On-Bill Financing Application Submission for Customers in the Rebate Center – Product View

User Guide

Southern California Edison (SCE)

Revision Date: 1/15/2025

SOUTHERN CALIFORNIA EDISON
Energy for What's Ahead℠

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Overview

This document explains how to use the **Rebate Center – Product View** website to submit applications for **On-Bill Financing (OBF)** loans for energy efficiency projects.

OBF allows you, the customer, to take out a loan from SCE to cover the costs of the project under the Energy Efficiency program you participate in, and to repay the loan in installments on your utility bill.

If you apply for OBF, you must submit the application **before** purchasing and installing the equipment (the "measures"). SCE will review the application, and if approved, will reserve funds for the loan. (If the application needs corrections, SCE will return it to you before approving it.) The funds reservation will be valid until the project installation deadline, which is set by the Energy Efficiency program.

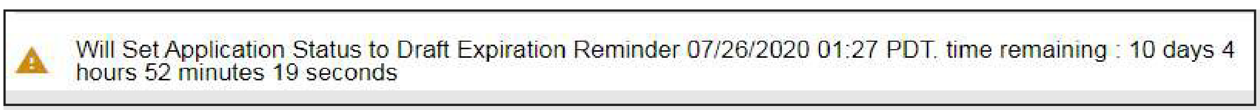
After installing the equipment, you will return to this website to enter information about the installation and to request payment. SCE will review and approve the final calculation of the loan amount.

About the Online Application

- The Application is divided into sections.
- Throughout the Application, required fields are marked with asterisks (*).
- Grayed-out fields are pre-populated and are read-only – you don't need to enter any data in them.

Expiration of the Application

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



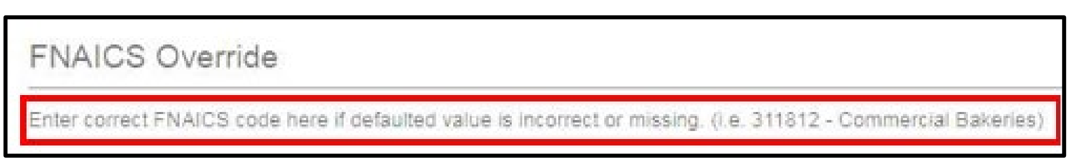
Application Header

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

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

Tooltip/ Instructional Text

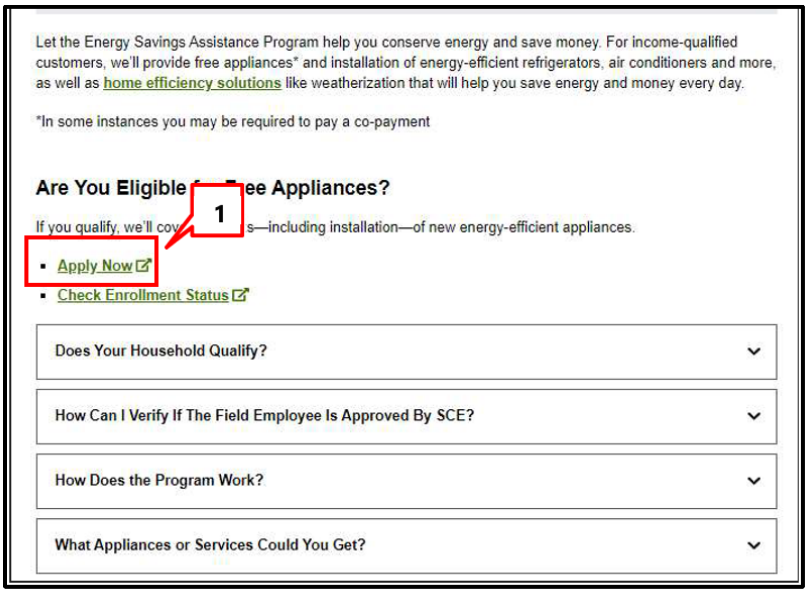
Many of the application fields display helpful or explanatory information below the field.



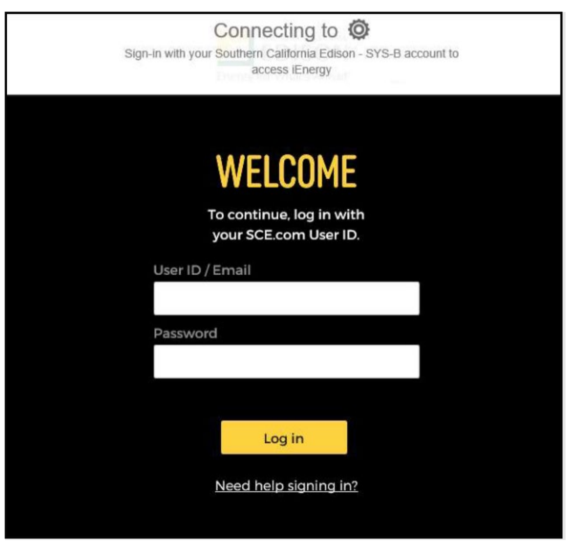
Submitting On-Bill Financing Applications

SCE Customers can access the Rebate Center website to submit and manage On-Bill Financing applications by logging into **My Account** on SCE.com.

The **Rebate Center – Product View** allows you to apply for a On-Bill Financing loan on eligible energy efficiency measures. For each loan application, you will fill out a form with customer and site details, then add On-Bill Financing (as a "product") to a shopping cart. A form can only include one installation site and one On-Bill Financing product.



1. On SCE.com, log into **MyAccount** and click **ApplyNow (#1)**. The Rebate Center home page displays.

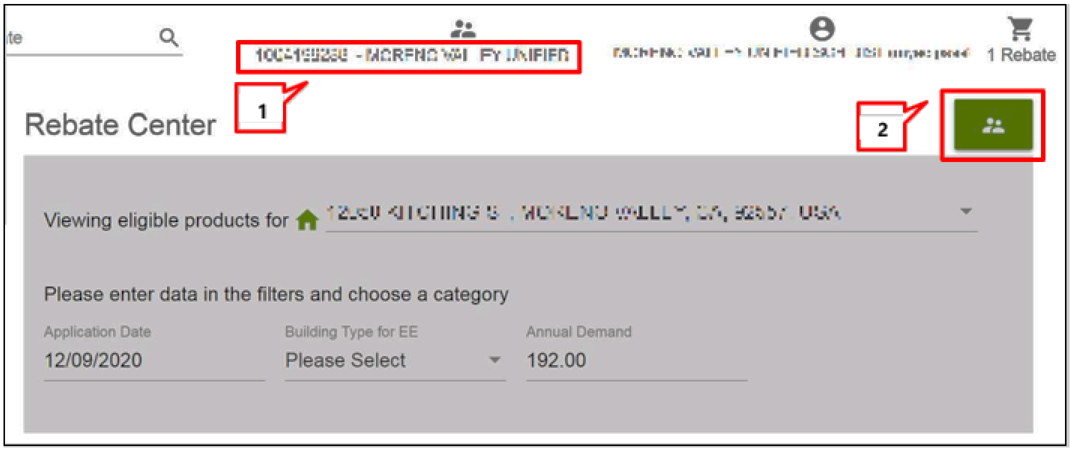


2. If you are not logged in, you will be prompted to log in when you click **Apply Now.** When login is completed, you will be automatically directed to the Rebate Center home page.

Accessing Multiple Accounts

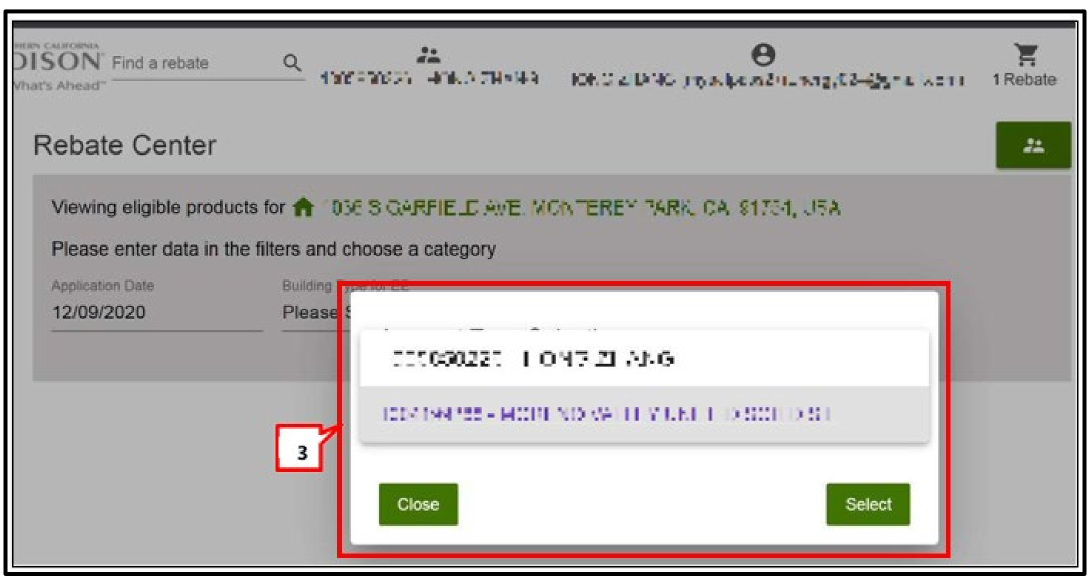
If you have multiple service accounts associated with a single SCE.com account, you can access any of those accounts when you log in to the Rebate Center. The current account is indicated at the top of the screen by the account number and name.

