Small Site Rebate (SSR) Charge Ready Application Portal

User Guide for External Users

Prepared for:

SSR Customers, and Charge Ready Trade Professionals

Prepared by:

EL&D Systems Training

Enterprise Learning & Development (EL&D)

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Overview

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

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

- Customers
- Charge Ready Trade Professionals

What is SSR?

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

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

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

Key Terms

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

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

Project Workflow

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

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

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

Program Forms

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

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

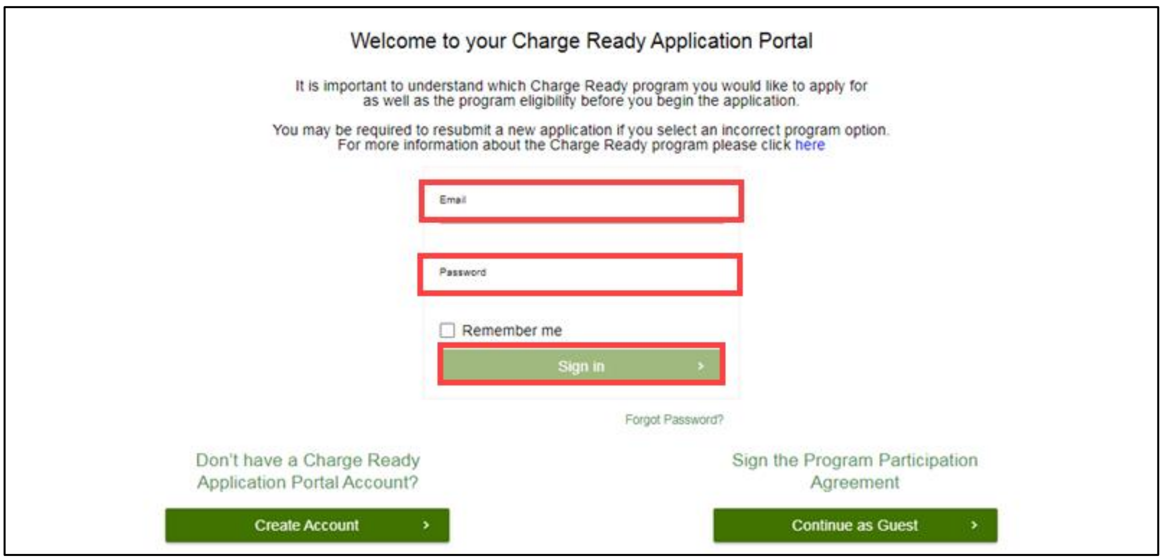
Accessing the Charge Ready Application Portal

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

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

   The **Welcome to your Charge Ready Application Portal** page displays.

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



The **Applications** page displays.

Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals

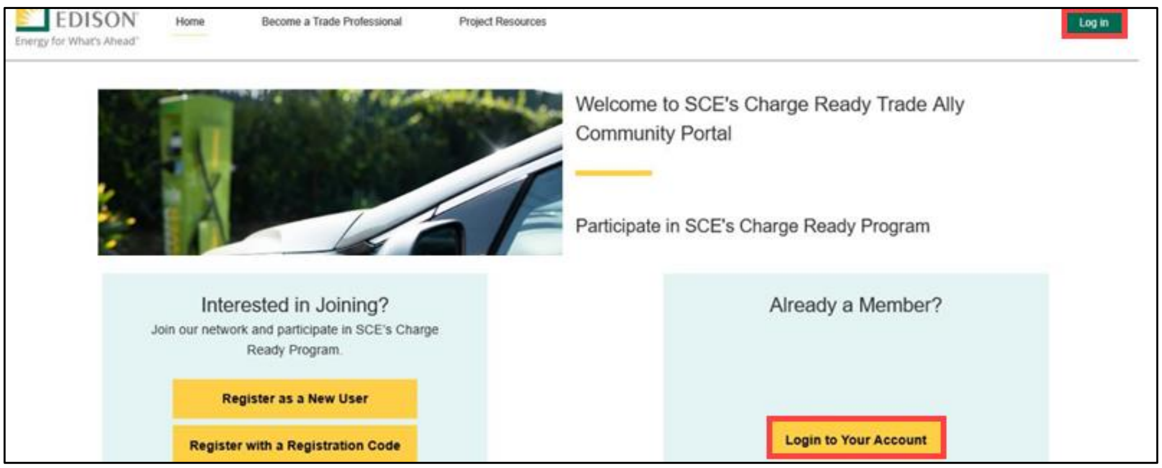
If you are a Charge Ready Trade Professional, you must have access to the Charge Ready Trade Ally Community (TAC) Portal. You and your company must also be approved by SCE to apply for rebates on behalf of the customer(s).

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

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

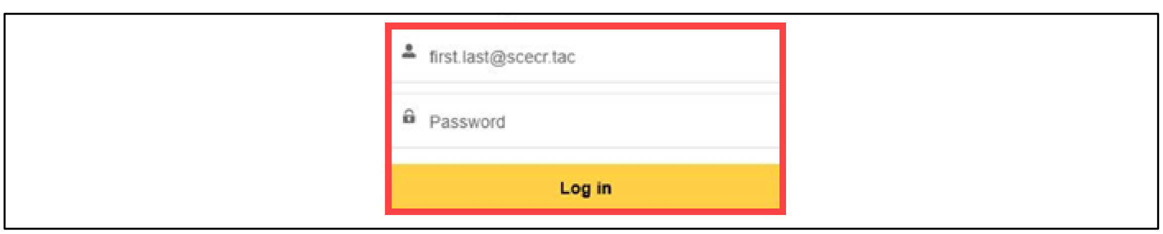
   The **TAC landing page displays**.

2. Select **Login** or **Login to Your Account**.



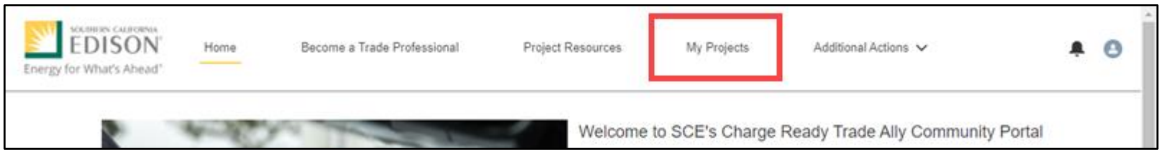
   The **Login** page displays.

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



   The **TAC Home Page** displays.

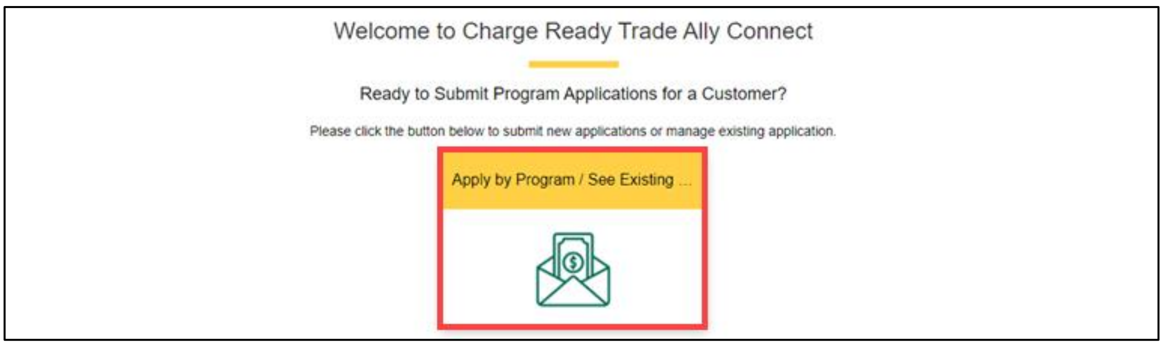
6. Select **My Projects**.



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

The **My Projects** page displays.

7. Click **Apply by Program**.



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

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

Project Submission

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

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

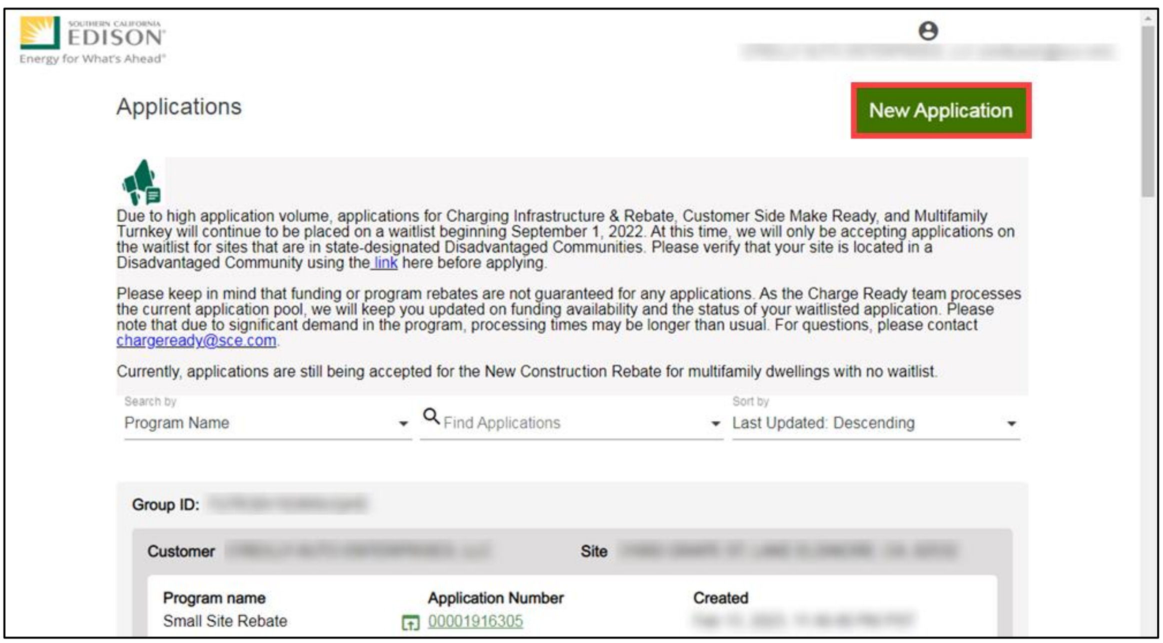
Once a Project Submission is complete, SCE determines the eligibility for program participation.

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

Completing the Project Submission Form

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

1. Click **New Application**.

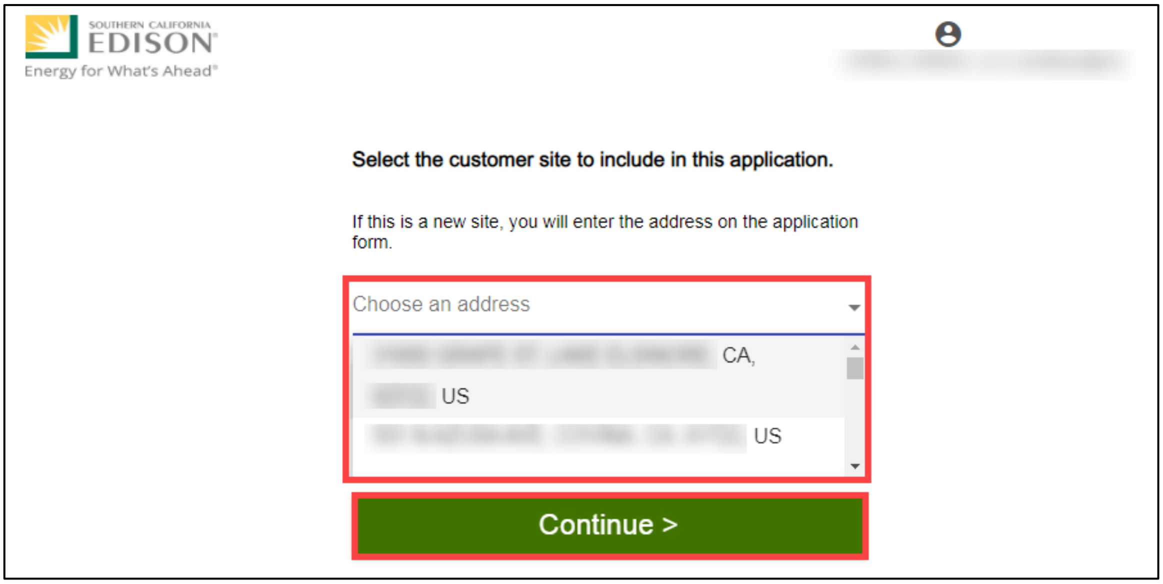


The **Select customer site to include in this application** page displays.

