New Construction Rebate (NCR) Charge Ready Application Portal

User Guide for External Users

Prepared for:

NCR Customers, and Charge Ready Trade Professionals



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Revision Date: 01/20/2022



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Overview

This user guide covers various features and functions of the Charge Ready Application Portal for the New Construction Rebate (NCR) program.

This document is intended for users who will submit requests for NCR rebates. These roles are:

- Customers
- Charge Ready Trade Professionals

What is NCR?

The New Construction Rebate (NCR) 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 charging stations at new, multi-family sites.

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

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

Key Terms

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

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

Project Workflow

When completing a New Construction Rebate request, the following processes take place:

- 1. Customer or Charge Ready Trade Professional completes a Project Submission form.
- 2. SCE reviews the form for completeness. If incomplete, notifies applicant of information needed for completion.
- 3. Customer completes Pending Installation and Incentive Request form, along with applicable attachments (only after installation occurs).
- 4. SCE completes the Incentive QA Review, and identifies if site inspection is required.
- 5. SCE schedules and conducts a site review and completes Incentive Site Review form, if required.
- 6. SCE approves or rejects the payment for a project.

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

Program Forms

The NCR program consists of two 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 or optional)
 - 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 to your Charge Ready Application Portal					
It is important to understand which C/ as well as the program eligi	It is important to understand which Charge Ready program you would like to apply for as well as the program eligibility before you begin the application.				
You may be required to resubmit a new a For more information about the	pplication if you select an incorrect program option. Charge Ready program please click here				
Email					
Password					
	ne 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.

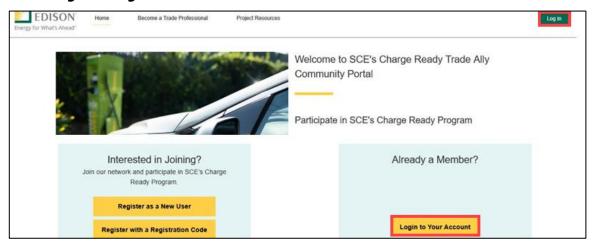
EDISON Energy for What's Ahead		θ
Applications		New Application
Search by Program Name	- Q Find Applications	Sort by Last Updated: Descending
Group ID:	-	

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:

- 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.

≜ fir	irst.last@scecr.tac
ê P	Password
	Log in

The **TAC Home Page** displays.

6. Select My Projects.

Energy for What's Ahead'	Home	Become a Trade Professional	Project Resources	My Projects	Additional Actions $$	# 0
	-		Welcome	to SCE's Charge	Ready Trade Ally Community	Portal

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

SOUTHERN CALIFORNIA EDISON®	Home	Become a Trade Pro	Project Resources	Additional Actions $ {igvee} $
Energy for What's Ahead®				

The **My Projects** page displays.

7. Click **Apply by Program**.

Welcome t	to Charge Ready Trade Al	ly Connect
Ready to S	Submit Program Applications for a	Customer?
	n below to submit new applications or manage	
	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 Tarde 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 NCR rebate only applies to newly constructed, multi-family site customers, which are defined as:

- Residential Properties
- Apartment Buildings
- Retirement Communities, Townhomes, Condominiums

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 NCR 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.

DESTREM CHIRTOWAN EDISON Inergy for What's Ahead"		-	θ
Applications		New Appli	cation
Search by Program Name	- Q Find Applications	Sort by Last Updated: Descending	-
Group ID:			
Customer	Site		
Application details	Application Number	Created	

A Customer Site to include in this application page displays.

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

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

- 3. Select an address.
- 4. Click **Continue**.

Energy for What's Ahead*		θ
	Customer site to include in this application. (In case of new site, Select continue)	
	Choose an address	
	14 9 CA, 9	
	Continue >	1
	Trouble logging in? Email ChargeReady@sce.com	

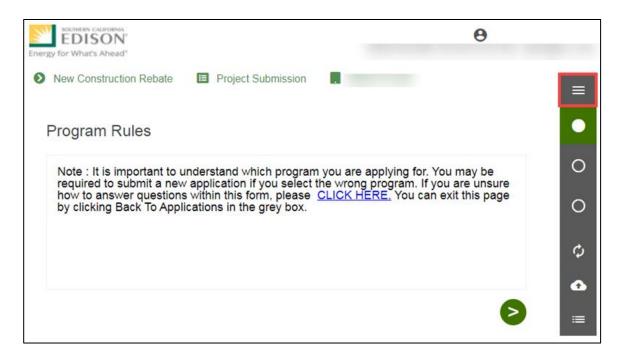
The **Select a program for the Application** page displays.

