



PROGRAM PARTICIPATION

QUICK REFERENCE GUIDE

Charge Ready Transport
Program Handbook Supplement

v2.0 7/10/19

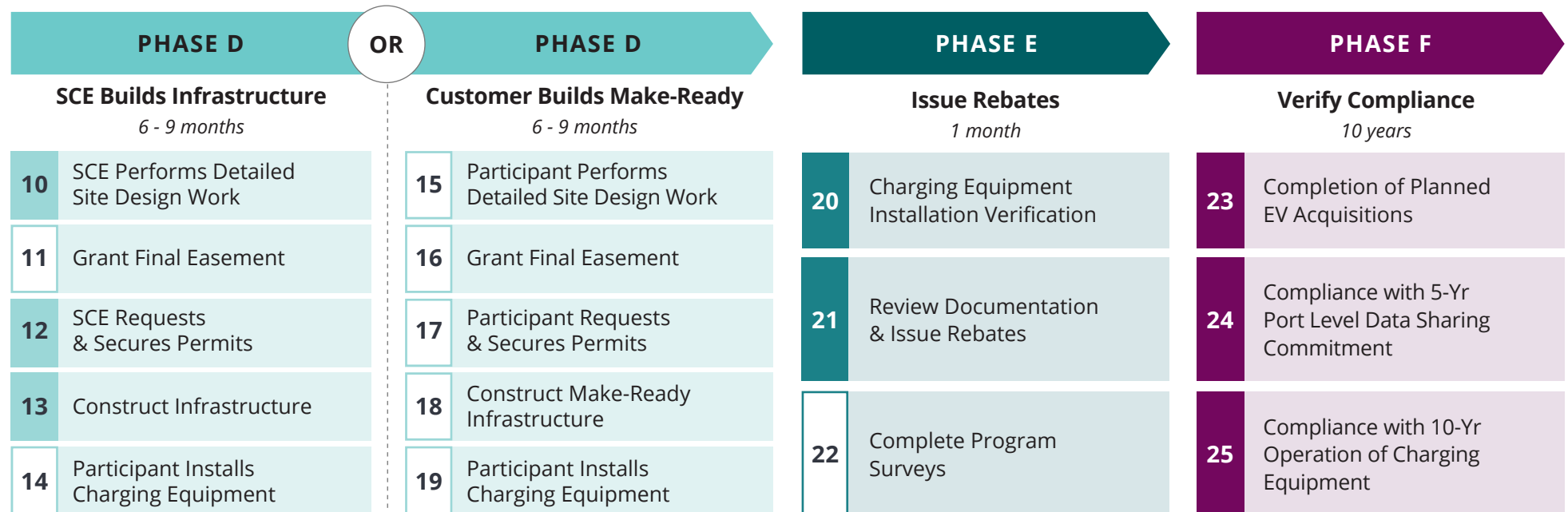
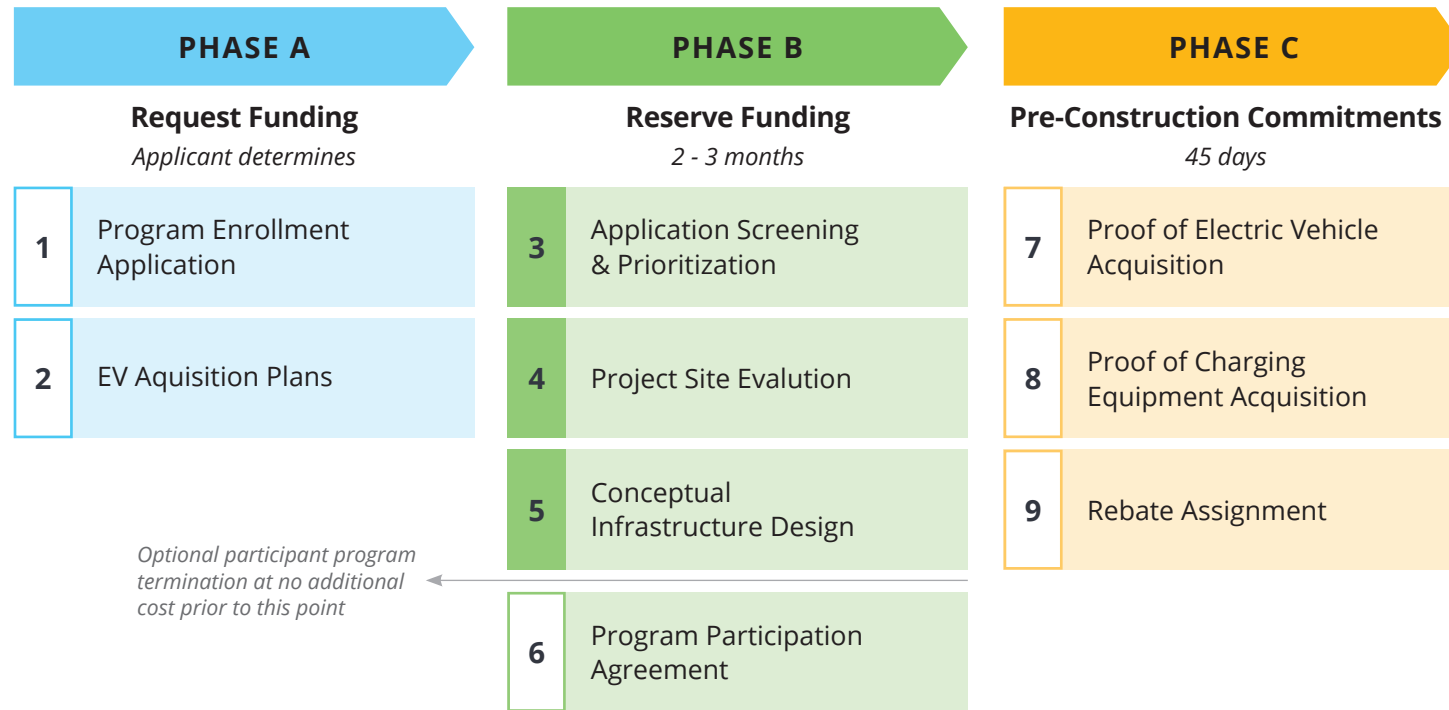


