



SOUTHERN CALIFORNIA
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Disclaimer: Participant is required to follow this Program Handbook, which is incorporated into the Participant Terms and Conditions by reference. If there are any conflicts between this Program Handbook and the Participant Terms and Conditions, the Participant Terms and Conditions will govern.

1. Program Objectives

SCE developed the Shared Fleet Charging Rebate (SFCR) program to help California achieve its climate goals by reducing greenhouse gas (GHG) emissions while providing clean air and other benefits to the communities it serves. The Program encourages the adoption of Medium-Duty and Heavy-Duty (MDHD) Electric Vehicles (EVs) by increasing the availability of funding for vehicle charging infrastructure.

The rebate will be structured as a dollars-per-installed-kW incentive. This will allow site hosts to cover various and comprehensive installation expenses that may not be covered by other programs or incentives (i.e. costs associated with land and/or land improvements).

1.1. Program Eligibility

Applications will be evaluated on a first-come-first-serve basis, and based upon:

- Applicant/site qualification.
- The completeness of site plans.
- Location, both in terms of available grid capacity and forecasted MDHD sector needs.
- Funding availability.

To be eligible for participation in the SFCR program, the Program Applicant and their site must meet the following requirements:

- Own, lease, manage, or be the customer of record for the charging site where the equipment will be installed.
- Applicants, if not the owner of the site at which the charging equipment will be installed, are required to obtain consent from the property owner to install the equipment.
- Qualifying sites must serve Medium Duty/Heavy Duty vehicles weighing 10,000 pounds and above.
- Qualifying sites must serve more than one fleet that are under the ownership of separate entities or be open to the public.
- Qualifying sites must have a minimum total site simultaneous power of:
 - 1MW for wired charging or
 - 150kW for each on-route wireless charging location.

- Charging equipment must be served under a Time-of-Use (TOU) EV rate plan once the site is operational.
- All project sites must be located within SCE's service territory.
- Applicants must work with SCE to determine a charging site location (if more than 1 location exists) that will have adequate grid capacity.
- Applicants must complete an Engineering Analysis Report with SCE which may have an additional fee.
- Applicants must be currently participating with SCE on a Rule 15, 16, or 29 project.
- Charging site must have completed "Preliminary Engineering Study" step and must have not completed the "Preliminary Design Phase" step found here [Rule 29 Application Prep | EVs for Business | SCE](#).
- Applicants are required to complete a SFCR program application and a Building, Renovation, and Project Planning Portal (BRPPP) [Application](#).
- Construction must start no later than two years after signing the SFCR Participation Agreement and SCE reservation of funds.
- Charge Ready Transport (CRT) sites that are in-progress are NOT eligible to participate in the SFCR program.
- Participants must maintain either Public Access or Shared-Private Access for class 3-8 vehicles at the Site for at least five (5) years after construction is complete.
- A single company, and all its subsidiaries, will have a total rebate reservation cap of not more than 50% of program funding in the first year of program launch. SCE will evaluate program performance 6 months after launch and may adjust the reservation cap.

If the application is approved and the project site is accepted for participation in the Program, SCE will present the Applicant with a Program Participation Agreement. This Agreement must be fully executed before SCE will reserve any rebate funds.

2. Incentive/Rebate Claim

The total rebate amount paid upon project completion will not exceed the actual costs associated with an individual project. To perform the final rebate calculation, applicants are required to provide documentation demonstrating that their project costs meet or exceed the rebate funds reserved for the project.

- Incentives will only be paid when the site is energized, and the customer-side construction is complete.

- Once the EV charging infrastructure project is complete, SFCR program applicants are required to submit the following documentation:
 - Evidence of a final inspection.
 - Photographs of the installation site.
 - Copies of all relevant invoices / receipts for the project.
 - Written verification of the installed capacity at the location.
- Upon SCE's review and approval of the required documentation, the rebate funds will be issued to the applicant or applicant's assigned designee.