(If you **don't** have multiple service accounts, skip ahead to the *Rebate Center Home Page* heading on the next page.)



Follow these steps:

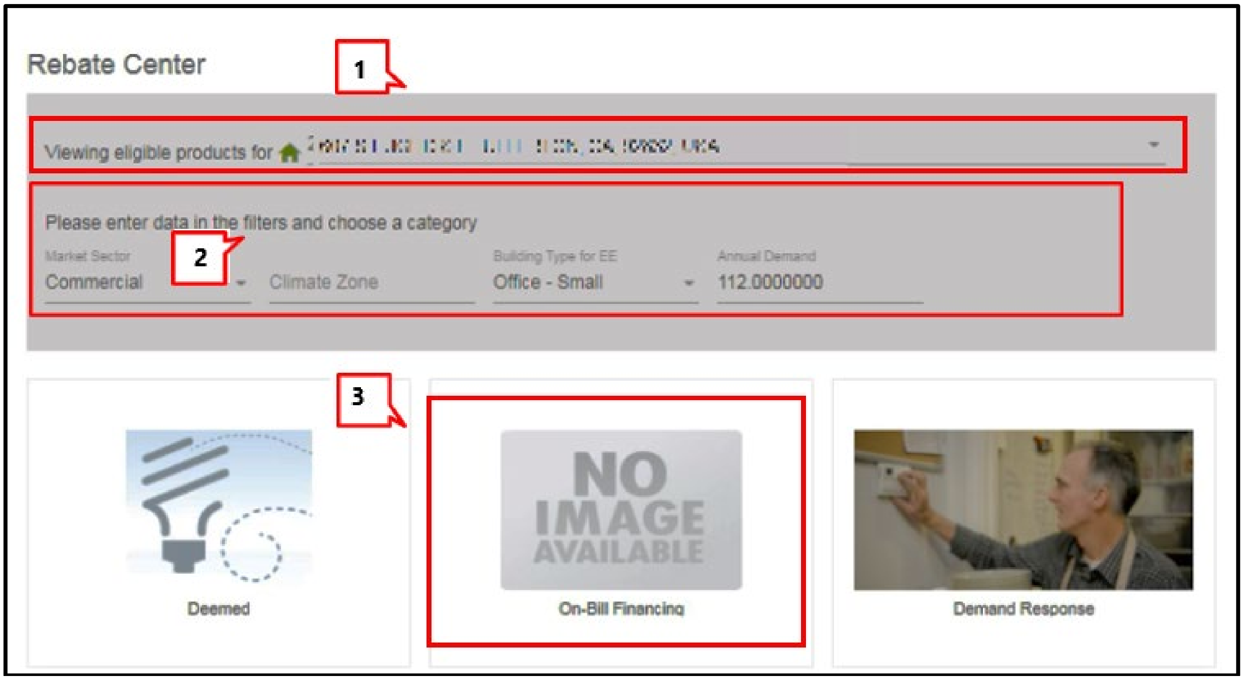
3. To switch accounts, click on the **Switch Accounts** icon. A pop-up selection window displays.
4. In the pop-up window, click the account number you want, then click **Select.**



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

See the top illustration on the next page.

Rebate Center Home Page



5. In the Viewing eligible products for [your site] field **(#1)**, your site address should display. If you have more than one site, select the one you want from the dropdown.

6. In the Please enter data in the filters and choose a category field **(#2):**

   - The Market Sector field defaults to **Commercial.** You can change it if needed.
   - In the Climate Zone field, enter the 3-character code for your climate zone, beginning with the letter **W.** *For example*, if your Climate Zone code is 13, enter **W13.** If your climate zone is 9, enter **W09.**
   - In the Building Type for EE field, your building type (pre-populated from your site information) displays. You can change this if needed, too.

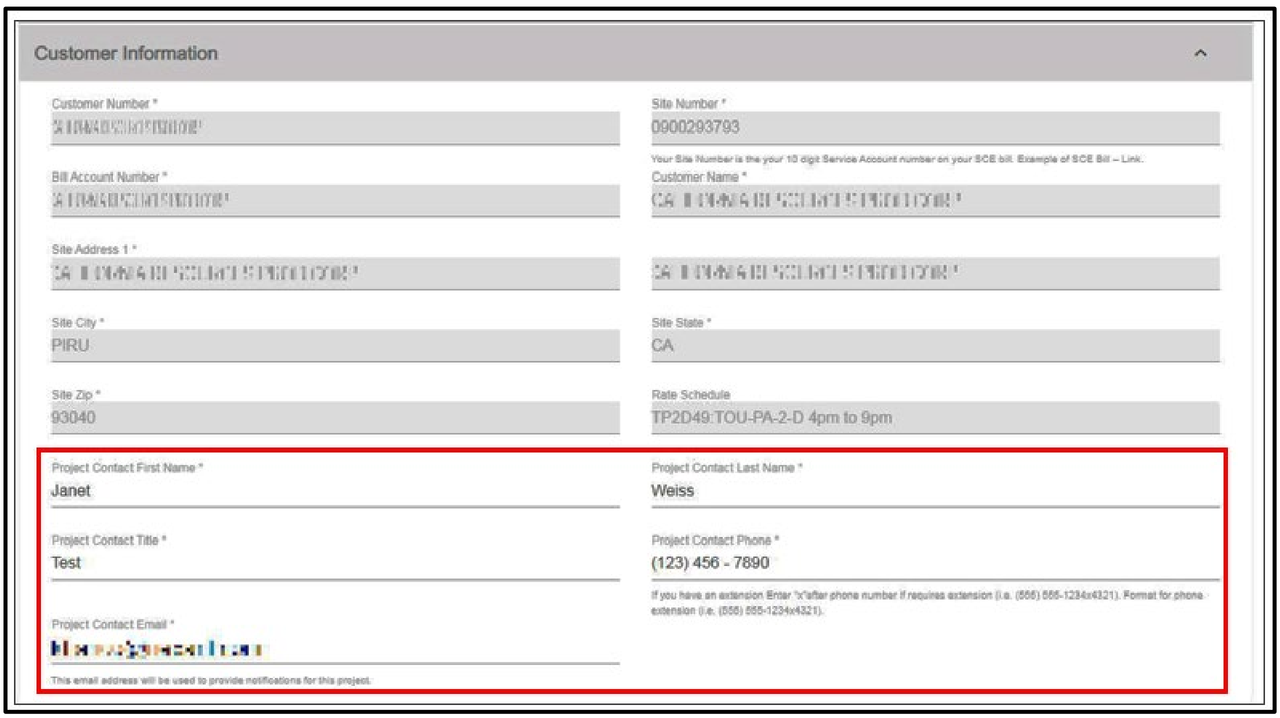
7. Click on the **On-Bill Financing** tile **(#3).** A new section headed "On-Bill Financing with qualifying rebates" displays.