5. Select the **P** right arrow to select **New Construction Rebate**.

d Program	5		
	Customer-Side Make-Ready Rebate Option	^	
	The Customer-Side Make-Ready Rebate is available to multi-family, commercial, and public properties. This rebate option is available to any	- 1	
	participant who chooses to design, purchase, and install the customer-side of	0	
	the meter infrastructure work on their own, rather than having SCE provide this	•	
	service. The Customer-Side Make-Ready Rebate is intended to offset up to 80 percent of the costs that SCE would otherwise incur for performing the work.		
	For more information, click here: <u>Sce.com/chargeready</u>	- 1	
D	New Construction Rebate		
	The New Construction Rebate Program provides rebates to multifamily		
	properties to help offset the costs associated with the purchase and installation	O	
	of EV charging equipment that exceeds CalGreen code at the time of	_	
	construction. • For more program information, click here: <u>Sce.com/chargeready</u>		

The **Program Rules** page displays.

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**.
- 7. Click the Next arrow.
 7. Click the Next arrow.
 7. Click the New Construction Rebate Project Submission
 Program Rules
 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 this page by clicking Back To Applications in the grey box.
 Confirm Terms and Condition Provisions

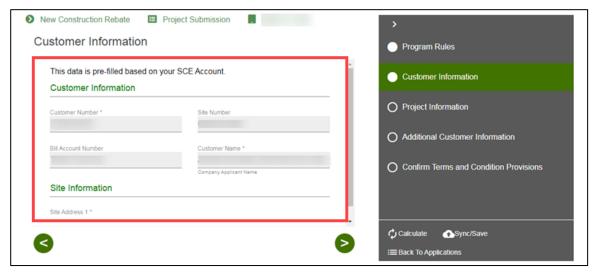
🖒 Calculate

Back To Applications

ASync/Save

Customer Information

- 8. Verify the Customer Information and Site Information.
- 9. Scroll down.



- 10. Enter the **Project Contact Information**.
- 11. Click the **Next** arrow.

		Program Rules
and the second sec	CA 👻	Customer Information
Project Contact Information		
The Project Contact is the primary person respon communications will be sent to this person.	sible for the customer's project. All	O Project Information
Project Contact First Name *	Project Contact Last Name *	O Additional Customer Information
Project Contact Title *	Project Contact Phone *	O Confirm Terms and Condition Provisions
	If you have an enteension enter "s" after the phone number if it requires an entension. (i.e. (656) 556- 1234x4321)	
Project Contact Email *		
This email address will be used to provide notifications for this project.		

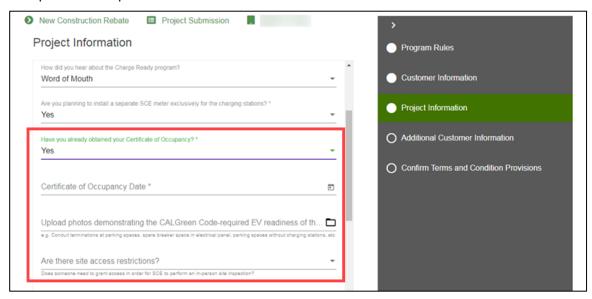
The **Project Information** page displays.

Project Information

- 12. Enter a **Project Description**.
- 13. Select How do you hear about the Charge Ready program?
- 14. Scroll down.

		Customer Information
Group ID		
This is an ID number assigned by SCE.	- 1.3	Project Information
Project Description *		O Additional Customer Information
Provide a name for this project, i.e. Convention Center, Building #5, South Lot.		
How did you hear about the Charge Ready program?		O Confirm Terms and Condition Provisions
Are you planning to install a separate SCE meter exclusively for the charging s		
Have you already obtained your Certificate of Occupancy? *	•	
Are there site access restrictions?	*	

- 15. Select Yes or No for Have you obtained your Certificate of Occupancy field.
- 16. Complete the required fields.



New Construction Rebate Project Submission 0000
 Project Information
 General Information
 Group 10
 Customer Information
 Project Information
 Project Information
 Project Information
 Customer Information
 Project Information
 Customer Information
 Project Information
 Customer Information
 Customer Information
 Project Information
 Customer Information
 Project Information
 Customer Information<

Note: If the **Certificate of Occupancy** is Yes, select a **Certificate of Occupancy Date**.

- 17. Enter the required information.
- 18. Click the **Next** arrow.

