Small Site Rebate (SSR) Charge Ready Application Portal

User Guide for External Users

Prepared for:

SSR Customers, and Charge Ready Trade

Professionals



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Overview

This use guide covers various features and functions of the Charge Ready Application Portal for the Small Site Rebate (SSR) program.

This document is intended for users who will submit requests for Small Site Rebates. These roles are:

- Customers
- Charge Ready Trade Professionals

What is SSR?

The Small Site Rebate (SSR) is a program under the larger eMobility Transportation Electrification (TE) Charge Ready (CR) program. It is used to submit requests for rebates for the installation of four or fewer charging stations at non-residential sites.

This user guide is to support the training of the Charge Ready Application Portal tool that supports the SSR program.

For more information about Site and Participant Eligibility, refer to the SSR Program Guidelines and Fact Sheet documents.

Key Terms

Term	Description
Program	Collection of projects
Projects	Different applications for a program
SSR	Small Site Rebate
ТАС	Trade Ally Community Portal for Charge Ready Trade Professionals
TE	Transportation Electrification

The table below lists key terms used in SSR and their description.

Project Workflow

When completing a Small Site Rebate request, the following processes take place:

- 1. **Customer** completes a Project Submission form.
- 2. SCE reviews the form for completeness. If incomplete, notifies applicant of information needed for completion.
- 3. SCE completes the Desktop Review.
- 4. SCE completes the Account Management Support form.
- 5. SCE completes the Site Assessment (for new meters only).
- 6. SCE completes the Agreement Preparation.
- 7. **Customer** completes the Agreement Acceptance.
- 8. SCE completes the Funds Reservation.
- 9. **Customer** completes the Site Plan Submission (for new meters only).
- 10. SCE completes the Design and Construction (for new meters only).
- 11. **Customer** completes the Design Acceptance (for new meters only).
- 12. **Customer** completes Pending Installation and Incentive Request form, along with applicable attachments (only after installation occurs).
- 13. SCE completes the Incentive Review, and identifies if site inspection is required.
- 14. SCE schedules and conducts a site review and completes Incentive Site Review form, if required.
- 15. SCE approves or rejects the payment for a project.

For more information about the program, refer to the SSR Program Guidelines and Fact Sheet.

Program Forms

The SSR program consists of five forms (or tasks), and each form has multiple sections. Depending on the phase of the process, form sections and fields may be:

- Unpopulated and fillable (required fields are marked with a red asterisk *)
- Auto-populated and editable
- Auto-populated and read-only
- Conditionally visible based on the values in other fields

Accessing the Charge Ready Application Portal

You can access the Charge Ready Application Portal through SCE.com. To access the portal, follow the steps below:

1. Navigate to https://sce-te.dsmcentral.com/traksmart4/html/pux/commercial/

The Welcome to your Charge Ready Application Portal page displays.

- 2. Enter your **Email**.
- 3. Enter your **Password**.
- 4. Click Sign In.

Welcome	e to your Charge Ready Application	on Portal
It is important to und	erstand which Charge Ready program you w the program eligibility before you begin the a	ould like to apply for
	resubmit a new application if you select an in mation about the Charge Ready program ple	
E CONTRACTOR OF CONTRACTOR	Email	1
-		
	Password	
	Remember me	
	Sign in >	
	Forgot Password?	
Don't have a Charge Ready Application Portal Account?		Sign the Program Participation Agreement
Create Account >		Continue as Guest >

The **Applications** page displays.

Energy for What's Ahead"		θ
Applications		New Application
Search by Program Name	 Q Find Applications 	Sort by • Last Updated: Descending •
Group ID:		

Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals

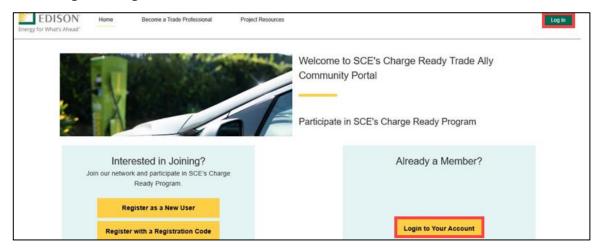
If you are a Charge Ready Trade Professional, you must have access to the Charge Ready Trade Ally Community (TAC) Portal. You and your company must also be approved by SCE to apply for rebates on behalf of the customer(s).

To access the portal as a Charge Ready Trade Professional, follow the steps below:

1. Navigate to the Trade Ally Community Portal: <u>https://sce-chargeready.force.com/s</u>

The TAC landing page displays.

2. Select Login or Login to Your Account.



The **Login** page displays.

- 3. Enter your Email.
- 4. Enter your **Password**.
- 5. Click Log In.

*	first.last@scecr.tac
ô	Password
	Log in

4 of 54

The TAC Home Page displays.

6. Select My Projects.



Note: If the My Projects tab is not on the screen, your company profile is not yet approved as a Charge Ready Trade Professional.

	Project Resources	Additional Actions $ {igsackslash} $
ergy for What's Ahead		

The **My Projects** page displays.

7. Click Apply by Program.

Welcome to	o Charge Ready Trade All	y Connect
Ready to S	Submit Program Applications for a (Customer?
	below to submit new applications or manag	
	Apply by Program / See Existing	

The Charge Ready Application Portal opens and the Applications page displays.

Energy for What's Ahead		θ	
Applications		New Application	
Search by Program Name	- Q Find Applications	Sort by Last Updated: Descending	
Group ID:			

For more information about Charge Ready Trade Professionals, refer to the Charge Ready TAC Fact Sheets and Program Handbook.

Project Submission

The Project Submission form is submitted by the **Customer** or **Charge Ready Trade Professional** through the Charge Ready Application Portal. By completing this form, participants request to reserve funding for a rebate.

Eligible participants complete this form prior to the purchase or installation of qualifying Electric Vehicle (EV) equipment. The Small Site Rebate only applies to four or fewer newly constructed charging stations at non-residential sites.

Once a Project Submission is complete, SCE determines the eligibility for program participation.

For a full list of eligible participants, or for more information about the program, refer to the Small Site Rebate Program Guidelines and Fact Sheet.

Completing the Project Submission Form

To create and complete a new application, follow the steps below:

1. Click New Application.

SOUTHER CALIFORNIA EDISON° or What's Ahead°		θ	
Applications		New Appli	cation
Disadvantaged Community using Please keep in mind that funding the current application pool, we v note that due to significant dema <u>chargeready@sce.com</u> .	the <u>link</u> here before applying. or program rebates are not guaranteed for vill keep you updated on funding availability nd in the program, processing times may be	ebate, Customer Side Make Ready, and Multifa 2. At this time, we will only be accepting applica 5. Please verify that your site is located in a any applications. As the Charge Ready team p and the status of your waitlisted application. Pl e longer than usual. For questions, please conta tate for multifamily dwellings with no waitlist.	
Search by Program Name	- C Find Applications	Last Updated: Descending	•
Group ID:			
Customer	01		
Customer Program name	Site Application Number	Created	

The Select customer site to include in this application page displays.

2. Select the drop-down menu under **Choose an address** and select an address.

Note: The **Choose an address** page displays for a customer with multiple sites.