8. Click on the **On-Bill Financing** tile image on the left. An **Apply for Rebate** button will appear.

9. Click the **Apply for Rebate** button to start your application, which is part of SCE's iEnergy System.

Reservation Request Application Sections

Customer Information Section



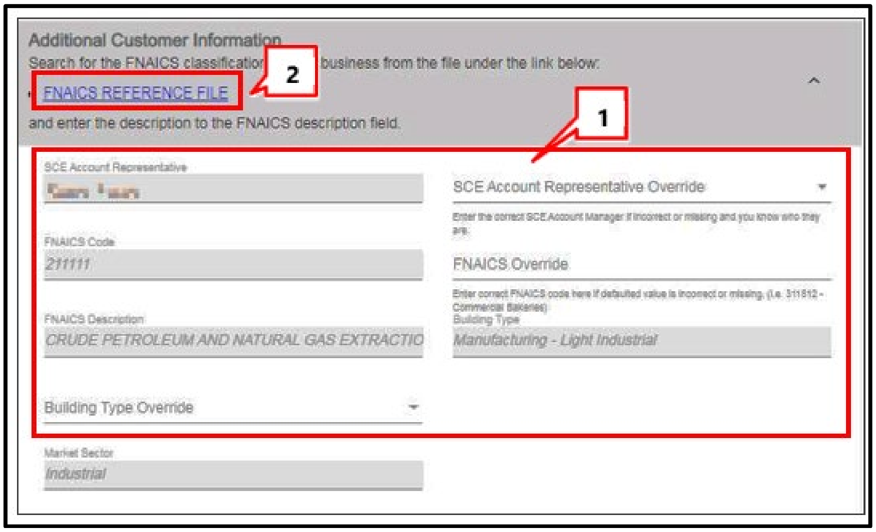
In the *Customer Information* Section, Customer and Site information — which is read-only — is already auto-populated.

10. The Project Contact information is also auto-populated based on your login, but at this point you can update or correct it if desired.

11. If you don't need to update the Project Contact information, go on to the *Additional Customer Information* Section.

Additional Customer Information Section

12. If the SCE Account Representative or Building Type **(#1)** values are missing or incorrect, update them here.



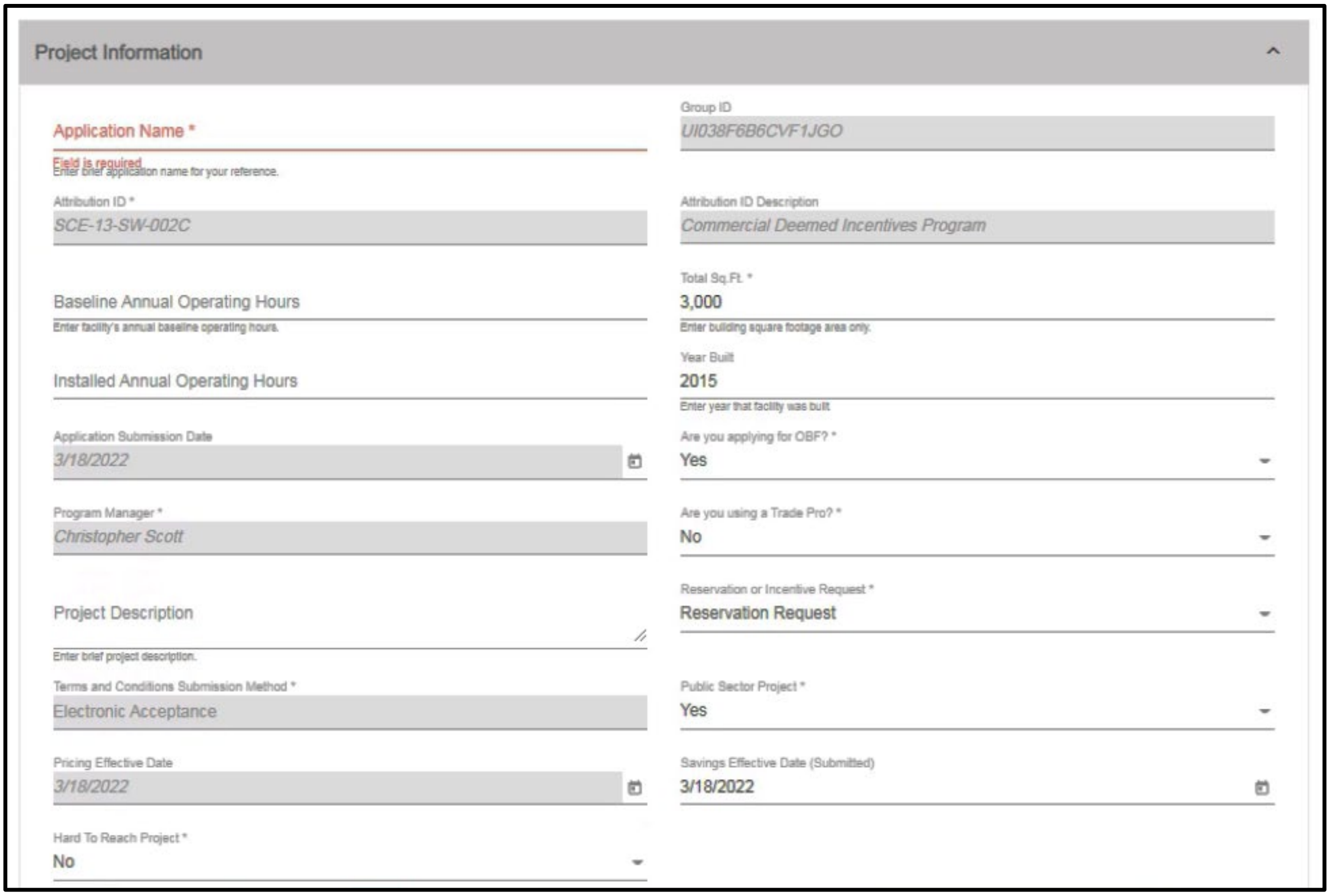
13. If the FNAICS Code value is incorrect, you can update it by clicking the **FNAICS REFERENCE FILE (#2)** link to download SCE's FNAICS Table to your computer. A detail of this table is shown below:

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

14. Enter the correct FNAICS Code, and go on to the *Project Information* Section.

Go on to the next page.

Project Information Section



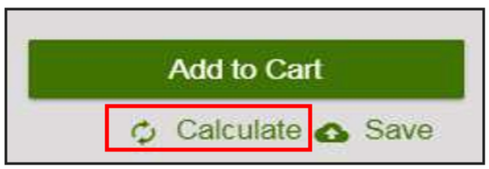
15. The following table describes the key fields in the *Project Information* section. **You must complete all Required fields,** and if possible, **also** complete the fields that are not required, following the instructions in **Table 1:**

Table 1. Fields in the Project Information Section

Field	Required?	What to Enter or Select:
Application Name	**Yes**	Give the project a name (example: "City Library")
Baseline Operating Hours	**No**	Enter the facility's annual baseline operating hours
Total Sq. Ft.	**Yes**	Enter the site's total square footage
Installed Annual Operating Hours	**No**	Enter the annual operating hours of the currently installed equipment
Year Built	**No**	Enter the construction year of the site
Are you applying for OBF?	**Yes**	Select **Yes.** This will add an OBF provision to the Terms and Conditions.

Field	Required?	What to Enter or Select:
Project Description	**No**	Enter a brief project description (example: "Replace HVAC units in City Library")
Reservation or Incentive Request	**Yes**	Select **Reservation Request**
Terms and Conditions Submission Method	N/A	Leave blank. This is automatically set to **Electronic Submission.**
Public Sector Project	**Yes**	Select **Yes** if the project is a public sector project
Hard to Reach Project	**No**	Select **Yes** if the site is in a Hard-to-Reach location
Are you using a Trade Pro?	**Yes**	Select **Yes** if you are working with an SCE-registered Trade Professional.

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



Project Totals Section (applies to Govt. and Institutional Customers Only)

17. If you are a Government or Institutional customer, and you want to receive a single payment for multiple loans, select **Yes** in the OBF Loan Bundling field on your application. SCE will group these OBF applications together for payment. (The payment will be sent only after all financed measures in a group are installed, reviewed, and approved.)

Trade Professional Information Section

18. If this section is displayed, you selected **Yes** to indicate that you are using a Trade Pro. If you are not working with an SCE Registered Trade Professional, return to the *Project Information* section and change the Trade Pro selection to **No.**

Product Details Section (EE Deemed Measure Container)

In SCE's iEnergy system, products (equipment or appliances) are called "measures." The system has a section named the *EE Deemed Measure Container* where the On-Bill Financing Program information will display. In this section, you will enter information about the project costs.

