, also outlined in red, contains the following information: Market Sector (Commercial), Application Date (07/21/2020), Building Type for EE (OFFICE - SMALL), and Annual Demand (22.00). Below the filters is a green 'Apply' button and a note: 'To select products from other category, please, start from category page again'. On the left side, there are two sections: 'Product Types' with checkboxes for Lighting, HVAC, Appliances, Refrigeration, Pumping, Foodservice, Process, and Water Heating; and 'Product Sub Types' with checkboxes for AC Only Units, AC Unit with Gas Heat, Heat Pump, Clothes Washer, and Motor. In the center, under the heading 'Deemed with qualifying rebates', there are two product cards. The first card, outlined in red and labeled '2', shows an image of an HVAC unit and the text: 'HVAC Economizer Control Adjustment on AC Only Units - (AC-11452-BRO-RCx-OfS-w09-Comm-EE Deemed Customer_Guest_Trade Pro)'. The second card shows an image of HVAC equipment and the text: 'HVAC Economizer Control Adjustment on AC Unit with Gas Heat - (AC-11458-BRO-RCx-OfS-w09-Comm-EE Deemed Customer_Guest_Trade Pro)'.

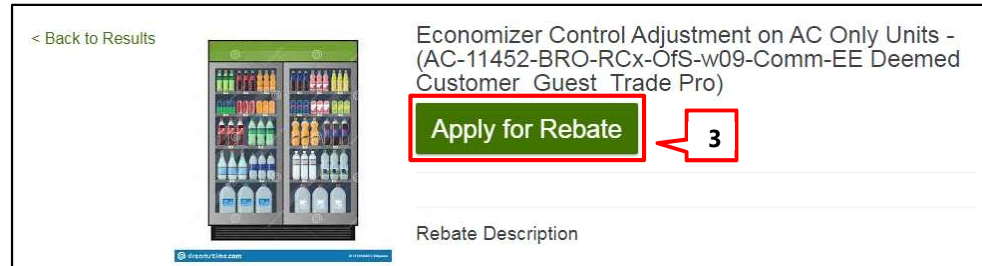
1. Refine results by using the filters at the top of the page and clicking **Apply**, or by selecting **Product Types** or **Sub Types** on the left.

Note: Changing *Market Sector* or *Building Type* will affect which products are available.

2. Click on a product image to select a product.

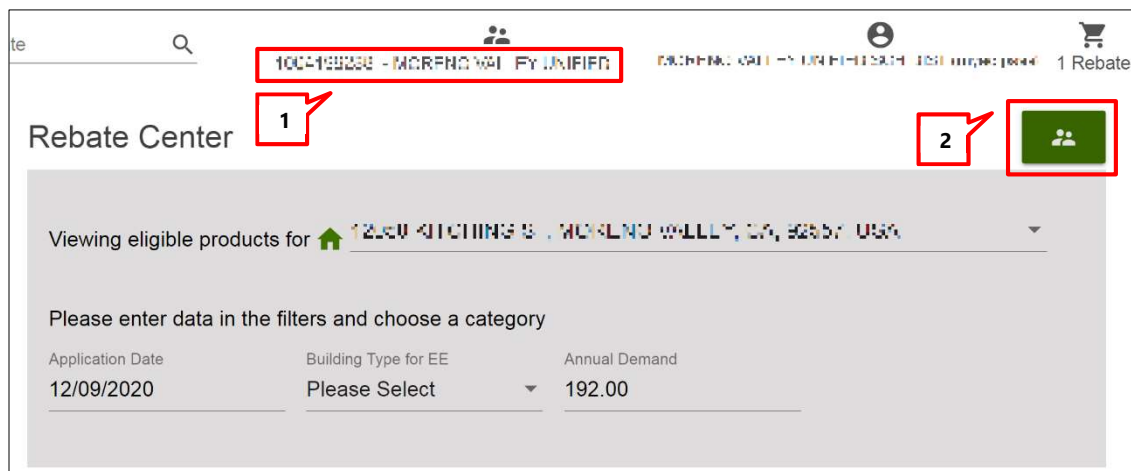
The product details page displays.

- Click **Apply for Rebate** to start the application.

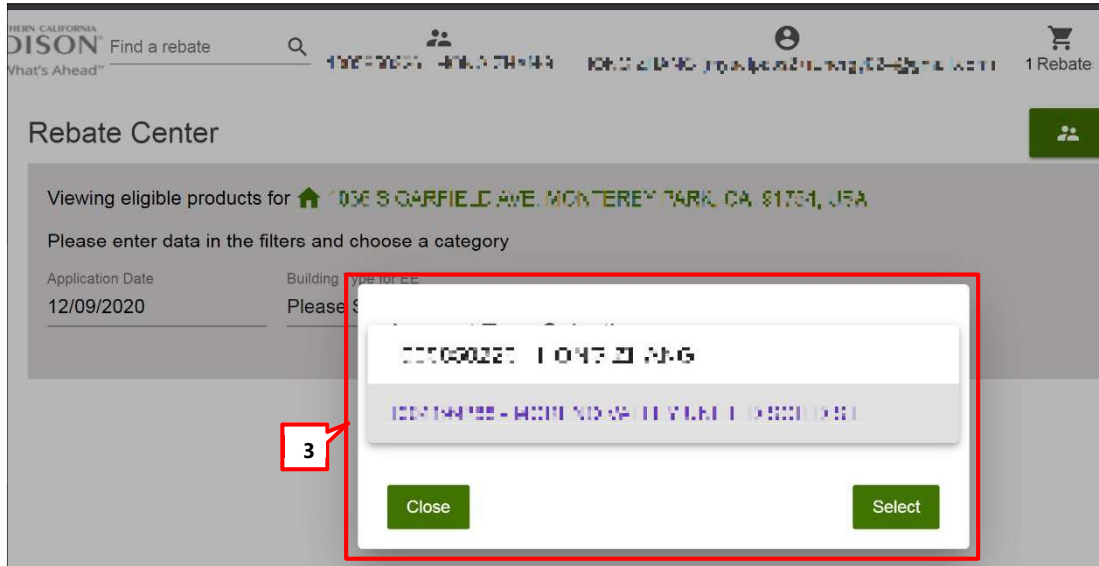


Accessing Multiple Accounts

When there are multiple user accounts associated with a single SCE.com account, and a user logs into the Rebate Center via SSO, they can access any of those accounts with the following steps:



- The current account is indicated at the top of the UI by the account number and name.
- To switch accounts, click on the **Switch Accounts** icon.
A pop-up selection window displays.



- In the pop-up window, click the desired account number then click **Select**.

The system will switch over to the selected account, which will display only projects associated with that account.


About the Application

Applications are divided into sections which may vary by program.

Throughout the application, required fields are marked with asterisks.

Greyed out fields are pre-populated and are read-only.

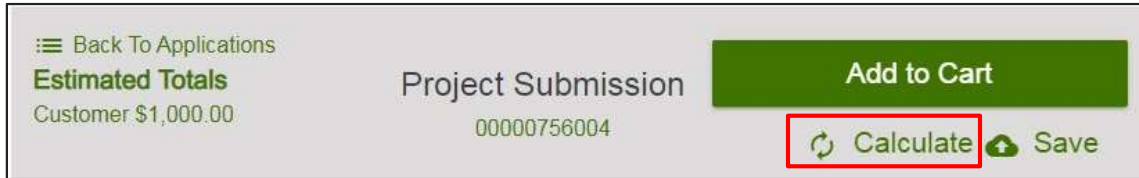
Expiration

 Will Set Application Status to Draft Expiration Reminder 07/26/2020 01:27 PDT. time remaining : 10 days 4 hours 52 minutes 19 seconds

Once you start an application, you have 45 days to complete it. You will see an expiration countdown at the top of the application until it is submitted. If needed, you will receive a reminder email 15 days before the expiration.

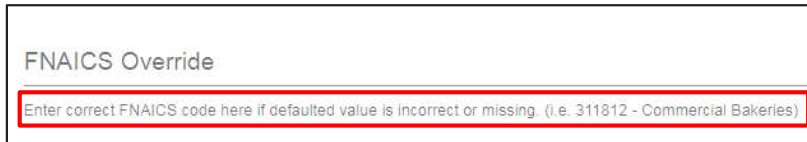
Application Header

Scroll down the page to see sections of the application. As you scroll, the header will stay at the top of the screen.



Click the **Calculate** button as directed throughout the application to populate fields and sections that depend on other entries.

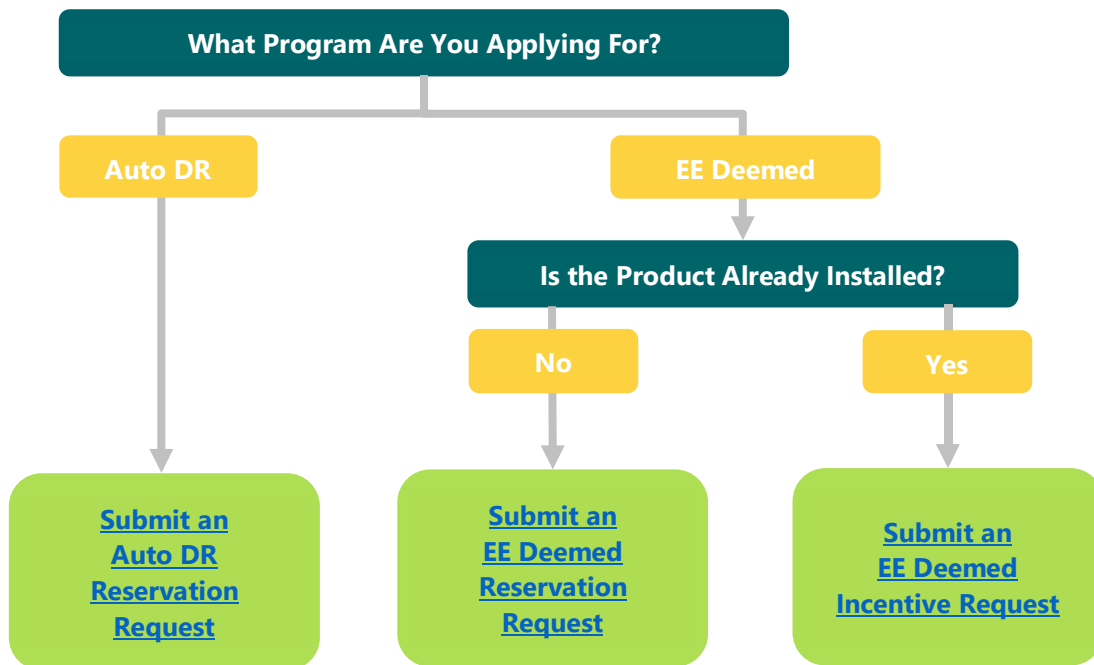
Tooltip/ Instructional Text



Many of the application fields display helpful or explanatory information below the field.

Select Program-Specific Instructions

Use the chart below to determine which instructions to use. Click on the link to go directly to the section. **Note:** If you are applying for OBF you must submit a reservation request.



Auto DR Applications

Auto DR applications have two steps: **Reservation Request** (pre-installation) and **Pending Installation and Incentive Request** (post-installation). This section includes instructions for both steps.

Submit an Auto DR Reservation Request

Select an Auto DR Product

The next page shows a list of products eligible for rebates.

< Back to Categories

Qualify **1** rebates

Product Types

HVAC Controls

Lighting

Product Sub Types

Duty Cycle

Fans

Space Temperature

Dimming

Enter filters to refine product listing

Market Sector: Commercial

Application Date: 07/21/2020

Building Type for EE: OFFICE - SMALL

Annual Demand: 22.00

To select products from other category, please, start form category page again

Apply

Demand Response with qualifying rebates

1

HVAC Controls
HVAC (Compressor & Supply Fan) - 15 Minute Duty Cycle

2

Lighting
Lighting Controls—40%
Dimming

Lighting
Lighting Controls—30%
Dimming

1. Refine results by using the filters at the top of the page and clicking **Apply**, or by selecting **Product Types** or **Sub Types** on the left.
2. Click on a product image to select a product.
The product details page displays.



3. After selecting the product, click **Apply for Rebate** to start the application.
The application form displays.

Auto DR Application Sections

Customer Information

Customer Information	
Customer Number *	Site Number *
1012345678	1012345678
Bill Account Number *	Your Site Number is the your 10 digit Service Account number on your SCE bill. Example of SCE Bill – Link. Customer Name *
1012345678	1012345678
Site Address 1 *	Site Address 2 (apt, suite, bldg, etc)
1012345678901234567890	STE A
Site City *	Site State *
FULLERTON	CA
Site Zip *	Rate Schedule
92833	TG1E:GS: TOU-GS-1-E (Grandfathered)
Project Contact First Name *	Project Contact Last Name *
Igor	Mortis
Project Contact Title *	Project Contact Phone *
Chief	(123) 456 - 7890
Project Contact Email *	<small>If you have an extension Enter 'to' after phone number if requires extension (i.e. (555) 555-1234x4321). Format for phone extension (i.e. (555) 555-1234x4321).</small>
i@m.com	

Read-only customer and site information auto-populates from iEnergy. Project contact information auto-populates based on the user logged in and can be edited.

Additional Customer Information

1. Most of the values in this section are read-only. You can update **Account Representative**, **FNAICS**, or **Building Type** values if needed.
2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCE FILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown at right.

	A	B
1	FirstOfFNAICS	Naics_text
2	422410	GENERAL LINE GROCERY WHOLESALERS
3	327910	ABRASIVE PRODUCT MANUFACTURING
4	325520	ADHESIVE MANUFACTURING
5	924110	ADMINISTRATION OF AIR AND WATER RESOURCE AND SC
6	924120	ADMINISTRATION OF CONSERVATION PROGRAMS
7	923110	ADMINISTRATION OF EDUCATION PROGRAMS
8	926110	ADMINISTRATION OF GENERAL ECONOMIC PROGRAMS
9	925110	ADMINISTRATION OF HOUSING PROGRAMS

Legacy Numbers and Customer Billing Determinants

Legacy Numbers	
CSS Customer Number 11706081	CSS Customer Account Number 373124551
CSS Service Account Number 36586817	CSS iSVC 5215229
Customer Billing Determinants	
Annual Max Demand DE-S	Avg Monthly Max Demand DE-S
Annual kWh DE-S	

These sections display read-only fields with customer account information populated by the system.