Dates someone need to grant access in order for SCE to perform an in-person site inspection?	Î	Customer Information	
Click here to review the CALGreen Code.		Project Information	
Total number of EV capable parking spaces required by Code *		Additional Customer Information	
Enter the Charging Station Information			
Select the best description of where charging equipment will be installed.	_	O Confirm Terms and Condition Provisio	ons
When will charging stations be installed and operational? *	Ð		
Planned Charger Types to Install? *	_		
Total Number of Ports Requested *	_ 1		

The Additional Customer Information page displays.

Install Separate SCE Meter is Yes

You can use the current SCE Meter or install a separate meter, as needed. **It is recommended that there is a separate meter for the project**. If installing a separate SCE Meter is Yes, follow the steps below:

19. Select Yes.

General Information	Customer Information
Group ID	
This is an ID number assigned by SCE.	Project Information
Project Description *	
Test	O Additional Customer Information
Provide a name for this project, i.e. Convention Center, Building #5, South Lot.	
How did you hear about the Charge Ready program?	O Confirm Terms and Condition Provisions
Word of Mouth	·
Are you planning to install a separate SCE meter exclusively for the charging stations? *	
Yes	•

Install Separate SCE Meter is No

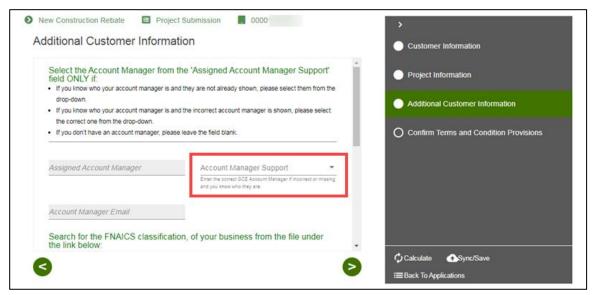
You can use the current SCE Meter or install a separate meter, as needed. **It is recommended that there is a separate meter for the project**. If installing a separate SCE Meter is No, follow the steps below:

20. Enter a reason.

General Information	·	
Group ID	Project Information	
Are you planning to install a separate SCE meter exclusively for the charging stations?*	i	
No	<u> </u>	
Please provide the reason(s) why you plan to not install a separate meter. *		
Have you already obtained your Certificate of Occupancy? *	· ·	

Additional Customer Information

- 21. Select an Assigned Account Manager Support, if applicable.
- 22. Scroll down.



23. Enter the Architect Contact Information, if applicable.

24.	Click	the	>	Next	arrow
∠	CIICK	uie		INCAL	anov

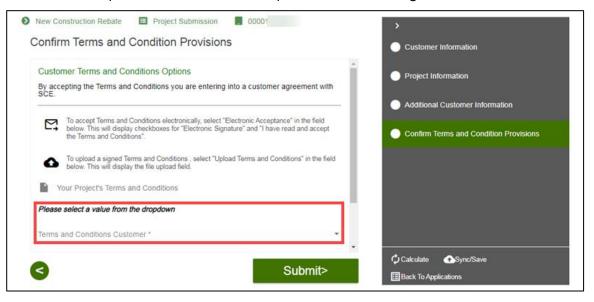
FNAICS Code		Project Information
	FNAICS Override	
	Enter correct FNAICS code here if defaulted value is incorrect or missing. (i.e. 311812 - Commercial Bakeries)	Additional Customer Information
FNAICS Description		
LESSORS OF NONRESIDENT	IAL BUIL	O Confirm Terms and Condition Provisions
Please provide Architect Cor	tact Information	O Confirm Terms and Condition Provisions
Please provide Architect Cor	Contact First Name	

The Confirm Terms and Condition Provisions page displays.

Confirm Terms and Condition Provisions

25. Select the project's Terms and Conditions.

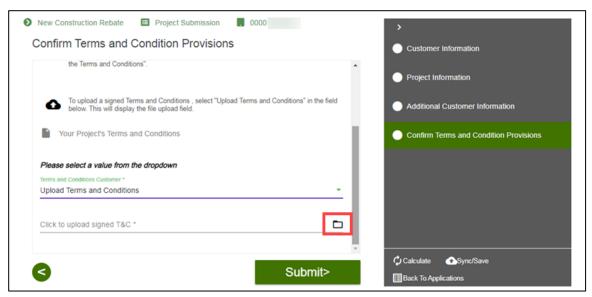
Note: You can upload a document or complete an electronic signature.



Uploading Terms and Conditions

To upload terms and conditions, follow the steps below:

26. Select the **Folder** icon.



An **Open** window displays.