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

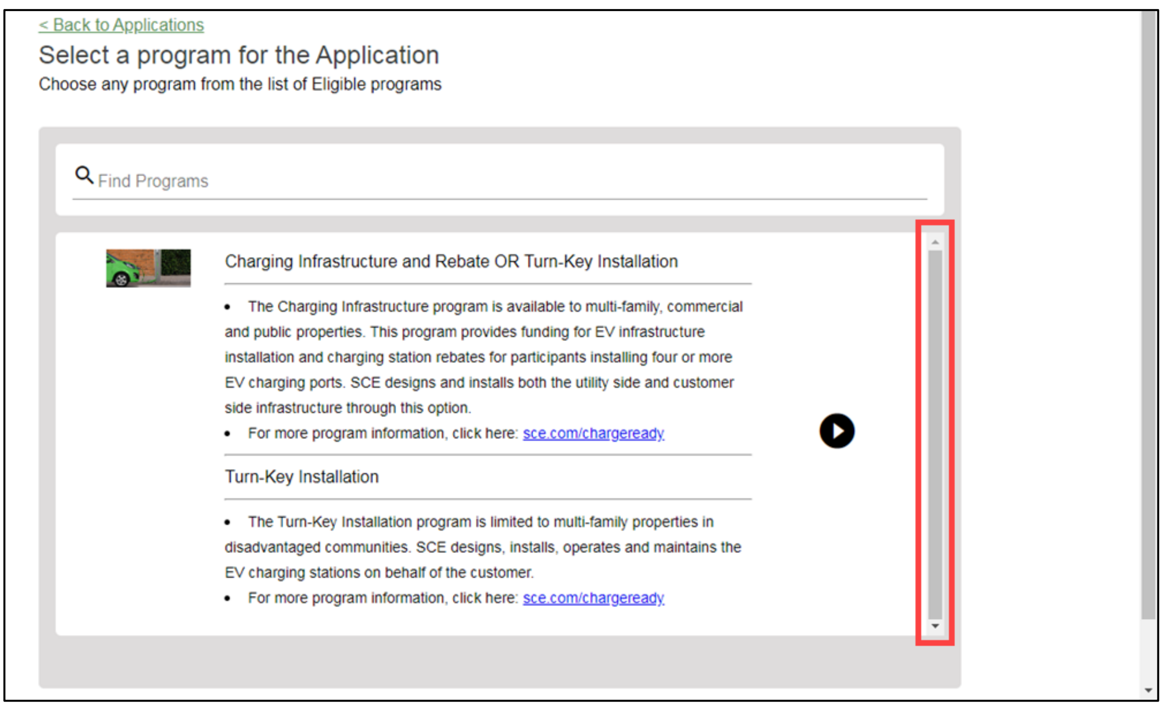
   Note: The **Choose an address** page displays for a customer with multiple sites.

3. Click **Continue**.

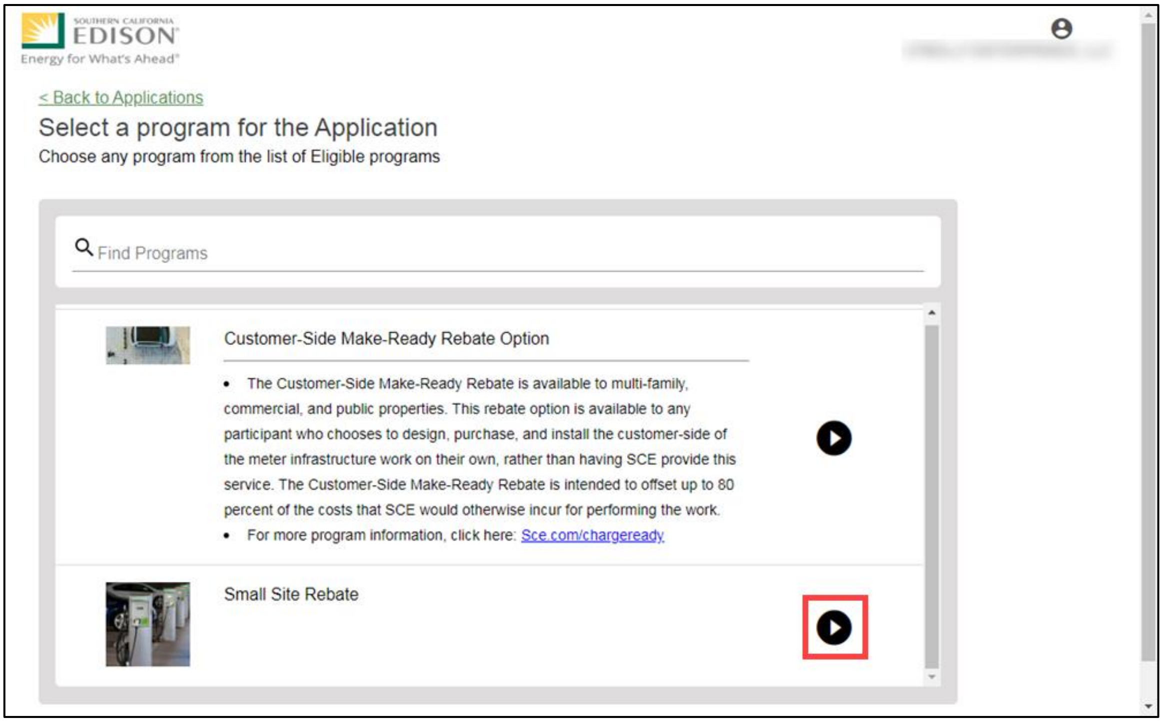


The **Select a program for the Application** page displays.

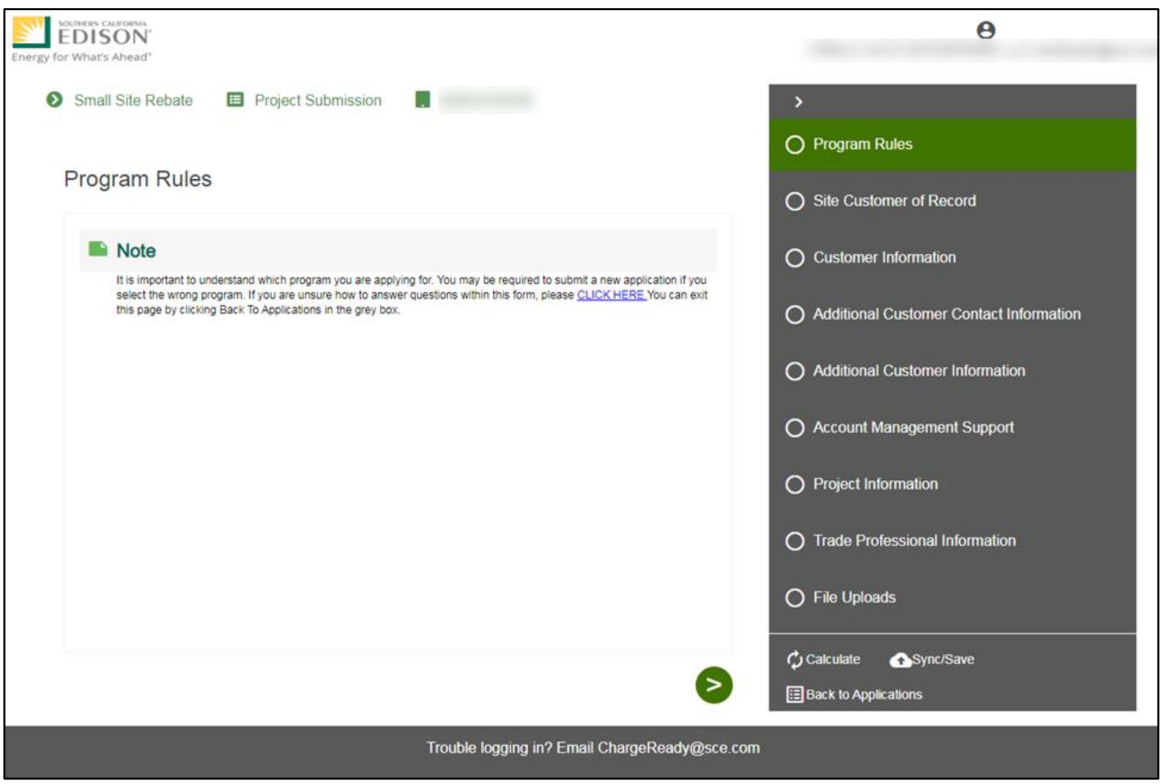
4. Scroll down.



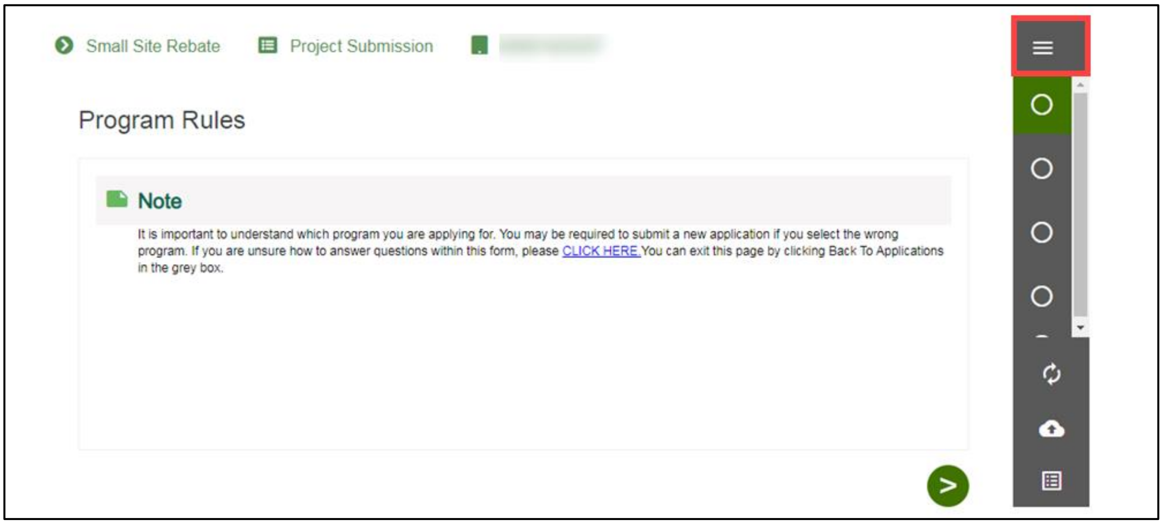
5. Click the right arrow to select **Small Site Rebate.**



The **Program Rules** page displays.