Project Information

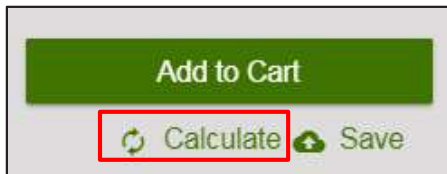
Project Information	
General Application Information	
Customer Project PUX Status Project Draft	Program Manager Scott Sisson
Application Name * <small>Enter brief application name for your reference.</small>	Group ID FN8IMDU58535A415
Fill in Project Site Information	
Year Built <small>Enter year that facility was built.</small>	Total Sq.Ft. * <small>Enter building square footage area only.</small>
Qualifying DR Program *	Application Submission Date 7/1/2020
Customer Selection for 3rd Party Vendor:	
<ul style="list-style-type: none"> For Installation, please select the Trade Professional from the drop down below and provide the details in Trade Professional Information Section. if DRAS configuration assistance is needed, please select Technical Coordinator, and SCE Admin will assign one. 	
Do you want a Tech Coordinator? *	Terms and Conditions Submission Method
Yes	Electronic Acceptance

The following table describes key fields in the Project Information section.

Field	Required	Action
Application Name	Yes	Name the application
Total Sq. Ft.	Yes	Enter the site total square footage
Qualifying DR Program	Yes	Select a DR program if the customer is enrolled: <ul style="list-style-type: none"> CPP (Critical Peak Pricing) RTP (Real Time Pricing) CBP (Capacity Bidding Program) DRAM (Demand Response Auction Mechanism) Not currently enrolled

Are you using a Trade Pro?	Yes	Select Yes if you are using a Trade Pro for the project. (An additional section will display on the form.) Otherwise, select No
Do you want a Tech Coordinator?	Yes	Select Yes if using a Tech Coordinator for the project. Otherwise, select No
Terms and Conditions Submission Method		N/A: In the Reservation request this is automatically set to Electronic Submission

Table of fields in the Project Information Section



When you have entered all the required values, click the **Calculate** button in the header to populate dependent sections and fields.

Trade Professional Information

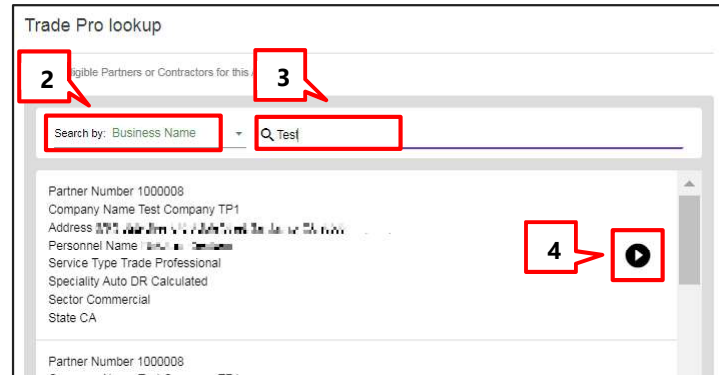
This section displays if you indicated in Project Information section that you are using a Trade Pro for your installation.

1. Click **Trade Pro lookup** to find a Trade Pro.

The Trade Pro lookup screen displays.

2. Select a search parameter:
Business Name or **Vendor ID**.
3. Type a value in the search field. The results populate automatically.
4. Click the arrow next to the partner you want to add as the payee.

You may see multiple entries for a company if they have multiple personnel in the system.



The Trade Pro details populate. (Not shown.) Update contact information as needed.

If a Trade Pro does not appear in this search, contact them and let them know that they need to register as a Trade Pro with SCE. In this case, the options for the current application are:

- ◆ Submit the project without a Trade Pro
- ◆ Select a different registered Trade Pro
- ◆ Leave the application in draft mode until the Trade Pro registers (the application will stay open for 30 days)

Product Details

In the iEnergy system, products are referred to as “measures.” Since more than one product/measure can be included on an application, there is a “measure container” section to which each product is added. For Demand Response rebates this section of the form is named either **Auto DR Express Measure** or **Auto DR Calculated Measure**.

In this section, enter information about the product, project costs, and kWh savings information. If you have selected multiple products, you will enter details separately for each one.

There are two subsections: **Equipment Information** and **Cost & Incentive Information**. The fields for each are described separately below.

Equipment Information

Auto DR Express Measure ^ 🗑

Equipment Information

Library Measure Ref# * Measure Name

Estimated Installation Date * Enter the date you think this measure/equipment will be installed. Equipment Model # Enter manufacturer's product model number.

Equipment Location Enter a brief description of where measure/equipment is being installed.

The following table describes key fields in the Equipment Information subsection.

Equipment Information Field	Required	Action Required
Estimated Installation Date	Yes	Enter the date you think this equipment will be installed
Equipment Model #	No	Enter the manufacturer’s product model number
Equipment Location	No	Enter a brief description of where the equipment is being installed

Table of editable fields in Measures Equipment Information subsection

Cost & Incentive Information

Cost & Incentive Information

Project Cost Information

\$ Estimated Equipment Cost *

If the measure/equipment has not yet been installed Enter the Estimated Cost of Installation

Total Estimated Project Cost

Project estimated equipment + labor cost

Max Payment

\$ Estimated Labor Cost *

If the measure/equipment has not yet been installed Enter the Estimated labor cost

Reimbursement %

Load Reduction Information

Estimated kW Reduction * Incentive Per Unit

Max Load Reduction Payment

Payment Information

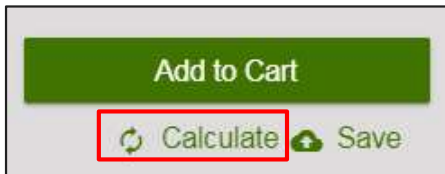
Payment % *Estimated Measure (Capped) Payment*

Measure Validation Message

The following table describes key fields in the Cost & Incentive Information subsection

Field	Required	Action Required
Estimated Equipment Cost	Yes	If the measure has not been installed, enter the estimated cost of installation
Estimated Labor Cost	Yes	If the measure has not been installed, enter the estimated labor cost
Total Estimated Project Cost		N/A - Populated by the system. You can click Calculate to populate these values when the required values are entered
Reimbursement %		
Max Payment		
Estimated kW Reduction		
Incentive Per Unit		
Payment %		
Estimated Measure (Capped) Payment		
Measure Validation Message		

Table of fields in Measures Cost & Incentive Information subsection



Click the **Calculate** button to populate the fields.

The **Cost & Incentive Information** and **Project Summary Totals** fields auto-populate.

Project Summary Totals

Project Summary Totals	
Total Estimated kW Reduction 3333.23	Total Estimated Equipment Cost \$2,445
Total Estimated Labor Cost \$666	Total Estimated Project Cost \$3,111
Total Estimated Measure Code Payment \$2,333.25	

Project Summary Totals fields populate when the application is calculated. All fields in this section are read-only.

File Uploads


Upload the **Scope of Work** document.

1. Click on the **file icon** to locate and select a file on your computer.
2. The uploaded file will display under the field.

File Uploads

Business Partner needs to attach "**Customer Authorization Form**" to submit the application.
OR
If the "Customer Authorization Form" is not attached please **1** the application and

Scope Of Work *

1  **Upload file(s)**

File Uploads

Business Partner needs to attach "**Customer Authorization Form**" to submit the application.
OR
If the "Customer Authorization Form" is not attached please, submit the application and

Scope Of Work *

1 **ScopeOfWork.docx** 11 KB **2** 

Terms and Conditions

1. Click the **Electronic Signature** checkbox to sign the application.
2. Confirm that the **Acceptance of Terms and Conditions** checkbox is checked.
3. Scroll to the top of the page and click **Add to Cart**.

[Back To Applications](#) **Project Submission** **Add to Cart**
Estimated Totals 00000715205 **3**
Customer \$0.00 **Calculate** **Save**

Confirm Terms and Condition Provisions

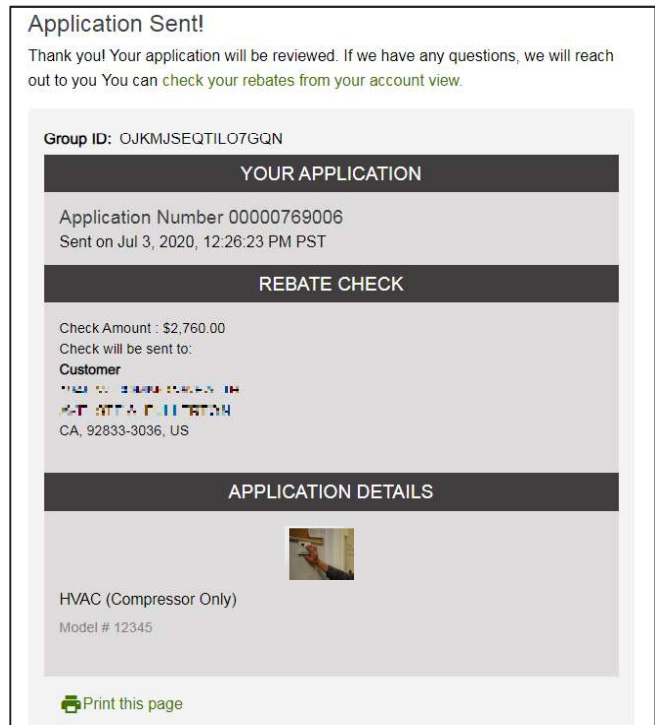
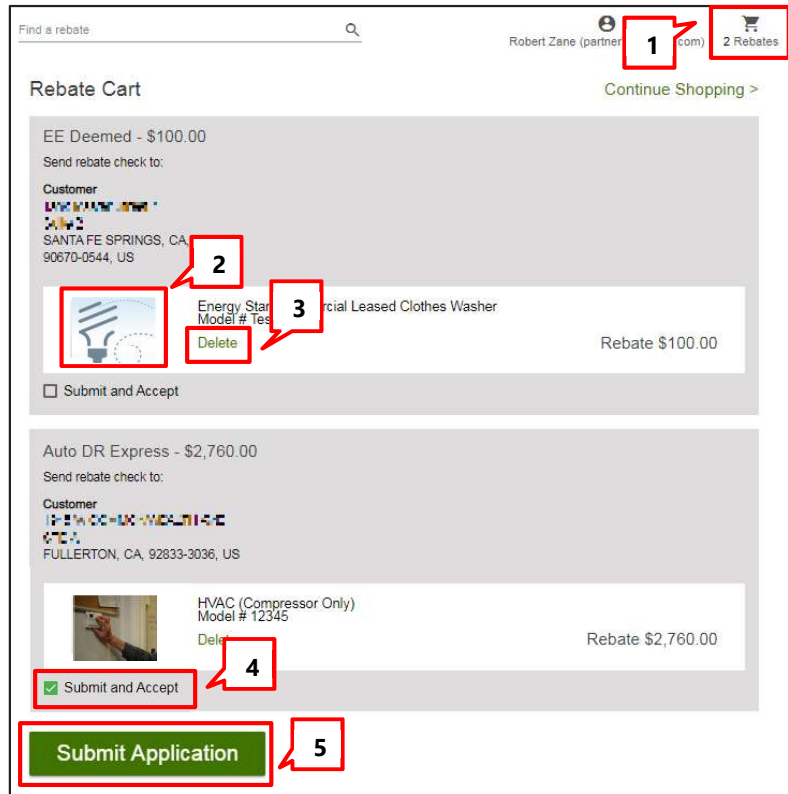
Electronic Signature **1**
When using the electronic signature, the Customer, or if Customer is not an individual, an authorized representative of the Customer, must complete all of the required check boxes and affirm that they have read, understand, and agree to the Terms and Conditions for participating in SCE's Incentive Program

Acceptance of Terms and Conditions **2**
By checking this box, Customer, or authorized representative of Customer, affirms that it is authorized to submit this Application and that it has read, understands, and agrees to all of the Terms and Conditions and all other requirements and restrictions for Customer's participation in the Program set forth in these Terms and Conditions and Express Solutions Statewide EE Business Incentives Manual. Customer certifies that the information provided in the Application is true and correct, and the project(s) for which Customer is requesting Program funding meet(s) all applicable requirements. Customer understands, agrees to, and represents that it meets, all eligibility requirements for participation in the Program. Customer also understands that SCE reserves the right to request additional information to verify Customer's eligibility to participate in the Program, and agrees to provide any such requested information.

The Rebate Cart screen displays.

Submit and Manage Applications (Auto DR)

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
2. To edit an application before it is submitted, click the image.
3. To delete an application, click **Delete**.
4. Click the **Submit and Accept** checkbox for any application you are ready to submit.
5. Click **Submit Application**.
A printable confirmation screen displays.



Update Auto DR Application After Reservation Is Approved

After the reservation is approved, the Applicant has the following options, which are covered in detail in this section.

- ◆ **Incentive Request** – If the product is installed, update the application with installation information and request an incentive payment
- ◆ **Withdrawal** – Request project withdrawal
- ◆ **Reservation Extension** – To avoid cancelling the project when the reservation expires, request an extension to the reservation expiration date. This routes the project back to SCE, where an Approver can:
 - Accept the reservation extension
 - Modify the reservation extension to a different expiration date
 - Reject the reservation extension and enforce the current expiration date
 - Reject the reservation extension and cancel the project

All these options are managed by updating the **Pending Installation and Incentive Request** form.

Open the Application

The screenshot shows the 'Application details' section of a software interface. At the top, it displays 'Group ID: ABQOAD19OMMKK67H'. Below this, there are fields for 'Customer' and 'Site'. The main content area is titled 'Application details' and includes the following information:

Application details	Application Number	Created
Auto DR Calculated	00000715205	Jun 8, 2020, 12:39:50 PM PST
	Status	Last Updated
	Funds Are Reserved	Jul 4, 2020, 4:39:06 PM PST

At the bottom of the application details, there is a warning icon and a message: 'Will Set Application Status to Reservation Expires in 30 Days 06/04/2021 00:00 PDT. time remaining : 334 days 7 hours 20 minutes 17 seconds'. A red box with the number '1' points to the 'Application Number' field, and another red box with the number '2' points to the 'Status' field.

1. The **Status** should be **Funds Are Reserved**.
2. Click the **Application Number** to open the application.

The Application Details screen displays.

Application Details Print this page

Group ID: PGAI085D0ELADAP2

Customer: 80700772605 WILMINGTON, CA Site: 1216 B HOUNTAIN RD, SANTA FE, CA 98101

Program Name	Tracking Number	Created
Auto DR Express	00000772605	Jul 3, 2020, 1:35:20 PM PST
	Status	Last Updated
	Funds Are Reserved	Jul 3, 2020, 2:13:05 PM PST

Application History

1. Project Submission	Jul 3, 2020
2. Reservation Review	Jul 3, 2020
4. Reservation of Funds Approval	Jul 3, 2020
3. Pending Installation and Incentive Request (Customer/TPro)	Jul 3, 2020

Will Set Application Status to Reservation Expires in 30 Days 06/03/2021 00:00 PDT. time remaining : 334 days 9 hours 34 minutes 38 seconds

Incentive Payments

Incentive \$1,740.00

3. Click the form name **Pending Installation and Incentive Request (Customer/TPro)** to open the application at the current form.
The form displays.