27. Select a document and select **Open**.

0	C Open	00	>	<
C	$\leftarrow \ \ \rightarrow \ \ \land \ \ \uparrow \ \ $ This PC $\ \ m Oownloads$ $\ \ m TEST$ $\ \ m Test$	✓ Õ Search Test	م	er Information
	Organize 🔻 New folder		= • 🔳 💡	
				nformation
	Or Photo.png Tr			al Customer Information
				Terms and Condition Provisions
	File name:	 ✓ All files (*.*) 	~	
		Open	Cancel	

The file uploads.

28. Click Submit.

New Construction Rebate	Project Submission . 00001	>
Confirm Terms and Con	dition Provisions	Customer Information
To upload a signed Terms an	nd Conditions , select "Upload Terms and (le upload field.	Conditions" in the field
below. This will display the fi	le upload field.	Additional Customer Information
Your Project's Terms and Co	onditions	
		Confirm Terms and Condition Provisions
Please select a value from the dr	opdown	
Terms and Conditions Customer *		
Upload Terms and Conditions		• •
Click to upload signed T&C *		
1 Photo.png	17 KB	•
		·
		Calculate Sync/Save
		Back To Applications

Completing an Electronic Signature

To complete an electronic signature, follow the steps below:

- 29. For Electronic Acceptance, read and select the check boxes.
- 30. Click Submit.

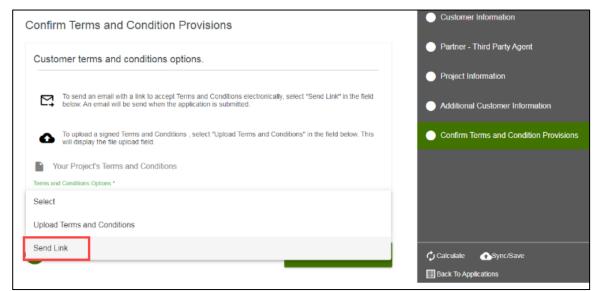
ems and Conditions Customer *	Project Information
lectronic Acceptance	
	Additional Customer Information
Electronic Signature	
	Confirm Terms and Condition Provision:
When using the electronic signature feature, Customer, or if Customer is authorized representative of the Customer, must complete all of the requ	
that they have read, understand, and agree to the Terms and Conditions New Construction Program	for participating in SCE's
New Construction Frogram	
] I have read and accept the Terms and Conditions	
heckbox is required	
	er, affirms that it is

Sending Terms and Conditions to Customers for Charge Ready Trade Professionals

Charge Ready Trade Professionals completing an application on behalf of a customer can send a Terms and Conditions link to a customer.

To send a Terms and Conditions link, follow the steps below:

1. Select **Send Link** under Terms and Conditions.



2. Select Submit.

Customer terms and conditions options.	Partner - Third Party Agent
	Project Information
To send an email with a link to accept Terms and Conditions electronically, select "Send Link" in the field below. An email will be send when the application is submitted.	Additional Customer Information
To upload a signed Terms and Conditions , select "Upload Terms and Conditions" in the field below. This will display the file upload field.	Confirm Terms and Condition Provisions
Your Project's Terms and Conditions	
Terms and Conditions Options *	
Send Link -	

An **Application Submission** email is sent to the Customer.

	りひ 1 .	↓ ~ (Ex	ternal):000010	62503 - T	and C to C	Customer -	- Message	(Plain Text				×
File	Message	Help 🛛 🖓 Tell	me what you	u want to	do							
<u>©</u> ~ ∂	Delete Archive	← Reply 🗄 ≪ Reply All 🖓 ~ → Forward 🛱 ~	Quick Steps ~	Move V	Tags	Lediting	A ⁱ⁾⁾ Speech	Zoom	Report Phishing) Insights	Send Recognition	
	Delete Respond Quick S 🔂 Zoom PhishAlarm Send Recogniti 🧖											
(External):00001062503 - T and C to Customer												
	$ \begin{array}{c c} & & & \\ & & & & \\ & & & \\ & $											

Form Sent!

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

29. Select check your rebates from your account view.

SOUTHERS CALIFORNA EDDISON" 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 chec	k your rebates from your account view.
Group ID:	
Application Number 00001 Sent on J	
New Construction Rebate	

The **Applications** page displays.

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

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**.