3. Click **Continue**.

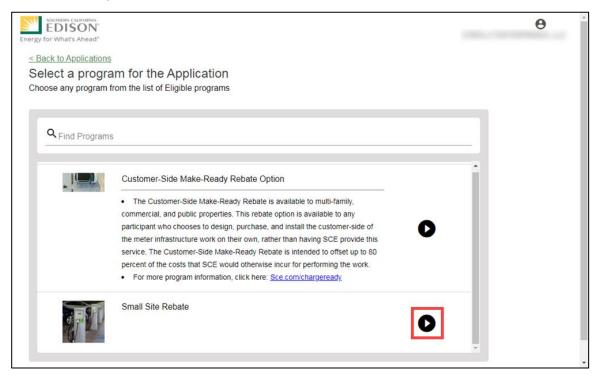
SOUTHERN CALIFORNIA EDISON® Energy for What's Ahead®		θ
	Select the customer site to include in this application.	
	If this is a new site, you will enter the address on the application form.	n
	Choose an address	~
	CA, US	
	US	*
	Continue >	

The **Select a program for the Application** page displays.

4. Scroll down.

looso any progre	m from the list of Eligible programs		
0			
Q Find Progr	ams		
	Charging Infrastructure and Rebate OR Turn-Key Installation	î.	
	The Charging Infrastructure program is available to multi-family, commercial		
	and public properties. This program provides funding for EV infrastructure installation and charging station rebates for participants installing four or more		
	EV charging ports. SCE designs and installs both the utility side and customer		
	side infrastructure through this option.		
	For more program information, click here: <u>sce.com/chargeready</u>	2	
	Turn-Key Installation		
	The Turn-Key Installation program is limited to multi-family properties in		
	disadvantaged communities. SCE designs, installs, operates and maintains the		
	EV charging stations on behalf of the customer.		
	 For more program information, click here: <u>sce.com/chargeready</u> 		

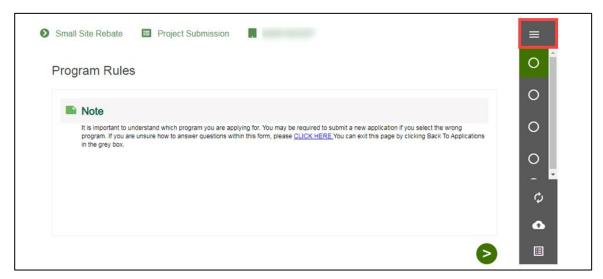
5. Click the **D** right arrow to select **Small Site Rebate**.



The Program Rules page displays.

Southers CANTORNA Energy for What's Ahead"	θ
Small Site Rebate E Project Submission	>
Program Rules	Program Rules Site Customer of Record
Note	Customer Information
It is important to understand which program you are applying for. You may be required to submit a new application if you select the wrong program. If you are unsure how to answer questions within this form, please <u>CLICK HERE</u> . You can exit this page by clicking Back To Applications in the grey box.	O Additional Customer Contact Information
	O Additional Customer Information
	O Account Management Support
	Project Information
	Trade Professional Information File Uploads
	Calculate
>	Back to Applications
Trouble logging in? Email ChargeReady@sce.com	

Note: If the menu on the right-hand side of the screen is minimized, select the **menu** icon.

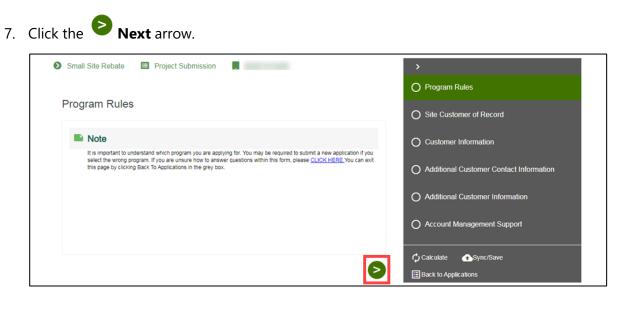


Once the Program Rules page displays, you will complete all the required fields.

The topics below covers how to complete each section of the Project Submission form.

Program Rules

6. Review the Program Rules.



Site Customer of Record

- 8. Select **Yes** or **No** for Is the applicant the customer of record for any meters at this site.
- 9. Click the **Next** arrow.

Small Site Rebate 🔲 Project Submission	>
Site Customer of Record	Program Rules Site Customer of Record
Customer of Record This section identifies whether the project will be installed at a site with an existing SCE Service Account under the applicant's SCE Costomer Account. A site address will be pre-populated if the applicant is the customer of record at the	O Customer Information
site. If the applicant is not the customer of record at the site, a site address must be entered on the next page.	Additional Customer Contact Information Additional Customer Information
	O Account Management Support
8	Calculate Calculate Calculate Calculate Calculate Calculate Calculate Calculate Calculations

Customer Information

10. Verify the **Bill Account Information** and **Site Information**.

Customer Information		Program Rules
This data is pre-filled based on	your SCE Account.	Site Customer of Record
Bill Account Information		O Customer Information
Customer Number *	Site Number	Additional Customer Contact Information
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 *	O Additional Customer Information
		O Account Management Support
Site Information		O Project Information
Site Address 1	Site Address 2 (apt, suite, bldg, etc)	O Trade Professional Information
Site City	Site State CA -	O File Uploads

Additional Customer Contact Information

- 12. Complete the **Project Contact Information**.
- 13. Complete the **Site Contact Information**.
- 14. Scroll down.

Project Contact Information		Site Customer of Record
Project Contact First Name *	Project Contact Last Name *	Customer Information
		O Additional Customer Contact Information
Project Contact Title *	Project Contact Phone *	Additional Customer Information
Project Contact Email *		
This email address will be used to provide notifications for project.	this	O Account Management Support
Site Contact Information		O Project Information
Enter a Site Contact if SCE should coordinate	on-site visits with someone other than the Project Contact	O Trade Professional Information
Customer Project Contact different fro		O File Uploads

Note: If Site Contact is different from Customer Project contact, enter the Site Contact details.

Site Contact Information		Site Customer of Record
Enter a Site Contact if SCE should coordinate on-site	visits with someone other than the Project Contact	Customer Information
Customer Project Contact different from Site Contact * Yes -		O Additional Customer Contact Information
Site Contact First Name *	Site Contact Last Name *	O Additional Customer Information
Site Contact Title *	Site Contact Phone *	O Account Management Support
Site Contact Email *		O Project Information

If Property is Own

- 15. Select Own.
- 16. Click the **Next** arrow.

Site Contact Informa	tion		
Enter a Site Contact if SCE sho	uld coordinate on-site visits with someone other than the Project Contac	O Additional	Customer Contact Information
Customer Project Contact different	from Site Contact *	Additional	Customer Information
No	·		
-		O Account N	lanagement Support
Property Owner Info	rmation		
Please verify property ownershi signature in addition to the SCE	p as agreements/easements will need to be routed to the property owne customer of record.	for O Project In	ormation
Property Ownership		0	
Property Ownership		O Trade Pro	fessional Information

If Property is Lease

- 15. Select Lease.
- 16. Complete the **Property Owner Contact Information**.
- 17. Click the **Next** arrow.