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CHARGE READY TRANSPORT PROGRAM – ACTIVITY FLOW

LEGEND	
1	Program Participant
1	SCE



A. FUNDING REQUEST

*Estimated duration: 45 minutes
Steps 1 & 2*

1. Program Enrollment Application

The on-line application can be accessed through the program enrollment portal. A minimum qualification for program participation includes the acquisition or conversion of at least two EV or convert at least two fossil-fueled vehicles to electric to be on-site within 18 months.

Customer Activities:

- Complete on-line application accessible through the program enrollment portal (www.SCE.com/ChargeReadyTransport).
- Upload a site plan annotated with preferred location(s) of the charging equipment to the program enrollment portal.
- Upload copy of the civil plan (requested but not required) to the program enrollment portal.

Documents Required:

- Application will be submitted electronically through the program enrollment portal once filled out completely.
- Upload a copy of the site plan annotated with preferred location(s) of the charging equipment in .pdf file format to the the program enrollment portal;
- Upload a copy of the civil plan (requested but not required) to the the program enrollment portal.

SCE Activities:

- Review application for completeness.
- SCE will determine initial eligibility for program participation.

2. EV Acquisition Plans

The acquisition plans are embedded in the Enrollment Application and capture the Applicants EV procurement plans over the next ten years. This information will help to qualify the Applicant for program participation and lay the ground work for understanding the site's charging infrastructure needs.

Customer Activities:

- Ensure the planned EV acquisition portion of the Application is accurate & complete.
- If the project includes truck stop electrification (TSE) or includes Transport Refrigeration Units (TRU's), please fill out and submit the "TRU and TSE Worksheet" which can be downloaded from the the program enrollment portal.



Documents Required:

- The EV Acquisition plan is embedded within the on-line Application.
- Projects for Truck Stop Electrification or Transport Refrigeration Units are required to complete and Upload a copy of the “TRU and TSE Worksheet” to the program enrollment portal.

SCE Activities:

- Review Applications for completeness.
- Ensure EV acquisition plan includes a minimum of two EVs to be on-site within 18 months.
- If applicable, ensure TRU and TSE worksheet is complete.