This data is pre-filled based on	your SCE Account.	O Project Information
Customer Information		
Customer Number *	Sile Number	O Additional Customer Information
1	0	
Bill Account Number	Customer Name *	O Confirm Terms and Condition Prov



Applications		New App		
Search by Program Name	• Q Find Applications	Sort by Last Updated: Desce	nding 👻	
Group ID:				
Customer	Site			
Application details New Construction Rebate	Application Number	Created	1 7	
New Construction Repute	Status	Last Updated		
	Project Draft		Ō	

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: Descend	ing 🔹
Group ID:			
Customer	Site		
Application details New Construction Rebate	Application Number	Created	*
	Status Project Draft	Last Updated	
	Project Drait		Ō

The **Application Details** page displays.

2. Select Click to Open.

< Back to Applications Application Details Group ID: Customer Program Name Tracking Number Created New Construction Rebate 0000 Created	Print this page
Customer Site Program Name Tracking Number Created	
Program Name Tracking Number Created	
Status Last Updated Project Draft	
Application History	
O 1. Project Submission Click to Open	

The **Customer Information** page displays.

3. Complete the application.

New Construction Rebate	Project Submission	>
Customer Information		Customer Information
This data is pre-filled based or	your SCE Account.	Project Information
Customer Information		
Customer Number *	Site Number	Additional Customer Information
	Y	O Confirm Terms and Condition Provisions
Bill Account Number	Customer Name *	

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.

0	011-	2	
Customer	Site		
Application details	Application Number	Created	1
New Construction Rebate	D000		
	Status	Last Updated	
	Project Draft		6

The **Customer site to include in this application** page displays.

2. Complete the application.

Customer site to include in this application.	
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.

Customer	Site		
Application details New Construction Rebate	Application Number	Created	1 7
	Status	Last Updated	
	Project Draft		Ē

A warning message displays.

2. Select OK.

Application details	sce-te-production.dsmcentral.com says			
New Construction Rebate	Are you sure you want to void this project?			
		ОК	Cancel	6

The application disappears from the Applications page.

Search by Program Name	•	Q Find Applications	•	Sort by Last Updated: Descending	•
Group ID:					
Customer		Site			
Application details New Construction Rebate	Lt.	Application Number	Crea	ated	
		Status	Last	Updated	
		Reservation Extension Was Requested			Ō

Pending Installation and Incentive Request

The Pending Installation and Incentive Request form is submitted by the **Customer** or **Charge Ready Trade Professional** 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 required documents, or for more information about the program, refer to the NCR Program Guidelines and Fact Sheet.

Completing the Pending Installation and Incentive Request Form

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

Applications		New Applicat	ion
Search by Program Name	Q Find Applications	Sort by Last Updated: Descending 	•
Group ID:			
Customer	Site 860		
Application details	Application Number	Created	
New Construction Repute	 Status	Last Updated	
	Project Is Being Reviewed	Ō	

1. Select the **Application Number**.

The **Application Details** page displays.

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

< Back to Applications Application Details			🖶 Print this page
Group ID:			
Customer	Site	860	
Program Name	Tracking Number	Created	
New Construction Rebate			
	Status	Last Updated	
	Project Is Being Reviewed		
Application History			
1. Project Submission			Apr 2, 2021
🕞 🚯 3. Pending Installation	on and Incentive Request	Click to Open	Apr 2, 2021

The **Project Information** page displays.

Project Information

3. Select Yes or No for Is Site Installation Complete?

New Construction Rebate E Pending Installation and Incentive Request		>
Project Information		Project Information
General Information	Å	O Customer Information
Is Site Installation Complete? *	÷	
	2	Calculate

Site Installation is not Complete

If site installation is not complete, the **Do You Require Funds Extension Days** field displays. This branches into:

- Request for Application Withdrawal This ends the application
- Funds Extension Days Required This extends the application deadline

Request for Application Withdrawal

- 4. Select No for Do You Require Funds Extension Days?
- 5. Select Request for Application Withdrawal.

New Construction Rebate Pending Installation and Incentive Request	
Project Information	Project Information
General Information Is Site Installation Complete? * No	Customer Information
Do You Require Funds Extension Days? * No	<u> </u>
Request for Application Withdrawal *	•
Project Reservation of Funds Date	<u> </u>

Funds Extension Days Required

- 6. Select Yes for Do You Require Funds Extension Days?
- 7. Select the Funds Extension Days Requested.

	>
	Project Information
	O Customer Information
<u>*</u>	
	Calculate

Site Installation is Complete

If site installation is complete, the available sections for the Pending Installation and Incentive Request expands.

- 8. Enter and verify the required information.
- 9. Scroll down.