Property Owner Information		Site Customer of Record
Please verify property ownership as agreements signature in addition to the SCE customer of reco	easements will need to be routed to the property owner for rd.	Customer Information
Property Ownership Lease	•	Additional Customer Contact Information
Property Owner Contact Informati	on	Additional Customer Information
If the customer does not own the project property	enter contact information for the property owner.	O Account Management Support
Property Owner First Name *	Property Owner Last Name *	O Project Information
Property Owner Company Name *	Property Owner Title *	O Trade Professional Information
		O File Uploads
Property Owner Email *	Property Owner Phone *	

Additional Customer Information

- 18. Enter the Market Segment/Business Type.
- 19. Enter the **Parking Type**.
- 20. Click the **Next** arrow.

Sr.No	Market Segment/Business Type	Business Classification Descriptor	Customer Information
1.	Agricultural Industry	Agricultural related	
2.	Airport	Commercial, General aviation	
3.	Automotive Dealership	New or Used Car Sales	Additional Customer Contact Information
4.	Beaches	Public beaches, etc.	
5.	Destination center	Theme parks, sports arenas, convention centers	
6.	Distribution Center/Warehouse	UPS or FedEx distribution centers, Major retail s warehouses, transportation services, etc.	O Additional Customer Information
7.	Government - Local	Local, State, Federal, recreational locations (E.c swimming pools, golf courses, etc.)	
8.	Government - State	Local, State, Federal, recreational locations (E.g. swimming pools, golf courses, etc.)	O Account Management Support
9.	Government - Federal	Local, State, Federal, recreational locations (E.g. swimming pools, golf courses, etc.)	O Project Information
<[]]]]]]	n n:		O Project mormation
Marke	t Segment/Business Type *	•	O Trade Professional Information
Darkin	g Type *		O File Uploads
- on Kill	д туре		

Account Management Support

21. Verify the Assigned Account Manager Support, if applicable.

Note: If you are not aware of your Assigned Account Manager, please leave this field blank. One will be assigned to your project.

22. Click the **Next** arrow.

Account Management Suppo	prt	Site Customer of Record
helping you with your project.	anager they will be pre-filled below. pport if a different SCE representative has been ager will be assigned to you for this project.	Customer Information
Assigned Account Manager	ager win be assigned to you for ans project.	Additional Customer Contact Information
	Account Manager Support	Additional Customer Information
	Enter the correct SCE Account Manager if incorrect or missing and you know who they are.	
	Account Manager Email	O Account Management Support
		Calculate Async/Save
\triangleleft	\mathbf{S}	: ≡ Back to Applications

Project Information

- 23. Complete the **Site Information**.
- 24. Scroll down.

Small Site Rebate 🔲 Project Submission ,	Program Rules
Project Information	
Site Information	Site Customer of Record
Group ID.	Customer Information
Project Description *	Additional Customer Contact Information
Provide a name for this project, La. Convention Center, Building #5, South Lot. Application Submission Date	Additional Customer Information
How did you hear about the Charge Ready program? *	Account Management Support
	O Project Information

25. Complete the Third-Party Assistance information.

Note: If you select Yes under Are you using a Charge Ready Trade Pro, the **Trade Professional Information** section displays. If you select No, the Trade Professional Information section does not display.

26. Scroll down.

Lange Third-Party Assistance		Site Customer of Record
Are you using a Charge Ready Trade Pro? *		Customer Information
Yes	*	
A Trade Pro is an vendor that the customer contracts to help develop Community Portal. If you identify a Trade Pro for your project they will		Additional Customer Contact Information
What charging station vendor(s) are you cons	siderina? "	Additional Customer Information

- 27. Complete the Charging Station Information.
- 28. Scroll down.

Enter the Charging Information		
Are there site access restrictions? *	Customer Information	
Describe any safey, access, or security restriction applicable to the site.	Additional Customer Contact Information	
Additional Project Information *		
Any other construction projects that may affect a Charge Ready site, charger location options, construction timing restrictions	Additional Customer Information	
Select the best description of where charging equipment will be installed. *	Account Management Support	

29. Compete the **Port Count/Preferred Location Information**.

Note: Four or fewer ports is a requirement for the Small Site Rebate. Any value above 4 leads to an error.

30. Click the **Next** arrow.

Project Information	Program Rules
2 _e . Port Count/Preferred Location Information	Site Customer of Record
Ports should be grouped together in closed proximite on have non-adjacent locations (i.e., two separate parking garages on one school campus), submit a separate application for each site.	Customer Information
Preferred Charger Deployment Location *	Additional Customer Contact Information
Procence Onanger Deproyment Excellent Describe the physical location where you would like charging equipment installed, i.e. first level, north side of lot, beneath solar canopy.	Additional Customer Information
Total Number of Ports Requested *	
Field is rounded would you like to be able to charge at one time?	Account Management Support
Meter Status *	O Project Information
Are you planning to install a separate SCE meter exclusively for the charging stations? *	O Trade Professional Information
J	O File Uploads
3	Calculate Sync/Save
	Back to Applications

New versus Existing Meters

NOTE: If you request 1 to 3 ports, it will give you the option to select an Existing Meter or a New Meter.

Total Number of Ports Requested * 1 How many vehicles would you like to be able to charge at one time? Meter Status *	O Project Information O Trade Professional Information
Select	
Existing Meter	O File Uploads
New Meter	

If you request 4 ports, it will only give you the option to select a New Meter.

Total Number of Ports Requested * 4	O Project Information	
How many vehicles would you like to be able to charge at one time? Meter Status *	O Trade Professional Information	
Select		
Select	O File Uploads	
New Meter		

Trade Professional Information, if applicable

This section only applies if you are using a Trade Professional.

31. Click the Trade Professional Lookup.

Small Site Rebate Project Submission Frade Professional Information	Q Trade Professional Lookup	> Program Rules
Sevent Company Information	ĺ	Site Customer of Record
Vendor ID *	Business Name *	Customer Information
Address 1 *	Address 2 (apt, suite, bldg, etc)	Additional Customer Contact Information
Address 1	Aduress 2 (apr, suite, blug, etc)	Additional Customer Information
City *	State	Account Management Support
Zip Code *		Project Information
Vendor Contact Information		O Trade Professional Information

The **lookup** displays.

32. Enter a vendor name.

Trade Professional Lookup	
Choose eligible Partners or Contractors for this Application	Account Management Support
	Project Information
Search by: Business Name - Q	O Trade Professional Information
	0

A **list of vendors** displays.

33. Select the applicable vendor.

Choose eligible Partners or Contractors fo	r this Application	Site Customer of Record
Search by: Business Name 👻	Q charge	Customer Information
		Additional Customer Contact Information
Company Name	ChargePoint, Inc.	
Address	, Campbell, CA, 95008	Additional Customer Information
Personnel Name		Account Management Support
Service Type	Approved Product List EVSE Vendor	Account Management Support
Speciality	Level 2 EV Charging Station Provider	
Sector	Business	Project Information
State	CA	
Office	ChargePoint, Inc. Office (Avenue , Campbell, CA, 95008)	O Trade Professional Information
Company Name	ChargePoint, Inc.	O File Uploads
Address	95008 Campbell, CA,	

- 34. Confirm the Vendor Company Information and Vendor Contact Information.
- 35. Click the **Next** arrow.