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



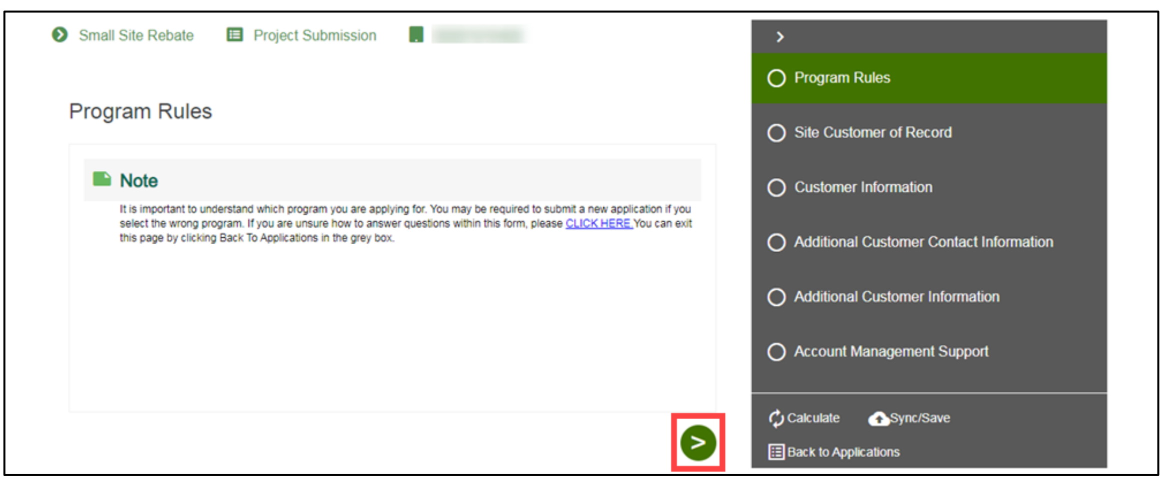
Once the Program Rules page displays, you will complete all the required fields.

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

Program Rules

6. Review the **Program Rules**.

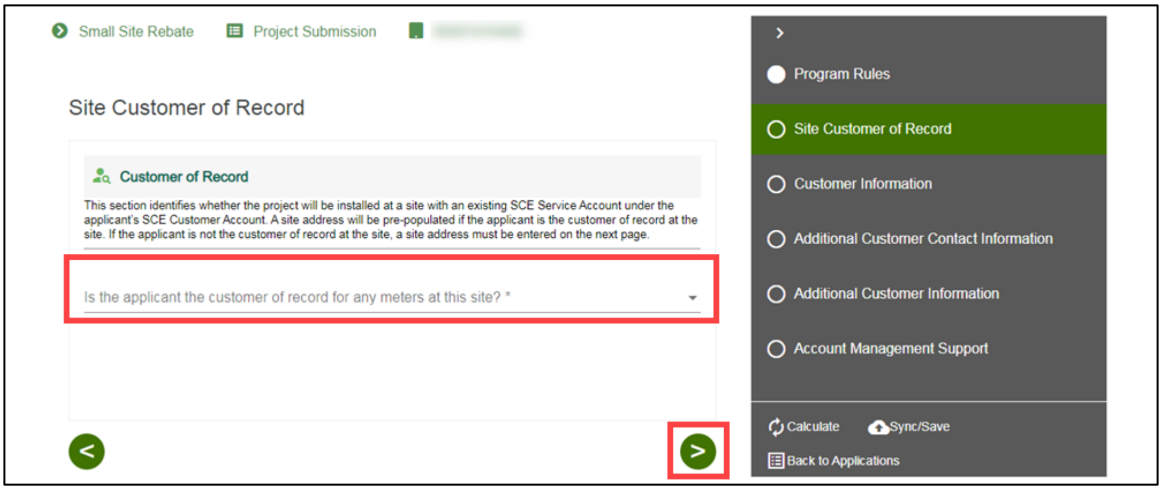
7. Click the **Next** arrow.



Site Customer of Record

8. Select **Yes** or **No** for Is the applicant the customer of record for any meters at this site.

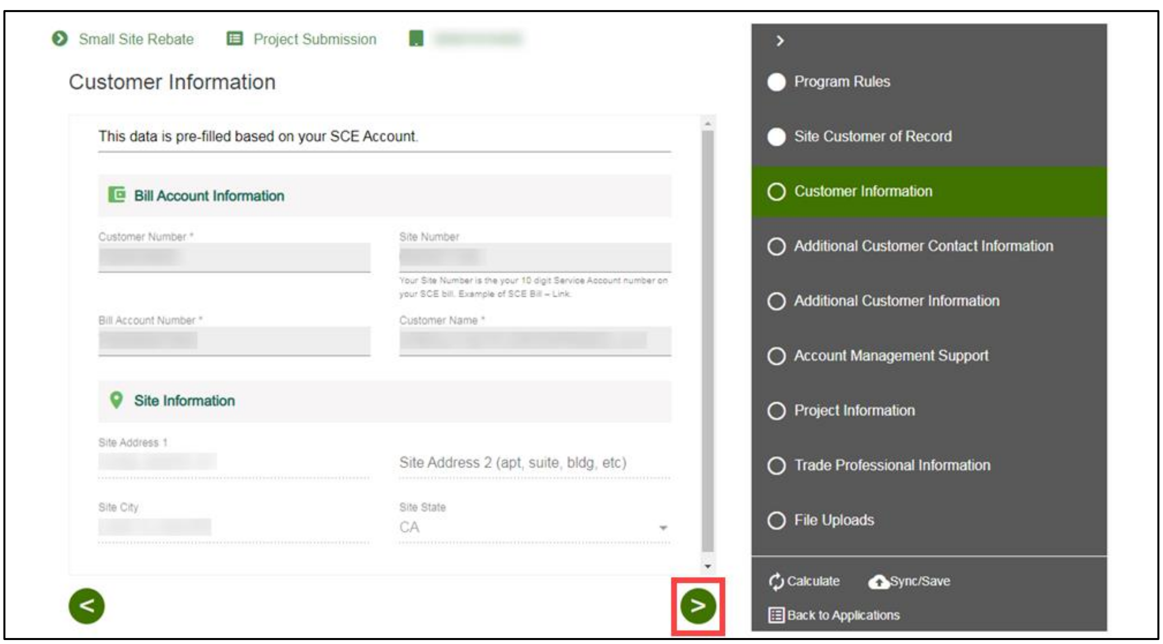
9. Click the **Next** arrow.



Customer Information

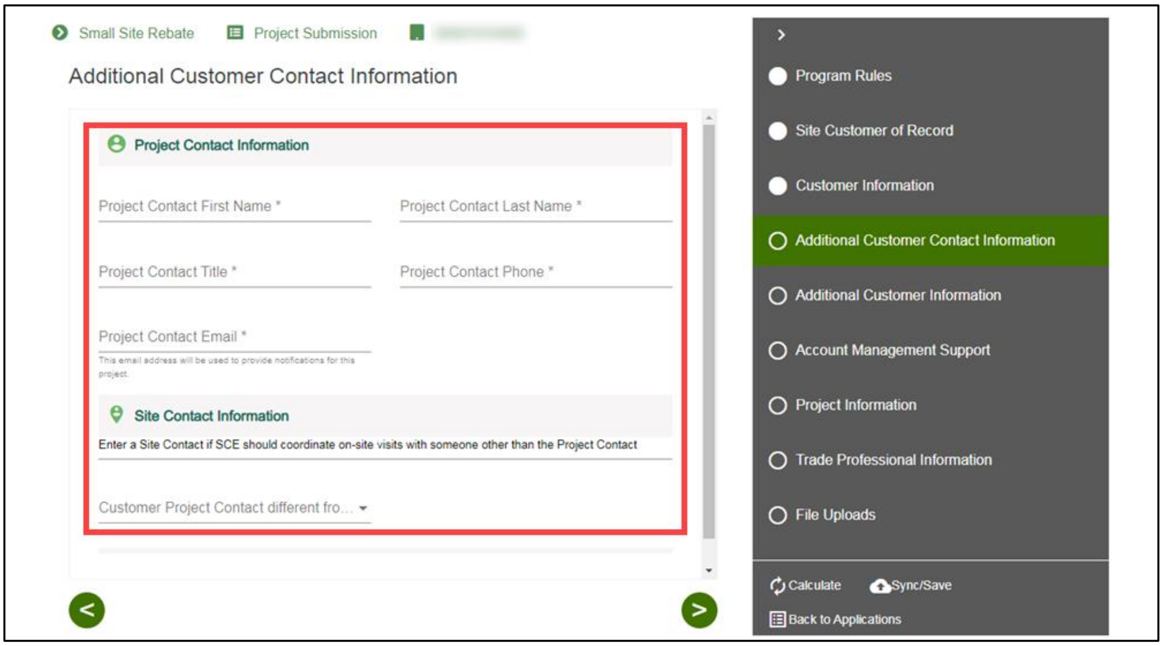
10. Verify the **Bill Account Information** and **Site Information**.

11. Click the **Next** arrow.

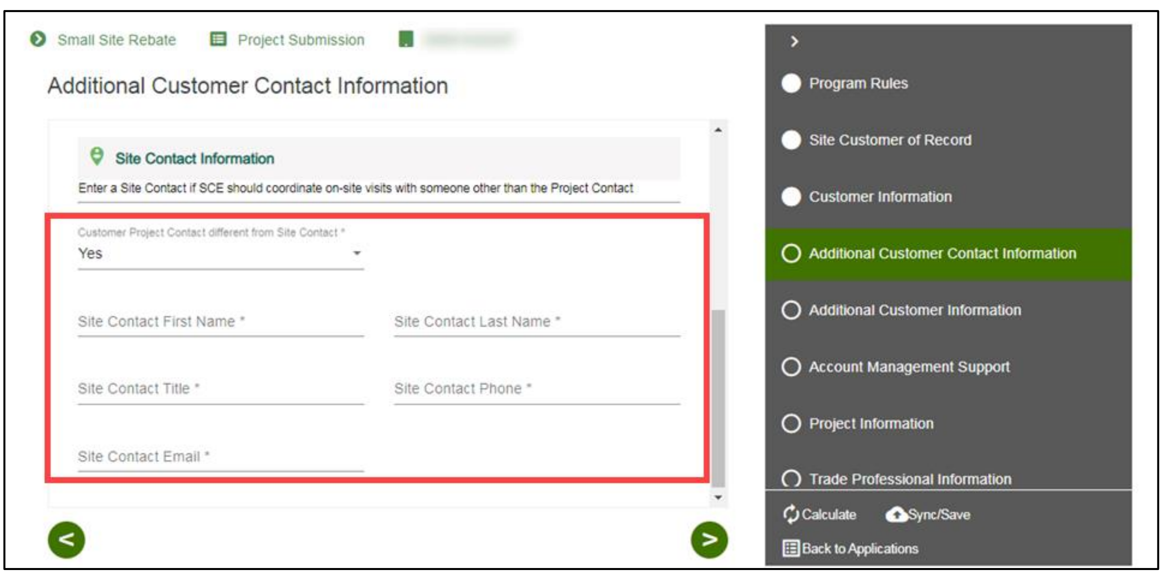


Additional Customer Contact Information

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



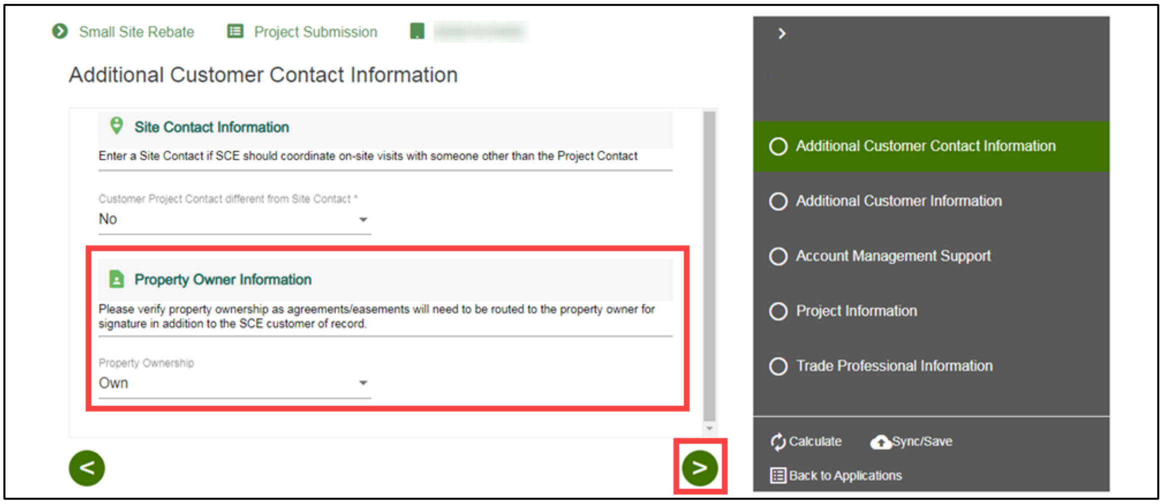
Note: If Site Contact is different from Customer Project contact, enter the Site Contact details.