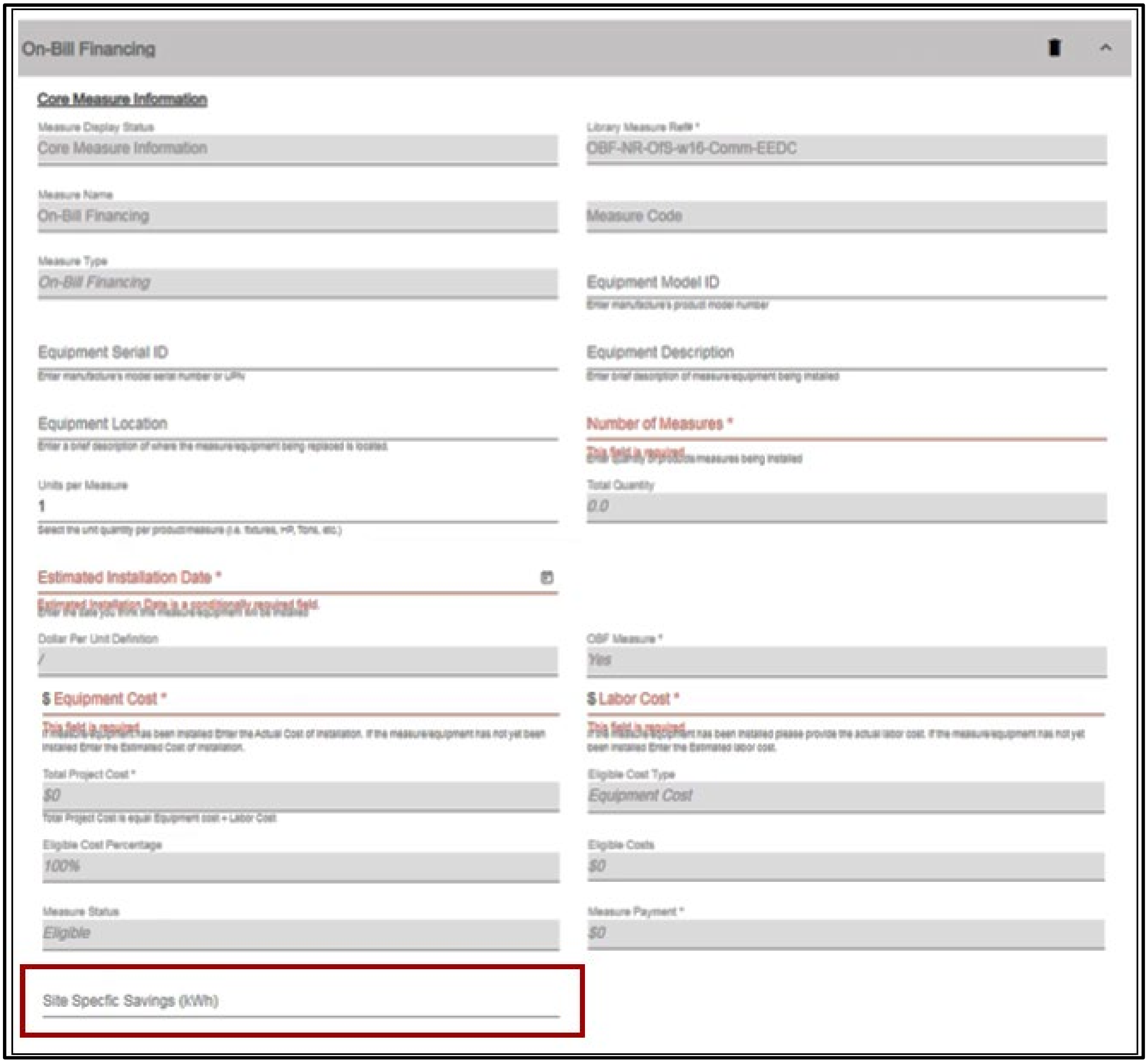
19. **You must complete all Required fields,** following the instructions in **Table 2** on the next page. Leave the other fields blank.

Table 2. Fields in the EE Deemed Container Measure Details Section

Note: See the next page for an illustration of the *EE Deemed Container* Section.

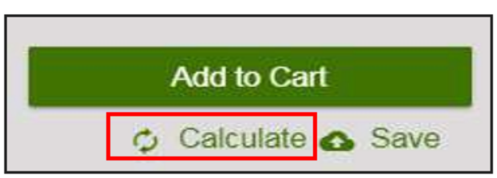
Measure Details Field	Required	Action Required
Equipment Model ID#	**No**	Leave blank.
Equipment Serial ID #	**No**	Leave blank.
Equipment Description	**No**	Leave blank.
Equipment Location	**No**	Leave blank.
Number of Measures	**Yes**	All OBF applications should have only **one** measure. In other words, the number of measures should equal **1.**
Estimated Installation Date	**Yes**	If the equipment has **not** yet been installed enter the date that the financed equipment is estimated to be installed and functional. If the equipment **has** been installed, enter the actual date that the financed equipment was installed and functional.
Equipment Cost	**Yes**	If the equipment has **not** yet been installed, enter the **estimated** cost of installation for the entire project. If the equipment **has** been installed, enter the **actual** cost of installation for the entire project.
Labor Cost	**Yes**	If the equipment has **not** yet been installed enter the **estimated** labor cost for the entire project. If the equipment **has** been installed, enter the **actual** labor cost for the entire project.
Purchase Date	**No**	Leave blank. If the equipment **has** been purchased, your project does not qualify for OBF.

Illustration: EE Deemed Container Section



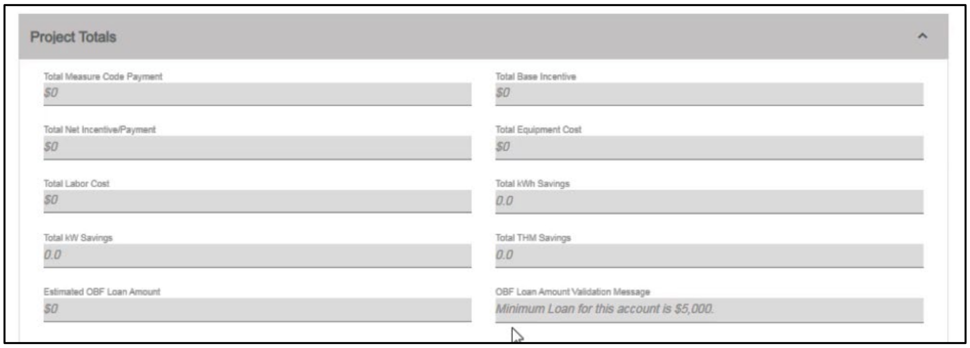
Note: Always complete the **Site Specific Savings (kWh)** field with the total energy savings for the project.

20. Then, click **Calculate** to populate the **Total Project Cost** and **Measure Payment** fields.



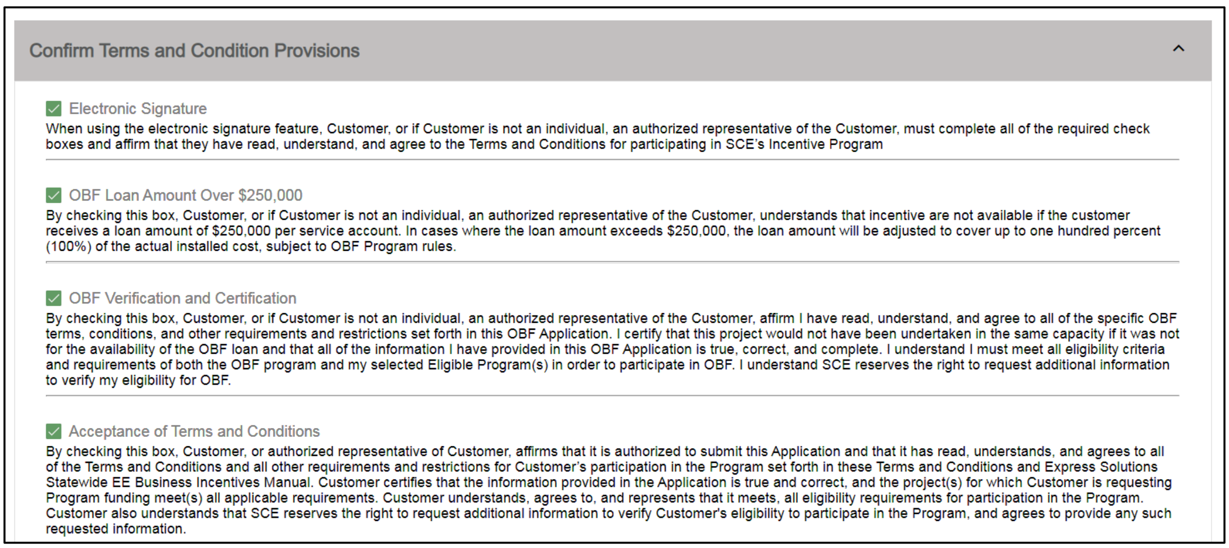
Project Totals Section

The *Project Totals* Section is read-only. It displays calculated values based on the project information you just entered. You don't need to enter anything here.