B. FUNDING RESERVATION

*Estimated duration: 2-3 months
Steps 3-6*

3. Application Screening & Prioritization

A number of factors will help SCE to determine project eligibility & prioritization. These include, but are not limited to: the number and timing of vehicles to be acquired or converted; size of the existing fleet; number of projected previously approved for similar sector; integration with on-site load management such as solar, battery storage, and other; and remaining program funds.

Customer Activities:

- Respond to any application related inquiries received from SCE.

Documents Required:

- None.

SCE Activities:

- SCE will initiate the project feasibility review (TEPFS).
- Determine if application moves to next step.
- If determined the application can move forward to the next step, SCE will schedule a site visit.

4. Project Site Evaluation

After reviewing and evaluating the application, SCE will continue through the evaluation process to schedule and perform a site assessment. This step is necessary for SCE to collect the information needed to develop a conceptual infrastructure design and project cost estimate.

Customer Activities:

- Participate in the on-site visit with SCE.
- Ensure the appropriate individual(s) representing the Customer Applicant, typically the Facility Manager or Yard Manager (someone familiar with the site and the planned installation of the vehicle charging equipment, familiar with how the vehicles are operated, will be parked, etc.), participate in the site walk-through.
- If the customer is already aware of the specific charging equipment they plan to purchase and install, attempt to invite the charging equipment supplier to the site visit.

Documents Required:

- If the customer is already aware of which charging equipment they plan to purchase, email a copy of the charging equipment product specification sheet(s) to TEPMChargeReadyTransport@sce.com. Include your application ID number in the subject line, e.g. CRT-2019-xxxx, followed by "STEP 4").

SCE Activities:

- Review Applications for completeness.
- Ensure EV acquisition plan includes a minimum of two EVs to be on-site within 18 months.
- If applicable, ensure TRU and TSE worksheet is complete.

5. Conceptual Infrastructure Design

If during the site assessment the proposed project meets program criteria, and if SCE determines the project can still potentially move forward, SCE will draft a conceptual design and provide a copy to the customer.

Customer Activities:

- If SCE provides the conceptual design, the customer will be requested to accept and approve (verbal will suffice) the design within 10 calendar days of receipt.
- If the customer does not approve the design, customer must then work with SCE to reach agreement on alternate potential lay-out.
- Decide if the make-ready infrastructure will be built by customer or SCE.
- Notify SCE of any other infrastructure projects are planned or underway at the site.
- Review SCE's standard easement language, and if not property owner ensure property owner has reviewed.

Documents Required:

- None. The conceptual design will be included in the Program Participation Agreement.

SCE Activities:

- Develop a conceptual infrastructure design for the site.
- Prepare high level costs estimates for the utility side and customer side infrastructure, including engineering, design and permitting.
- If the proposed project meets program criteria, cost thresholds, and other considerations, SCE will provide the conceptual design exhibit to the customer for approval.
- Receive customer's verbal approval of the conceptual infrastructure design.
- Receive customer's decision on make-ready build (customer or SCE).
- Confirm with customer whether or not there are any other site infrastructure projects planned or underway.

6. Program Participation Agreement

If during the site assessment the proposed project meets program criteria, and if SCE determines the project can still potentially move forward, SCE will draft a conceptual design and provide a copy to the customer.

Customer Activities:

- Customer to provide SCE with decision on specific charging equipment that will be purchased.
- Customer to make any final revisions to the vehicle acquisition plan.
- Receive, review and sign (electronic signature) the Program Participation Agreement that will be available through the program enrollment portal.

Documents Required:

- Signed Program Participation Agreement (via electronic signature – through the program enrollment portal).

SCE Activities:

- Identify the specific charging equipment the customer has chosen.
- Identify any changes to the vehicle acquisition plan.
- Prepare the Program Participation Agreement.
- Upon receipt of customer signature, execute the Agreement and reserve project funds.

C. PRE-CONSTRUCTION COMMITMENTS

*Estimated duration: 45 days
Steps 7-9*

7. Proof of Vehicle Acquisition

Within 45 days of the date funds are reserved, customers must provide proof of procurement of at least two EVs or convert at least two fossil-fueled vehicles to electric.