New Construction Rebate Pending Installation and Incentive Request	• ••
Project Information	Project Information
Is Site Installation Complete? * Yes	Customer Information
Project Reservation of Funds Date 4/23/2021	Additional Customer Information
Funds Reservation Expiration Date	O EV Charging Station (0)
4/22/2024 Project Fund Days (Fund Reservation Days)	Project Totals
1095	O Multifamily Development Building Information (Optional)
	Calculate

- 10. Enter the required information.
- 11. Click the **Next** arrow.

New Construction Rebate	>
Project Information	Project Information
Total Number of Ports Requested 5	Customer Information
	O Additional Customer Information
\$ Total Charging Station Cost * Field is required	O EV Charging Station (0)
Total Charging Station Installation Cost *	O Project Cost Totals
Field is required S Total Infrastructure Cost *	O Multifamily Development Building Information
End in making and labor cost that goes above the CALGreen Code.	Calculate
	Eleck To Applications

The Customer Information page displays.

Customer Information

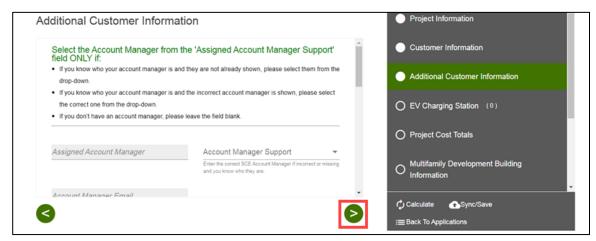
- 12. Enter the **Customer Information** and **Site Information**.
- 13. Click the **Next** arrow.

This data is pre-filled based on y	our SCE Account.	Customer Information
Customer Information	·	
Customer Number *	Site Number *	O Additional Customer Information
1	C.	O EV Charging Station (0)
Bill Account Number	Customer Name *	
7	N	O Project Cost Totals
Site Information		Multifamily Development Building

The Additional Customer Information page displays.

Additional Customer Information

- 14. Select an Account Manager Support, if applicable.
- 15. Click the **Next** arrow.



The **EV Charging Station** page displays.

EV Charging Station

- 16. Select a measure.
- 17. Click the **Next** arrow.

EV Charging Station	Project Information
Search by: Library Mea Q Find Product by Measure Name and add to Rebate application	Customer Information
BTCPower BTCPower - EVP-2001-30-#	Additional Customer Information
EVP-2001-30-#	O EV Charging Station (1)
ChargePoint ChargePoint - CT4025 CT4025	O Project Totals
ChargePoint - CT4025-GW1	O Multifamily Development Building Information (Optional)
ChargePoint ChargePoint - CT4025-GW1-PMGMT40 CT4025-GW1	O Payment Details
ChargePoint ChargePoint - CT4027	O Payee Information
+ Add To Project	File Uploads
3	Calculate 🕢 Sync/Save
	Im Back To Applications

The selected measure displays.

- 18. Enter the applicable information.
- 19. Click the **Next** arrow

L2	7.2		Customer Information	
			Additional Customer Information	
Installed Number of Ports *	Planned Charging Station Location			
Please provide a total count of the number of ports installed (not the count of stations)	Please describe where the charging stations were installed at your site		EV Charging Station (1) BTCPower - EVP-2001-30-###	
Rebates		1.5		
Maximum Incentive per Port		0	Project Cost Totals	
\$3,500				
		0	Multifamily Development Building	

The **Project Totals** page displays.

Project Cost Totals

20. Verify the **Project Cost Totals**.

21. Click the **Next** arrow.

oject Cost Totals		Project Cost Totals
Total Project Cost \$3,702	Total Installed Number of Ports 5.0	O Multifamily Development Building Information
This field is calculated based on the information provided		
Total Maximum Incentive	Total Approved Incentive	O Payment Details
\$17,500	\$3,702	0, 1
This is the base total incentive amount before any applicable adjustments	This is the approved incentive amount, minimum between Total Project Cost and Total Maximum Incentive.	O Payee Information

The Multifamily Development Building Information (Optional) page displays.

Multifamily Development Building Information

- 22. Enter and verify the required information.
- 23. Click the **Next** arrow. Project Cost Totals Multifamily Development Building Information Multifamily Development Building Information Charging Station Publically Accessib... • Number of Affordable Housing Units Enter the number of income re O Payment Details Number of Commerical Parking Spaces Number of Mixed Parking Spaces If this a moved use building, please specify the number of parking spaces allocated for either residential or commercial If this a mixed use building, please specify the number of parking spaces allocated exclusively for commercial use. O Payee Information O File Uploads Number of Residential Parking Spaces Total Number of Residential Units If this a mixed use building, please specify the number of parking spaces allocated exclusively for residential use. O Confirm Terms and Condition Provisions Calculate Sync/Save < :≡Back To Applications

The **Payment Details** page displays.