If Property is Own

15. Select Own.

16. Click the **Next** arrow.

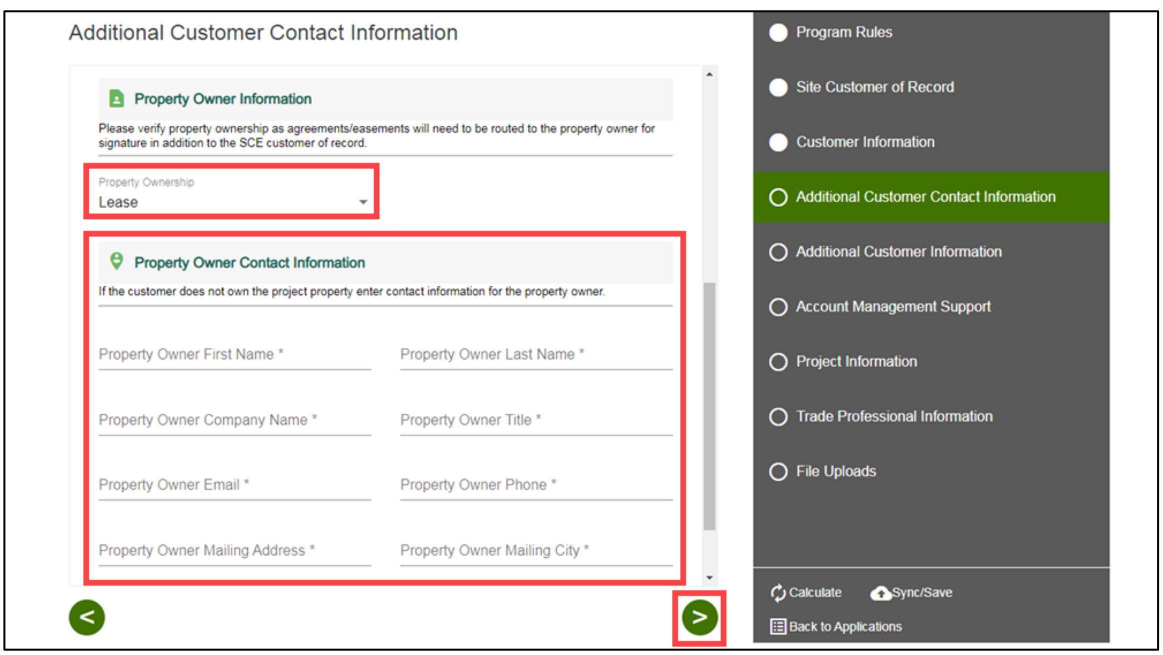


If Property is Lease

15. Select **Lease**.

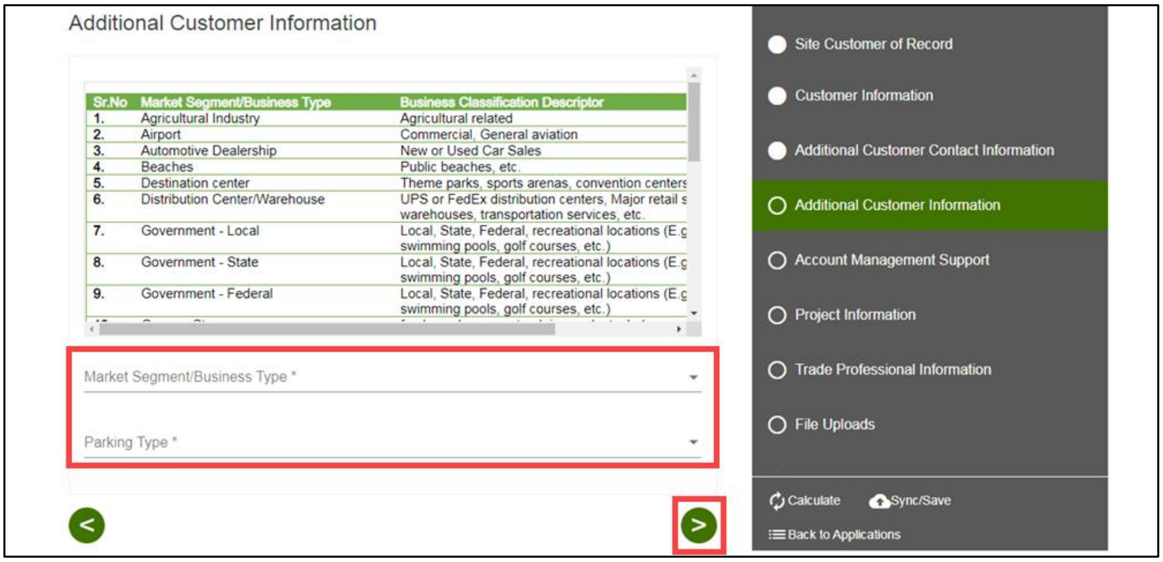
16. Complete the **Property Owner Contact Information**.

17. Click the **Next** arrow.



Additional Customer Information

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

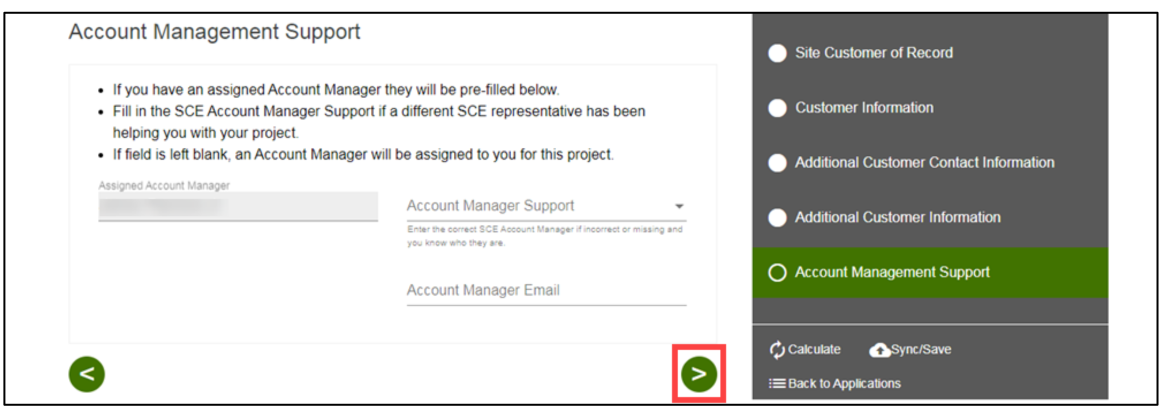


Account Management Support

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

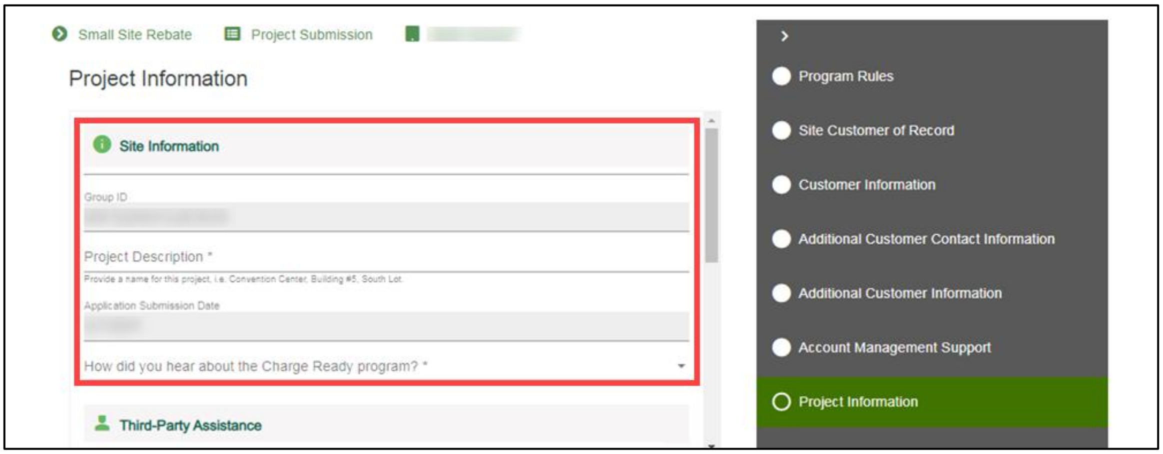
    Note: If you are not aware of your Assigned Account Manager, please leave this field blank. One will be assigned to your project.

22. Click the **Next** arrow.



Project Information

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



25. Complete the **Third-Party Assistance** information.

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

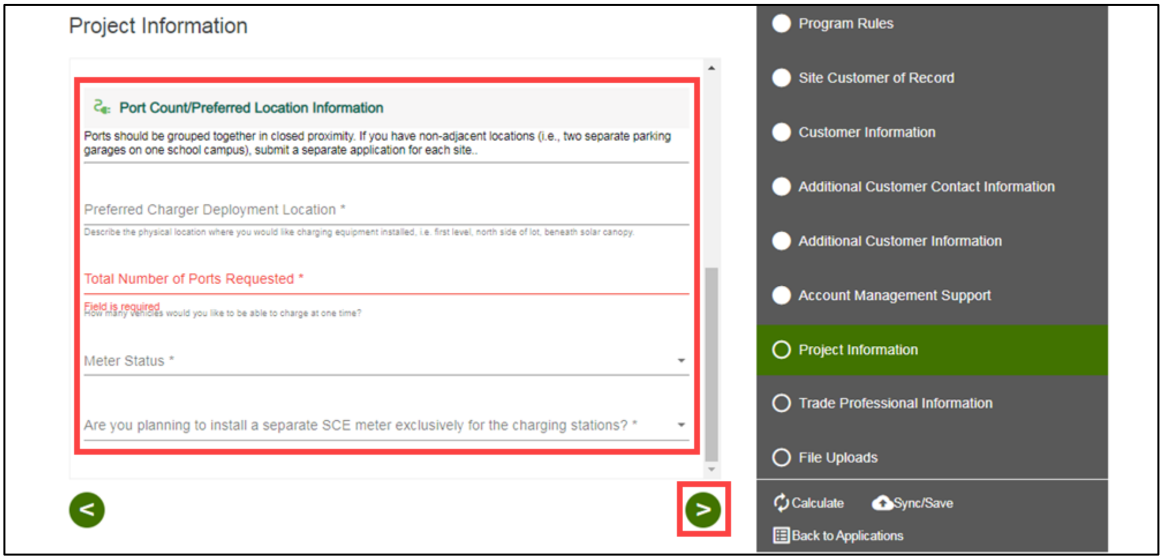
26. Scroll down.