Customer Activities:

- Prepare copy of proof of EV lease or purchase agreement.
- At least two vehicles must be scheduled to arrive on-site within 18 months.

Documents Required:

All documents should be uploaded to the program enrollment portal:

- Copy of itemized lease or purchase contract.
The document must include:
 - Execution Date
 - Lease term (if leased)
 - EV dealer(s) name and address
 - Model numbers and quantity of Electric Vehicles purchased, leased or converted.

- Expected vehicle delivery date(s) – MUST BE WITHIN 18 MONTHS.
- Payment status (paid or payment terms)

SCE Activities:

- Receive documentation and review for completeness.
- If not complete, follow-up with the customer as may be required.

8. Proof of Charging Equipment Acquisition

Within 45 days of the date funds are reserved for the project, customers must provide proof of procurement ALL vehicle charging equipment designated for the project.

Customer Activities:

- Submit copy of the purchase order, paid invoice, or sales receipt for charging equipment (separately listed purchase price from any EVITP certified installer costs).
- If applicable, submit a copy of the Network Service Agreement (required for charging equipment fueling on-road EVs).
- For non-standard equipment, submit a copy of the NRTL Safety Performance Evaluation Test Report & complete and submit copy of

the Testament of Compliance with SCE's Non-Standard Equipment Technical Requirements.

- A limited extension of this procurement period may be granted by submitting an extension request in writing prior to the expiration of the initial 45 day period. SCE may, at its discretion, provide an extension, if, in SCE's sole judgment, the Participant is actively seeking to complete the procurement.

Documents Required:

All documents relating to Step 8 should be uploaded to the program enrollment portal:

- Proof of purchase including purchase date, the make, model and serial #'s of the charging equipment, expected delivery date and individual unit pricing;
- If applicable, a copy of Network Services Agreement;
- For non-standard equipment – copy of NRTL Safety Test Report;
- For non-standard equipment, a signed copy of the Technical Requirements for Non-Standard Charging Equipment.

SCE Activities:

- Receive documents and review for completeness.
- If not complete, follow-up with the customer as may be necessary.

9. Rebate Assignment

This form is used to collect the necessary information for SCE to process and remit applicable rebates.

Customer Activities:

- If Participant is eligible for the Charging Equipment Rebate or the Make-Ready Rebate, within 45 days of the date funds are reserved for the project, complete the on-line Rebate Assignment Form.
- Submit completed copy of W-9 for tax purposes.
- Submit completed copy of the CA 590 form, if applicable.

Documents Required:

- If rebate eligible, complete the on-line Rebate Assignment Form located on the program enrollment portal;
- If rebate eligible, upload a copy of a completed and signed copy of IRS Form W-9;
- If applicable, upload a signed copy of a completed CA form 590.

SCE Activities:

- Receive documents and review for completeness.
- If not complete, follow-up with the customer as may be required.



D. DESIGN AND BUILD PHASE

SCE BUILDS INFRASTRUCTURE

*Estimated duration: 6-9 months
Steps 10-19*

10. SCE Performs Detailed Site Design Work

Following the execution of an Agreement, and upon receipt of all required Pre-Construction documentation, SCE will commence with drafting detailed design plans and developing final infrastructure cost estimates.

Customer Activities:

- Approve SCE's site visit request to collect information which will help with developing the detailed design work & cost estimates.
- The customer will be presented with the detailed design, and is requested to complete their review and approval within 10 calendar days.

Documents Required:

- Email approval of the Preliminary design to TEPMChargeReadyTransport@sce.com (include your application number in the subject line, e.g. CRT-2019-xxxx, followed by "STEP 10").



SCE Activities:

- The design and build phase will commence following completion of the Pre-Construction Commitments outlined in Steps 7-9.
- SCE will schedule/coordinate the site visit to start the detailed design work.
- Develop Preliminary design & present to customer.
- Receive Preliminary design approval from customer.

11. Grant Final Easement

The customer is required to execute and notarize the easement, or facilitate its execution (for non-owned sites).