3. SCE Data Collection and Reporting

SCE will collect information from program participants to better understand the impacts of electrification on the MDHD EV sector. This data may include:

- Site location and anticipated / actual fleet vehicle charging behavior.
- Charging power capacities / vehicle connector types installed.
- Information about possible integration of Distributed Energy Resources (DERS) with charging networks.
- Information on the applicant's use of load management technologies.
- Details about the infrastructure deployed at the charging site locations.
- Participation in SCE's Time-of-Use (TOU) EV rate plans and possibly other SCE provided infrastructure programs.

4. Program Design and Detailed Activities

A detailed activity flow chart is provided in Figure 1, which outlines the 15 process steps from the initial starting point of Applicant consulting SCE for a Rule 29 project through payment of the Rebate. Each step in the process is detailed in the following section of the Program Handbook.

Shared Fleet Charging Rebate (SFCR) Program Activity Flow

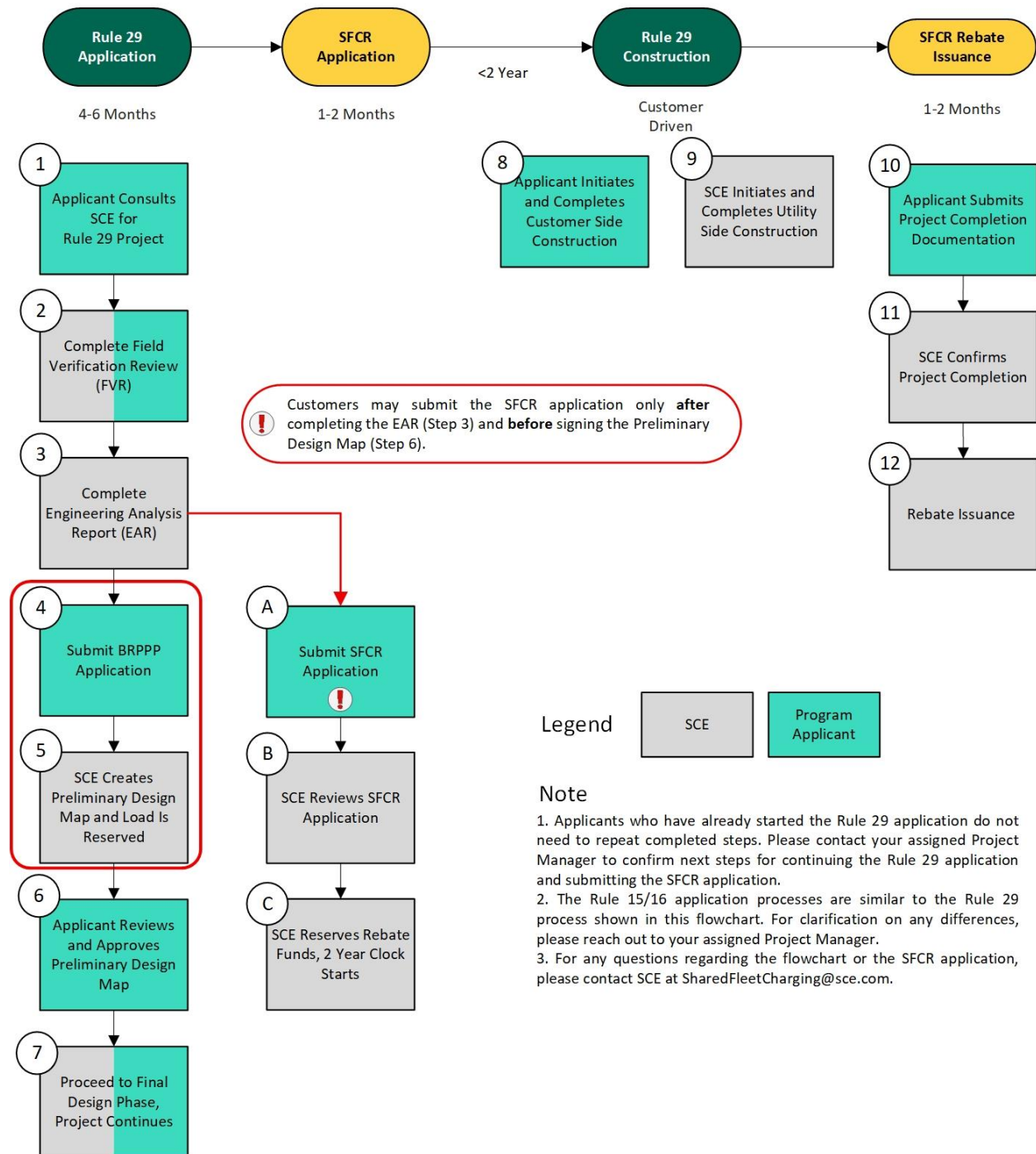


Figure 1

Step 1 - Applicant Consults SCE regarding Rule 29 Application

Applicants considering the SFCR program should review program details and contact SCE at TEPMCommercialEV@sce.com for guidance on initiating their Rule 29 Application.

Step 2 - Complete Field Verification Review (FVR)

After an EV charging infrastructure project is identified, applicants must complete *the Field Verification Review (FVR)* as outlined in at <https://www.sce.com/business/smart-energy-solar/evs-for-business/rule-29-electric-vehicle-infrastructure/ready-to-apply>. SCE will review the submitted information upon receipt and complete the FVR.

Step 3 – SCE Completes an Engineering Analysis Report (EAR)

SCE will conduct an EAR referred to as the *Preliminary Engineering Study* step at <https://www.sce.com/business/smart-energy-solar/evs-for-business/rule-29-electric-vehicle-infrastructure/ready-to-apply>.

NOTE: For SFCR program applicants, the SFCR application (Step A) must be submitted after the EAR is completed (Step 3) and before signing the Preliminary Design Map (Step 7 – 6).

Step A –Submit SFCR Application

After completing the EAR and before signing and approving the Preliminary Design Map, applicants must submit the SFCR program application.

Step B - SCE Reviews SFCR Application