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

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

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

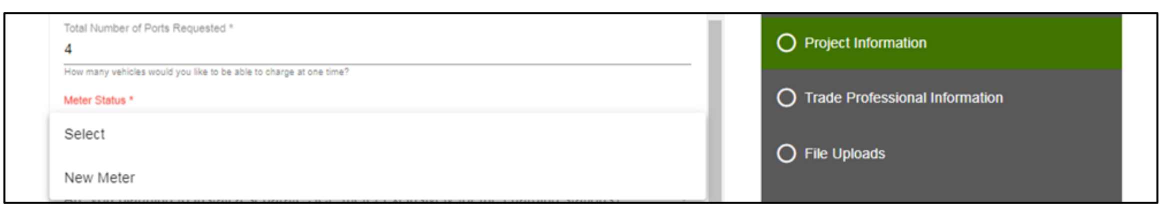
30. Click the > **Next** arrow.



New versus Existing Meters

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

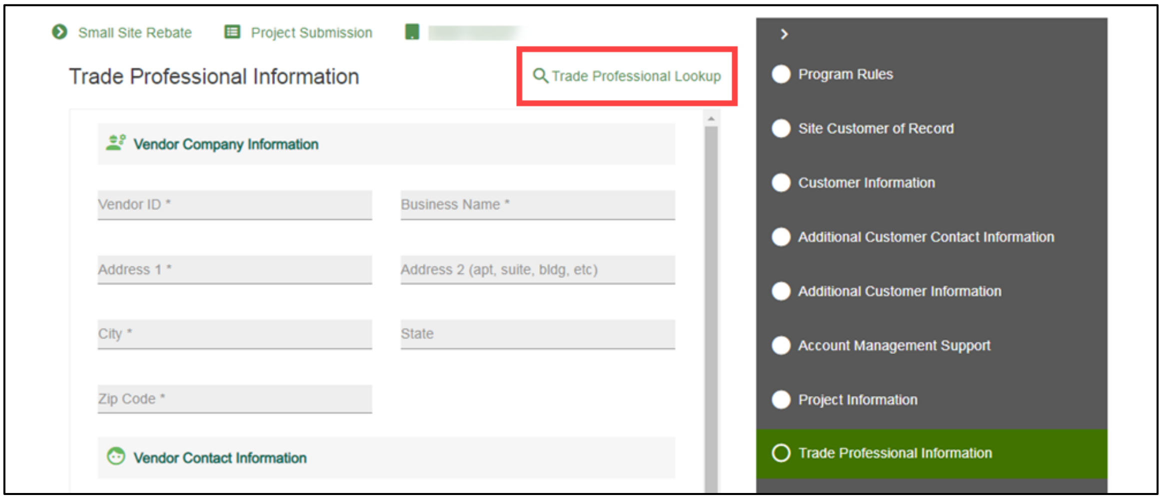
If you request 4 ports, it will only give you the option to select a New Meter.



Trade Professional Information, if applicable

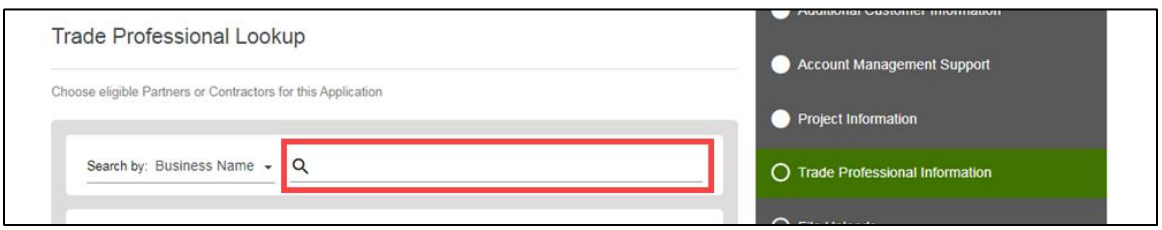
This section only applies if you are using a Trade Professional.

31. Click the **Trade Professional Lookup**.



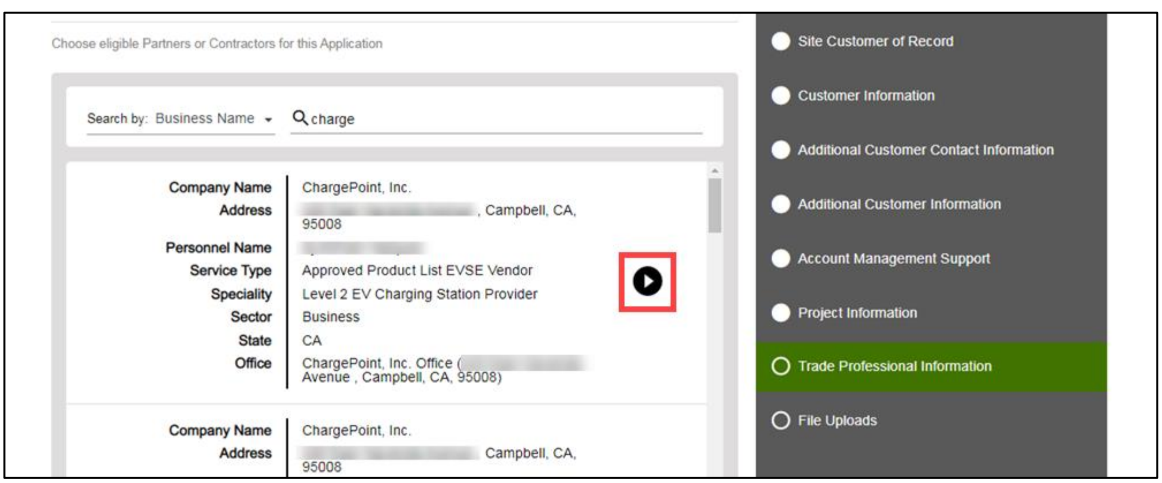
The **lookup** displays.

32. Enter a vendor name.



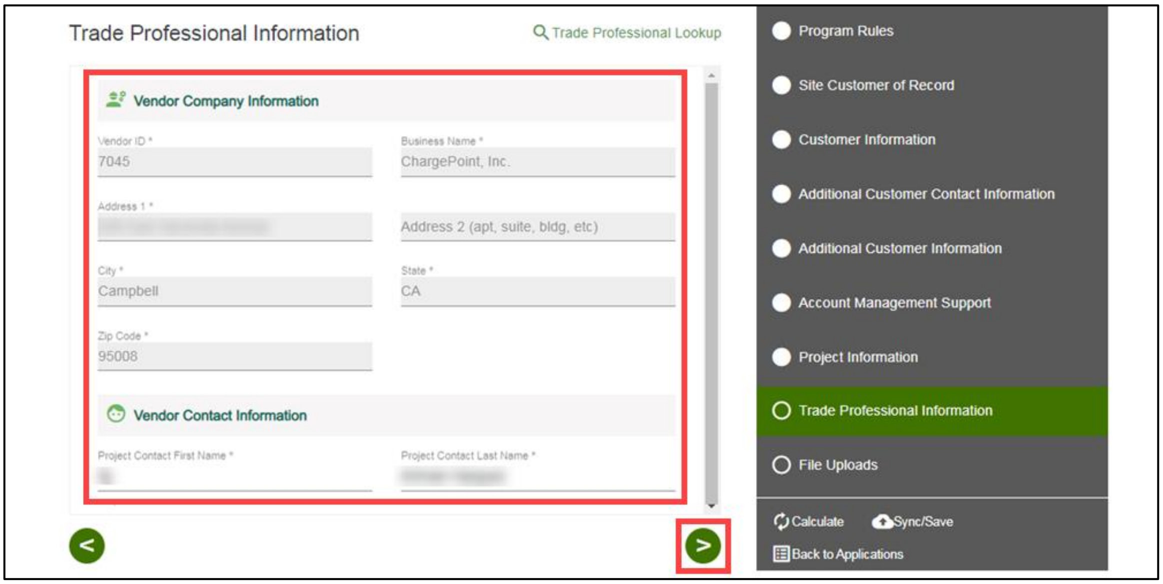
A **list of vendors** displays.

33. Select the applicable vendor.



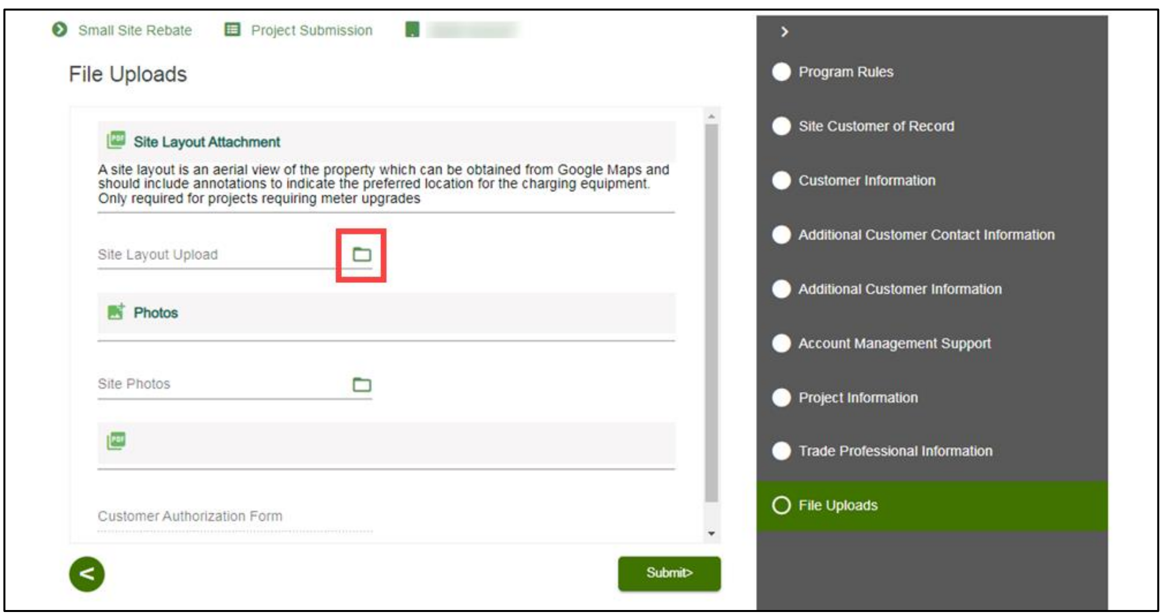
34. Confirm the **Vendor Company Information** and **Vendor Contact Information**.