21. Scroll down to the *Confirm Terms and Conditions Provisions* Section.

Confirm Terms and Conditions Provisions Section



22. Click the **Electronic Signature** checkbox to sign the application.
23. Click the **OBF Loan Amount Over $250,000** checkbox (regardless of the loan amount).
24. Click the **OBF Verification and Certification** checkbox to apply for OBF.
25. Click the **Acceptance of Terms and Conditions** checkbox.

Go on to the next page.

File Uploads Section

In this Section:

26. Upload the **OBF Project Matrix Form** document.

    <u>Note</u>: Project cost and energy savings information in the OBF Project Matrix Form **must match the information in the online application.**

27. If using **Site Specific Savings,** upload copies of your energy savings calculations.

28. For non-SCE incentive projects, upload **proof of participation** in an eligible Energy Efficiency program.

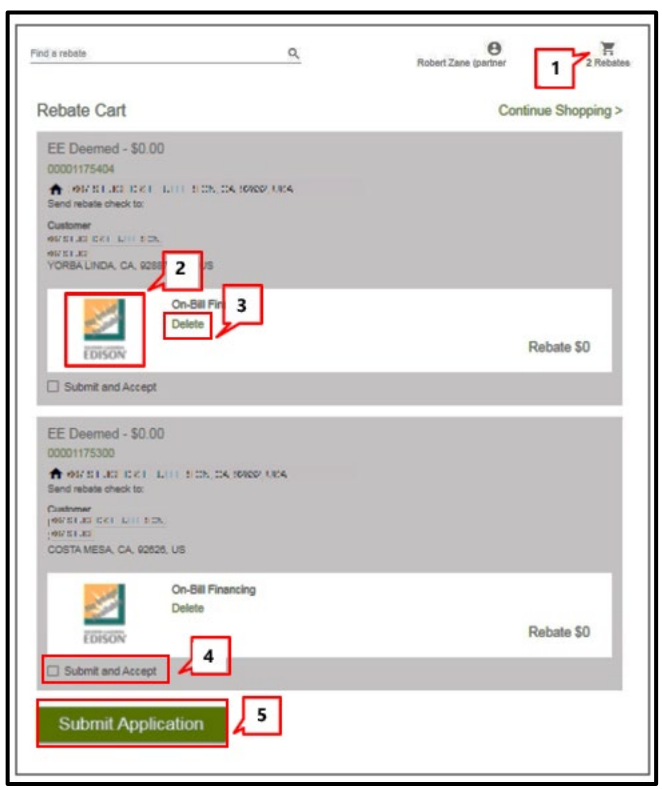
Add to Cart (in Header)

29. Click the **Add to Cart** button in the header to display the Rebate Cart screen.

Submit and Manage Applications

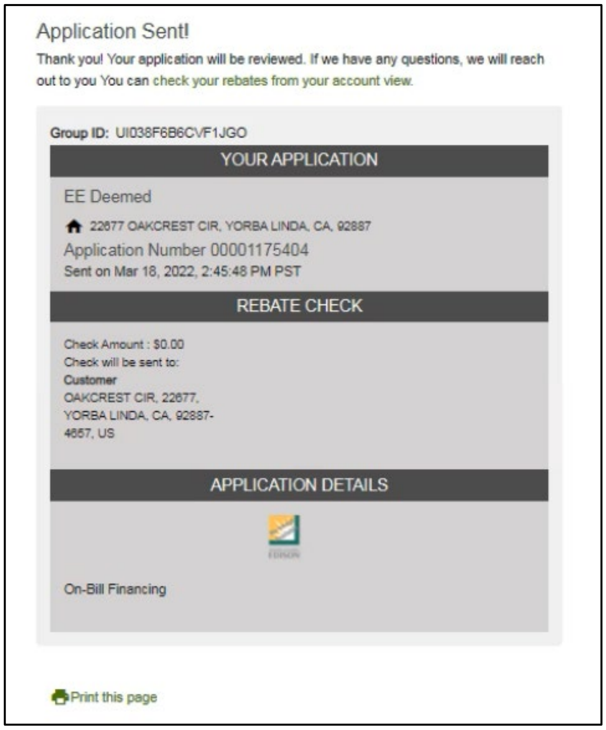
<u>Note</u>: At any point, you can click the shopping cart icon **(#1)** to see all your unsubmitted applications.

30. To edit an application before you submit it, click the image **(#2).**
31. To delete an application, click **Delete (#3).**
32. Click the **Submit and Accept (#4)** checkbox for any application if you are ready to submit it.
33. Click **Submit Application (#5).**

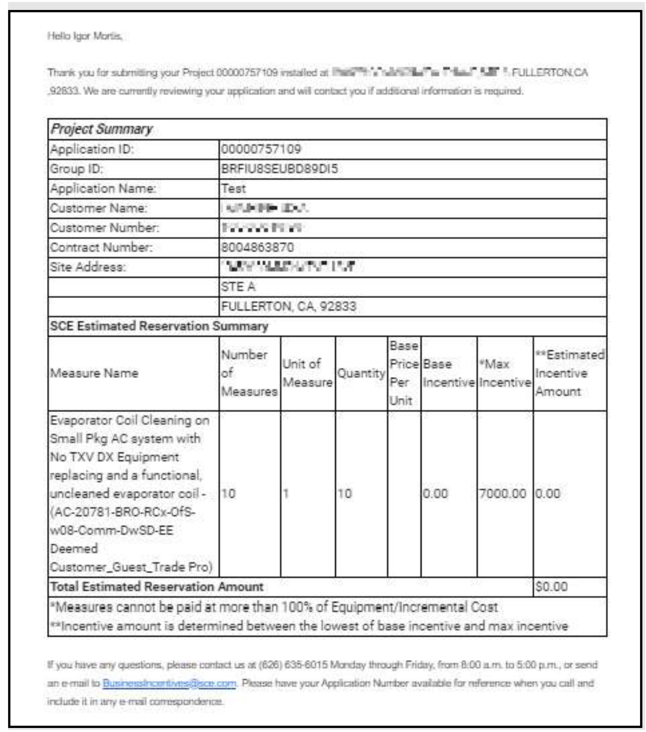


34. A printable confirmation page displays, and the system sends you an e-mail with the project details.

Confirmation Page



E-mail with Project Details



For information on updating the Application, go on to the next page.

Updating the On-Bill Financing Application After Funds Reservation Approval

After the reservation is approved, you have the following options, which are covered in detail in this part of the User Guide. To select any of these options, you'll update your application at the Pending Installation and Incentive Request Task stage in iEnergy.

- **Option 1, Withdrawal:** If you decide not to pursue the project, you should withdraw the project application as soon as possible. Applications may be withdrawn at any time before loan funding.
- **Option 2, Reservation Extension:** To avoid the project being cancelled when the funding reservation expires, you can request SCE to extend the reservation expiration date. An SCE Approver can then:
  - Approve the reservation extension to a date you request, or
  - Modify the reservation by extending it to a different expiration date, or
  - Reject the reservation date extension and enforce the current expiration date.
- **Option 3, Incentive Request:** This is your **Request for Loan Funding.** Once the equipment being financed with OBF has been installed under the Energy Efficiency program you are participating in, you must update the OBF application with installation information and request SCE to fund the loan. You will also need to upload a **final (revised) OBF Project Matrix** form, a **project invoice** signed by the customer, and **proof of final project approval** from the Energy Efficiency program.