Project Information

In the Project Information section, you must update information about the site installation and the terms and conditions submission method. You can also update other information if needed.

As described above, the three options are to withdraw a project, request a reservation extension, or submit an incentive request. These are determined by selections in the Project Information section and are detailed below.

To Withdraw a Project

Make the following selections. Some fields only display when the previous field is completed.

1. **Is Site Installation Complete:** Select **No**.
2. **Do You Require Funds Extension?:** Select **No**.
3. **Application Withdrawal:** Select **Yes**.

1. Is Site Installation Complete? *
No

2. Do You Require Funds Extension? *
No

3. Application Withdrawal *
Yes

Reservation of Funds Date: 06/03/2021

To Request a Reservation of Funds Extension

Make the following selections. Some fields only display when the previous field is completed.

1. **Is Site Installation Complete:**
Select **No**.
2. **Do You Require Funds Extension:** Select **Yes**.
3. **Funds Extension Days:** Select the extension length from the dropdown.
4. **Estimated Incentive Request Date (not shown):** Use the calendar dropdown to select the date that you think you will enter the post-installation information.

To Proceed With an Incentive Request

To proceed with the Incentive Request, you will update information in different sections of the form, as explained below.

Project Information

1. Enter the **Estimated Incentive Request Date**.
2. Select **Yes** from the **Is Site Installation Complete?** dropdown.
3. Enter the number of **Installed Annual Operating Hours**.

Continued on the next page.

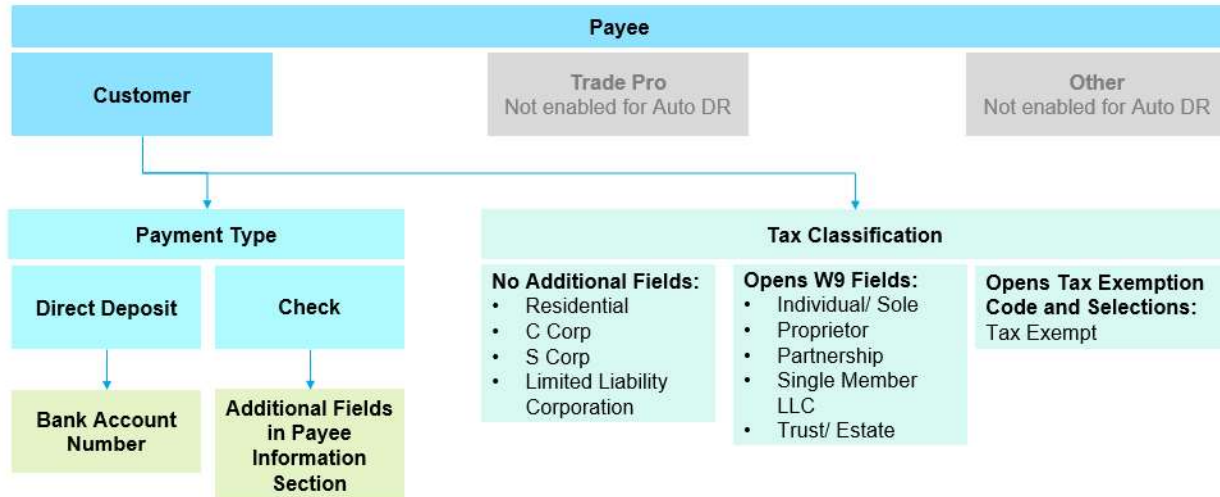
4. Use the **Terms and Conditions Submission Method** dropdown to select:

- ◆ **Electronic Acceptance** – You will accept terms and conditions in the form
- ◆ **Print and Upload** – You must upload a signed copy of the terms and conditions

Payment Details

1. Do you want to apply for Single Payment?
 - **Yes** – Payments for all projects with the same Group ID are included together. Group ID is managed by SCE. To request that projects be grouped for payment, email *AutoDR@sce.com*
 - **No** – The payment for this project will be sent separately
2. Payee Selection: Select **Customer**. (Th is the only available option for Auto DR rebates.)

The process flow below shows which sections and fields are required for each payee selection option.



When **Payee Selection** is **Customer**: **Payment Type** and **Tax Classification** fields display.

About Payment Type

Check: An additional **Payee Information** section displays. The Customer or Trade Pro will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer or Trade Pro user can enter or update it.

Direct Deposit: An additional **Bank Account Number** field displays. The customer selects from a dropdown that includes a list of bank accounts on file for the customer. Each bank account is designated by its last four digits only.

About Tax Classification Fields

Regardless of payment type, Customers must select a Tax Classification. As shown in the workflow above, the different tax classifications cause additional fields to display:

- ◆ These selections do not open any additional fields:
 - **Residential**
 - **C Corp**
 - **S Corp**
 - **Limited Liability** Corporation
- ◆ The following selections open a set of W9 Fields:

- **Individual/ Sole**
 - **Proprietor**
 - **Partnership**
 - **Single Member LLC**
 - **Trust/ Estate**
- ◆ The **Tax Exempt** selection opens a Tax Exemption Code and Selections field

Scenario 1: Payee is Customer and Payment Type is Check

Note: This scenario does not address tax classification selections. These are covered separately from payment type.

In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

Note: Country Code must be two digits. Enter "US" for United States or "CA" for Canada.

Scenario 2: Payee is Customer and Payment Type is Direct Deposit

An additional **Bank Account Number** field displays.

- ◆ The dropdown displays the last four digits of the bank account(s) the customer has added to MyAccount on SCE.com
- ◆ If there are no bank accounts available, a pop up will note that no bank accounts are available for this customer. Notify the customer that they need to add the account to My Account on SCE.com, after which it will display in iEnergy

- ◆ In this case, the Payee Information section will display two auto-populated fields: **Company Name** and **Company Number**. (Not shown)

Scenario 3: Payee is Customer and Tax Classification opens W9 fields

1. Use the **Tax ID Type** dropdown to select EIN or SSN.
Enter the Tax ID and Tax ID confirmation.

2. Click the **pencil icon** in the **Tax ID Number** and **Tax ID Number Confirm** fields enter the value. The value is not shown on the form.

3. Click the **eye icon** to view the **Tax ID Number** values.
4. Enter the tax contact information.

The screenshot shows the 'W9 Information Section' of a form. It includes a dropdown for 'Tax Classification *' set to 'Individual/Sole'. Below this is a 'W9 Information Section' header and a link to view W9 documents. The form contains several fields: 'Tax ID Type *' (a dropdown menu), 'Tax ID Number' (with a pencil icon), 'Tax ID Number Confirm' (with a pencil icon), 'Name *', 'Address 1 *', 'Address 2', 'City *', 'State *', and 'Zip Code *'. Red callout boxes with numbers 1 through 4 point to the 'Tax ID Type' dropdown, the pencil icons in the 'Tax ID Number' and 'Tax ID Number Confirm' fields, the eye icon in the 'Tax ID Number Confirm' field, and the entire address and city/zip section respectively.

Scenario 4: Payee is Customer and Tax Classification is Tax Exempt

An additional Tax Exemption Code subsection displays.

Tax Classification *

Tax Exempt

Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor, C Corporation, Partnership)

Tax Exemption Code

Please select below code for Tax Exemption Reason:

- Code Number:1 - An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).
- Code Number:2 - The United States or any of its agencies or instrumentalities.
- Code Number:3 - A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities.
- Code Number:4 - A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- Code Number:5 - A corporation.
- Code Number:6 - A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession.
- Code Number:7 - A futures commission merchant registered with the Commodity Futures Trading Commission.
- Code Number:8 - A real estate investment trust.
- Code Number:9 - An entity registered at all times during the tax year under the Investment Company Act of 1940.
- Code Number:10 - A common trust fund operated by a bank under section 584(a)
- Code Number:11 - A financial institution
- Code Number:12 - A middleman known in the investment community as a nominee or custodian.
- Code Number:13 - A trust exempt from tax under section 664 or section 647.

Exempt Code *

2

Enter the exempt code you are tax exempt. (i.e. non-profit organization, religious organization)

Tax Exempt Reason

The United States or any of its agencies or instrumentalities

1. The customer or Trade Pro selects a reason code. (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **Tax Exempt Reason** field.

This concludes the payment/payee details scenarios.

Product/ Measure

Auto DR Express Measure

Equipment Information

Measure Ref# 1:98044-25kW-w09-WRUF

Measure Name Lighting Controls—40% Dimming

Actual Installation Date *

Enter the date that the measure/equipment was installed and functional

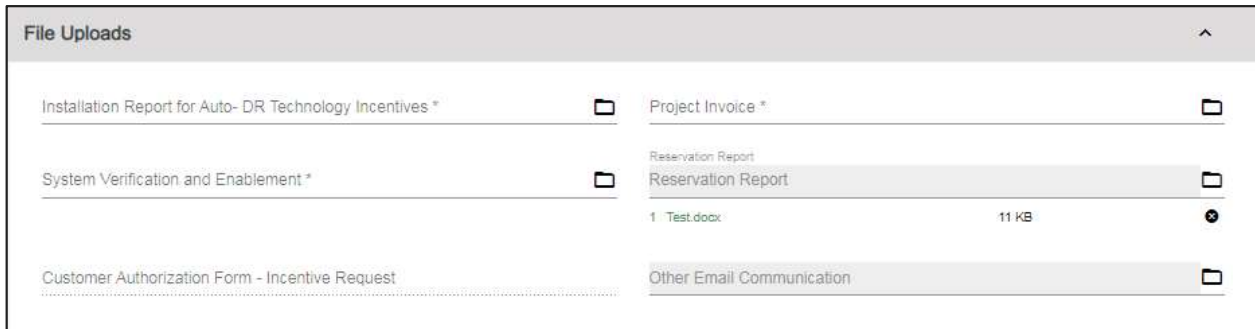
Equipment Model #

Equipment Location

1. Enter the **Actual Installation Date** (required).

Note: **Equipment Model #** and **Equipment Location** are optional fields.

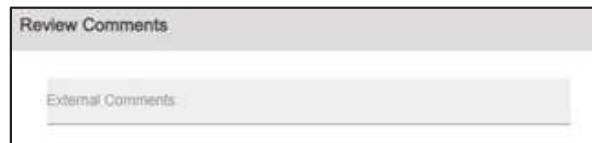
File Uploads



- ◆ Required file uploads are:
 - **Installation Report for Auto DR Technology Incentives**
 - **System Verification and Enablement**
 - **Project Invoice**
- ◆ If the **Terms and Conditions Submission Method** is **Print and Upload**, the **Customer Authorization Form – Incentive Request** is required

Review Comments

Any comments from the SCE team will appear in the External Comments field.



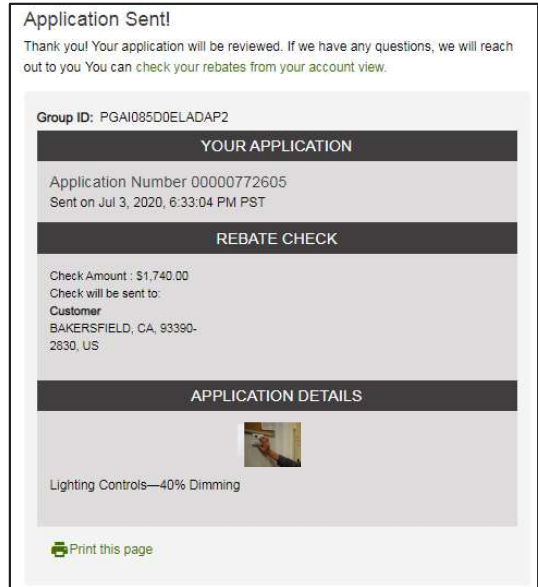
Submit the application



Click **Submit** in the header.

The confirmation screen displays.

This concludes the section on updating an Auto DR application after installation.



Deemed Applications

This section includes two sets of instructions:

Reservation Request: If you are submitting an application before installation, submit a Reservation Request. After installation, you will complete a second form – Pending Installation and Incentive Request.

Note: If you are applying for OBF you must begin with a Reservation Request.

Incentive Request: If you are submitting an application after product installation you will submit an Incentive Request, which includes installation and payment information.

Deemed Reservation Request

Select a Deemed Product

The screenshot shows a web interface for selecting a deemed product. On the left, there is a sidebar with a home icon and a callout '1' pointing to the 'Qualifying rebates for:' section. Below this are two lists of checkboxes: 'Product Types' (Lighting, HVAC, Appliances, Refrigeration, Pumping, Foodservice, Process, Water Heating) and 'Product Sub Types' (AC Only Units, AC Unit with Gas Heat, Heat Pump, Clothes Washer, Motor). On the right, a filter box titled 'Enter filters to refine product listing' contains dropdowns for 'Market Sector' (Commercial), 'Application Date' (07/21/2020), and 'Building Type for EE' (OFFICE - SMALL), along with a text input for 'Annual Demand' (22.00) and an 'Apply' button. Below the filters, the text 'To select products from other category, please, start form category page again' is visible. In the center, the heading 'Deemed with qualifying reb' is followed by a callout '2' pointing to two product cards. Each card features an image of a refrigerated chef base, the category 'HVAC', and the product name 'Economizer Control Adjustment on AC Only Units - (AC-11452-BRO-RCx-OfS-w09-Comm-EE Deemed Customer_Guest_Trade Pro)' and 'Economizer Control Adjustment on AC Unit with Gas Heat - (AC-11458-BRO-RCx-OfS-w09-Comm-EE Deemed Customer_Guest_Trade Pro)'.

After selecting the product category, the next page shows a list of products eligible for rebates.

1. Refine results by using the filters at the top of the page and clicking **Apply**, or by selecting **Product Types** or **Sub Types** on the left.
2. Click on a product image to select a product.
The product details page displays.

3. After selecting the product, click **Apply for Rebate** to start the application.

The screenshot shows the product details page for a refrigerated chef base. It includes a '< Back to Results' link, an image of the product, and a detailed description: 'Refrigerated Chef Bases with an exterior length between 55 - 73 inches and energy consumption less than 1.61 kWh/day Chef Bases replacing Standard Refrigerated Chef Bases - (FS-20265-NR-Com-w11-Comm-DwSD-EE Deemed Customer_Guest_Trade Pro)'. A green 'Apply for Rebate' button is highlighted with a callout '3'. Below the button, the text 'Rebate Description' is visible.