2 Vendor Company Information		Site Customer of Record
Vendor ID *	Business Name *	Customer Information
7045	ChargePoint, Inc.	
Address 1 *		Additional Customer Contact Information
	Address 2 (apt, suite, bldg, etc)	
City *	State *	Additional Customer Information
Campbell	CA	Account Management Support
Zip Code *		
95008		Project Information
S Vendor Contact Information		O Trade Professional Information
Project Contact First Name *	Project Contact Last Name *	O File Uploads

File Uploads

36. Select the **Folder** icon to upload **Site Layout**.

File Uploads		Program Rules
Site Layout Af	tachment	Site Customer of Record
A site layout is an a should include anno Only required for pr	erial view of the property which can be obtained from Google Maps and tations to indicate the preferred location for the charging equipment. ojects requiring meter upgrades	Customer Information
Site Layout Upload		Additional Customer Contact Information
Photos	-	Additional Customer Information
		Account Management Support
Site Photos	<u> </u>	Project Information
1		Trade Professional Information
Customer Authoriza	tion Form	O File Uploads
	Submit>	

The **Open pop-up window** displays.

37. Select the applicable file.

38. Click Open.

Open	×
← → · · ↑ 🧵 « Downloads → Test	✓ Ŏ
ne property icate the pr g meter up	III • 🔟 🕐
S This PC Name	Type Information
	PNG File
Desktop	tion
Downloads v <	,
File name: Photo.png	✓ All Files (*,*) ✓
	Open Cancel
	Trade Professional Information
	te property cale the pro g meter up This PC This PC This PC Desktop Documents Documents File name: Photo.png

The file uploads.

- 39. Select the **Folder** icon to upload **Site Photos**.
- 40. Click Submit.

A site layout is an aeria should include annotati Only required for project	I view of the property which can be obtained from Go ons to indicate the preferred location for the charging ts requiring meter upgrades	ogle Maps and Site Customer of Record
Site Layout Upload		Customer Information
		Additional Customer Contact Information
1 Photo.ong	17 KB 💿	
Photos		Additional Customer Information
Site Photos		Account Management Support
1000		Project Information
		Trade Professional Information
Customer Authorization	Form	O File Uploads
Customer Authonization	Polin	C File Uploads

Form Sent!

Once you submit an application, the Form Sent! page displays, and a submission email is sent to you.

41. Select check your rebates from your account view.

Socialities California EDISON Energy for What's Ahead	θ
Form Sent! Thank you! Your submission will be reviewed. If we have any questions, we will send a message to you. You car check you	our rebates from your account view.
Group ID: Application Number Sent on PM PST	
Small Site Rebate	
Equipment or Measures	
Print this page	

The **Applications** page displays.

Program Name	 Q Find Applications 	Sort by Last Updated: Descending	•
Group ID:			
Customer	Site		
Program name	Application Number	Created	
Small Site Rebate	[]	THE T. LEWIS CO. M. LEWIS CO.	
	Status	Last Updated	
	Test Report Allow	THE R. LEWIS CO., MICH.	
Project Description			

Once a Project Submission is complete, SCE determines the eligibility for program participation.

Applications in Draft Status

You can save an application and complete it at a later time.

Saving an Application in Draft Status

To begin an application and save it in Draft status, follow the steps below:

1. While completing an application, select **Back to Applications**.

Small Site Rebate 🔲 Project Submission	>
	O Program Rules
Program Rules	O Site Customer of Record
Note It is important to understand which program you are applying for. You may be required to submit a new application if you	O Customer Information
select the wrong program. If you are unsure how to answer questions within this form, please <u>CLICK HERE</u> . You can exit this page by clicking Back To Applications in the grey box.	O Additional Customer Contact Information
	O Additional Customer Information
	O Account Management Support
	Calculate Sync/Save
Ð	Back to Applications

The Applications page displays.

Constants have		Order	
Search by Program Name	Q Find Applications	✓ Last Updated: Desce	ending -
Group ID:			
Customer	Site		
Program name	Application Number	Created	
Small Site Rebate		THE R. LEWIS CO., LANSING MICH.	
	Status Project Draft	Last Updated	
Project Description			-
Project Description	i tojot bran		6

Editing an Application in Draft Status

To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.

Search by Program Name	 Q Find Applications 	Sort by - Last Updated: Desce	nding -
Group ID: Customer	Site		
Program name Small Site Rebate	Application Number	Created	
	Status Project Draft	Last Updated	

The **Application Details** page displays.

2. Select Click to Open.

< Back to Applications Application Details		Print this page
Group ID:		
Customer	Site	
Program name Small Site Rebate	Application Number Status Project Draft	Created Last Updated
Application History	Click to Op	ben

The **Program Rules** page displays.

3. Complete the application.

	O Program Rules
Program Rules	O Site Customer of Record
Note It is important to understand which program you are applying for. You may be required to submit a new application if you select the wrong program. If you are unsure how to answer questions within this form, please CLICK HERE. You can exit	O Customer Information

Duplicating an Application

You can duplicate an application in the following statuses:

- Draft
- Submitted
- Withdrawn
- Complete

To duplicate an application, follow the steps below:

1. Click the **Duplicate** icon.

Search by Program Name	► Q Find Applications	Sort by Last Updated: Descending	•
Group ID:			
Customer	Site		
Program name Small Site Rebate	Application Number	Created	1 7
	Status Project Draft	Last Updated	
Project Description			

The Select the customer site to include in this application page displays.

2. Complete the application.

Energy for What's Ahead*		θ
	Select the customer site to include in this application.	
	If this is a new site, you will enter the address on the application form.	
	Choose an address	
	Continue >	

Discarding a Draft Application

You can delete an application in *Draft* status.

Note: The **F** Delete icon only appears for applications in Draft status.

To delete an application, follow the steps below:

1. Select the **F** Delete icon.

			olication
Search by Program Name	➡ Q Find Applications	Sort by Last Updated: Descending	•
Group ID:			
Customer	Site		
Program name Small Site Rebate	Application Number	Created	1 7
	Status Project Draft	Last Updated	

A warning message displays.

2. Select OK.

Energy for What's Ahead"	sce-te-production.dsmcentral.com says Are you sure you want to void this project?	θ
Applications	OK Cancel	New Application
Search by	Sort by	

Agreement Acceptance

The Agreement Acceptance is completed by the **Customer** or **Charge Ready Trade Professional** through the Charge Ready Application Portal. By completing this form, participants review and sign the Participation Agreement.

Eligible participants complete this form prior to the installation of qualifying Electric Vehicle (EV) infrastructure and equipment. This form:

• Specifies the program agreement of the project

Once an Agreement Acceptance is complete, SCE executes and reserves project funds.

For a full list of eligible participants, or for more information about the program, refer to the Small Site Rebate Program Guideline.

Completing the Agreement Acceptance Form

To complete the Agreement Acceptance, follow the steps below:

1. Select the Application Number.

Customer	Site		
Program name	Application Number	Created	
Small Site Rebate	0000		PST
	Status	Last Updated	
			PST
Project Description			
			6

The Application Details page displays.

2. Select **Click to Open** under 7. Agreement Acceptance.

Group ID: Customer Program name App Small Site Rebate 0000 Star Project Description	plication Number	Site	eated	
Program name App Small Site Rebate 000 Sta	plication Number		eated	
Small Site Rebate 000		Cre	eated	
Project Description	itus	Las	st Updated	
Application History				
1. Project Submission			0	123
7. Agreement Acceptance	С	Click to Open	0	23

The **Customer Information** page displays.