Customer Activities:

- Sign and notarize easement documents.
- Email a copy of the document to SCE.
- Return the original signed and notarized easement to SCE within 30 calendar days from the date of receipt.
- If customer is not the site owner, have the owner of property sign and notarize easement documents

Documents Required:

- Email copy of notarized easement to TEPMChargeReadyTransport@sce.com (include your application number in the subject line, e.g. Ex CRT-2019-xxxx, followed by "STEP 11");
- Return original signed and notarized easement to SCE following the mailing instructions that will be provided.

SCE Activities:

- SCE prepares easement documents and provide to customer for execution.
- SCE ensures notarized copy is received.

12. SCE to Request & Secure Permits

SCE will submit its construction plans to the relevant AHJ to secure all necessary reviews, approvals and permits.

Customer Activities:

- Sign permit application documents as may be requested by SCE.

Documents Required:

- Upon request from AHJ, as may be required.

SCE Activities:

- SCE submits designs to the AHJ for plan check and permitting.

- Send customer any required documents requiring signature.
- Provide customer the necessary information to establish a new Service Account (address for service).

13. Construct Infrastructure

SCE will design, procure, construct and maintain the necessary equipment on both the utility side and customer side of the meter up to the first point of interconnection with the planned location of the customer's charging equipment.

Customer Activities:

- Within 15 days of the completed make-ready construction, customers are required to provide SCE with approval of the work performed.
- Work with SCE Account Representative to select TOU rate plan and request service turn-on (performed before meter is set).

Documents Required:

- Email a signed copy of the "Infrastructure Approval and Acceptance Certificate" to TEPMChargeReadyTransport@sce.com within 15 days. Include your application number in the subject line, e.g. CRT-2019-xxxx, followed by "STEP 13".

SCE Activities:

- After securing permits, initiate construction phase.
- Complete the construction phase.
- Confirm receipt of infrastructure form.
- Activate new Service Account upon Participant's request.

14. Participant Installs Charging Equipment

Customers will always be required to install the vehicle charging equipment following the completion of the utility side and customer side of the meter infrastructure work. Post charging equipment installation, and within 10 calendar days, relevant documentation to be submitted to SCE.

Customer Activities:

- Ensure compliance with the CPUC TE Safety Checklist.
- Obtain final invoices for charging equipment installation and notify SCE the work is complete.
- Secure permits for charging equipment Installation.
- Install equipment within 20 calendar days and have final inspections performed.
- Obtain "EVSE Commissioning" Report.
- Submit a completed "Charging Equipment Registration Form".
- If charging equipment is not listed on SCE's APL, obtain copy of the Field Listing Inspection Report.
- If charging equipment is not listed on SCE's APL, work with SCE to schedule (possible) equipment commissioning test.
- Any publicly-accessible charging equipment must be reported to the US Department of Energy's EV Charging Station Locations mapping tool at: https://www.afdc.energy.gov/fuels/electricity_locations.html#/find/nearest?fuel=ELEC

Documents Required:

All documents specified should be scanned for upload to the program enrollment portal.

- A copy of the installation permit & evidence of final inspection;
- A copy of the final charging equipment purchase invoice;
- A copy of the charging equipment installation invoice (in all cases the equipment purchase price should be broken out from the installation costs);
- A copy of the completed "Charging Equipment Registration Form";
- A copy of the "EVSE Commissioning Report";
- If the charging equipment was not listed on SCE's APL, submit copy of the Field Listing Inspection Report.

SCE Activities:

- Receive notification work is complete, receive documents and review for completeness.
- Follow up with customer as may be required for missing information.
- Determine if SCE will be performing equipment commissioning test and schedule if needed.



D. DESIGN AND BUILD PHASE

CUSTOMER BUILDS MAKE-READY

*Estimated duration: 6-9 months
Steps 10-19*

15. Participant Performs Detailed Site Design Work

Customers choosing to perform their own make-ready infrastructure installation are responsible for its design, procurement, construction and maintenance.

Customer Activities:

- Complete the make-ready infrastructure design.
- Create a base map and civil plan map, for location of the make-ready and charging equipment (see Appendix of Program Handbook for civil plan sample) and provide copy to SCE.
- Submit a copy of estimated construction costs to SCE.
- Provide approval for SCE utility side infrastructure design.