Deemed Reservation Request Application Sections

Customer Information

Customer Information ^

Customer Number * <input type="text" value="CA 11111111111111111111111111111111"/>	Site Number * <input type="text" value="0900293793"/>
Bill Account Number * <input type="text" value="CA 11111111111111111111111111111111"/>	Your Site Number is the your 10 digit Service Account number on your SCE bill. Example of SCE Bill – Link. Customer Name * <input type="text" value="CA 11111111111111111111111111111111"/>
Site Address 1 * <input type="text" value="CA 11111111111111111111111111111111"/>	<input type="text" value="CA 11111111111111111111111111111111"/>
Site City * <input type="text" value="PIRU"/>	Site State * <input type="text" value="CA"/>
Site Zip * <input type="text" value="93040"/>	Rate Schedule <input type="text" value="TP2D49:TOU-PA-2-D 4pm to 9pm"/>

Project Contact First Name * <input type="text" value="Janet"/>	Project Contact Last Name * <input type="text" value="Weiss"/>
Project Contact Title * <input type="text" value="Test"/>	Project Contact Phone * <input type="text" value="(123) 456 - 7890"/>
Project Contact Email * <input type="text" value="jweiss@ca.gov"/>	<small>If you have an extension Enter 'x' after phone number if requires extension (i.e. (555) 555-1234x4321). Format for phone extension (i.e. (555) 555-1234x4321).</small>

This email address will be used to provide notifications for this project.

Read-only Customer and Site information auto-populates from iEnergy. Project contact information auto-populates based on the user logged in and can be edited.

Additional Customer Information

1. If the **Account Representative**, **FNAICS**, or **Building Type** values are missing or incorrect, update them here.
2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCE FILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown below

Additional Customer Information ^

Search for the FNAICS classification 2 business from the file under the link below:
[FNAICS REFERENCE FILE](#) and enter the description to the FNAICS description field. 1

SCE Account Representative <input type="text" value="John Weiss"/>	SCE Account Representative Override <small>Enter the correct SCE Account Manager if incorrect or missing and you know who they are.</small>
FNAICS Code <input type="text" value="211111"/>	FNAICS Override <small>Enter correct FNAICS code here if defaulted value is incorrect or missing. (i.e. 311512 - Commercial Bakeries) Building Type</small>
FNAICS Description <input type="text" value="CRUDE PETROLEUM AND NATURAL GAS EXTRACTIO"/>	<input type="text" value="Manufacturing - Light Industrial"/>
Building Type Override <input type="text" value=""/>	<input type="text" value=""/>
Market Sector <input type="text" value="Industrial"/>	<input type="text" value=""/>

	A	B
1	FirstOfFNAICS	Naics_text
2	422410	GENERAL LINE GROCERY WHOLESALERS
3	327910	ABRASIVE PRODUCT MANUFACTURING
4	325520	ADHESIVE MANUFACTURING
5	924110	ADMINISTRATION OF AIR AND WATER RESOURCE AND SC
6	924120	ADMINISTRATION OF CONSERVATION PROGRAMS
7	923110	ADMINISTRATION OF EDUCATION PROGRAMS
8	926110	ADMINISTRATION OF GENERAL ECONOMIC PROGRAMS
9	925110	ADMINISTRATION OF HOUSING PROGRAMS

Project Information

Project Information ^

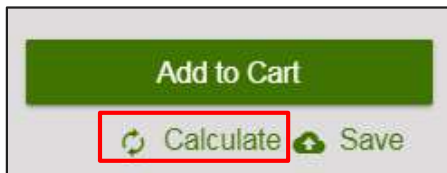
<p>Application Name * Test</p> <p><small>Enter brief application name for your reference.</small></p> <p>Attribution ID * SCE-13-SW-002C</p> <p>Baseline Annual Operating Hours</p> <p><small>Enter facility's annual baseline operating hours.</small></p> <p>Installed Annual Operating Hours</p> <p>Application Submission Date 6/26/2020</p> <p>Program Manager * Rebate Center</p> <p>Reservation or Incentive Request * Reservation Request</p> <p>Public Sector Project No</p> <p>Pricing Effective Date 6/26/2020</p>	<p>Group ID BRFIU8SEUBD89D15</p> <p>Attribution ID Description Commercial Deemed Incentives Program</p> <p>Total Sq Ft. *</p> <p><small>Enter building square footage area only.</small></p> <p>Year Built</p> <p><small>Enter year that facility was built. Are you applying for OBF? *</small></p> <p>No</p> <p>Project Description</p> <p><small>Enter brief project description. Terms and Conditions Submission Method *</small></p> <p>Electronic Acceptance</p> <p>Hard To Reach Project No</p>
--	---

The following table describes key fields in the Project Information section.

Field	Required	Action Required
Application Name	Yes	Name the application
Baseline Operating Hours	No	Enter facility's annual baseline operating hours
Total Sq. Ft.	Yes	Enter the site total square footage
Installed Annual Operating Hours	No	Enter the installed annual operating hours
Year Built	No	Enter the construction year of the site

Are you applying for OBF?	Yes	Select Yes or No . If Yes , an OBF provision is added to Terms and Conditions On Bill Financing (OBF) allows you to procure a loan from SCE to cover the project costs. This loan will be repaid in installments on your utility bill
Project Description	No	Enter a brief project description
Reservation or Incentive Request	Yes	Select Reservation Request
Terms and Conditions Submission Method		N/A: In the Reservation request this is automatically set to Electronic Submission .
Public Sector Project	No	Specify whether the project is a public sector project
Hard to Reach Project	No	Specify whether the installation is in a hard to reach location
Are you using a Trade Pro?	Yes	Select Yes if you are using a Trade Pro for the project. Otherwise, select No .

Table of fields in the Project Information Section

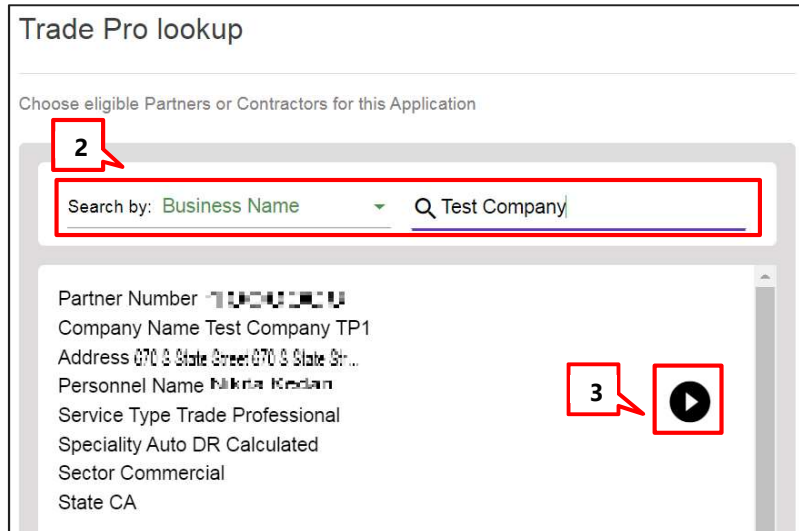


When you have entered all the required values, click the **Calculate** button to populate dependent sections and fields.

Trade Professional Information

This section displays if use of a Trade Pro was indicated in the Project Information section.

1. Click the **Trade Pro lookup** link in the section header to search for a Trade Pro.
2. Select a search parameter (**Business Name** or **Vendor ID**) and type a keyword. Results populate automatically.
3. Select the Trade Pro from the results and click on the arrow.



If a Trade Pro does not appear in this search, contact them and let them know that they need to register as a Trade Pro with SCE. In this case, the options for the current application are:

- ◆ Submit the project without a TP
- ◆ Select another registered TP
- ◆ Leave the application in draft mode until the TP registers (the application will stay open for 30 days)


Product Details

In the iEnergy system, products are referred to as “measures”. Since more than one product/measure can be included on an application, there is a “measure container” section to which each product is added. For Deemed projects this section of the application is named **EE Deemed Container**.

In this section, enter information about the product, project costs, and kWh savings information. If you have selected multiple products, you will enter details separately for each one.

Click **Calculate** to populate the **Total Project Cost** and **Measure Payment** fields.

Note: Click the **trash can icon** in the section header to remove a product from the application. (See the screenshot below.)

EE Deemed Container 

Core Measure Information

Measure Display Status
Core Measure Information

Library Measure Ref# *
AC-20781-BRO-RCx-OFS-w08-Comm-DwSD-EE Deemed Customer_Guest_Trai

Measure Name
AC-20781

Measure Code
AC-20781


Equipment Model ID
Enter manufacturer's product model number

Equipment Description
Enter brief description of measure/equipment being installed

Equipment Serial ID
Enter manufacturer's model serial number or UPN

Equipment Location
Enter a brief description of where the measure/equipment being replaced is located.

Number of Measures *
Enter quantity of products/measures being installed

Estimated Installation Date * 
Enter the date you think this measure/equipment will be installed.

Dollar Per Unit Definition

OBP Measure

\$ Equipment Cost *
If measure/equipment has been installed Enter the Actual Cost of installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of installation.

\$ Labor Cost *
If the measure/equipment has been installed please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost.

Measure Status

Total Project Cost
Total Project Cost is equal Equipment cost + Labor Cost

Eligible

Measure Payment

Site Specific Savings (kWh)

The following table describes key fields in the EE Deemed Measure Container section.

Measure Details Field	Required	Action Required
Equipment Model ID#	No	Enter the manufacturer's product model number
Equipment Serial ID #	No	Enter the manufacturer's model serial number or UPN
Equipment Description	No	Enter a brief description of the measure/equipment being installed
Equipment Location	No	Enter a brief description of where the equipment is being installed
Number of Measures	Yes	Enter the quantity of products/measures being installed

Estimated Installation Date	Yes	Enter the date that the measure/equipment was installed and functional
Equipment Cost	Yes	If measure/equipment has been installed, enter the Actual Cost of Installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of Installation
Labor Cost	Yes	If the measure/equipment has been installed, please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost
Purchase Date	Yes	Enter the date the measure/equipment was purchased

Table of fields in the EE Deemed Container measure details section

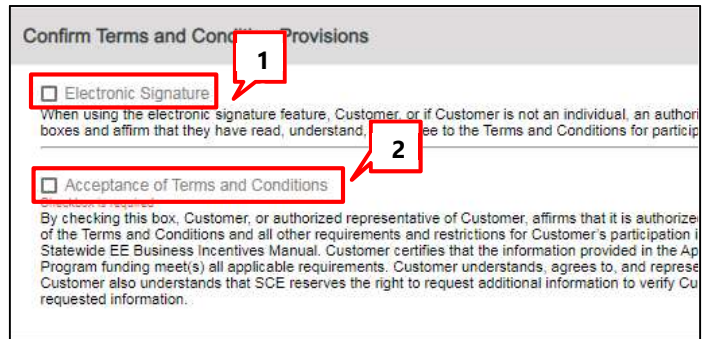
Project Totals

Project Totals	
Total Measure Code Payment \$0	Total Base Incentive \$0
Total Net Incentive/Payment \$0	Total Equipment Cost \$5,000
Total Labor Cost \$2,000	Total kWh Savings 0.0
Total kW Savings 0.0	Total THM Savings 0.0

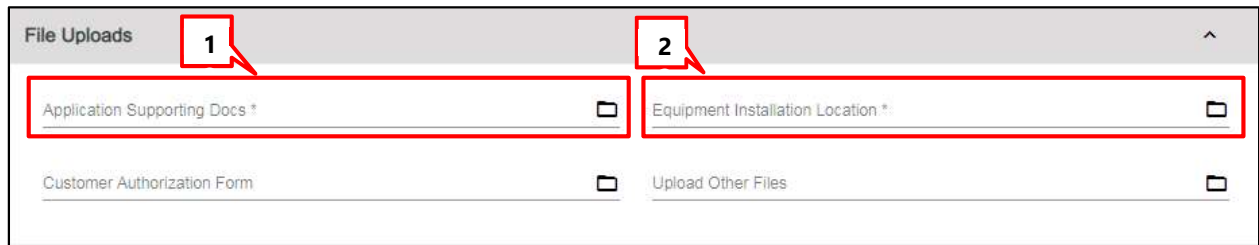
Project Totals is a read-only section that displays calculated values based on the project information entered.

Confirm Terms and Conditions Provisions

1. Click the **Electronic Signature** checkbox to sign the application.
2. Click the **Acceptance of Terms and Conditions** checkbox.



File Uploads

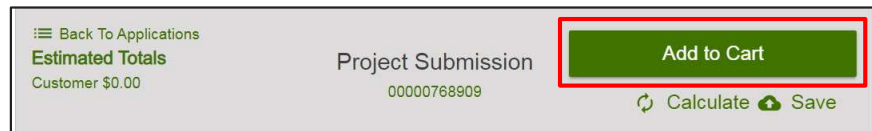


1. Upload **Application Supporting Docs**.
2. Upload the **Equipment Installation Location** document.

Add to Cart

Click the **Add to Cart** button in the header.

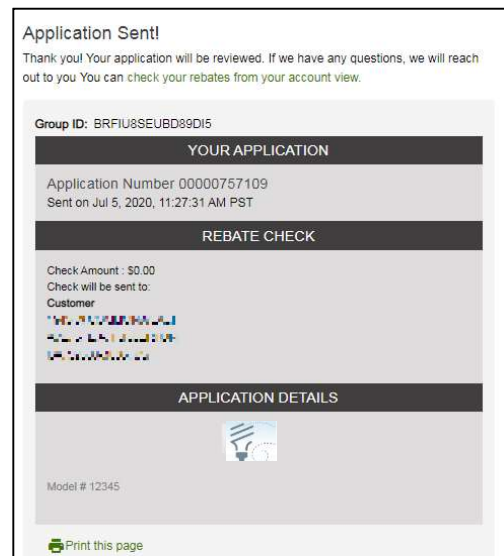
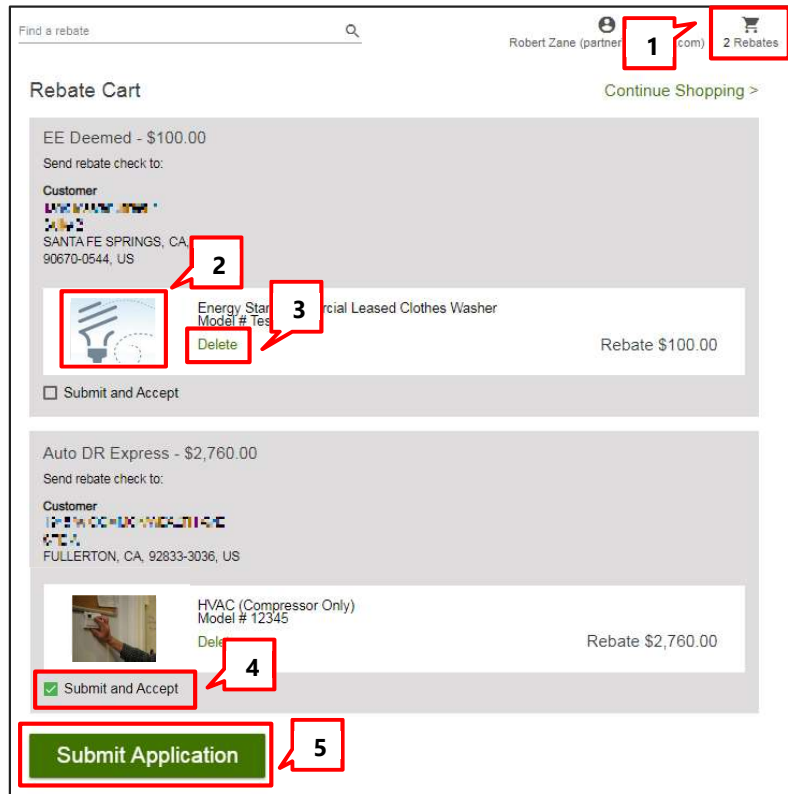
The **Rebate Cart** screen displays.