35. Click the **Next** arrow.



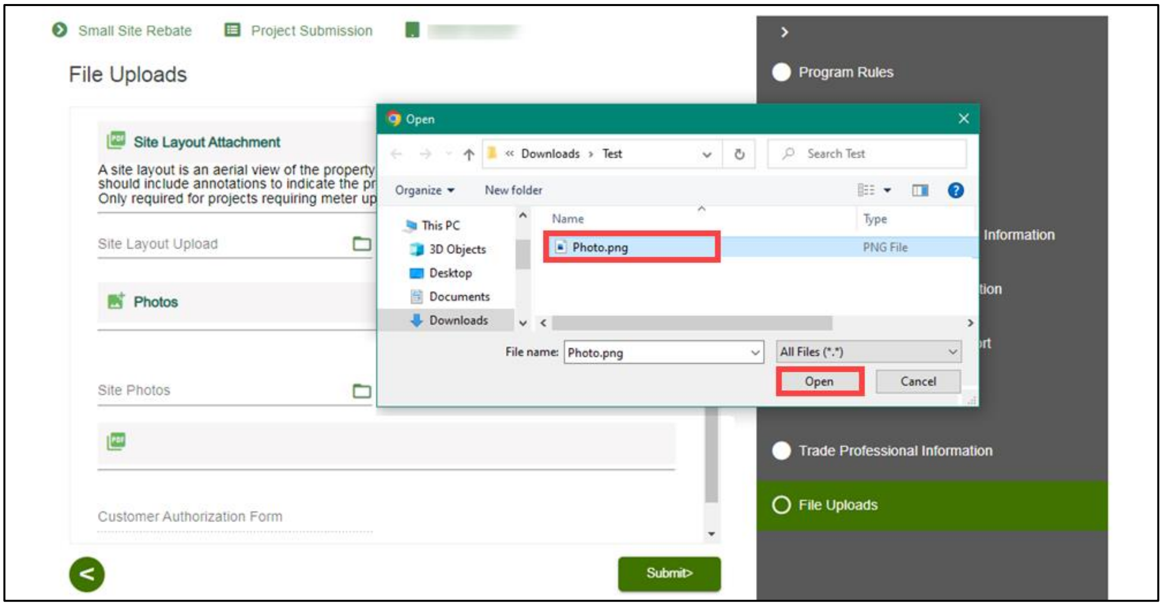
File Uploads

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



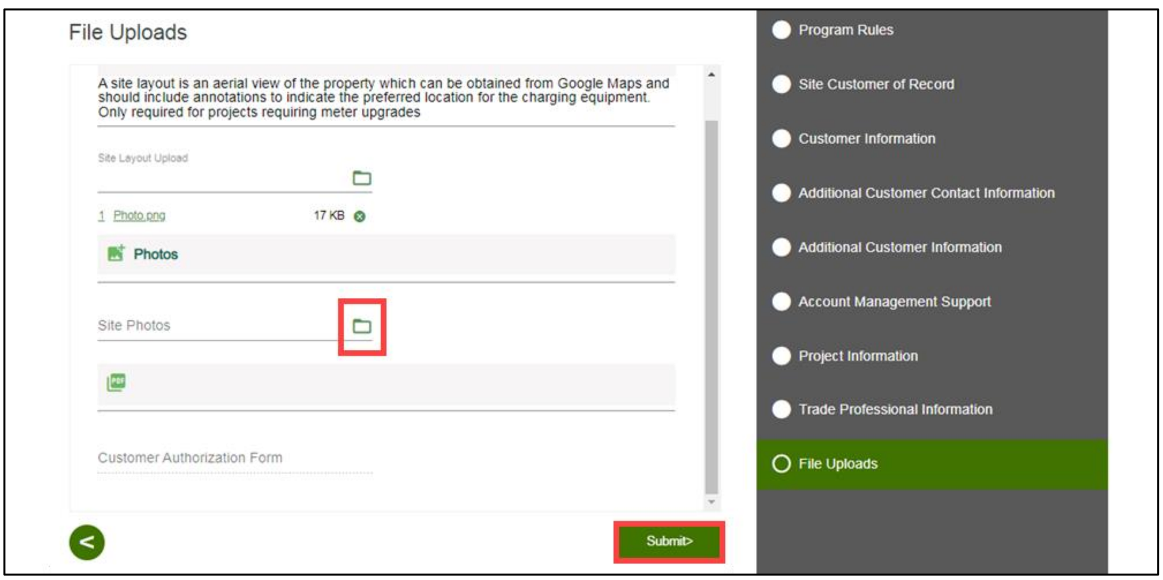
The **Open pop-up window** displays.

37. Select the applicable file.
38. Click **Open**.



The file uploads.

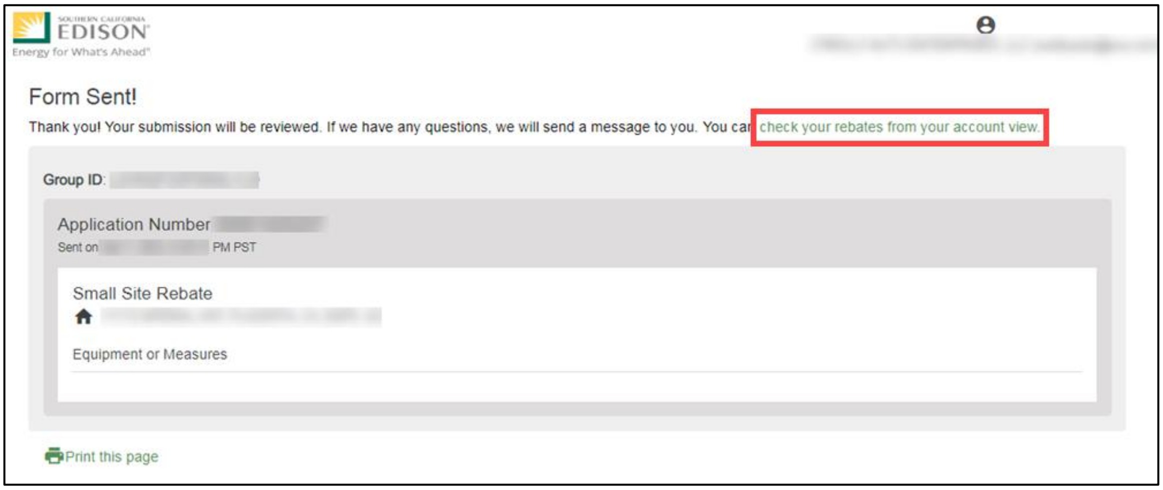
39. Select the Folder icon to upload **Site Photos**.
40. Click **Submit**.



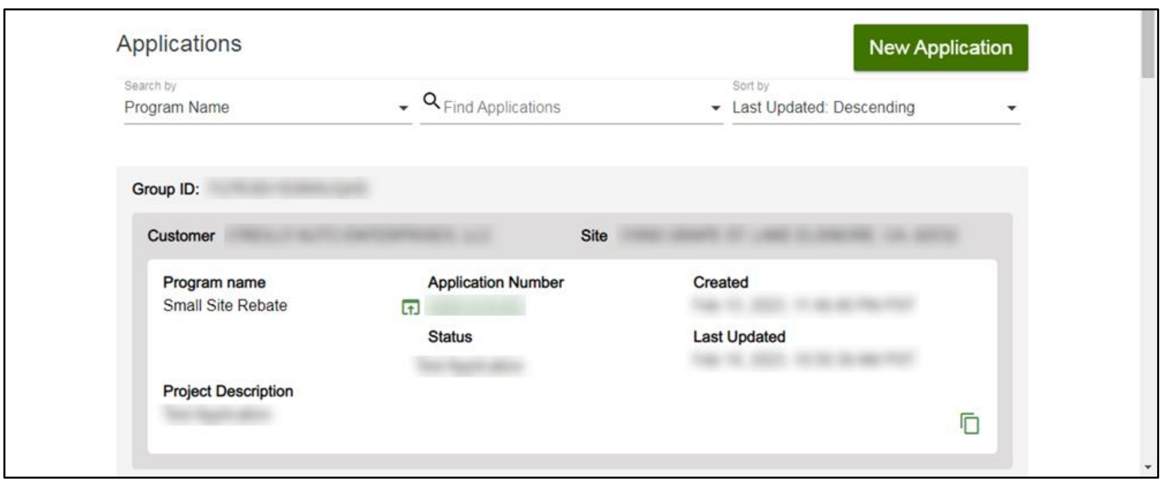
Form Sent!

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

41. Select **check your rebates from your account view**.



The **Applications** page displays.



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

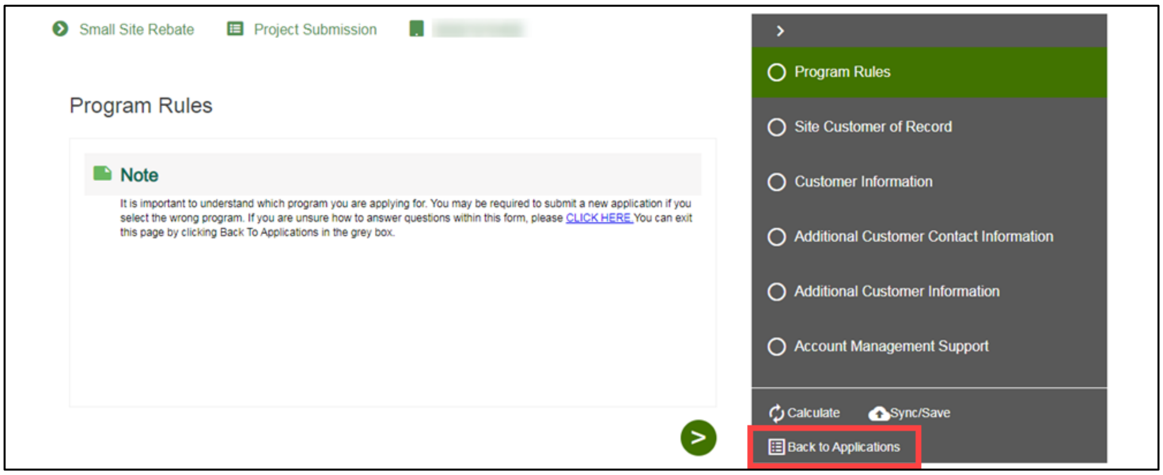
Applications in Draft Status

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

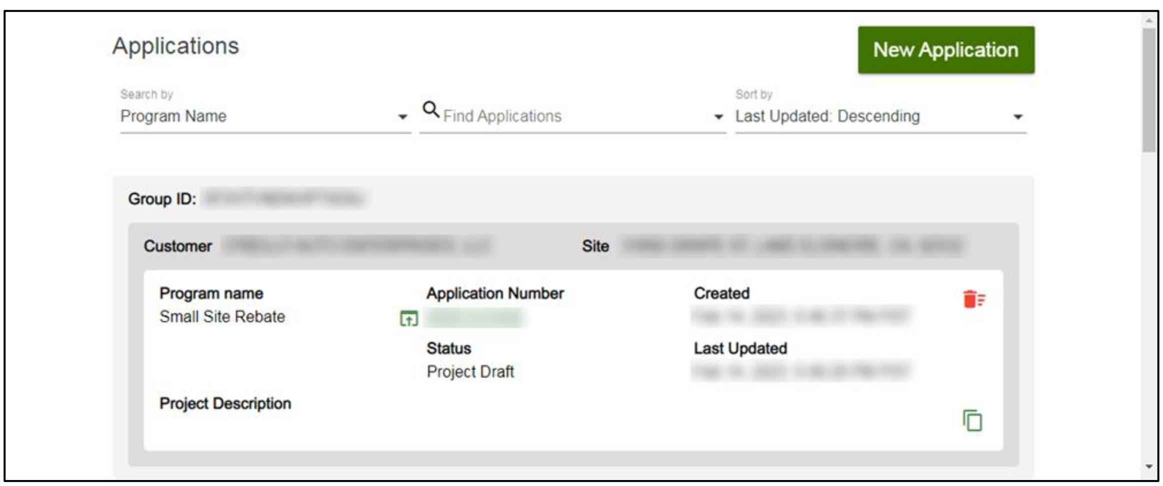
Saving an Application in Draft Status

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

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



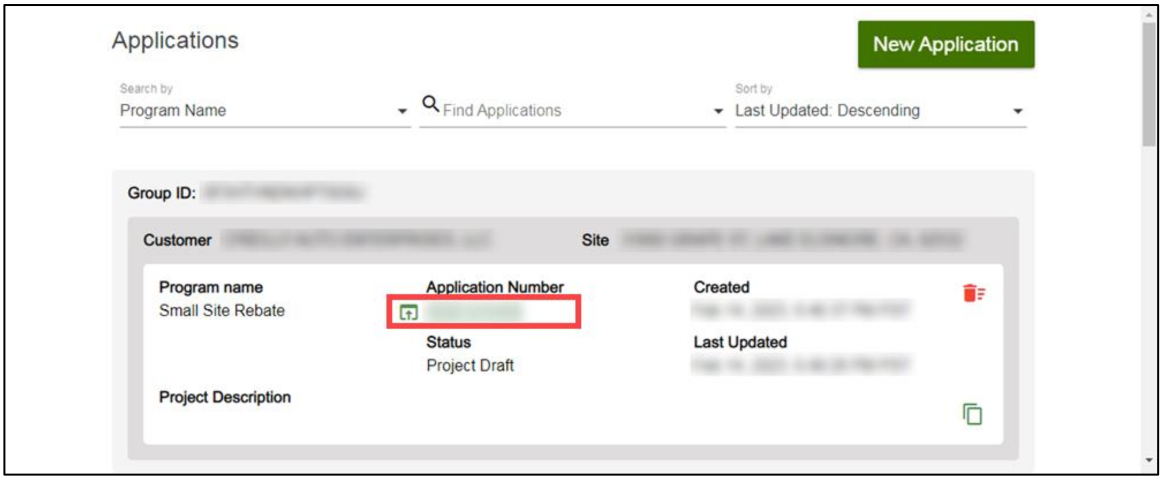
The **Applications** page displays.