Documents Required:

- All documents required for this step should be aggregated into a single email and submit to TEPMChargeReadyTransport@sce.com. Include your application number in the subject line, e.g. CRT-2019-xxxx, followed by "STEP 15").
- A copy of the base map detailing the make-ready Infrastructure design (include E-sheet and load calculations) following the "CAD File Requirements" included in the Appendix of the Program Handbook;

- A copy of the civil plan in .pdf file format;
- A copy of the estimated construction costs broken out by design and engineering costs; permitting costs; and construction costs. A template is provided in the Appendix of the Program Handbook;
- A copy of the approval of SCE's utility side infrastructure design (sign design before sending a .PDF copy).

SCE Activities:

- After receiving customer's plans, design utility side infrastructure.
- SCE to draft and share utility side infrastructure design with the customer via email for approval.
- Draft the legal description for the utility side infrastructure easements.
- Receive documentation from customer and ensure completeness.

16. Grant Final Easement

The SCE team will draft the legal description to be used for the utility side infrastructure easement.

Customer Activities:

- Once SCE provides the final easement language for the utility side infrastructure, the customer is required to grant, or facilitate the

- granting of new easements for the utility side infrastructure work.
- Sign and notarize easement documents.
- Email a copy of the document to SCE.
- Return the original signed and notarized easement to SCE within 30 calendar days from the date of receipt.
- If customer is not the site owner, have the owner of property sign and notarize easement documents.

Documents Required:

- Email a copy of notarized easement to TEPMChargeReadyTransport@sce.com. Include your application number in the subject line, e.g. CRT-2019-xxxx, followed by "STEP 16";
- Return original signed and notarized easement to SCE following the mailing instructions that will be provided.

SCE Activities:

- Provide customer with final utility side easement language.
- Once copy of final easement is obtained, SCE will initiate recording of the easement.

17. Participant Requests & Secures Permits

Customer is required to submit its construction plans to the relevant AHJ to secure all reviews, approvals and permits.

Customer Activities:

- Initiate permitting process.

- Obtain necessary permits.
- SCE will provide customer with the necessary information to establish a new Service Account.

Documents Required:

- Any required by AHJ.

SCE Activities:

- Provide customer with support as may be necessary.
- SCE will secure any permits relevant to the construction of the utility side infrastructure.
- Provide customer the necessary information to establish a new Service Account (address for service).

18. Construct Infrastructure

Customers will be responsible for managing and coordinating all related infrastructure design and installation work and complying with labor and safety requirements.

Customer Activities:

- Schedule a preconstruction meeting with SCE and provide a detailed construction schedule.
- Procure equipment & manage all infrastructure work.
- Ensure installation contractor is state licensed and insured, using IBEW signatory labor for all work performed.

- Ensure compliance with Contractor training certification (EVITP) and obtain copies of certificates in advance of work being performed.
- Review and ensure compliance with the CPUC's Transportation Electrification Safety Requirements Checklist.
- Post installation, ensure final inspection process is complete.
- Work with SCE Account Representative to select TOU rate plan and request service turn-on (new account activation).

Documents Required:

- Email a copy of the detailed construction schedule in advance of work to be performed to TEPMChargeReadyTransport@sce.com. For all emailed documents, please include your application ID number in the subject line, e.g. CRT-2019-xxxx, followed by "STEP 18").
- Following construction, email copies of:
 - Evidence of final inspection;
 - A copy of the final as-built map; and
 - A signed copy of the Testament of Compliance with the Safety Requirements Checklist.

SCE Activities:

- Notify customer when utility side infrastructure work is complete.
- Attend the customer's scheduled pre-construction meeting.
- Energize site once customer has completed construction and received all necessary AHJ approvals.
- Activate new Service Account upon Participant's request.

19. Participant Installs Charging Equipment

Customers will be required to install the vehicle charging equipment following the completion of the utility side and customer side of the meter infrastructure work. Within ten calendar days of completion of the installation, the required documents should be submitted to SCE.