Once the Agreement page displays, you will complete all the required fields.

The topics below covers how to complete each section of the Agreement Acceptance form.

Customer Information

- 3. Verify the **Customer Information**.
- 4. Click the **Next** arrow.

Small Site Rebate 🔲 Agreemen	t Acceptance 0000	>
		O Customer Information
Customer Information		O Summary of Assessment Chargers
Bill Account Information		O Agreement
Customer Number *	Site Number *	O File Uploads
Bill Account Number *	Customer Name *	O Project Information
Site Information		O Trade Professional Information
Site Address 1 *		O Internal EV Charger Measure (1)
Site City *	Site State *	O EV Charger Station (0)
	CA	O Additional Customer Contact Information
		Calculate Sync/Save
		Back to Applications

The Summary of Assessment Chargers page displays.

Summary of Assessment Chargers

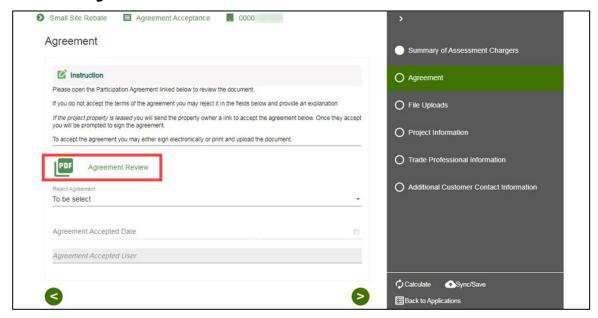
- 5. Verify the Summary of Assessment Chargers.
- 6. Click the **Next** arrow.

Summary of Assessment Chargers	O Summary of Assessment Chargers
Approved Chargers and Ports Information	O Agreement
Please note the following details regarding your Application which was Approved during Site Assessment phase. Please continue to Add EV Chargers during chargers installation.	
Approved Total Number of Chargers Approved Total Quantity of Ports	O File Uploads
Total L2 Ports	O Project Information
4	
Total Number of Procured Chargers	O Trade Professional Information
4	
Total Number of Procured Ports	O Additional Customer Contact Information
4	
Total Load (KW)	
48	

The **Agreement** page displays.

Agreement

7. Select PDF Agreement Review.



An Agreement window displays.

8. Review the agreement.

Note: Review the agreement in its entirety before accepting the agreement.

9. Select **Close**.

Note: You can also download the Agreement Review.

Agree	ment Review	
	Charge Ready - Small Site Rebate - Program Agreement	Î
	PROGRAM PARTICIPATION TERMS AND CONDITIONS	
	This Charge Ready Small Site Rebate Participation Agreement (Agreement) sets forth the terms and conditions for the Program Participant to participate in the Program.	
	Pursuant to the terms of this Agreement, and if applicable, SCE will (1) install the Utility-Side of the meter Infrastructure (as defined herein) at no cost to the Program Participant after all terms and conditions have been met by the Program Participant.	
	Program Participant hereby agrees to the following terms and conditions of the Charge Ready Small Site Rebate Program (the "Program").	
	APPROVED CHARGING PORTS	
	1. Total Number of Approved Charging Ports:	-
Close		Download

The **Agreement** page displays.

10. Select Yes or No under Reject Agreement.

Note: If Reject Agreement is Yes, enter an **Agreement Rejection Explanation**.

Agreement	Customer Information
C Instruction	Summary of Assessment Chargers
Please open the Participation Agreement linked below to review the document.	O Agreement
If you do not accept the terms of the agreement you may reject it in the fields below and provide an explanation If the project property is leased you will send the property owner a link to accept the agreement below. Once they accept you will be prompted to sign the agreement.	O File Uploads
To accept the agreement you may either sign electronically or print and upload the document.	O Project Information
PDF Agreement Review	O Trade Professional Information
Reject Agreement Yes	Additional Customer Contact Information
Agreement Rejection Explanation	
Agreement Accepted Date	

Note: If Reject Agreement is No, select an **Agreement Acceptance Method**.

Agreement Review Reject Agreement No	Project Information Trade Professional Information Additional Customer Contact Information
Agreement Acceptance Method *	

Electronic Acceptance

Note: Trade Pros submitting on behalf of customers are only able to Print and Upload the Agreement.

If the Agreement Acceptance Method is Electronic Acceptance, follow the steps below.

- 1. Select Electronic Acceptance.
- 2. Enter an Agreement Accepted Date.
- 3. Select the checkbox under Customer Accepts Agreement.
- 4. Click the **Next** arrow.

Agreement	Customer Information
Please open the Participation Agreement linked below to review the document.	Summary of Assessment Chargers
If you do not accept the terms of the agreement you may reject it in the fields below and provide an explanation	
If the project property is leased you will send the property owner a link to accept the agreement below. Once they accept you will be prompted to sign the agreement.	O Agreement
To accept the agreement you may either sign electronically or print and upload the document.	O File Uploads
PDF Agreement Review	O Project Information
Reject Agreement No	Trade Professional Information
Agreement Acceptance Method * Electronic Acceptance	O Additional Customer Contact Information
Agreement Accepted Date *	
Customer Accepts Agreement *	
Agreement Accepted User	
	Calculate
	Back to Applications

Note: If the Agreement requires a signature from the Property Owner, you will be prompted to send a link for their signature.

L		
L	Send Link	🖒 Calculate 🕂 Sync/Save
		Back To Applications

The **File Uploads** page displays.

Print and Upload

If the Agreement Acceptance Method is Print and Upload, follow the steps below:

- 1. Select **Print and Upload**.
- 2. Upload a file under **Agreement Upload**.
- 3. Click the **Next** arrow.

Agreement		Customer Information
If you do not accept the terms of the agreement you may reject it in the fields below and provide an explanation	n 🔺	
If the project property is leased you will send the property owner a link to accept the agreement below. Once t accept you will be prompted to sign the agreement.	hey	Summary of Assessment Chargers
To accept the agreement you may either sign electronically or print and upload the document.		O Agreement
Agreement Review		O File Uploads
Reject Agreement No	•	O Project Information
Agreement Acceptance Method *	- 10	O Trade Professional Information
Print and Upload		
Agreement Accepted Date *	e	O Additional Customer Contact Information
Agreement Upload *		
Agreement Accepted User		
		Calculate Sync/Save
S	2	EBack to Applications

Note: If the Agreement requires a signature from the Property Owner, you will be prompted to send a link for their signature.

Send Link	
	Calculate 🕂 Sync/Save
	Back To Applications

The File Uploads page displays.

File Uploads

- 11. Upload an **Email Communication file**, if applicable.
- 12. Click the **Next** arrow.

Small Site Rebate E Agreement.	Acceptance 🖪 0000		Summary of Assessment Chargers
T&D Illustration	Email Communication upload		Agreement
			O File Uploads
			O Project Information
3		Ø	Calculate Cosync/Save ⊞Back to Applications

The **Project Information** page displays.