To update the application, follow these steps:

Opening the Application

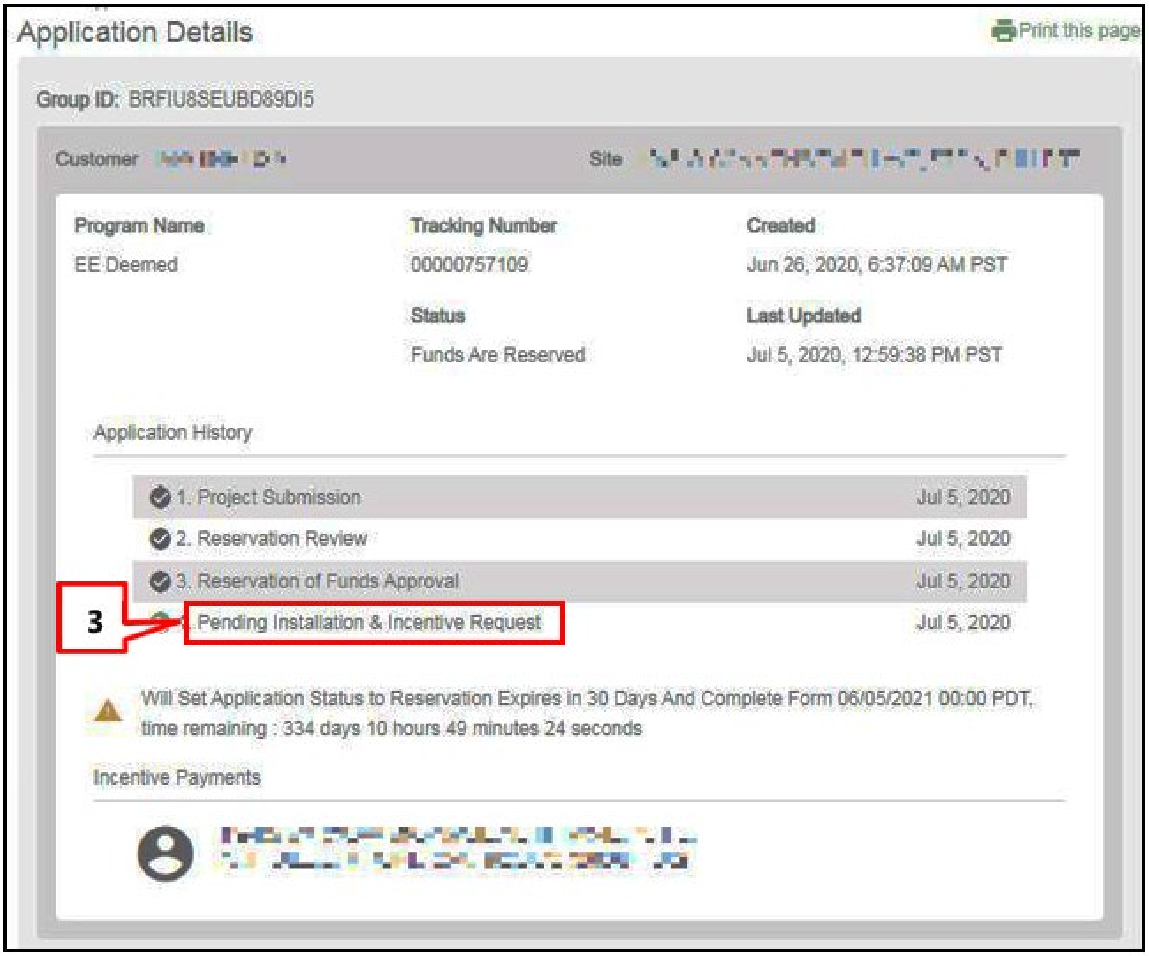
1. Log into **MyAccount** and click the **Application Number (#1)** to open the application.

   <u>Note</u>: The Application should have the <u>Status</u>: **Funds Are Reserved (#2).**

   The *Application Details* screen displays.

See the illustration on the next page.

2. Click the link **(#3)** for **Pending Installation & Incentive Request** to open the application.



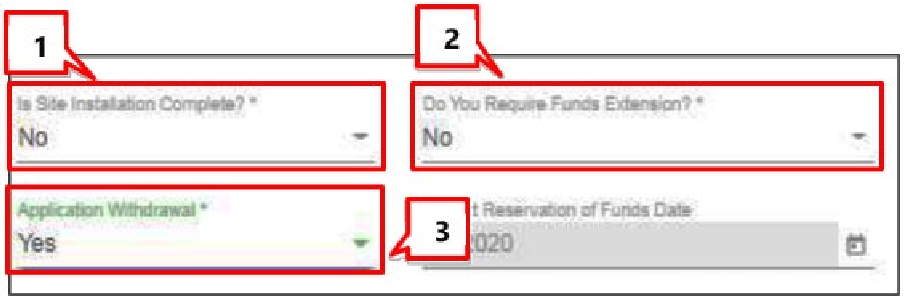
Go on to the next page.

1. To Withdraw a Project (Loan Application)

(*As mentioned above, you can withdraw an Application at any time before loan funding*.)
Make the following selections. Some fields only display when the previous field is completed.

1. Scroll down to the *Project Information* Section.

2. In the Is Site Installation Complete?* field: Select **No (#1).**

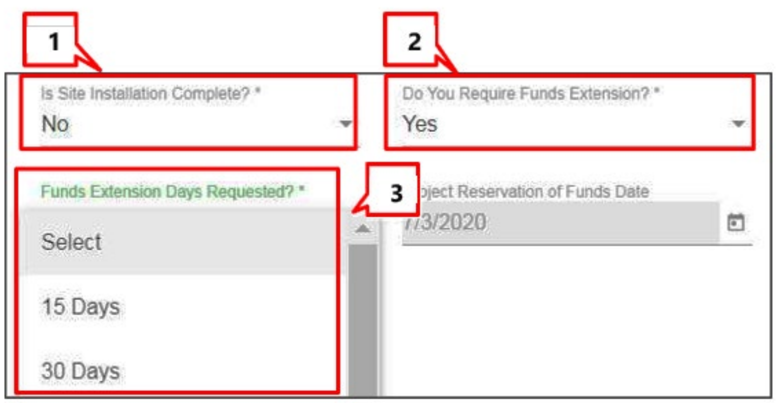


3. In the Do You Require Funds Extension?* field: Select **No (#2).**
4. In the Application Withdrawal* field: Select **Yes (#3).**

2. To Request Reservation of Funds Extension

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

1. Scroll down to the *Project Information* Section.
2. In the Is Site Installation Complete?* field: Select **No (#1).**



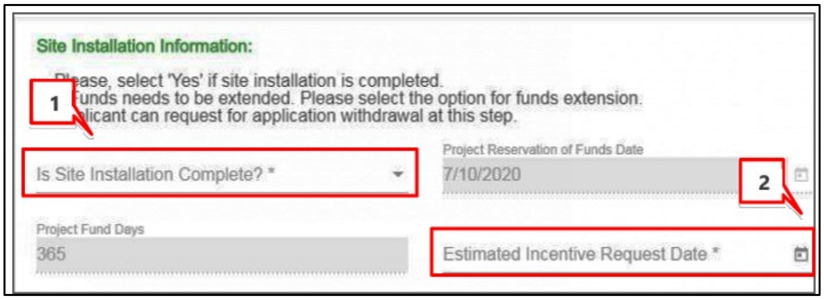
3. In the Do You Require Funds Extension?* field: Select **Yes (#2).**
4. In the Funds Extension Days Requested?* field: Select the extension length from the dropdown **(#3).**
5. In the Estimated Incentive Request Date* field (*not shown here*): Use the calendar dropdown to select the date that you think you will enter the post-installation information.

3. To Request Loan Funding

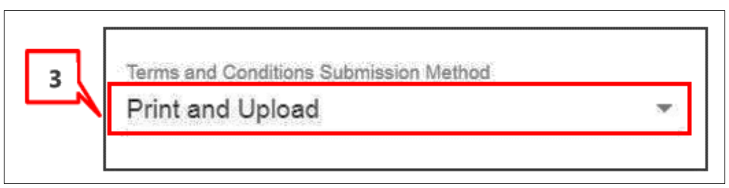
To proceed with the Loan Funding Request, you will update information in different Sections of the application, as explained below.

Project Information Section

1. Select **Yes (#1)** from the Is Site Installation Complete? dropdown.



2. Enter the **Estimated Incentive Request Date (#2).**
3. In the Terms and Conditions Submission Method field, use the dropdown to select:
   - Either **Print and Upload:** If you select this, you will upload a copy of the signed Terms and Conditions Form further down in the *File Uploads* Section.
   - Or **Electronic Acceptance:** If you select this, you will click **Accept Terms and Conditions** further down in the *Confirm Terms and Conditions Provisions* Section.