Payment Details

24. Select a Payee Selection.

Multifamily Development Building Information
Payment Details

Additional fields display.

- 25. Select a Payment Type.
- 26. Select a Tax Classification.
- 27. Click the **Next** arrow.

New Construction Rebate Pending Installation and Incentive Request .	`
Payment Details	Project Cost Totals
Payee Selection * Customer • Payment Type * •	Multifamily Development Building Information
Tax Classification *	Payment Details
Select the appropriate U.S. federal tax classification for the Payee identified. (.e. IndividualiSole Proprietor; C Corporation; Partnership)	O Payee Information
6	Calculate

Note: Certain Tax Classifications require more information.

yment Details			Project Cost Totals
Individual/Sole	-		Multifamily Development Building
Select the appropriate U.S. federal tax classif Payee identified. () e. Individual/Sole Propriet Corporation, Partnership)			Information
W9 Information Section			Payment Details
 Please click <u>here</u> to visit IRS.gov Please click <u>here</u> to view W9 doct 			O Payee Information
Tax Identification Type *	-		8 0 50 10 10 10 10 10 10 10 10 10 10 10 10 10
		Enter your Federal Tax ID Number or Individual Social Security Number (Le TIN XX-XXXXXX SSN XXX-XXXXXXXXXXXXXXXXXXXX	O File Uploads
	10		O Confirm Terms and Condition Provisions
Re Entered Tax Identification	N V	Name *	

The **Payee Information** page displays.

Payee Information

28. Enter and verify the required information.

29. Click the **Next** arrow.

yee Information		Project Cost Totals
Attention To	Company Name * A	 Multifamily Development Building Information
Customer Number 1		 Payment Details
Address1 *	Address2	Payee Information
City *	State *	O File Uploads
Zip Code "		 O Confirm Terms and Condition Provisions

The File Uploads page displays.

File Uploads

30. Select the **Folder** icon.

Click here to upload Registration Form	Customer Information
Click here to upload invoices for actual EVSE installation costs	Additional Customer Information
	EV Charging Station (2)
Click here to upload copy of paid invoice for EVSE	Project Totals
Click here to upload Pictures of Installed Charging Stations	Multifamily Development Building
Nick here to upload Sitemap Showing Location of Charging Stations	
tis can be as simple as a birds eve view of the site annotated with EVSE location	Payment Details
Click here to upload Site design document	Payee Information
Click here to upload any additional documentation	File Uploads

An **Open** window displays.

31. Select a document and select **Open**.

> -> 🛧 📕 > Thi	s PC > Downloads > TEST		~ 0	Search TEST		P	
Organize • New folde	r			E •		0	stomer Information
^	Name	Date	Type	Size	Tags		
A Quick access	Electricity vs Diesel	4/14/2021 11:57 PM	PNG File	18 KB			ditional Customer Information
OneDrive - Southe	Photo.png	2/25/2021 9:39 AM	PNG File	18 KB			
S This PC							Charging Station (2)
3D Objects							
Desktop							ject Totals
B Documents							
Downloads							Itifamily Development Building
Music							ormation (Optional)
🗽 Pictures							
Videos							
🛀 OSDisk (C:) 🗸 🤟	<					>	yment Details
File nam			~	All files (*,*)		~	
The light				Continues (1.7		100	yee Information

The file uploads.

32. Click the **Next** arrow.

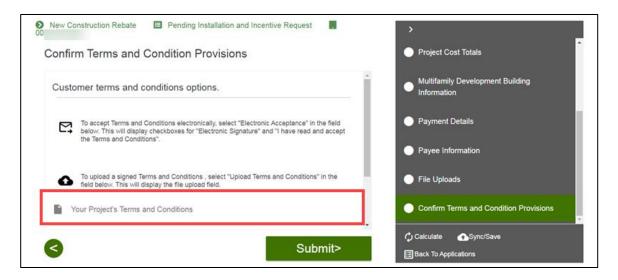
ile Uploads			Project Information
Click here to upload Registration Form		E Î	Customer Information
1 Photo.pnq	17 KB	0	Additional Customer Information
Click here to upload invoices for a	actual EVSE installation costs		EV Charging Station (2)
Click here to upload copy of paid	invoice for EVSE	•	Project Totals
Click here to upload Pictures of Ir	nstalled Charging Stations	-	Multifamily Development Building Information (Optional)
Click here to upload Sitemap Sho	wing Location of Charging Stations	•	Payment Details
This can be as simple as a birds eve view of the sit	e annotated with EVSE location		
Click here to upload Site design o	locument		Payee Information
Click here to upload any addition	al documentation	-	File Uploads
Click here to upload any addition	al documentation	<u> </u>	
			Calculate 🔂 Sync/Save

The **Confirm Terms and Condition Provisions** page displays.