Editing an Application in Draft Status

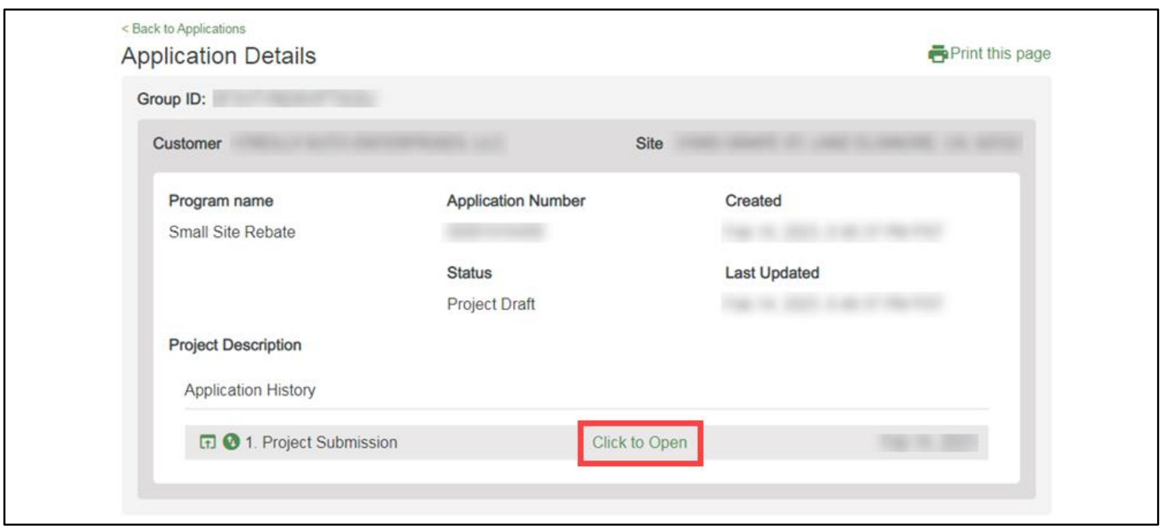
To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.



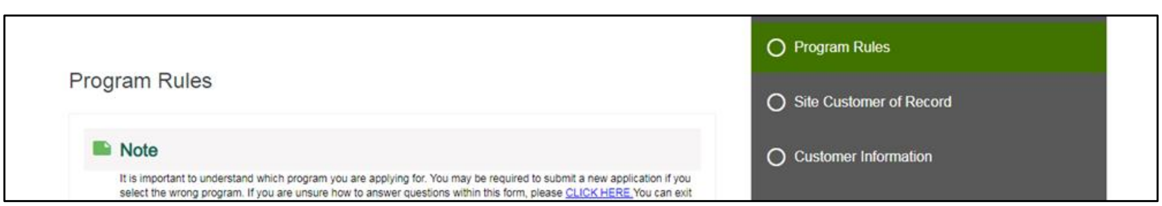
The **Application Details** page displays.

2. Select **Click to Open**.



The **Program Rules** page displays.

3. Complete the application.



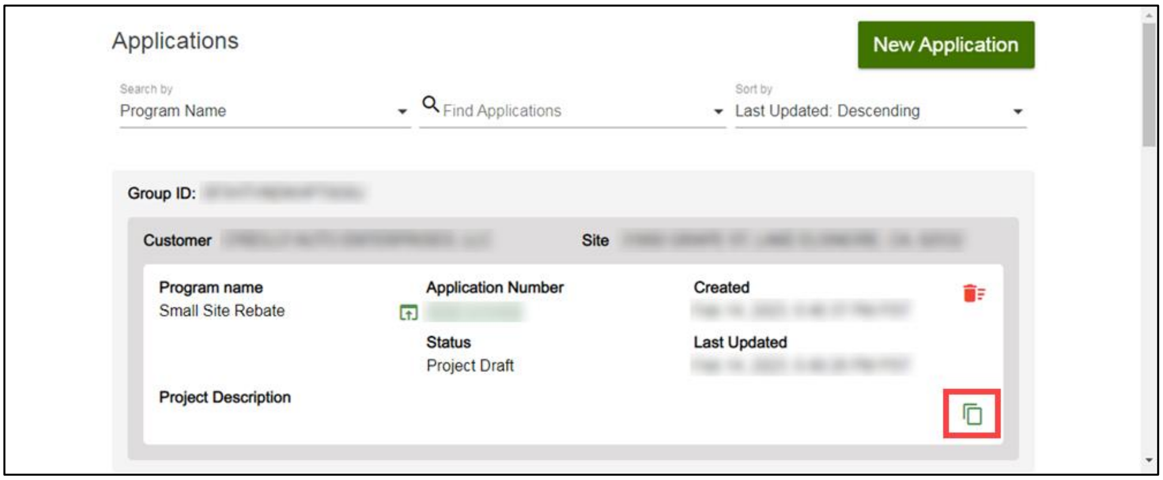
Duplicating an Application

You can duplicate an application in the following statuses:

- Draft
- Submitted
- Withdrawn
- Complete

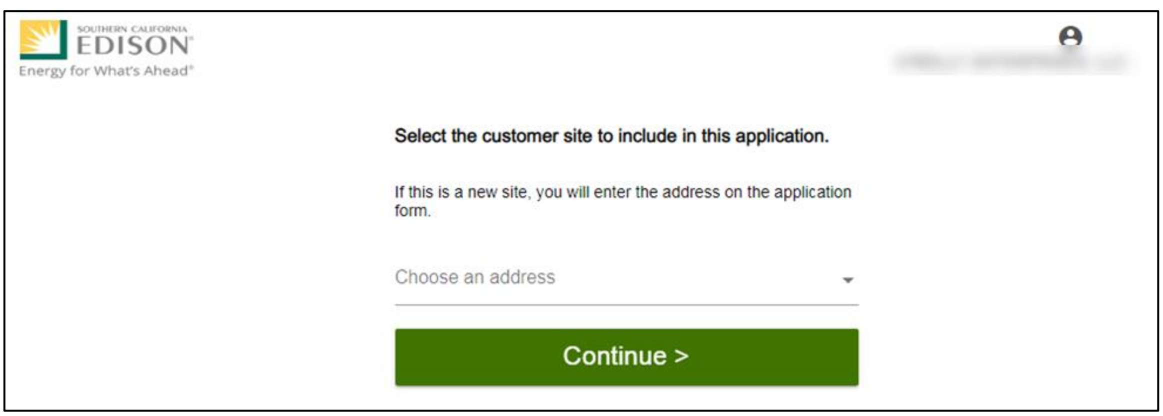
To duplicate an application, follow the steps below:

1. Click the **Duplicate** icon.



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

2. Complete the application.



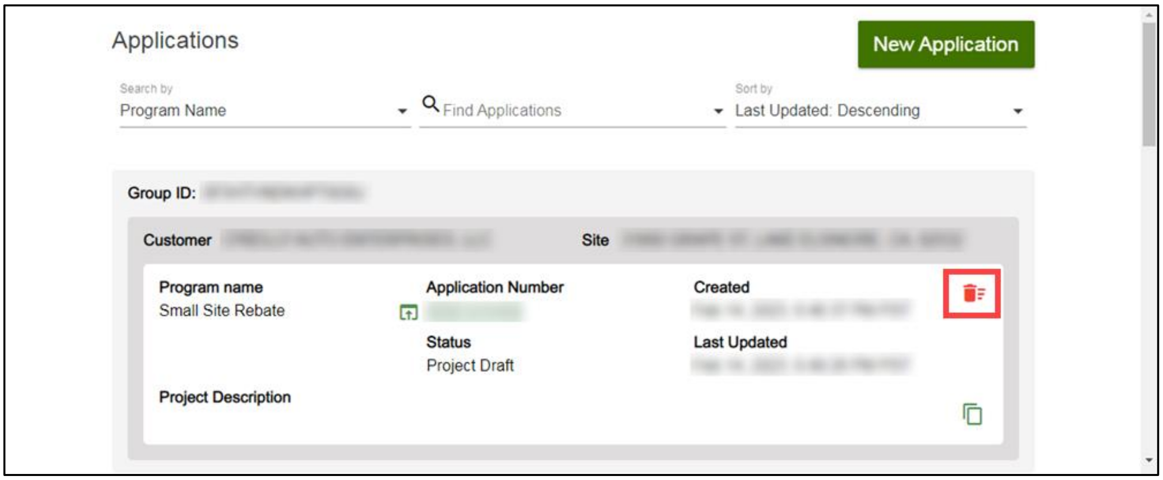
Discarding a Draft Application

You can delete an application in *Draft* status.

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

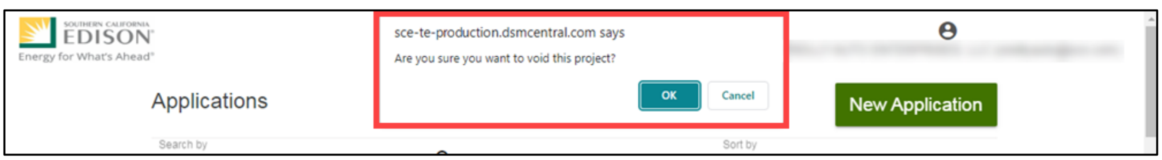
To delete an application, follow the steps below:

1. Select the **Delete icon**.



A **warning message** displays.

2. Select **OK**.



Agreement Acceptance

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

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

- Specifies the program agreement of the project

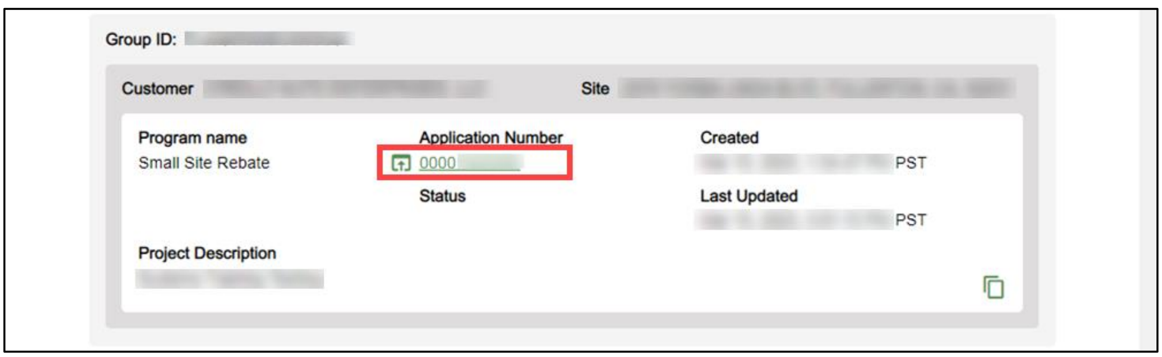
Once an Agreement Acceptance is complete, SCE executes and reserves project funds.