Go on to the next page

EE Deemed Container Section

4. In the *EE Deemed Container* Section, update the following fields:

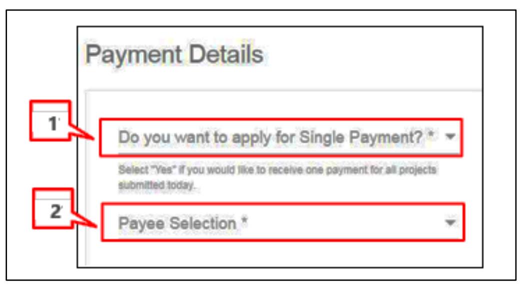
- Enter the **Actual Installation Date (#1)** (required).
- Enter the equipment **Purchase Date (#2)** (required).

Note: You can update other product details if needed.

Payment Details Section

5. In the *Payment Details* Section, update the following fields:

- In the Do you want to apply for Single Payment? field: Select **No (#1).**



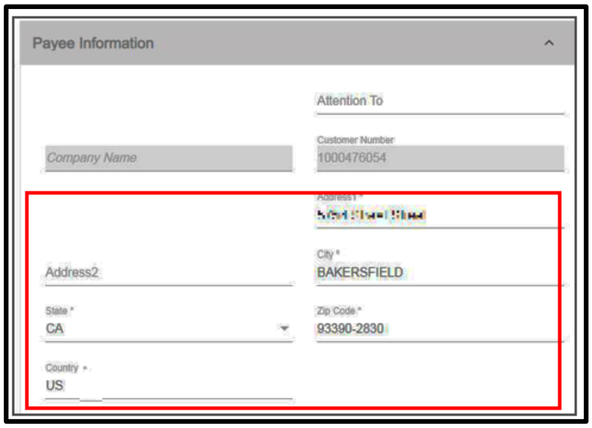
- In the Payee Selection **(#2)** field, **you must select the same loan payee you originally designated** through DocuSign (at the time of Loan Reservation). If your payee selection does not match the payee on the Loan Reservation letter, the application will be marked as "Revisions Required" and will be returned to you for corrections.

After you select the Payee, new Payment Type and Tax Classification fields display:

6. In the Payment Type field, select **Check.** This is currently the **only** payment type available for OBF.

   An additional *Payee Information* section displays with the customer information auto-populated. The Payee Address fields in this section default to the customer billing address, but you can edit or update them.

7. Enter or update the address where you want the check to be mailed.



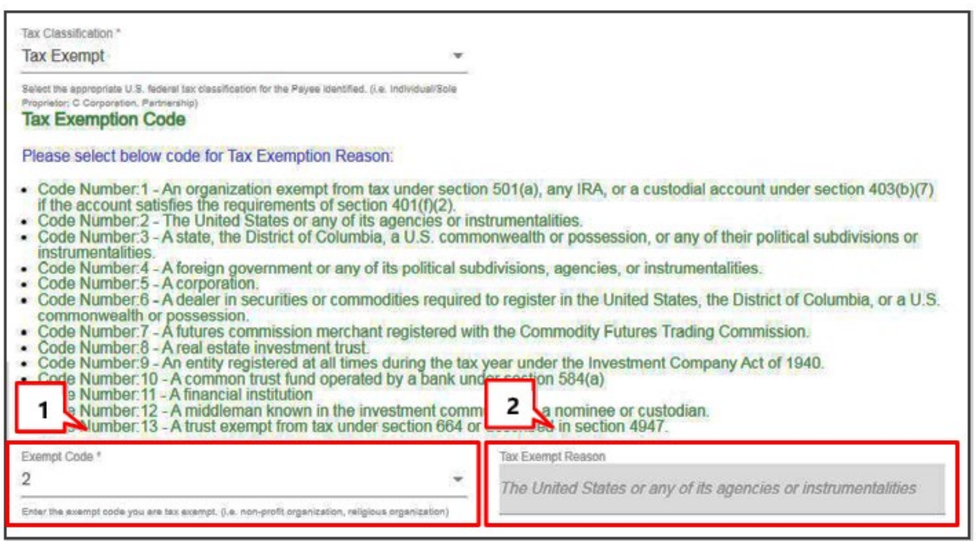
Note: The Country Code field must be two characters: either "**US**" for United States, "**CA**" for Canada, or "**MX**" for Mexico.

8. In the Tax Classification field, select **Tax Exempt.** All OBF loan disbursements are tax-exempt. This means that, regardless of payment type or ownership, OBF customers must select the **Tax Exempt** Tax Classification.

Note: At this point, if a Tax ID dropdown field displays, you accidentally selected a Tax Classification other than **Tax Exempt.** If this happens, go back to the Tax Classification field and select the **Tax Exempt** option.

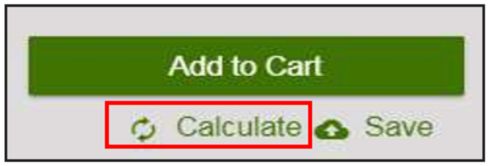
Tax Exemption Code Subsection

An additional Tax Exemption Code subsection displays.



9. In the Exempt Code field, select **Code Number 14 (#1), Disbursement is an OBF loan subject to repayment.** (All the codes are explained in the green text above the field.)

10. An *Add to Cart* pop-up will display. Click the **Calculate** button.



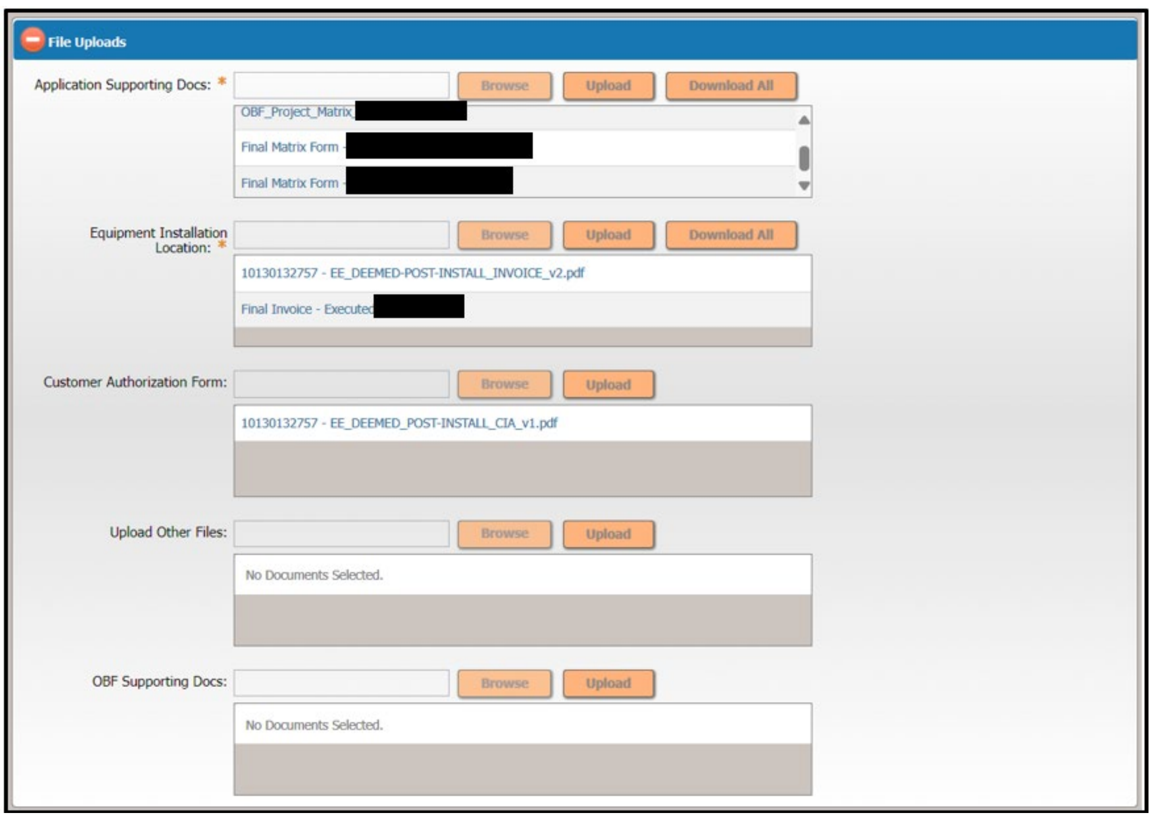
11. The exempt code will display in the Tax Exempt Reason field **(#2).**

File Uploads Section

In the *File Uploads* Section, you are **required** to upload the following files:

- Final OBF Project Matrix Form
- Final energy savings calculations
- Project invoice signed by the customer, and
- Proof of final approval from the eligible Energy Efficiency incentive program.