Customer Activities:

- Ensure compliance with the CPUC TE Safety Checklist.
- Obtain final invoices for charging equipment installation and notify SCE the work is complete.
- Secure permits for charging equipment Installation.
- Install equipment within 20 calendar days and have final inspections performed.
- Obtain "EVSE Commissioning Report".
- Submit completed copy of the "Charging Equipment Registration Form".
- Work with SCE to schedule (possible) equipment commissioning test.
- If charging equipment is not listed on APL, obtain copy of the Field Listing Inspection Report.
- Any publicly-accessible charging equipment must be reported to the US Department of Energy's EV Charging Station Locations mapping tool at: https://www.afdc.energy.gov/fuels/electricity_locations.html#/find/nearest?fuel=ELEC

Documents Required:

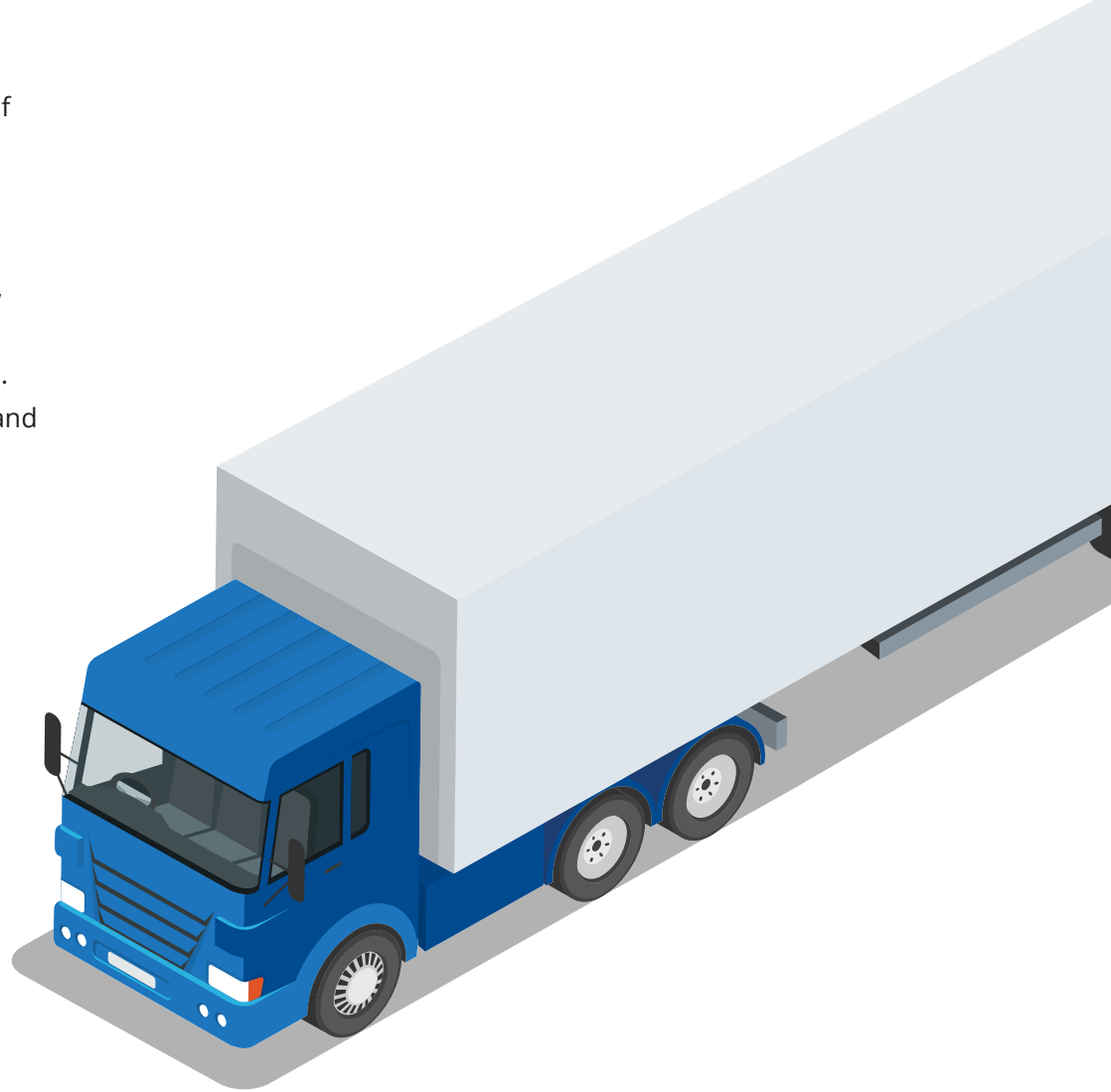
All documents specified should be scanned for upload to the program enrollment portal:

- A copy of the installation permit & evidence of final inspection;
- A copy of the final charging equipment purchase invoice;

- A copy of the charging equipment installation invoice (in all cases the equipment purchase price should be broken out from the installation costs);
- A copy of the completed "Charging Equipment Registration Form";
- A copy of the "EVSE Commissioning Report";
- If the charging equipment was not listed on SCE's APL, submit copy of the Field Listing Inspection Report.