Confirm Terms and Condition Provisions

33. Select the Project's Terms and Conditions.

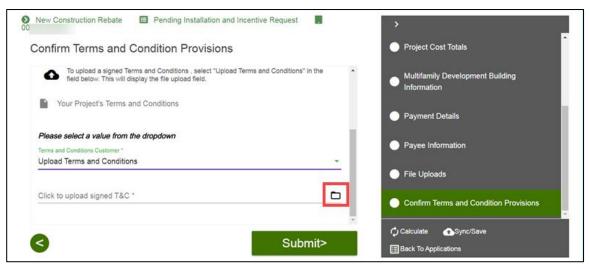
Note: You can upload a document or complete an electronic signature.



Uploading Terms and Conditions

To upload terms and conditions, follow the steps below:

34. Select the **Folder** icon.



An **Open** window displays.

35. Select a document and select Open.

Confirm Terms and Co	ndition Provisi	ions			Cu	stomer Information
Cl Open					×	
$- \leftarrow \rightarrow \vee \uparrow$] > This PC	> Downloads > TEST		∨ Ŭ Se	arch TEST	,	tional Customer Information
Organize 👻 New folder				E •	•	
Cuick access	Jame	Date	Туре	Size	Tags	Charging Station (2)
	 Electricity vs Diesel Photo.png 	4/14/2021 11:57 PM 2/25/2021 9:39 AM	PNG File PNG File	18 KB 18 KB		ect Totals
3D Objects Desktop Documents						family Development Building mation (Optional)
Downloads						nent Details
Ter Up Up SDisk (C:)					,	e Information
Cli File name:			~ Al	l files (*.*)	v	Uploads
Fie				Open 0	ancel .	irm Terms and Condition Provisions

36. Click Submit.

New Construction Rebate 🔲 Pending Installation and Incentive Request	
Confirm Terms and Condition Provisions	Project Cost Totals
Your Project's Terms and Conditions	Multifamily Development Building
Please select a value from the dropdown	Payment Details
Terms and Conditions Customer * Upload Terms and Conditions	Payee Information
Click to upload signed T&C *	File Uploads
1 Photo.png 17 KB	Confirm Terms and Condition Provisions
Sub	Calculate CSync/Save

Completing an Electronic Signature

To complete an electronic signature, follow the steps below:

- 37. For Electronic Acceptance, read and select the check boxes.
- 38. Click **Submit**.

riease select a value norm me uropoown Terms and Conditions Costomer * Electronic Acceptance	Multifamily Development Building
Electronic Signature	Payment Details
When using the electronic signature feature, Customer, or if Customer is not an individual, an authorized representative of the Customer, must complete all of the required check boxes and affin	Payee Information
that they have read, understand, and agree to the Terms and Conditions for participating in SCE's New Construction Program	File Uploads
I have read and accept the Terms and Conditions Checkbox is required	Confirm Terms and Condition Provisions

Form Sent!

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

39. Select check your rebates from your account view.

Form Sent! hank you! Your submission will be reviewed	. If we have any questions, we will send a messag	e to you. You car check your rebate	s from your account view.
Group ID: Application Number 00001			
New Construction Rebate			

The **Applications** page displays.

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

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

Appendix A: Charge Ready Trade Professionals Submitting an Application for a Customer without an Existing Account

If you are a Charge Ready Trade Professional submitting an application on behalf of a customer, there may be times when:

• A Customer does not have any existing site in the SCE territory, **AND** does not have an SCE Customer Account Number

To submit an application for a customer without an existing site or an SCE Customer Account Number, follow the steps below:

- 1. Direct the customer to request a new account by emailing <u>ChargeReady@sce.com</u>. In the email, they should include the following details:
 - Subject Line: New Customer Request
 - Body of email:
 - Company Name
 - Company Address
 - Contact Name
 - Contact Email Address
 - Project Address or Adjacent Address

The Charge Ready team will create an account, and email the customer their Customer Account Number.

IMPORTANT: The customer must share their account number with you.

2. Once received, enter the Customer Account Number and the Project Zip Code when identifying the customer on the application to proceed with the project.