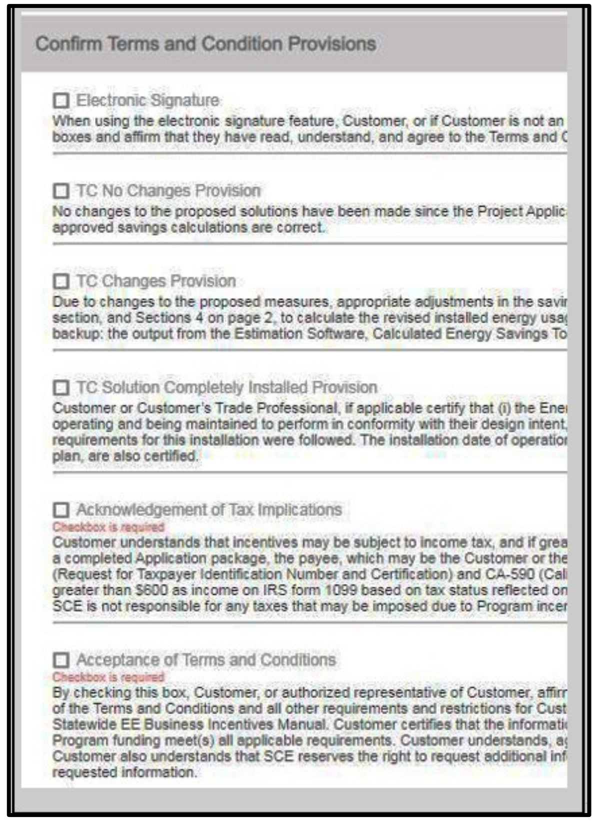
Note: If the Terms and Conditions Submission Method you selected above was **Print and Upload,** you must also upload a **signed** Terms and Conditions form. See ***Review Terms and Conditions Section,*** below.



Confirm Terms and Conditions Provisions Section

12. This Section displays if you selected **Electronic Acceptance** as the Terms and Conditions Submission Method in the *Project Information* Section above. Click all applicable checkboxes:

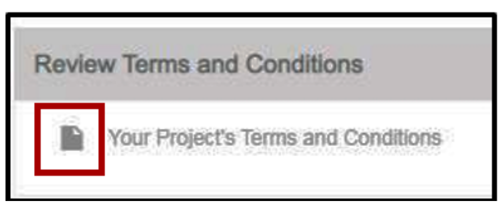
- **Electronic Signature**
- **TC No Changes Provision** – If no changes have been made since the Reservation Request
- **TC Changes Provision** – If changes have been made since the Reservation Request
- **TC Solution Completely Installed Provision**
- **Acknowledgement of Tax Implications** – If W9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



Review Terms and Conditions Section

13. This Section displays if you selected **Print and Upload** as the Terms and Conditions Submission Method in the *Project Information* Section above.

    Click on the file icon under **Review Terms and Conditions** to open the Terms and Conditions Form in a new browser tab.



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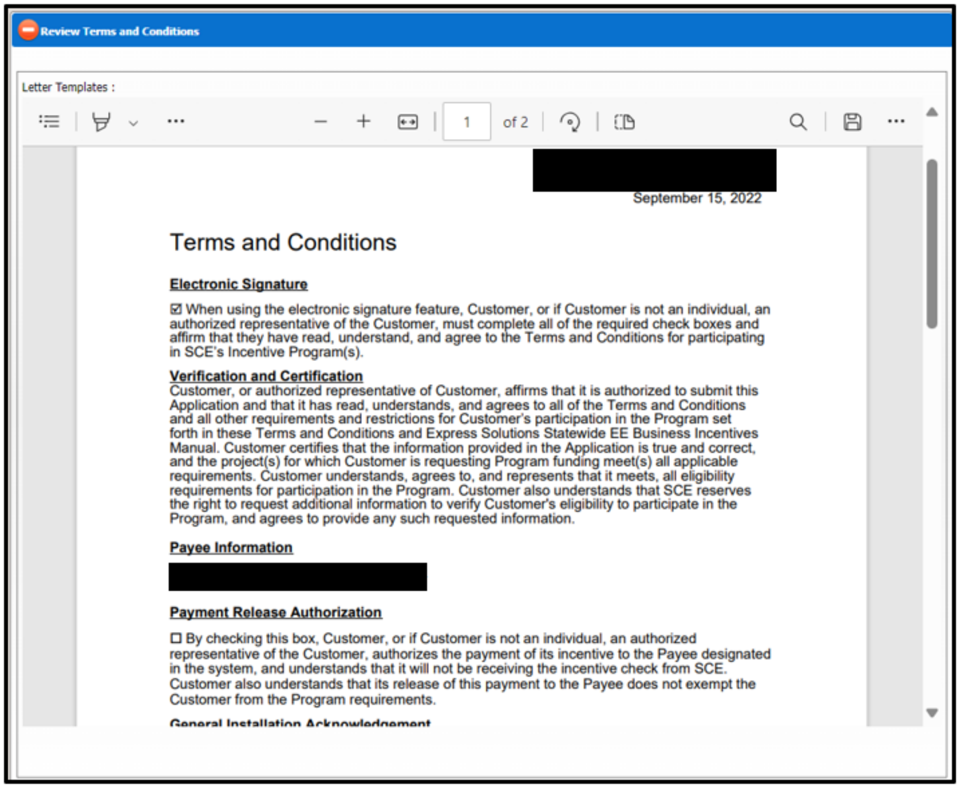
Review Terms and Conditions Tab



[redacted]
September 15, 2022

Terms and Conditions

Electronic Signature

☑ 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 affirm that they have read, understand, and agree to the Terms and Conditions for participating in SCE's Incentive Program(s).

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

Payee Information

[redacted]

Payment Release Authorization

☐ By checking this box, Customer, or if Customer is not an individual, an authorized representative of the Customer, authorizes the payment of its incentive to the Payee designated in the system, and understands that it will not be receiving the incentive check from SCE. Customer also understands that its release of this payment to the Payee does not exempt the Customer from the Program requirements.

General Installation Acknowledgement

14. Print this out, sign it, and upload it in the File Uploads Section.

Review Comments Section

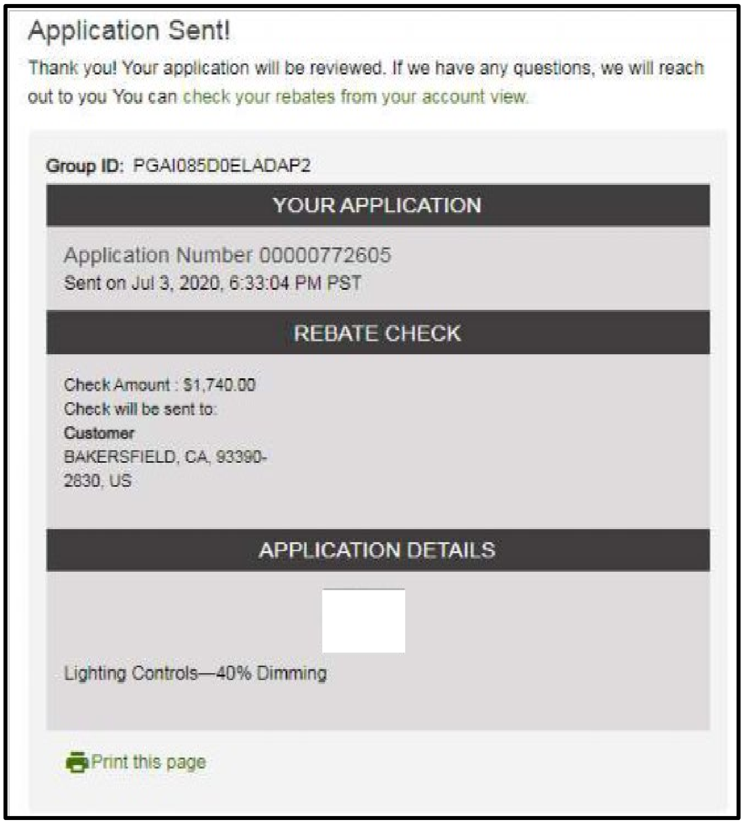
Note: Any comments from the SCE team will appear in the External Comments field.

15. Click **Submit** in the header.

The confirmation screen displays.

See the illustration on the next page.

Application Sent Confirmation Screen



This is the end of the On-Bill Financing Application Submission for Customers in the Rebate Center – Product View User Guide.