SCE Activities:

- Receive notification work is complete, receive documents and review for completeness.
- Follow up with customer as may be required for missing information.
- Determine if SCE will be performing equipment commissioning test and schedule if needed.



E. ISSUE REBATES

*Estimated duration: 1 month
Steps 20-22*

20. Charging Equipment Installation Verification

After SCE is notified the work is complete, the required documentation has been received, and the new service account was activated, SCE will perform final site inspection.

Customer Activities:

- Notify SCE when installation of charging equipment is complete.

Documents Required:

- None

SCE Activities:

- After notification received from customer, perform final site inspection.
- Once inspection complete, initiate rebate process.

21. Review Documentation & Issue Rebates

Following site visit and review of ALL required documentation, SCE will move forward with processing the rebate for remittance to the assigned designee.

Customer Activities:

- No further action required for Charging Equipment Rebate processing.
- For the Make-Ready Rebate, if applicable, the documentation outlined below will be required within 10 calendar days after charging equipment is installed.

Documents Required:

All documents for the Make-Ready Rebate should be scanned for upload to the program enrollment portal:

- A copy of the "Participant Installed Make-Ready Cost Breakdown worksheet";
- A copy of the final "As-Built" for the make-ready infrastructure work;
- A copy of the final inspection for the make-ready Infrastructure work.



SCE Activities:

- Review documentation for completeness.
- Initiate processing of rebates.
- Issue rebate check.

22. Complete Program Surveys

Customers may be provided with program related information request(s) and/or surveys at various times throughout the duration of the program.

Customer Activities:

- Respond to survey requests in a timely manner.

Documents Required:

- Provide responses as requested (may be received in electronic or paper format).

SCE Activities:

- Develop surveys, distribute, process responses and follow-up as may be necessary.



F. COMPLIANCE VERIFICATION

*Estimated duration: 10 years
Steps 23-25*

23. Completion of Planned EV Acquisitions

SCE will monitor project related EV acquisitions to ensure those reflected in the Agreement materialize.

Customer Activities:

- Acquire EVs as outlined in the Agreement (adhere to volume and timing of vehicle delivery).
- If for any reason, the volume or timing of delivery deviates from the Agreement, promptly notify SCE.

Documents Required:

- On-going response to SCE's annual EV acquisition survey. Participants will be asked to provide the Make and Model of vehicles acquired during that calendar year, and for information relating to the retirement of any EV during that calendar year.

SCE Activities:

- Ongoing monitoring for each participating site.
- SCE may follow-up with customers to monitor compliance with planned vehicle acquisitions.

24. Compliance with 10-Yr Operation of Charging Equipment

The customer is required, at its own expense, to operate and maintain the equipment in good working order at the originally installed location for 10 years.

Customer Activities:

- Maintain the charging equipment in good working order for 10 years.
- Replace or repair charging equipment, if required, as set forth in the Agreement and Handbook.

Documents Required:

- None.

SCE Activities:

- Ongoing monitoring for each site.
- Aggregate usage data available for all EV load.
- Follow up with customer as may be necessary.

25. Compliance with 5-Yr Port Level Data Sharing Commitment

Customers must provide EV charging usage data for a period of 5 years.

Customer Activities:

- Maintain 5 year contract with Network Service Provider to capture and share port level usage data with SCE for charging equipment used to fuel on-road vehicles.

Documents Required:

- Must provide monthly electronic usage data files conforming to SCE's "Charging Equipment Usage Data Monthly Report" instructions included in Appendix of the Handbook.

SCE Activities:

- Ongoing monitoring for each site.
- Follow up with customer as may be necessary.