Project Information

13. Select Yes or No under Request to Withdraw Project.

General Information	Summary of Assessment Chargers
Project Description	Agreement
Provide a name for this project, i.e. Convention Center, Building #5, South Lot. Application Submission Date	File Uploads
	O Project Information
Request to Withdraw Project	Trade Professional Information

14. Select Yes or No under **Is your charging station vendor installing the charging** equipment.

Are you Adding or Changing a Trade Pro? * No	File Uploads
	O Project Information
Is your charging station vendor installing the charging equipment?	Trade Professional Information
Are there site access restrictions? NO	Additional Customer Contact Information
Charging Information	
	·

- 15. Confirm the **Charging Information** is correct.
- 16. Click the **Next** arrow.

	File Uploads
Charging Information	_
Select the best description of where charging equipment will be installed.	O Project Information
Grade-level parking lot	
on and the parally of	O Trade Professional Information
Preferred Charger Deployment Location	
	O Installer Information
Describe the physical location where you would like charging equipment installed, i.e. first level, north side of lot, beneath solar canopy.	
Total Number of Ports Requested	
4	Additional Customer Contact Information
Meter Status	
New Meter	·
Are you planning to install a separate SCE meter exclusively for the charging stations?	
Yes	

The Trade Professional Information page displays.

Trade Professional Information

- 17. Verify the Trade Professional Information.
- 18. Click the **Next** arrow.

		Summary of Assessment Chargers
Vendor ID *	Business Name *	
	ChargePoint, Inc.	Agreement
Address 1 *		File Uploads
and the second second	Address 2 (apt, suite, bldg, etc)	
City *	State *	Project Information
	CA	
Zip Code *		O Trade Professional Information
		O Installer Information
Project Contact First Name *	Project Contact Last Name *	
	and the second second	Additional Customer Contact Information

The Installer Information or Additional Customer Contact Information page displays.

Installer Information, if applicable

- 19. Verify the Installer Information.
- 20. Click the **Next** arrow.

Installer Information		Project Information
installer mormation		Trade Professional Information
Business Name	Project Contact First Name	O Installer Information
Project Contact Last Name	Project Contact Email	O Additional Customer Contact Information
		Calculate Sync/Save

The Additional Customer Contact Information page displays.

Additional Customer Contact Information

- 21. Verify the **Customer Contact Information**.
- 22. Select Submit.

Project Contact Information		
Project Contact First Name	Project Contact Last Name	Agreement
10.000	10000	File Uploads
Project Contact Title	Project Contact Phone	
and the second sec		Project Information
Project Contact Email		Trade Professional Information
		Installer Information
Enter the Site Contact information	if it is different from Project Contact	O Additional Customer Contact Information
Customer Project Contact different from Site Conta	ict	
No		
Property Ownership		
Own		

The **Application Details** page displays.

Application Details

Once you submit the Agreement Acceptance, the Application Details page displays.

Note: You can select **Back to Applications** to go back to the Applications page.

oplication Details		Print this p
Group ID:		
Customer	Site	
Program name	Application Number	Created
Small Site Rebate	0000	100 To 2000 100 PT 100 PT
	Status	Last Updated
Project Description		
Application History		
1. Project Submission		10.0.00
7. Agreement Acceptance		Tax 11, 2011

Once an Agreement Acceptance is complete, SCE executes and reserves project funds.

Site Plan

The Site Plan form is required only for participants who have requested new meter service and is submitted by the **Customer** through the Charge Ready Application Portal. By completing this form, participants provide the plan of the project site.

Eligible participants complete this form prior to the utility side design and installation of qualifying Electric Vehicle (EV) infrastructure and equipment. This form:

• Specifies the overall site plan.

Once a Site Plan is complete, SCE reviews the site plan.

For a full list of eligible participants, or for more information about the program, refer to the Small Site Rebate Program Guidelines.

Completing the Site Plan Form

To complete the Site Plan, follow the steps below:

1. Select the **Application Number**.

Customer	Site		
Program name	Application Number	Created	
Small Site Rebate	0000		PST
	Status	Last Updated	
			PST
Project Description			
Andrew Street, Spinster,			6

The Application Details page displays.

2. Select **Click to Open** under 9. Site Plan Required.

Program name Small Site Rebate	Application Number	Created
	Status	Last Updated
Project Description		
Application History		
1. Project Submission		
 7. Agreement Acceptance 		10.11

The **Customer Information** page displays.

Once the Customer Information page displays, you will complete all required fields.

The topics below covers how to complete each section of the Site Plan form.

Customer Information

- 3. Verify the **Customer Information**.
- 4. Click the **Next** arrow.

ustomer Informatior	ı		Customer Information
Customer Number	Site Number		O Additional Customer Contact Information
Bill Account Number	Customer Company Name		O File Uploads
Site Address 1	Site Address 2	- H	
Site City	Site State/Province CA		
Site Zip/Postal Code			
		\geq	:= Back To Applications

The Additional Customer Contact Information page displays.

Additional Customer Contact Information

- 5. Verify the Additional Customer Contact Information.
- 6. Click the **Next** arrow.

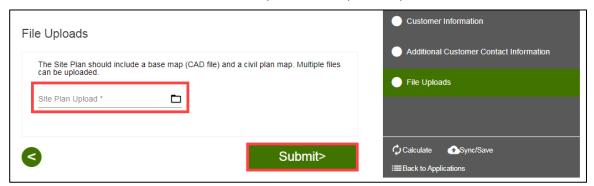
Enter the Project Contact Inf	formation.	🔶 Ac	ditional Customer Contact Information
Project Contact Last Name	Project Contact First Name		
			e Uploads
Project Contact Title	Project Contact Phone		
		- 1 - 1	
Project Contact Email			
	nation if it is different from Project Contac	ct.	
Customer Project Contact different fro		ct.	
		ct.	
Customer Project Contact different fro	vm Sit	ct.	
Customer Project Contact different fro	vm Sit	ct.	ulate Osync/Save

The File Uploads page displays.

File Uploads

- 7. Upload the Site Plan.
- 8. Select Submit.

Note: Site Plans must include a base map and a civil plan map in CAD file format.



The **Application Details** page displays.

Application Details

Once you submit the Site Plan, the Application Details page displays.

Note: You can select **Back to Applications** to go back to the Applications page.

pplication Details		🖶 Print this p
Group ID:		
Customer	Site	
Program name	Application Number	Created
Small Site Rebate	0000	100 To 2000 - 20 P To 200
	Status	Last Updated
Project Description		
Application History		
1. Project Submission		10.11.000
7. Agreement Acceptance		100 TO 100
9. Site Plan Required		100-10-0001

Once a Site Plan is complete, SCE reviews the site plan.

Design Acceptance

The Design Acceptance form is submitted by the Customer through the Charge Ready Application Portal. By completing this form, participants are agreeing to the preliminary design and site plans for the project.

Eligible participants complete this form prior to the installation of qualifying Electric Vehicle (EV) infrastructure and equipment. This form:

• Specifies the design of the site plan

Once a Design Acceptance is complete, SCE begins work on project requirements.

For a full list of eligible participants, or for more information about the program, refer to the Small Site Rebate Program Guidelines.

Completing the Design Acceptance Form

To complete the Design Acceptance, follow the steps below:

1. Select the **Application Number**.

Created
PST
Last Updated
PST

The Application Details page displays.