Submit and Manage Applications (Deemed)

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
2. To edit an application before it is submitted, click the image.
3. To delete an application, click **Delete**.
4. Click the Submit and Accept checkbox for any application you are ready to submit.
5. Click **Submit Application**.

A printable confirmation page displays. (See below.)



The system sends an email with the project details.

Hello Igor Moris,

Thank you for submitting your Project 00000757109 installed at 14500 E. FULLERTON, CA 92833. We are currently reviewing your application and will contact you if additional information is required.

Project Summary							
Application ID:	00000757109						
Group ID:	BRFIUSSEUJD89DI5						
Application Name:	Test						
Customer Name:	[REDACTED]						
Customer Number:	[REDACTED]						
Contract Number:	8004863870						
Site Address:	[REDACTED]						
	STE A						
	FULLERTON, CA, 92833						
SCE Estimated Reservation Summary							
Measure Name	Number of Measures	Unit of Measure	Quantity	Base Price Per Unit	Base Incentive	*Max Incentive	**Estimated Incentive Amount
Evaporator Coil Cleaning on Small Pkg AC system with No TXV DX Equipment replacing and a functional, uncleaned evaporator coil - (AC-20781-BRO-RCx-Ofs-w08-Comm-DwSD-EE Deemed Customer_Guest_Trade Pro)	10	1	10	0.00	7000.00	0.00	
Total Estimated Reservation Amount							\$0.00
*Measures cannot be paid at more than 100% of Equipment/Incremental Cost							
**Incentive amount is determined between the lowest of base incentive and max incentive							

If you have any questions, please contact us at (626) 635-6015 Monday through Friday, from 8:00 a.m. to 5:00 p.m., or send an e-mail to BusinessIncentives@Sce.com. Please have your Application Number available for reference when you call and include it in any e-mail correspondence.

Update Deemed Application After Reservation Is Approved

After the reservation is approved, the Applicant has the following options, which are covered in detail in this section. These are done by updating the Pending Installation and Incentive Request form.

- ◆ **Incentive Request** – If the product is installed, update the application with installation information and request incentive payment
- ◆ **Withdrawal** – If the applicant decides to not pursue the project, they should withdraw the project at this point
- ◆ **Reservation Extension** – To avoid cancelling the project when the reservation expires, the customer or representative can request an extension to the reservation expiration date at this point. This routes the project back to SCE, where an Approver can:
 - Accept the reservation extension
 - Modify the reservation extension to a different expiration date
 - Reject the reservation extension and enforce the current expiration date
 - Reject the reservation extension and cancel the project

Open the Application

Group ID: BRFIU8SEUBD89DI5

Customer **IMAGINE USA** Site **1345 W COMMONWEALTH AVE - STE A, FULLER**

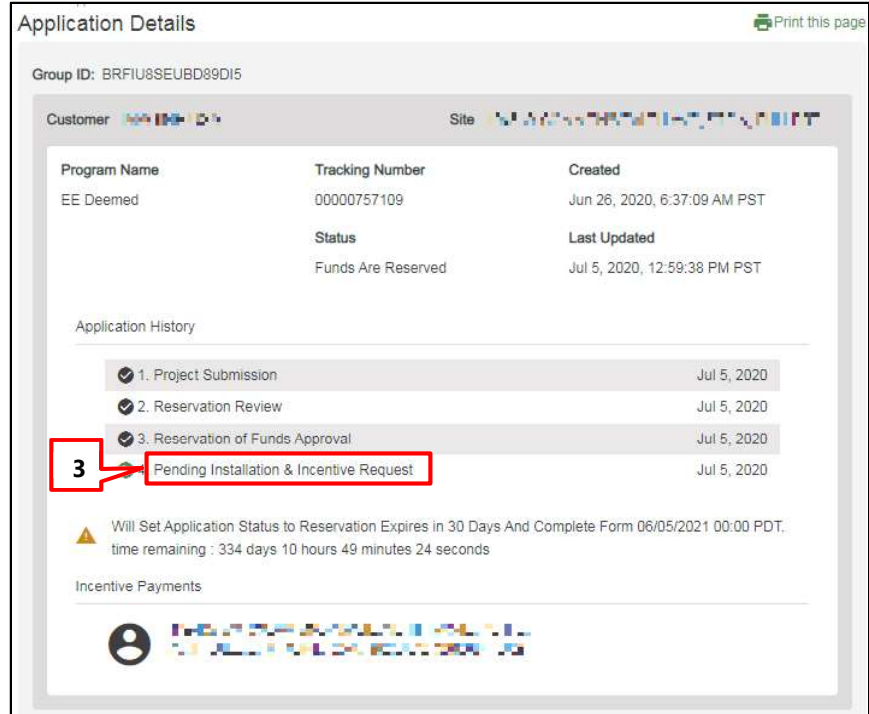
Application details EE Deemed	Application Number 00000757109	Created Jun 26, 2020, 6:37:09 AM PST
	Status Funds Are Reserved	Last Updated Jul 5, 2020, 12:59:38 PM PST

Will Set Application Status to Reservation Expires in 30 Days And Complete Form 06/05/2021 00:00 PDT.
time remaining : 334 days 10 hours 58 minutes 39 seconds

1. The Application should have the **Status: Funds Are Reserved**.
2. Click the **Application Number** to open the application.

The Application Details screen displays.

- Click the form name **Pending Installation & Incentive Request** to open the application at the current form.



Project Information

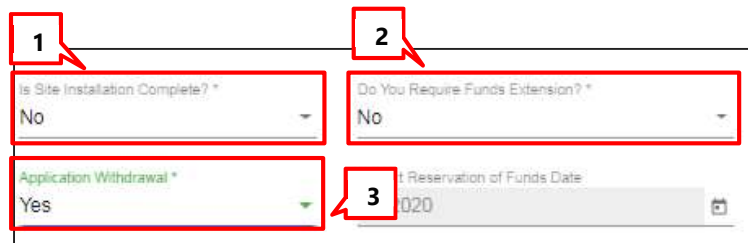
In the Project Information section, you must update information about the site installation and the terms and conditions submission method. You can also update other information if needed.

As described above, the three options are to withdraw a project, request a reservation extension, or submit an incentive request. These are determined by selections in the Project Information section and are detailed below.

To Withdraw a Project

Make the following selections. Some fields only display when the previous field is completed.

- Is Site Installation Complete:** Select **No**.
- Do You Require Funds Extension?:** Select **No**.
- Application Withdrawal:** Select **Yes**.



To Request Reservation of Funds Extension

Make the following selections. Some fields only display when the previous field is completed.

- Is Site Installation Complete:** Select **No**.
- Do You Require Funds Extension?:** Select **Yes**.
- Funds Extension Days:** Select the extension length from the dropdown.
- Estimated Incentive Request Date:** Use the calendar dropdown (not shown) to select the date that you think you will enter the post-installation information.

The screenshot shows a form with the following fields and callouts:

- 1:** A red box highlights the 'Is Site Installation Complete?' dropdown menu, which has 'No' selected.
- 2:** A red box highlights the 'Do You Require Funds Extension?' dropdown menu, which has 'Yes' selected.
- 3:** A red box highlights the 'Funds Extension Days Requested?' dropdown menu, which has '15 Days' selected.

Other visible fields include 'Project Reservation of Funds Date' with the value '7/3/2020' and a calendar icon.

To Proceed With an Incentive Request

To proceed with the Incentive Request, you will update information in different sections of the form, as explained below.

Project Information

- Select **Yes** from the **Is Site Installation Complete?** dropdown.
- Enter the **Estimated Incentive Request Date**.
- Use the **Terms and Conditions Submission Method** dropdown to select:
 - ◆ **Print and Upload** – You must upload a copy of the signed terms and conditions
 - ◆ **Electronic Acceptance** – You will accept terms and conditions in the form

The screenshot shows the 'Site Installation Information' section of the form with the following fields and callouts:

- 1:** A red box highlights the 'Is Site Installation Complete?' dropdown menu, which has 'Yes' selected.
- 2:** A red box highlights the 'Estimated Incentive Request Date' field, which has a calendar icon and the value '7/10/2020'.

Other visible fields include 'Project Fund Days' with the value '365' and 'Project Reservation of Funds Date' with the value '7/10/2020'.

The screenshot shows the 'Terms and Conditions Submission Method' dropdown menu with the value 'Print and Upload' selected. A red box and callout '3' highlight this field.

Product/ Measure

In the EE Deemed Container section update the following fields:

1. Enter the **Actual Installation Date** (required).
2. Enter the equipment **Purchase Date** (required).

Other product details can be updated if needed.

The screenshot shows a form with several sections. The top section is titled 'Actual Installation Date *' and has a red box around it with a callout '1'. Below it is a text input field with the placeholder 'Enter the date that the measure/equipment was installed and functional'. The next section is 'Labor Cost *' with a value of '\$ 2,000.00'. Below that is 'Measure Status *' with a dropdown menu set to 'Eligible'. The bottom section is 'Purchase Date *' with a red box around it and a callout '2'. Below it is a text input field with the placeholder 'Enter the date the measure/equipment was Purchased'.

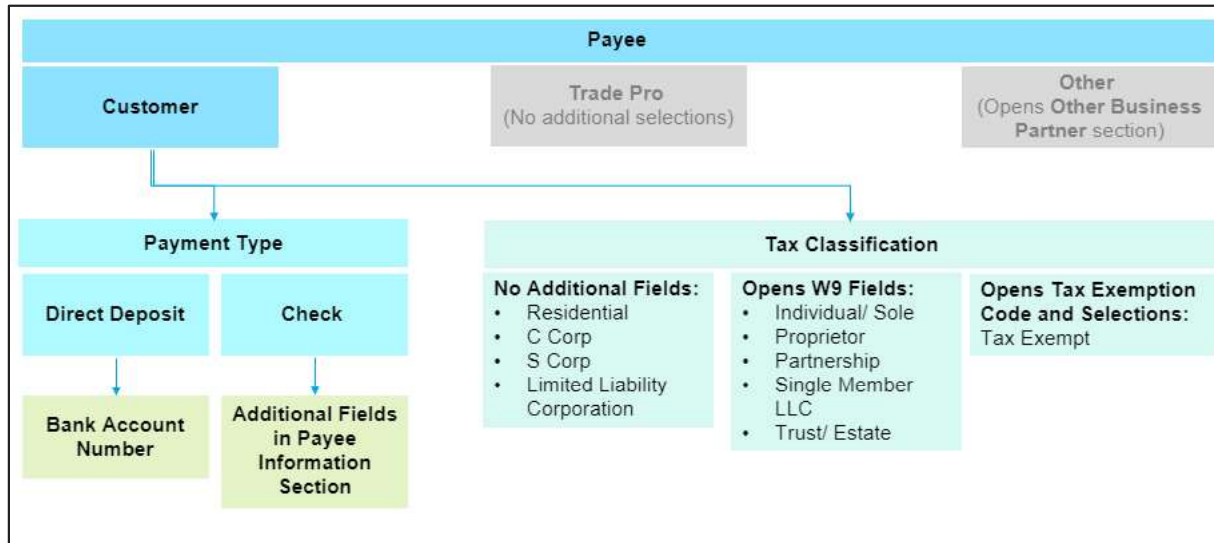
Payment Details

1. Do you want to apply for Single Payment?
 - **Yes** – Payments for all projects with the same Group ID are included together. Group ID is managed by SCE. To request that projects be grouped for payment, email *BusinessIncentives@sce.com*
 - **No** – The payment for this project will be sent separately

The screenshot shows a form titled 'Payment Details'. The first field is a dropdown menu labeled 'Do you want to apply for Single Payment? *' with a red box around it and a callout '1'. Below it is a text input field with the placeholder 'Select "Yes" if you would like to receive one payment for all projects submitted today.'. The second field is another dropdown menu labeled 'Payee Selection *' with a red box around it and a callout '2'.

2. **Payee Selection:** Select **Customer**, **Trade Pro**, or **Other**. Depending on this selection, other required fields may display. The following section details the requirements for each possible payee scenario.

The process flow below shows which sections and fields are required for each payee selection option.



When **Payee Selection** is **Customer**, **Payment Type** and **Tax Classification** fields display.

About Payment Type

Check: An additional **Payee Information** section displays. The Customer or Trade Pro will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer or Trade Pro user can enter or update it.

Direct Deposit: An additional **Bank Account Number** field displays. The customer selects from a dropdown that includes a list of bank accounts on file for the customer. Each bank account is designated by its last four digits only.

About Tax Classification Fields

Regardless of payment type, Customers must select a Tax Classification. As shown in the workflow above, the different tax classifications cause additional fields to display:

- ◆ These selections do not open any additional fields:
 - **Residential**
 - **C Corp**
 - **S Corp**

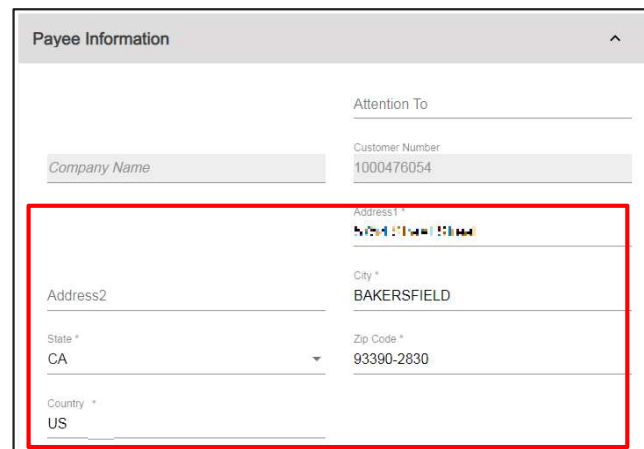
- **Limited Liability** Corporation
- ◆ These selections open a set of W9 Fields:
 - **Individual/ Sole**
 - **Proprietor**
 - **Partnership**
 - **Single Member LLC**
 - **Trust/ Estate**
- ◆ This selection opens a Tax Exemption Code and Selections field: **Tax Exempt**

Scenario 1: Payee is Customer and Payment Type is Check

Note: This scenario does not address tax classification selections. These are covered separately from payment type.