SCE will review the SFCR application. If approved, SCE will calculate the applicable project rebate. SCE will then prepare and provide an SFCR Program Agreement. Applicants should review, sign and return the Agreement via DocuSign. During this process, status updates will be sent to the applicants via the email address provided in the application.

Step C – SCE Reserves Rebate Funds, 2 Year Clock Starts

Once the applicant's SFCR application is approved, and the Program Agreement has been returned, SCE will reserve the rebate funds. To retain the reservation of rebate funds, project construction must begin within two years of the date the Program Agreement was signed by the applicants. If construction is not started within the 2-year period, SCE may cancel the rebate reservation and close out the project. Recognizing that permitting and construction delays may occur due to factors beyond the applicant's control, SCE

does not impose a strict timeline for project completion. However, rebate funds will only be disbursed once the site is energized, and the customer-side construction is complete.

Step 4 – Submit BRPPP Application

Once the EAR is completed, applicant should submit their Rule 29 application via the Building, Renovation, and Project Planning Portal at <https://www.sce.com/projectportal>.

Step 5 - SCE Creates Preliminary Design Map and Load Reservation

Upon receipt of the requested documentation in the BRPPP, SCE will perform the formal engineering study (different than the previous EAR completed) to reserve the load for the project and determine the details of upgrades that may be required. SCE will develop a preliminary design which will be provided to the applicant for review and approval.

NOTE: For SFCR program applicants, the SFCR application must be submitted before signing and approving the Preliminary Design Map (Step 6).

Step 6 - Applicant Reviews and Approves Preliminary Design Map

Applicants need to review and approve the preliminary design map provided by SCE. Applicants are responsible for notifying SCE of any changes in site use, ownership, or operational intent that may affect the validity of an existing load reservation. Failure to do so may result in cancellation of the reservation and reallocation of the reserved capacity. If an applicant chooses not to proceed with a project, they are responsible for canceling the reservation to allow SCE to make the reserved capacity available to other applicants. SFCR applicants must submit the SFCR application prior to signing and approving the Preliminary Design map (see Step A).