2. Select **Click to Open** under 11.Design Acceptance.

Application History		
1. Project Submission		
♦ 6. Conceptual Design Review		
8. Agreement Acceptance		
🕞 🔇 11. Design Acceptance	Click to Open	100 C

The File Uploads page displays.

Once the File Uploads page displays, you will complete all the required fields.

The topics below covers how to complete each section of the Design Acceptance form.

File Uploads

- 3. Verify the **File Uploads**.
- 4. Click the **Next** arrow.

			File Uploads
ign for review	vhere. You can accept the design on	the	O Comments
			O Preliminary Design
	Customer Authorization Form		
17 KB			O Customer Information
			Calculate 💽 Sync/Save
			:≡Back to Applications
		Customer Authorization Form	

The **Comments** page displays.

Comments

- 5. Enter Preliminary Design Comments from Customer, if needed.
- 6. Click the **Next** arrow.

Comments	 File Uploads
	Comments
Comments	O Preliminary Design
Preliminary Design Comments from Customer	<i>h</i>
3	Calculate Sync/Save i≡Back to Applications

The **Preliminary Design** page displays.

Preliminary Design

- 7. Select **Yes** or **No** for Preliminary Design Approved.
- 8. Click the **Next** arrow.

Preliminary Design	File Uploads
Preliminary Design Approved * Yes	 Comments Preliminary Design
6	Calculate Sync/Save

Note: If Preliminary Design Approved is No, enter a **Revision Reason**.

Preliminary Design			
Preliminary Design Approved *			Comments
No	•	Revision Reason	Preliminary Design
			C) Calculato ASuna (Cauco

The Final Design page displays.

Final Design

- 9. Upload the applicable files.
- 10. Click the **Next** arrow.

SCE Final Received Planned				Comments
SOL Final Received Planned	Ē	SCE Final Received Actual	•	Preliminary Design
AE Final Planned				
	Ē	AE Final Actual	1	Final Design
Electronic WO Received	Ē			O Customer Information

The **Customer Information** page displays.

Customer Information

- 11. Verify the **Customer Information**.
- 12. Click the **Next** arrow.

Customer Information		Comments
Customer Number *	Site Number	Preliminary Design
Bill Account Number *	Customer Name *	Final Design
Site Information		Customer Information

The Additional Customer Contact Information page displays.

Additional Customer Contact Information

- 13. Verify the Additional Customer Contact Information.
- 14. Select Submit.

Project Contact Information		Comments
Project Contact First Name	Project Contact Last Name	Preliminary Design
Project Contact Title	Project Contact Phone	Final Design
Project Contact Email		Customer Information
		Additional Customer Contact Information
Enter the Site Contact inform	ation if it is different from Project Contact	

The **Application Details** page displays.

Application Details

Once you submit the Design Acceptance, the Application Details page displays.

Note: You can select **Back to Applications** to go back to the Applications page.

Customer	Site	
Program name	Application Number	Created
Small Site Rebate	0000	
	Status	Last Updated
Project Description		

Once a Design Acceptance is complete, SCE begins work on project requirements.

Pending Installation and Incentive Request

This form is submitted by the Customer through the Charge Ready Application Portal. By completing this form, participants are requesting their rebate.

Eligible participants complete this form after the installation of qualifying EV equipment is complete. This form:

- Specifies the equipment installed at the site
- Includes documentation such as final invoices, site photos, and proof of ownership

Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

For a full list of eligible participants, or for more information about the program, refer to the Small Site Rebate Program Guidelines.

Completing the Pending Installation and Incentive Request Form

To complete the Pending Installation and Incentive Request form, follow the steps below.

1. Select the **Application Number**.

Program name	Application Number	Created		
Small Site Rebate	0000	U. CARGO	PST	
	Status	Last Updated		
		100 10 1000 1000	PST	
Project Description				

The **Application Details** page displays.

2. Select **Click to Open** under 12. Pending Installation and Incentive Request.

Back to Applications				Print this pag
Customer		Site		
Program name Small Site Rebate	Application Number		Created	
	Status		Last Updated	r
Project Description				
Application History				
1. Project Submission				
7. Agreement Acceptance				
9. Site Plan Required				
🕑 11. Design Acceptance				
🗈 🚯 12. Pending Installation	and Incentive Request	Click	to Open	

The **Customer Information** page displays.

Customer Information

- 3. Confirm the **Bill Account Information** and **Site Information**.
- 4. Click the **Next** arrow.

ustomer Information	bunt.	ESTIMATED TOTALS \$0.00 Estimated Incentive:
Bill Account Information		O Customer Information
		O Additional Customer Contact Information
		O Project Information
Site Information		O Network Service Provider
		O Charger Installation
		O EV Charging Station (0)
	and theme	O Summary of Chargers

The Additional Customer Contact Information page displays.

Additional Customer Contact Information

- 5. Verify the **Project Contact Information**, **Site Contact Information**, and **Property Owner Information**.
- 6. Click the **Next** arrow.

Additional Customer Contact Inforr	nation	ESTIMATED TOTALS
Project Contact Information		\$0.00 Estimated Incentive:
		Customer Information
		O Additional Customer Contact Information
		O Project Information
Site Contact Information		O Network Service Provider
Enter a Site Contact if SCE should coordinate on-site visite	s with someone other than the Project Contact	O Charger Installation
		O EV Charging Station (0)
Property Owner Information Please verify property ownership as agreements/easement	to will even to be so that to the property surger for	O Summary of Chargers
signature in addition to the SCE customer of record.	ts will need to be routed to the property owner to	O Payment Details

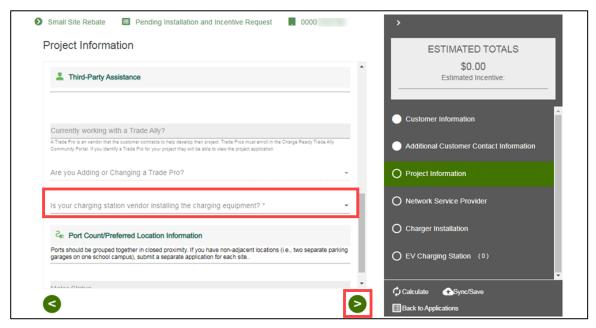
The **Project Information** page displays.

Project Information

- 7. Verify the **Project Information**.
- 8. Scroll down.

Project Information	ESTIMATED TOTALS
	\$0.00 Estimated Incentive:
Provide a name for this project, i.e. Convention Center, Building #6, South Lot.	Customer Information
Site Information	Additional Customer Contact Information
ubmission Date	O Project Information
	O Network Service Provider
	O Charger Installation
	O EV Charging Station (0)
	O Summary of Chargers
The first second of the second second second second	O Payment Details
	Calculate

- 9. Select Yes or No under Is your charging vendor installing the charging equipment?
- 10. Click the **Next** arrow.



The Installer Information or Network Service Provider page displays.

Installer Information

- 11. Enter the **Installer Information**, if applicable.
- 12. Click the **Next** arrow.

nstaller Information		ESTIMATED TOTALS \$0.00 Estimated Incentive:
Business Name *		
Project Contact First Name *	Project Contact Last Name *	Customer Information Additional Customer Contact Information
Project Contact Email *		Project Information
		O Installer Information
		O Network Service Provider

The Network Service Provider Information page displays.