In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

Note: Country Code must be two digits. Enter "US" for United States or "CA" for Canada.



The screenshot displays the 'Payee Information' form with the following fields and values:

Payee Information	
Attention To	
Company Name	Customer Number 1000476054
Address1 *	504 1st St
Address2	City * BAKERSFIELD
State *	Zip Code * 93390-2830
Country *	US

Payment Type Scenario 2: Payee is Customer and Payment Type is Direct Deposit

Payee Selection * Customer	Payment Type * Direct Deposit
Bank Account Number * <small>Select the Last 4 digits of payee's bank account number (If any changes required please visit your SCE.com My Account profile).</small>	Tax Classification * <small>Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor; C Corporation, Partnership)</small>

An additional **Bank Account Number** field displays.

- ◆ The dropdown displays the last four digits of the bank account(s) the customer has added to MyAccount on SCE.com
- ◆ If there are no bank accounts available, a pop up will note that no bank accounts are available for this customer. Notify the customer that they need to add the account to My Account on SCE.com, after which it will display in iEnergy
- ◆ In this case, the Payee Information section will display two auto-populated fields: **Company Name** and **Company Number**. (Not shown)

Scenario 3: Payee is Customer and Tax Classification opens W9 fields

1. Use the **Tax ID Type** dropdown to select EIN or SSN.
Enter the Tax ID and Tax ID confirmation.

2. Click the **pencil icon** in the **Tax ID Number** and **Tax ID Number Confirm** fields enter the value. The value is not shown on the form.

3. Click the **eye icon** to view the **Tax ID Number** values.
4. Enter the tax contact information.

Payee Selection * Customer	Payment Type * Direct Deposit
Bank Account Number * <small>Select the Last 4 digits of payee's bank account number (If any changes required please visit your SCE.com My Account profile).</small>	Tax Classification * <small>Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor; C Corporation, Partnership)</small>

The form includes four numbered callouts:

- 1: Points to the Tax ID Type dropdown.
- 2: Points to the Tax ID Number field.
- 3: Points to the Tax ID Number Confirm field.
- 4: Points to the Tax Contact Information section.

Scenario 4: Payee is Customer and Tax Classification is Tax Exempt

An additional Tax Exemption Code subsection displays.

Tax Classification *

Tax Exempt ▼

Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor, C Corporation, Partnership)

Tax Exemption Code

Please select below code for Tax Exemption Reason:

- Code Number:1 - An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).
- Code Number:2 - The United States or any of its agencies or instrumentalities.
- Code Number:3 - A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities.
- Code Number:4 - A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- Code Number:5 - A corporation.
- Code Number:6 - A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession.
- Code Number:7 - A futures commission merchant registered with the Commodity Futures Trading Commission.
- Code Number:8 - A real estate investment trust.
- Code Number:9 - An entity registered at all times during the tax year under the Investment Company Act of 1940.
- Code Number:10 - A common trust fund operated by a bank under section 584(a).
- Code Number:11 - A financial institution
- Code Number:12 - A middleman known in the investment community as a nominee or custodian.
- Code Number:13 - A trust exempt from tax under section 664 or described in section 4947.

Exempt Code *

2 ▼

Enter the exempt code you are tax exempt. (i.e. non-profit organization, religious organization)

Tax Exempt Reason

The United States or any of its agencies or instrumentalities

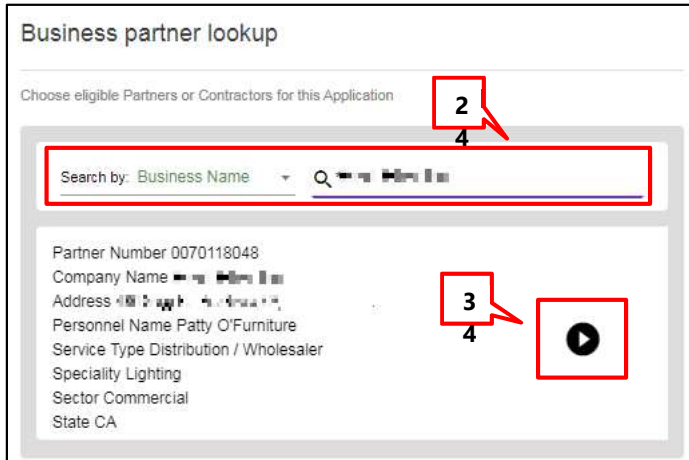
1. The customer or Trade Pro selects a reason code. (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **Tax Exempt Reason** field.

Scenario 5: Payee is Trade Pro

When **Payee Selection** is the **Trade Pro**, then the Payee Information section is auto-populated with the selected Trade Pro **Company Name Vendor ID**. (Not shown.)

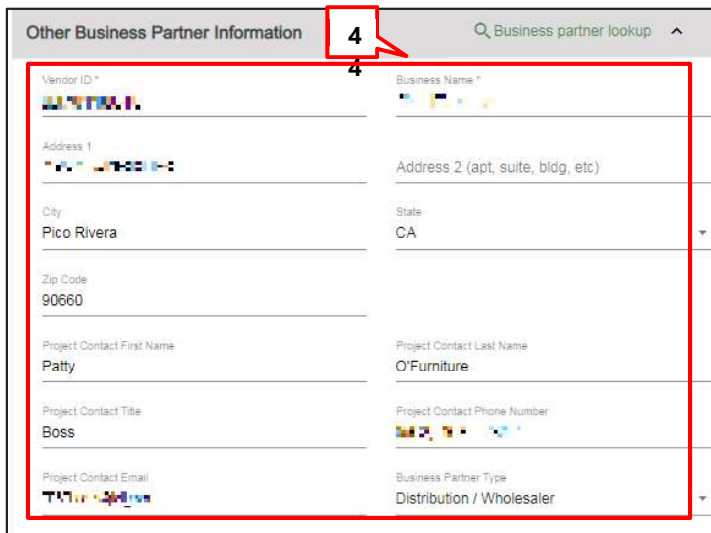
Scenario 6: Payee is Other

When **Payee Selection** is **Other**, the **Other Business Partner Information** section displays. Look up a business partner.



1. Click **Partner lookup** in the section header.
The Partner lookup screen displays.
2. Select a search parameter: **Business Name** or **Vendor ID** and type a value in the search field. The results populate automatically.
3. Click the arrow next to the partner you want to add as the payee.
4. The business partner details populate.

*The **Payee Information** section will auto-populate with the selected partner's **Company Name** and **Vendor ID**.*



This concludes the payment/payee details scenarios.

Terms and Conditions – Electronic Submission

This section displays when the Terms and Conditions Submission Method is Electronic Acceptance. Click all applicable checkboxes:

- ◆ **Electronic Signature**
- ◆ **TC No Changes Provision** – If no changes have been made since the Reservation Request
- ◆ **TC Changes Provision** – If changes have been made since the Reservation Request
- ◆ **TC Solution Completely Installed Provision**
- ◆ **Acknowledgement of Tax Implications** – If W9 information required.
- ◆ **Acceptance of Terms and Conditions**

Confirm Terms and Condition Provisions

Electronic Signature
When using the electronic signature feature, Customer, or if Customer is not an authorized signatory, must check the appropriate boxes and affirm that they have read, understand, and agree to the Terms and Conditions.

TC No Changes Provision
No changes to the proposed solutions have been made since the Project Application was submitted. All approved savings calculations are correct.

TC Changes Provision
Due to changes to the proposed measures, appropriate adjustments in the savings calculations, and Sections 4 on page 2, to calculate the revised installed energy usage and savings. The output from the Estimation Software, Calculated Energy Savings Tool, and the Project Application, are also certified.

TC Solution Completely Installed Provision
Customer or Customer's Trade Professional, if applicable certify that (i) the Energy Efficient Solution is installed, operating and being maintained to perform in conformity with their design intent, and (ii) the installation requirements for this installation were followed. The installation date of operation, and the date of certification, are also certified.

Acknowledgement of Tax Implications
Checkbox is required
Customer understands that incentives may be subject to income tax, and if greater than \$600 as income on IRS form 1099 based on tax status reflected on the Project Application, the payee, which may be the Customer or the Customer's Trade Professional, must provide a Request for Taxpayer Identification Number and Certification) and CA-590 (California Statewide EE Business Incentives Manual). Customer certifies that the information provided for tax purposes is true and correct. Customer understands that SCE is not responsible for any taxes that may be imposed due to Program incentives.


Acceptance of Terms and Conditions
Checkbox is required
By checking this box, Customer, or authorized representative of Customer, affirms that they have read, understand, and agree to the Terms and Conditions and all other requirements and restrictions for Customer's participation in the Statewide EE Business Incentives Manual. Customer certifies that the information provided for tax purposes meet(s) all applicable requirements. Customer understands that SCE reserves the right to request additional information.

Terms and Conditions – Print and Upload

This section will be displayed when the **Terms and Conditions Submission Method** is **Print and Upload**.

Click on the file to open the terms and conditions in a new browser tab.

Review Terms and Conditions

 [Your Project's Terms and Conditions](#)

File Uploads

The screenshot displays a 'File Uploads' section with a list of required documents. The documents are arranged in two columns. The first column includes 'Installation Report for Auto- DR Technology Incentives *', 'System Verification and Enablement *', and 'Customer Authorization Form - Incentive Request'. The second column includes 'Project Invoice *', 'Reservation Report', and 'Other Email Communication'. The 'Reservation Report' is highlighted, and below it, a file named 'Test.docx' is shown with a size of 11 KB. There are folder icons next to each document name and a file icon next to the 'Test.docx' file.

- ◆ Required file uploads are:
 - Installation Report for Auto DR Technology Incentives
 - System Verification and Enablement
 - Project Invoice
- ◆ If the **Terms and Conditions Submission Method** is **Print and Upload**, the **Customer Authorization Form – Incentive Request** is required

Review Comments

The screenshot shows a 'Review Comments' section. It has a header 'Review Comments' and a large text area labeled 'External Comments'.

Any comments from the SCE team will appear in the External Comments field.

Click **Submit** in the header.

The screenshot shows the application header. On the left, there is a 'Back To Applications' link and 'Estimated Totals Customer \$0.00'. In the center, it says 'Pending Installation & Incentive Request' with the ID '00000757109'. On the right, there is a green 'Submit' button highlighted with a red box, and 'Calculate' and 'Save' buttons below it.

The confirmation screen displays.

This concludes the section on applying for a Deemed rebate beginning with a Reservation Request.

Application Sent!
Thank you! Your application will be reviewed. If we have any questions, we will reach out to you. You can check your rebates from your account view.

Group ID: PGAI085D0ELADAP2


YOUR APPLICATION


Application Number 00000772605
Sent on Jul 3, 2020, 6:33:04 PM PST

REBATE CHECK

Check Amount : \$1,740.00
Check will be sent to:
Customer
BAKERSFIELD, CA, 93390-2830, US

APPLICATION DETAILS


Lighting Controls—40% Dimming

 [Print this page](#)

Submit a Deemed Incentive Request

Select a Deemed Product

The screenshot shows a product selection interface. At the top left, there is a link for '< Back to Categories' and a section for 'Qualifying rebates for:' with a home icon and a list of categories. To the right, a filter box titled 'Enter filters to refine product listing' contains the following information: Market Sector: Commercial; Application Date: 07/21/2020; Building Type for EE: OFFICE - SMALL; Annual Demand: 22.00. Below the filters, a green 'Apply' button is visible. On the left side, there are two sections of checkboxes: 'Product Types' (Lighting, HVAC, Appliances, Refrigeration, Pumping, Foodservice, Process, Water Heating) and 'Product Sub Types' (AC Only Units, AC Unit with Gas Heat, Heat Pump, Clothes Washer, Motor). The main area displays 'Deemed with qualifying rebates' with two product listings. The first listing is for 'HVAC Economizer Control Adjustment on AC Only Units - (AC-11452-BRO-RCx-OFS-w09-Comm-EE Deemed Customer_Guest_Trade Pro)' and the second is for 'HVAC Economizer Control Adjustment on AC Unit with Gas Heat - (AC-11458-BRO-RCx-OFS-w09-Comm-EE Deemed Customer_Guest_Trade Pro)'. Both listings include an image of the product and a red box highlighting the 'Apply for Rebate' button.

- On the product selection page, refine results by using one or both of the following methods:
 - Using the filters at the top of the page
 - Selecting **Product Type** and **Product Sub Type** checkboxes to the left of the page
- Click on the product.
The product details page displays.

The screenshot shows the product details page for 'Refrigerated Chef Bases with an exterior length between 55 - 73 inches and energy consumption less than 1.61 kWh/day Chef Bases replacing Standard Refrigerated Chef Bases - (FS-20265-NR-Com-w11-Comm-DwSt Deemed Customer_Guest_Trade Pro)'. The page includes an image of the product and a green 'Apply for Rebate' button. A red box highlights the button, and a red callout bubble with the number '3' points to it. Below the button, there is a section for 'Rebate Description'.

- After selecting the product, click **Apply for Rebate** to start the application.

Deemed Incentive Request Application Sections

Customer Information

Most of the customer and site information is auto-populated from iEnergy and not editable.

Project contact information is auto-populated and can be updated as needed.

Customer Information

Customer Number 700162343991	Site Number 0900495380
Bill Account Number 700162343991	Your Site Number is the your 10 digit Service Account number on your SCE bill. Example of SCE Bill Customer Name WAGNER USA
Site Address 1 240 N COMMERCIAL BLVD	Site Address 2 (apt, suite, bldg, etc) STE A
Site City FULLERTON	Site State CA
Site Zip 92833	
Project Contact First Name * Igor	Project Contact Last Name * Mortis
Project Contact Title * Chief	Project Contact Phone * (123) 456 - 7890
Project Contact Email * i@m.com	Format for phone extension (i.e. (555) 555-1234x321). Rate Schedule: TG1E-GS: TOU-GS-1-E (Grandfathered)

This email address will be used to provide notifications for this project.