Step 7 – Rule 29 Project Proceeds to Final Design Phase

Once the preliminary map is signed and sent back to SCE, the project moves into the final design phase, picking up at “Final Design Phase” of <https://www.sce.com/business/smart-energy-solar/evs-for-business/rule-29-electric-vehicle-infrastructure/ready-to-apply>.

Step 8 - Applicant Initiates and Completes Customer-Side Construction

Applicant initiates and completes all customer-side EV charging infrastructure work. This may be concurrent with, or sequential to SCE’s construction work

Step 9 - SCE Initiates and Completes Utility-Side Construction.

Step 9 - SCE Initiates and Completes Utility-Side Construction

If applicable, SCE will initiate and complete all the necessary utility-side upgrades and construction work.

Step 9 - SCE Initiates and Completes Utility-Side Construction

Step 10 - Applicant Submits Project Completion Documentation

Once the EV charging infrastructure project is complete, SFCR program applicants are required to submit the following documentation:

- Evidence of a final inspection,
- Photographs of the project installation,
- Copies of all relevant invoices / receipts for the project,
- Written verification of the newly installed EV charging capacity at the site.

SCE will coordinate the submission of these documents.

Step 11 - SCE Confirms Project Completion

Upon receiving the final documentation, SCE will conduct a thorough review. If the documentation meets all requirements, SCE will notify the applicant of the approval.

Step 12 – SCE Issues Rebate

Following SCE's final approval, the rebate funds will be issued up to the reservation amount included in the Participation Agreement. The actual rebate amount will be based on the final invoices/receipts submitted by the participant for qualifying project expenses up to the total amount of rebate funds that were reserved for the project.

5. Appendix

Glossary of Terms

Building, Renovation, and Project Planning Portal (BRPPP): SCE's online portal that enables customers, contractors, and internal teams to submit, track, and manage requests for new business services, building projects, renovations, and electric infrastructure upgrades.

Charge Ready Transport (CRT): SCE incentive program that provides rebates to businesses that install the infrastructure to support a fleet of Medium- and Heavy-Duty EVs.

Charging Station – (EV Charging Station): An individual charging station unit that may contain one or more charging ports for the purpose of connecting the EV to a grid connected power source capable of recharging the vehicles battery pack. The individual connectors of the Charging Station are referred to as ports. Each charging station can charge one or more vehicles depending on the number of ports of which each unit is equipped.

California Public Utilities Commission (CPUC): The California state regulatory agency that is responsible for regulating privately owned electric, natural gas, telecommunications, water, railroad, rail transit, and passenger transportation companies.

Distributed Energy Resources (DER): typically characterized as small-scale energy assets, such as solar panels, batteries, and EVs, that generate, store, or manage electricity close to where it's consumed. They differ from traditional, large, centralized power plants by being located at or near homes, businesses, and other points of use.

Electric Vehicle (EV): A plug-in battery equipped vehicle that is propelled by one or more electric motors and powered by an onboard battery pack.

Electric Vehicle Supply Equipment (EVSE): the infrastructure and devices used to deliver electricity from the grid (or another source) to an EV for the purpose of recharging its battery. EVSE includes charging stations, connectors, cables, control systems, and related hardware and software.

Final Design: Map and related documents, as applicable, that show the proposed layout of the Infrastructure and Charging Stations, including but not limited to, conduit routing and equipment placement. The Final Design is the engineered construction drawing submitted for permitting and will be completed prior to start of construction.

Final Invoice: Statement of the total amount paid by Participant to Charging Station Supplier(s) for the purchase of Charging Stations.

Infrastructure: All work and facilities, as determined by SCE, in SCE's sole discretion and subject to change in SCE's sole discretion, to be located, designed and installed by SCE, necessary to allow the Participant to install and operate the Charging Stations. Infrastructure may include, but is not limited to new transformers, services, and meters, new panels, stepdown transformers, conduits, wires, connectors, and any other hardware installed by SCE on the Site. If the Participant elects SCE to build the customer-side make ready infrastructure, it will become a part of the infrastructure.