Network Service Provider

- 13. Enter the Partner Company Name and Partner Email.
- 14. Click the **Next** arrow.

Network Service Provider		\$0.00 Estimated Incentive:	I
Partner Company Name *	Partner Email *		A
		O Network Service Provider	I
		O Charger Installation	L
		O EV Charging Station (0)	Į.
		O Summary of Chargers	L
		O Payment Details	÷
3		Calculate Sync/Save	

The Charger Installation page displays.

Charger Installation

- 15. Enter the Charger Installation Completed Date.
- 16. Enter notes, if applicable.
- 17. Click the **Next** arrow.

	ESTIMATED TOTALS
Charger Installation	\$0.00
The installation date must have occurred prior to today's date.	Estimated Incentive:
Charger Installation Completed Date *	Network Service Provider
Provide comments on any anomalies with the charging station installation that SCE should be aware of during site review.	
	O Charger Installation
Charging Station Installation Notes from Customer	O EV Charging Station (0)
	O Summary of Chargers
	O Payment Details
	Calculate 🛧 Sync/Save
	■ Back to Applications

The **EV Charging Station** page displays.

EV Charging Station

- 18. Select the applicable product.
- 19. Click the **Next** arrow.

	y: Library Me Q Find Product by Measure Name and add to Rebate application	ESTIMATED TOTALS \$0.00 Estimated Incentive:
	BTCPower-EVP-1001-30	Customer Information
	BTCPower-EVP-1001-30	Additional Customer Contact Information
	BTCPower-EVP-2002-30	Project Information
	BTCPower-EVP-2001-40	Installer Information
	BTCPower-EVP-2002-40	Network Service Provider Charger Installation
	ChargePoint-CPF25	O EV Charging Station (0)
	ChargePoint-CPF25-DUAL	O Summary of Chargers
+ Add To	Project	O Payment Details
3	0	Calculate Concentrate Concentrations Concentrations

- 20. Enter the Installed Number of Charging Stations.
- 21. Click the **Next** arrow.

Charging Station Details		Additional Customer Contact Information
	el you previously entered during procurement, please select tion Status field. Then select "Add Equipment" to enter details on the equipment will still be visible on the page.	Project Information
Manufacturer	Model #	
BTCPower	EVP-1001-30-#	Installer Information
Charging Station Installation Status	Charger Type	Network Service Provider
Eligible	• L2	
Number of Ports per Charger		Charger Installation
1	Installed Number of Charging Stations	
	Max Power Output (kW)	O EV Charging Station (1) BTCPower-EVP-1001-30
Installed Number of Ports	7.2	
	•	O Summary of Chargers

The **Summary of Chargers** page displays.

Summary of Chargers

- 22. Enter the **Total Charger Project Cost**.
- 23. Click the **Next** arrow.

	ESTIMATED TOTALS
Summary of Chargers	\$10,000.00 Estimated Incentive:
Charging Station Overview	
Total Installed Number of Charging Stations	Project Information
1	
Total Installed Number of Ports	Installer Information
1	Network Service Provider
Total Load (kW) 7.2	
1.46	Charger Installation
\$ Total Charger Project Cost	EV Charging Station (1)
Payment to Customer	O Summary of Chargers
Total Non Cap Charger Incentive \$10.000	O Payment Details
310,000	0
Maximum Charging Station Incentive \$10,000	O Payee Information
	O File Uploads

The **Payment Details** page displays.

Payment Details

24. Select a Payee Selection.

Small Site Rebate 🗉 Pending Installation and Incentive Request 🚦 0000	>
Payment Details	ESTIMATED TOTALS \$10,000.00 Estimated Incentive:
Payee Selection *	Summary of Chargers Payment Details
	Payee Information File Uploads
3	Calculate Sync/Save i≡Back to Applications

Additional fields display.

- 25. Select the **Payment Type**.
- 26. Select the **Tax Classification**.

Payment Details		ESTIMATED TOTALS \$10,000.00 Estimated incentive:
Payee Selection * Customer	✓ Payment Type *	Project Information
Tax Classification *	•	Summary of Chargers
General une appropriate teoeral tax classification	tor the costorie.	O Payment Details
		O Payee Information
3		> File Uploads
-		Calculate Sync/Save

Additional fields display.

- 27. Complete the required information.
- 28. Click the **Next** arrow.

	\$10,000.00 Estimated Incentive:
Payee Selection * Paymen Customer • Check	
	Project Information
Tax Classification * C Corporation • Tax Id	entification Type *
Select the appropriate federal tax classification for the customer.	
Tax Identification Number	er Tax Identification Number
Name *	Charger Installation
	EV Charging Station (1)
Address 1 * Addre	Summary of Chargers
City State	O Payment Details
Zip Code	O Payee Information
	O File Uploads

The Payee Information page displays.

Note: Certain Tax Classifications require more information.

ayment Details		ESTIMATED TOTALS
Payee Selection * Customer	Payment Type *	\$10,000.00 Estimated Incentive:
W9 Information Section		Project Information
Please enter information exactly as it appears or	an IRS W-9.	
 Please click <u>here</u> to visit IRS.gov website. Please click <u>here</u> to view W9 document. 		Installer Information
Tax Classification * Individual/Sole Proprietor	 Tax Identification Type * 	Network Service Provider
Select the appropriate federal tax classification for the custor	ner.	
Tax Identification Number	Re-Enter Tax Identification Number 🖍	Charger Installation
Name *		EV Charging Station (1)
		Summary of Chargers
Address 1 *	Address 2	O Payment Details
City	State	O Payee Information

Other Payee Selection

If the Payee Selection is Other, the Other Business Partner Information page displays on the right-hand side menu.

Small Site Rebate E Pending Installation and Incentive Request	`
Payment Details	ESTIMATED TOTALS \$10,000.00 Estimated Incentive:
Payee Selection * Other *	
	Summary of Chargers
	O Payment Details
	O Other Business Partner Information
	O Payee Information
	O File Uploads
	Calculate Sync/Save
<u>v</u>	Back to Applications

Payee Information

- 29. Enter and verify the required information.
- 30. Click the **Next** arrow.

ayee Information		ESTIMATED TOTALS \$10,000.00 Estimated Incentive:
For Attention Of	Company Name	Project Information
Customer Number *	Addresst *	Summary of Chargers
Address2	City *	Payment Details
State/Province *	Zip/Postal Code *	O Payee Information
		O File Uploads

The File Uploads page displays.

File Uploads

- 31. Upload and verify the applicable files.
- 32. Select Submit.

ile Uploads			_	\$10,000.00 Estimated Incentive:
Networking Invoice/Agreement *		Project Invoice *		
1 Agreement.docx 49	кв 😵			Summary of Chargers
Contract Package Invoice		Customer Permits		Payment Details
Engineering Assessment Result		Proof Of Procurement EVSE Upload		Payee Information
T&D Illustration		Customer Grant Deed Upload		O File Uploads

The **Application Details** page displays.

Application Details

Once you submit the Pending Installation and Incentive Request, the Application Details page displays.

Note: You can select **Back to Applications** to go back to the Applications page.

Back to Applications		Print this page
Customer	Site	
Program name	Application Number	Created
Small Site Rebate	0000	
	Status	Last Updated
Project Description		
Application History		

Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.