Additional Customer Information

1. If the **Account Representative**, **FNAICS**, or **Building Type** values are missing or incorrect, update them here.
2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCE FILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown below right.

Additional Customer Information

Search for the FNAICS classification **2** business from the file under the link below:
[FNAICS REFERENCE FILE](#) **1**
 and enter the description to the FNAICS description field.

SCE Account Representative IGOR MORTIS	SCE Account Representative Override Enter the correct SCE Account Manager if incorrect or missing and you know who they are.
FNAICS Code 211111	FNAICS Override Enter correct FNAICS code here if defaulted value is incorrect or missing. (i.e. 311512 - Commercial Bakeries) Building Type Manufacturing - Light Industrial
FNAICS Description CRUDE PETROLEUM AND NATURAL GAS EXTRACTIO	
Building Type Override	
Market Sector Industrial	

	A	B
1	FirstOfFNAICS	Naics_text
2	422410	GENERAL LINE GROCERY WHOLESALERS
3	327910	ABRASIVE PRODUCT MANUFACTURING
4	325520	ADHESIVE MANUFACTURING
5	924110	ADMINISTRATION OF AIR AND WATER RESOURCE AND SC
6	924120	ADMINISTRATION OF CONSERVATION PROGRAMS
7	923110	ADMINISTRATION OF EDUCATION PROGRAMS
8	926110	ADMINISTRATION OF GENERAL ECONOMIC PROGRAMS
9	925110	ADMINISTRATION OF HOUSING PROGRAMS

Project Information

Enter information about the project.

Project Information ^

<p>Application Name * test</p> <p><small>Enter brief application name for your reference.</small></p> <p>Attribution ID * SCE-13-SW-002C</p> <p>Baseline Annual Operating Hours <small>Enter facility's annual baseline operating hours.</small></p> <p>Installed Annual Operating Hours</p> <p>Application Submission Date 7/6/2020</p> <p>Program Manager * [User Icon]</p> <p>Project Description <small>Enter brief project description.</small></p> <p>Terms and Conditions Submission Method * Electronic Acceptance</p> <p>Hard To Reach Project</p>	<p>Group ID NJVMPL2PHVOVK89U</p> <p>Attribution ID Description Commercial Deemed Incentives Program</p> <p>Total Sq Ft. *</p> <p>Year Built <small>Enter year that facility was built. Are you applying for OSF? *</small></p> <p>Are you using a Trade Pro? *</p> <p>Reservation or Incentive Request * Incentive Request</p> <p>Public Sector Project</p> <p>Pricing Effective Date 7/6/2020</p>
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The following table describes key fields in the Project Information section.

Field	Required	Description of Action
Application Name	Yes	Name the application
Total Sq. Ft.	Yes	Enter the square footage of the installation site
Are you applying for OBF?	Yes	Select No . (OBF is not available for incentive requests)
Reservation or Incentive Request	Yes	Select Incentive Request . A new Payment Details section is added to the application
Terms and Conditions Submission Method	Yes	Specify the method by which you will accept the terms and conditions - Electronic Signature : Sign in the form - Print and Upload : Upload a signed form
Baseline Operating Hours	No	Enter baseline operating hours
Installed Annual Operating Hours	No	Enter installed annual operating hours
Year Built	No	Enter year of site construction
Project Description	No	Enter a project description
Public Sector Project	No	Designate if is a public sector project
Hard to Reach Project	No	Designate whether project is located in a hard to reach location

Trade Professional Information

This section displays if use of a Trade Pro was indicated in the Project Information section.

1. Click the **Trade Pro lookup** link in the section header to search for a Trade Pro.
2. Select a search parameter (**Business Name** or **Vendor ID**).
3. Type a keyword. Results populate automatically.
4. Select the Trade Pro from the results and click on the arrow.

If a Trade Pro does not appear in this search, contact them and let them know that they need to register as a Trade Pro with SCE.

In this case, the options for the current application are:

- ◆ Submit the project without a TP
- ◆ Select another registered TP
- ◆ Leave the application in draft mode until the TP registers (the application will stay open for 30 days)

The screenshot shows the 'Trade Professional Information' section. At the top, there is a header 'Trade Professional Information' with a 'Trade Pro lookup' link. Below this, a search interface is displayed with the title 'Trade Pro lookup' and the instruction 'Choose eligible Partners or Contractors for this Application'. The search bar has a dropdown menu set to 'Business Name' and a search input field containing 'Test Company'. Below the search bar, a list of search results is displayed, including Partner Number, Company Name, Address, Personnel Name, Service Type, Speciality, Sector, and State. A play button icon is visible next to the search results.

Product Details

Note: For Deemed products this section is called **EE Deemed Container**.

EE Deemed Container

Core Measure Information

<p>Measure Display Status Core Measure Information</p> <hr/> <p>Measure Name</p> <hr/> <p>Measure Type <i>HVAC</i></p> <hr/> <p>Equipment Serial ID <small>Enter manufacturer's model serial number or UPN</small></p> <hr/> <p>Equipment Location <small>Enter a brief description of where the measure/equipment being replaced is located.</small></p> <hr/> <p>Dollar Per Unit Definition \$/</p> <hr/> <p>\$ Labor Cost * <small>If the measure/equipment has been installed please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost.</small></p> <hr/> <p>Measure Status <i>Eligible</i></p>	<p>Library Measure RefId * AC-42889-AOE-OFS-w08-Comm-DwSD-EE Deemed Customer_Guest_Trade Pr</p> <hr/> <p>Measure Code AC-42889</p> <hr/> <p>Equipment Model ID <small>Enter manufacturer's product model number</small></p> <hr/> <p>Equipment Description <small>Enter brief description of measure/equipment being installed</small></p> <hr/> <p>Number of Measures * <small>Enter quantity of products/measures being installed</small></p> <hr/> <p>Actual Installation Date * <small>Enter the date that the measure/equipment was installed and functional</small></p> <hr/> <p>\$ Equipment Cost * <small>If measure/equipment has been installed Enter the Actual Cost of Installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of Installation.</small></p> <hr/> <p>Total Project Cost * \$0</p> <hr/> <p>Total Project Cost is equal Equipment cost + Labor Cost</p> <hr/> <p>Measure Payment * \$0</p>
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In this section, enter information about the product, equipment, and project costs. If you have selected multiple products, you will enter details separately for each installed product/measure. The following table details the editable fields in this section.

When all the information has been entered, click **Calculate** at the bottom right of the page to populate the **Total Project Cost** and **Measure Payment** fields.

Measure Details Field	Required	Action Required
Equipment Model ID#	No	Enter the manufacturer's product model number
Equipment Serial ID #	No	Enter the manufacturer's model serial number or UPN
Equipment Description	No	Enter a brief description of the measure/equipment being installed
Equipment Location	No	Enter a brief description of where the equipment is being installed
Number of Measures	Yes	Enter the quantity of products/measures being installed
Actual Installation Date	Yes	Enter the date that the measure/equipment was installed and functional

Equipment Cost	Yes	If measure/equipment has been installed, enter the Actual Cost of Installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of Installation
Labor Cost	Yes	If the measure/equipment has been installed please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost
Purchase Date	Yes	Enter the date the measure/equipment was purchased

Table of editable fields in the EE Deemed Container measure details section

Project Totals

Project totals is a read only section that displays calculated values based on the project information entered.

The Project Totals section sums key values for all products/measures contained within this application.

Project Totals	
Total Measure Code Payment \$2,000	Total Base Incentive \$2,000
Total Net Incentive/Payment \$2,000	Total Equipment Cost \$12,312
Total Labor Cost \$2,500	Total kWh Savings 2560.8
Total kWh Savings 0.56826	Total T+M Savings 158.796

Payment Details

1. **Do you want to apply for Single Payment?**

- **Yes** – Payments for all projects with the same Group ID are included together. Group ID is managed by SCE. To request that projects be grouped for payment, email *BusinessIncentives@sce.com*
- **No** – The payment for this project will be sent separately

Payment Details

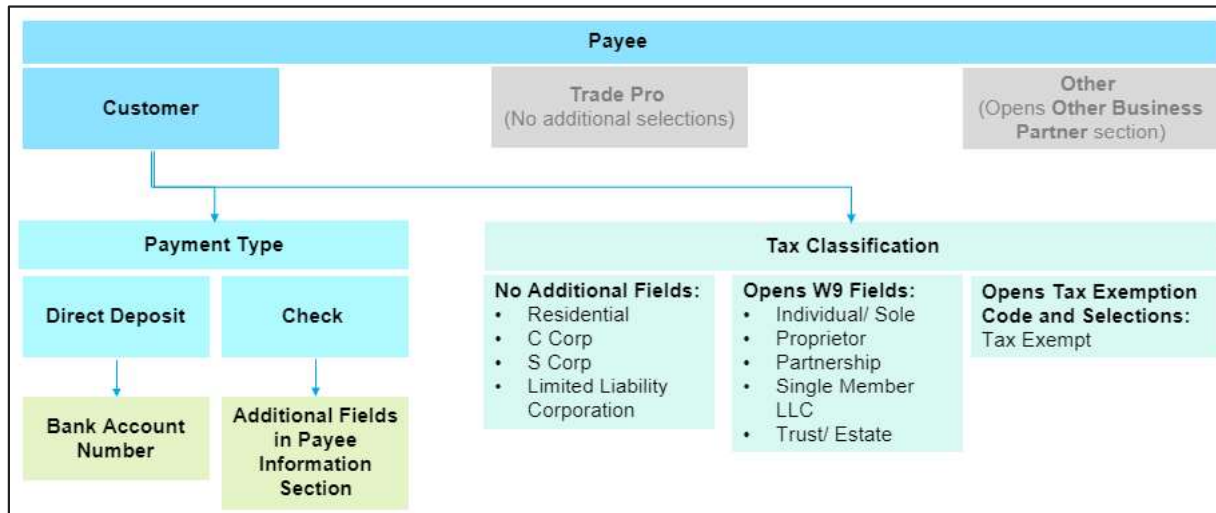
1 Do you want to apply for Single Payment? * ▾

Select "Yes" if you would like to receive one payment for all projects submitted today.

2 Payee Selection * ▾

2. **Payee Selection:** Select Customer, Trade Pro, or Other. Depending on this selection, other required fields may display. The following section details the requirements for each possible payee scenario.

The process flow below shows which sections and fields are required for each payee selection option.



When **Payee Selection** is **Customer**, additional fields display:

- ◆ Payment Type
- ◆ Tax Classification

About Payment Type

- ◆ **Check:** An additional **Payee Information** section displays. The Customer or Trade Pro will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer or Trade Pro user can enter or update it.
- ◆ **Direct Deposit:** An additional **Bank Account Number** field displays. The customer selects from a dropdown that includes a list of bank accounts on file for the customer. Each bank account is designated by its last four digits only.

About Tax Classification

Regardless of payment type, Customers must select a tax classification. As shown in the workflow above, the different tax classifications cause additional fields to display:

- ◆ These selections do not open any additional fields:
 - **Residential**
 - **C Corp**
 - **S Corp**
 - **Limited Liability Corporation**

- ◆ These selections open a set of W9 Fields:
 - **Individual/ Sole**
 - **Proprietor**
 - **Partnership**
 - **Single Member LLC**
 - **Trust/ Estate**
- ◆ This selection opens a Tax Exemption Code and Selections field: **Tax Exempt**

Scenario 1: Payee is Customer and Payment Type is Check

Note: This scenario does not address tax classification selections. These are covered separately from payment type.

In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

Note: Country Code must be two digits. Enter "US" for United States or "CA" for Canada.

Payee Information	
Attention To	
Company Name	Customer Number 1000476054
Address1 *	████████████████████
Address2	City * BAKERSFIELD
State *	Zip Code * 93390-2830
CA	
Country *	
US	

Payment Type Scenario 2: Payee is Customer and Payment Type is Direct Deposit

Payee Selection *	Payment Type *
Customer	Direct Deposit
Bank Account Number *	Tax Classification *
Select the Last 4 digits of payee's bank account number (If any changes required please visit your SCE.com My Account profile).	Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor; C Corporation, Partnership)

An additional **Bank Account Number** field displays.

- ◆ The dropdown displays the last four digits of the bank account(s) the customer has added to MyAccount on SCE.com

- ◆ If there are no bank accounts available, a pop up will note that no bank accounts are available for this customer. Notify the customer that they need to add the account to My Account on SCE.com, after which it will display in iEnergy
- ◆ In this case, the Payee Information section will display two auto-populated fields: **Company Name** and **Company Number**. (Not shown)

Scenario 3: Payee is Customer and Tax Classification opens W9 fields

1. Use the **Tax ID Type** dropdown to select EIN or SSN.
Enter the Tax ID and Tax ID confirmation.
2. Click the **pencil icon** in the **Tax ID Number** and **Tax ID Number Confirm** fields enter the value. The value is not shown on the form.
3. Click the **eye icon** to view the **Tax ID Number** values.
4. Enter the tax contact information.

The screenshot shows the 'W9 Information Section' of a form. It includes a dropdown for 'Tax Classification *' set to 'Individual/Sole'. Below it is a link to 'W9 Information Section' with a callout '1'. The 'Tax ID Type *' dropdown has callout '2'. The 'Tax ID Number' field has a pencil icon with callout '3'. The 'Tax ID Number Confirm' field has a pencil icon with callout '4'. Below these are fields for Name, Address 1, Address 2, City, State, and Zip Code.

Scenario 4: Payee is Customer and Tax Classification is Tax Exempt

An additional Tax Exemption Code subsection displays.

Tax Classification *

Tax Exempt

Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor; C Corporation, Partnership)

Tax Exemption Code

Please select below code for Tax Exemption Reason:

- Code Number:1 - An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).
- Code Number:2 - The United States or any of its agencies or instrumentalities.
- Code Number:3 - A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities.
- Code Number:4 - A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- Code Number:5 - A corporation.
- Code Number:6 - A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession.
- Code Number:7 - A futures commission merchant registered with the Commodity Futures Trading Commission.
- Code Number:8 - A real estate investment trust.
- Code Number:9 - An entity registered at all times during the tax year under the Investment Company Act of 1940.
- Code Number:10 - A common trust fund operated by a bank under section 584(a).
- Code Number:11 - A financial institution.
- Code Number:12 - A middleman known in the investment community as a nominee or custodian.
- Code Number:13 - A trust exempt from tax under section 664 or a trust exempt from tax under section 4947.

Exempt Code *

2

Enter the exempt code you are tax exempt. (i.e. non-profit organization, religious organization)

Tax Exempt Reason

The United States or any of its agencies or instrumentalities

1. The customer or Trade Pro selects a reason code. (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **Tax Exempt Reason** field.