Low Carbon Fuel Standard (LCFS): a standard that is designed to decrease the carbon intensity of California's transportation fuel pool and provide an increasing range of low-carbon and renewable alternatives, which reduce petroleum dependency and achieve air quality benefits.

Medium and Heavy-Duty Vehicles (MDHD): Eligible medium and heavy-duty vehicles are vehicles with a gross vehicle weight exceeding 10,000 pounds.

Participant: see Program Participant.

Program: Also referred to as the Shared Fleet Charging Rebate or SFCR. The SFCR is designed to help Program Participants offset the costs of developing shared MDHD infrastructure sites.

Program Participant: The SCE non-residential customer that applies for the Program, executes the Agreement, and is accepted by SCE, in SCE's sole discretion, to participate in the Program. Also referred to as the "Participant".

Program Participation Agreement or Program Agreement: An agreement between SCE and the Participant that includes the terms and conditions for participating in the Program and is provided to an Applicant following SCE determination that a project has

been approved for the infrastructure work required for the installation of EV charging equipment.

Rebate: Financial reimbursement paid to eligible Participant, or its designee, pursuant to this Agreement to encourage the development and deployment of public and shared MDHD charging infrastructure.

Rebate Payment: The payment made by SCE to Participant, or its designated assignee, for all applicable Rebates, if any, pursuant to the Program.

Rule 15: SCE’s Electric Tariff Rule 15, Distribution Line Extensions, found at [TM2 - 0000001220 Rule 15: Distribution Line Extensions - All Documents](#) or search in a browser: <https://www.sce.com/sites/default/files/inline-files/Rule15.pdf>

Rule 16: SCE’s Electric Tariff Rule 16, Service Extensions, found at [TM2 - ELECTRIC RULES 16.pdf - All Documents](#) or search in a browser: <https://www.sce.com/sites/default/files/inline-files/Rule16.pdf>

Rule 29: SCE’s Electric Tariff Rule 29, Electric Vehicle Infrastructure, found at [TM2 - ELECTRIC RULES 29.pdf - All Documents](#) or search in a browser: https://www.sce.com/sites/default/files/custom-files/PDF_Files/ELECTRIC_RULES_29.pdf

Service Account: An SCE account associated with a particular on-site meter established by SCE upon customer request. To establish a new Service Account, the Participant is responsible for contacting SCE’s Customer Service Department (listed on the customer’s monthly billing statement) and requesting a new service turn-on.

Shared Fleet Charging Rebate (SFCR): See Rebate.

Site: The premises, owned, leased or operated by the Participant.

Site Energized: The status achieved when all required electric infrastructure at a project site has been installed, inspected, and activated by Southern California Edison, allowing the site to receive electrical power and operate as intended. Rebate or incentive payments are issued only after the site is energized and all required documentation is submitted and approved.

Site Plan: The site plan is a birds-eye exhibit of a site with building footprints, roads, parking areas and other above ground structures notated. May be an engineered drawing or may just be a satellite image with notes.

Time-of-Use (TOU) Rate Plans: All TOU plans feature energy charges that vary based on the time of day, the day of the week, and the season. Some plans also include demand charges that are based on the maximum amount of electricity your business uses at once. For more information about TOU rate plan options, please visit <https://www.sce.com/business/rates/time-of-use>

TOU-EV Rate Plans (Time-of-Use EV Rate Plans): Specialized electricity pricing schedules offered by SCE for customers who separately meter the charging of EVs at their premises. More information about these rate plans can be found at: [Electric Vehicle Energy Rates | SCE](#).

6. Program Documents

6.1. [Shared Fleet Charging Rebate Program Website](#)

6.2. *Interest Form*

6.3. [Quick Reference Sheet](#)

For questions, please email SCE at SharedFleetCharging@sce.com.