Scenario 5: Payee is Trade Pro

When **Payee Selection** is the **Trade Pro**, no additional information is required. Click the forward arrow to continue.

The Payee Information section displays.

The Payee Information section is auto-populated with the selected Trade Pro **Company Name** and **Vendor ID**.

Payee Information

Company Name *

Testing Construction Inc

Vendor ID

70022021

Customer Number

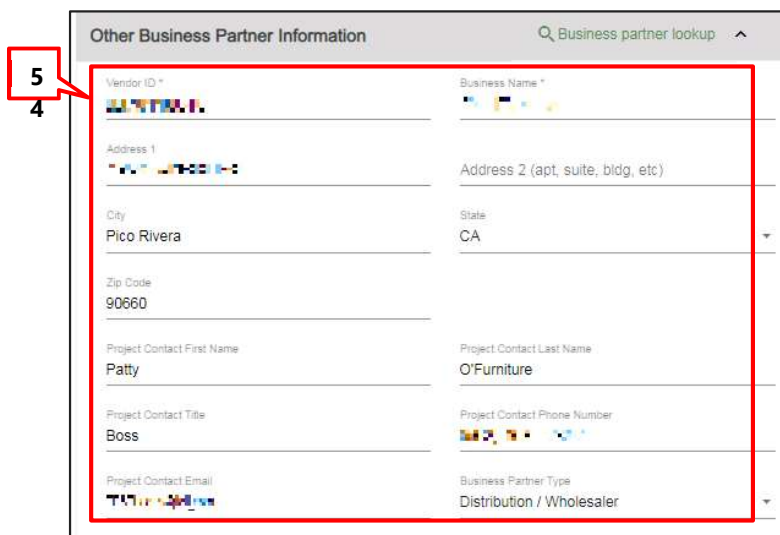
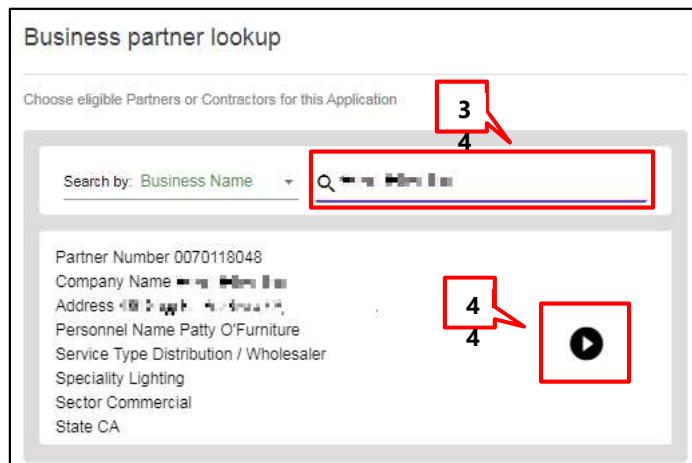
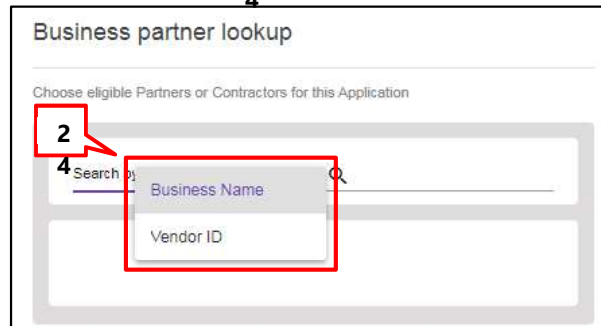
700001628

Scenario 6: Payee is Other

When **Payee Selection** is **Other**, the **Other Business Partner Information** section displays. To add a business partner:

1. Click **Business partner lookup**.
The Partner lookup screen displays.
2. Select a search parameter: Business Name or Vendor ID.
3. Type a value in the search field. The results populate automatically.
4. Click the arrow next to the partner you want to add as the payee.
5. The business partner details populate.

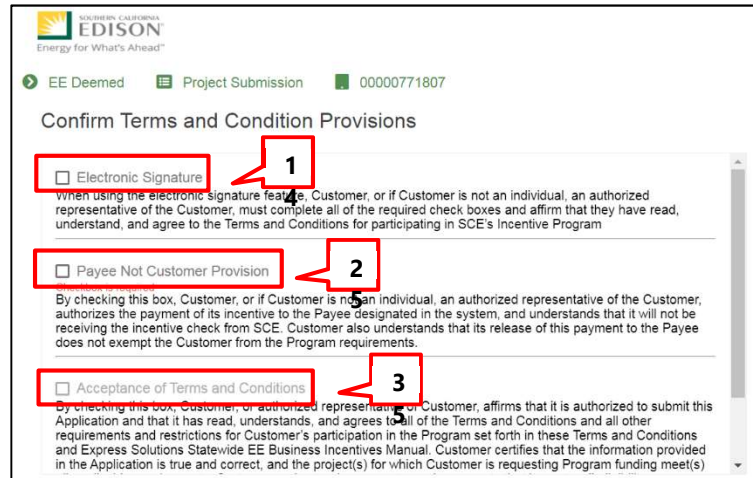
*The **Payee Information** section will auto-populate with the partner's **Company Name** and **Vendor ID** of the selected partner.*



Confirm Terms and Conditions Provisions – Electronic Acceptance

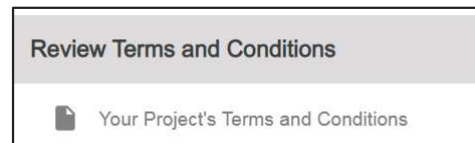
The Confirm Terms and Conditions Provision section displays if the **Terms and Conditions Submission Method** set as **Electronic Acceptance** in the Project Information section.

1. Click the **Electronic Signature** checkbox to electronically sign the application.
2. If the payee was set to Trade Pro or Other, the **Payee Not Customer Provision** is required.
3. Check **Acceptance of Terms and Conditions**.



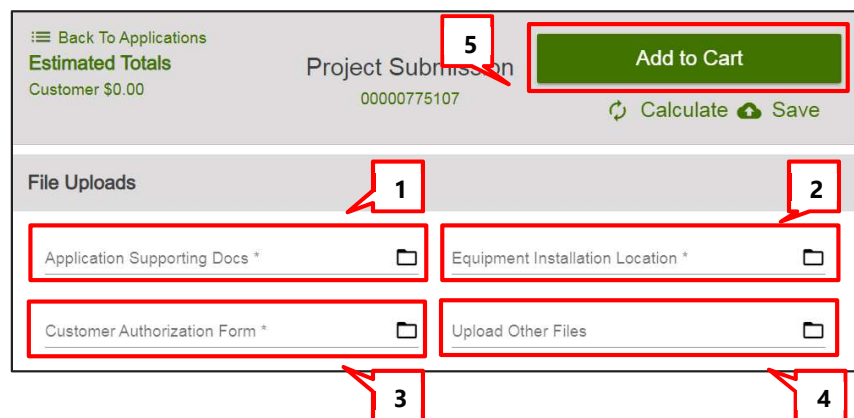
Confirm Terms and Conditions Provisions – Print and Upload

Click on the file icon to open the terms and conditions in a new browser tab.



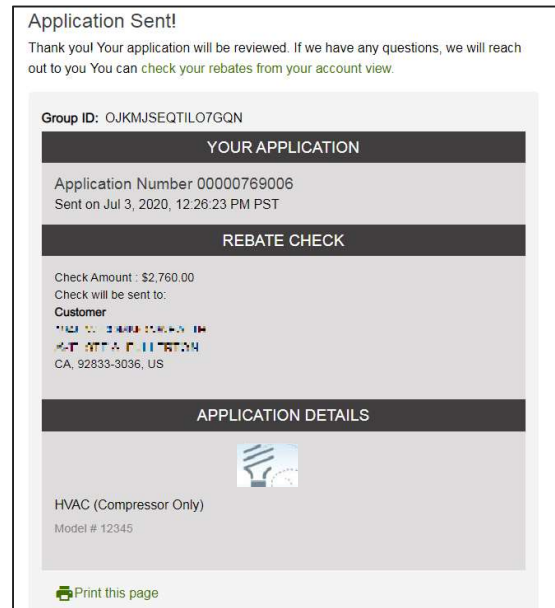
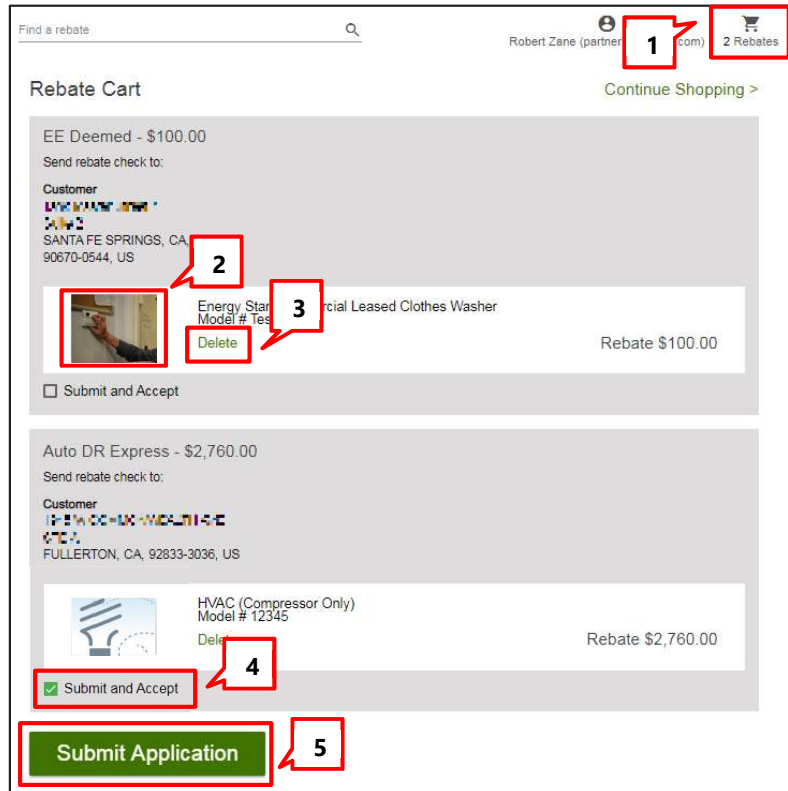
File Uploads

1. Upload **Application Supporting Docs.**
2. Upload the **Equipment Installation Location** document.
3. If T&Cs submission was Print and Upload, upload **Customer Authorization Form.**
4. Upload other files as needed.
5. Scroll to the top of the page and click **Add to Cart.**
The Rebate Cart displays.



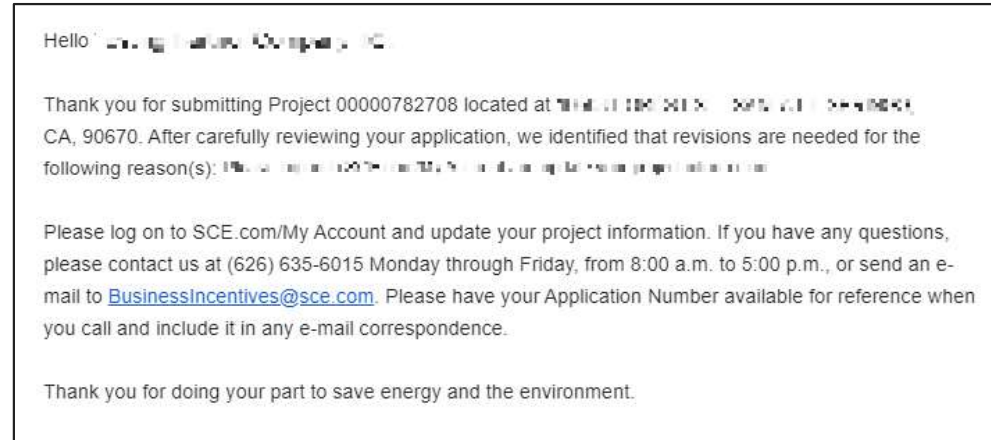
Submit and Manage Applications

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
2. To edit an application before it is submitted, click the image.
3. To delete an application, click **Delete**.
4. Click the Submit and Accept checkbox for any application you are ready to submit.
5. Click **Submit Application**.
A printable confirmation screen displays.



Revisions Required

If the application submission is incomplete or missing needed information for processing, the application will be sent back to the applicant to address the issues.

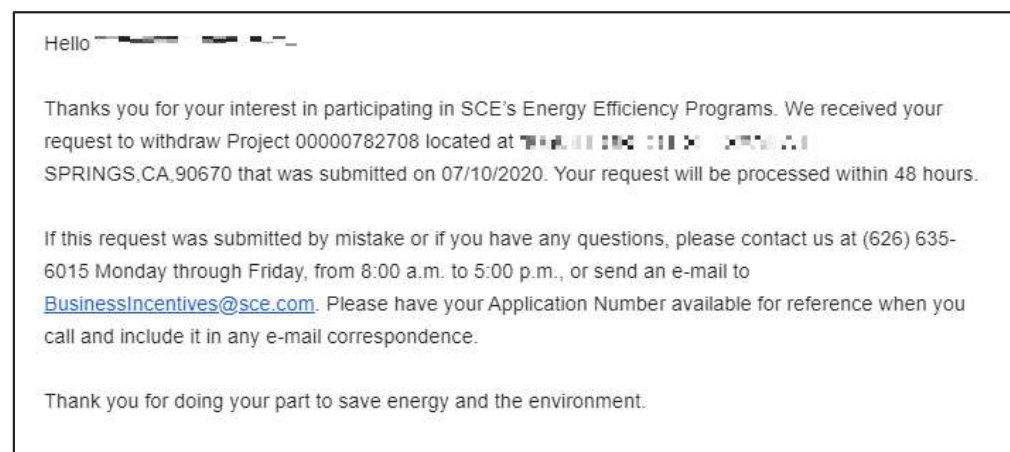


In this case, an email notification informs the application submitter that revisions are required and the application must be updated or withdrawn.

Project Withdrawal

If the customer wishes to withdraw the project instead of making the revisions, then the application submitter requests withdrawal from the **Project Submission** form by updating the **Withdrawal Requested** field to **Yes** and completing the form.

This ends the project. The applicant and the customer each receive a notification that the project has ended.



Check Payment Status

For Deemed and Auto DR applications, payment status is only available after installation.

After submitting an application, you can check the payment status of your payment in the Rebate Center.

1. At the top right of the screen, click on your username, then select **Applications**.
The Applications page displays.
2. On the Applications page, you can see the status of each application. The statuses shown below are **Project is being Reviewed** and **Project Payment Was Sent**.
3. You can click on an **Application Number** to access the project details.

This concludes the section on checking payment status.