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

Completing the Agreement Acceptance Form

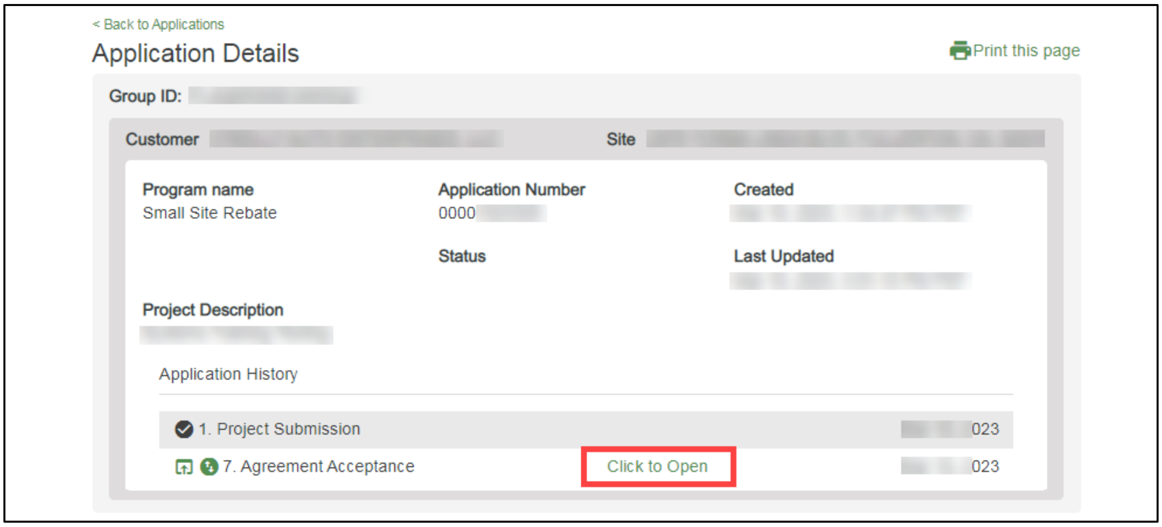
To complete the Agreement Acceptance, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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



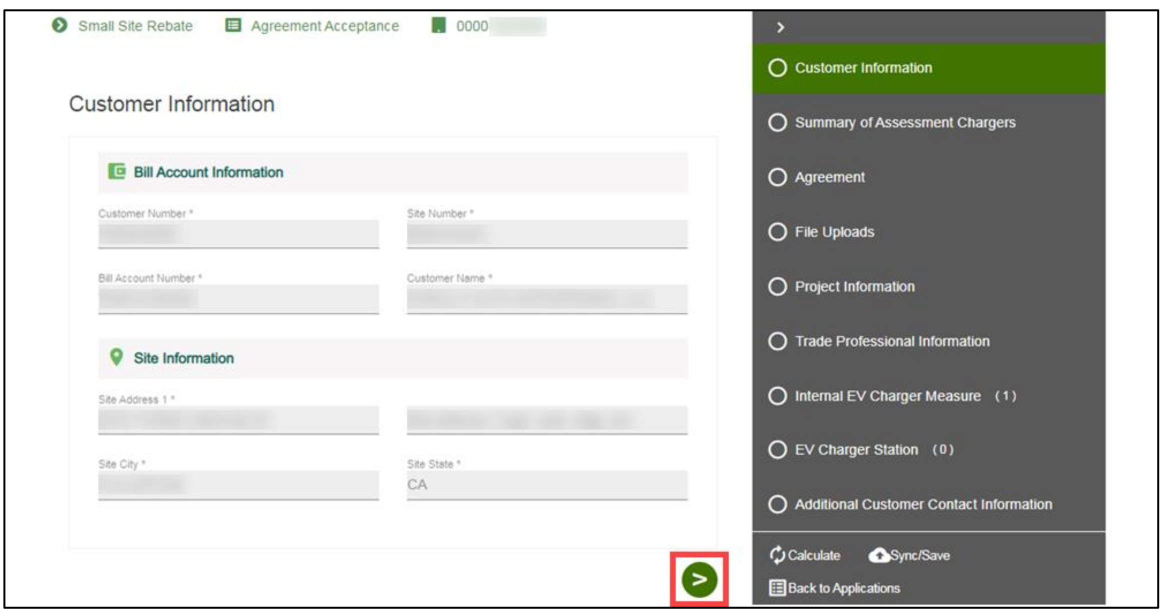
The **Customer Information** page displays.

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

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

Customer Information

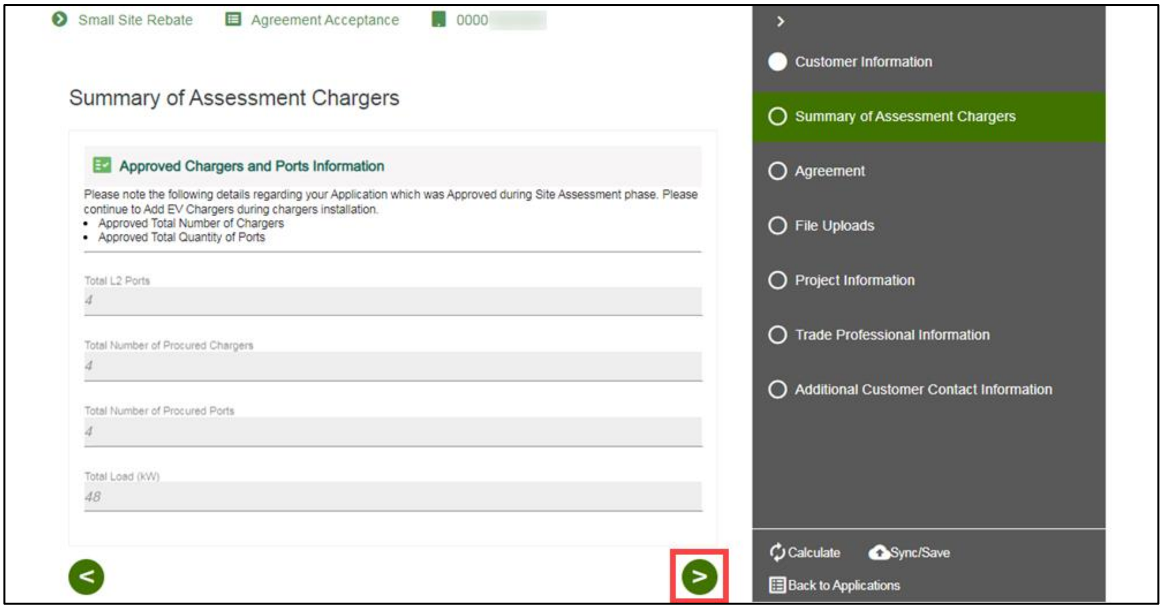
3. Verify the **Customer Information**.
4. Click the **Next** arrow.



The **Summary of Assessment Chargers** page displays.

Summary of Assessment Chargers

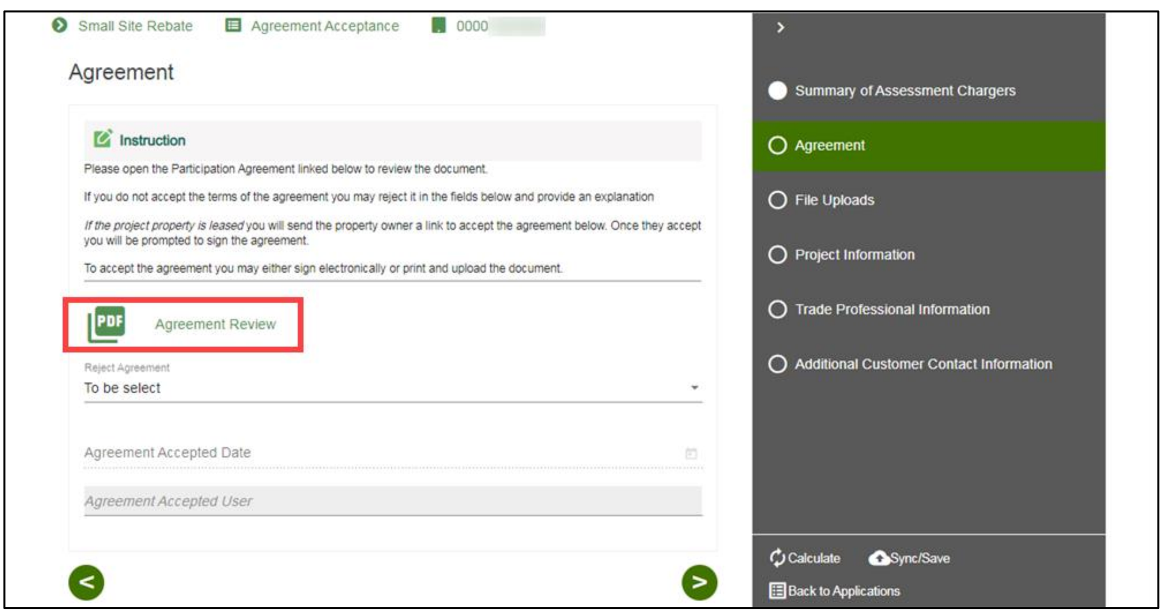
5. Verify the **Summary of Assessment Chargers**.
6. Click the **Next** arrow.



The **Agreement** page displays.

Agreement

7. Select **PDF Agreement Review**.



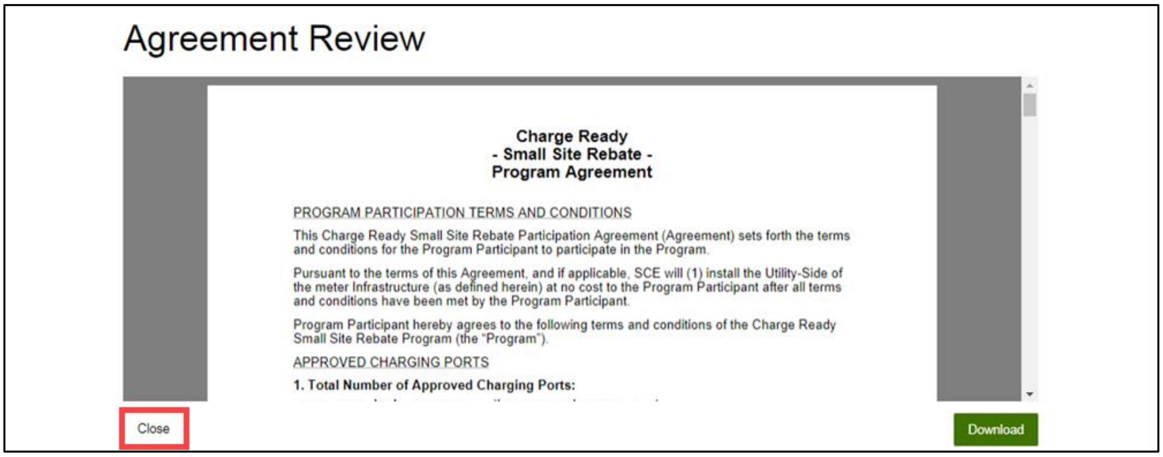
An **Agreement** window displays.

8. Review the agreement.

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

9. Select **Close**.

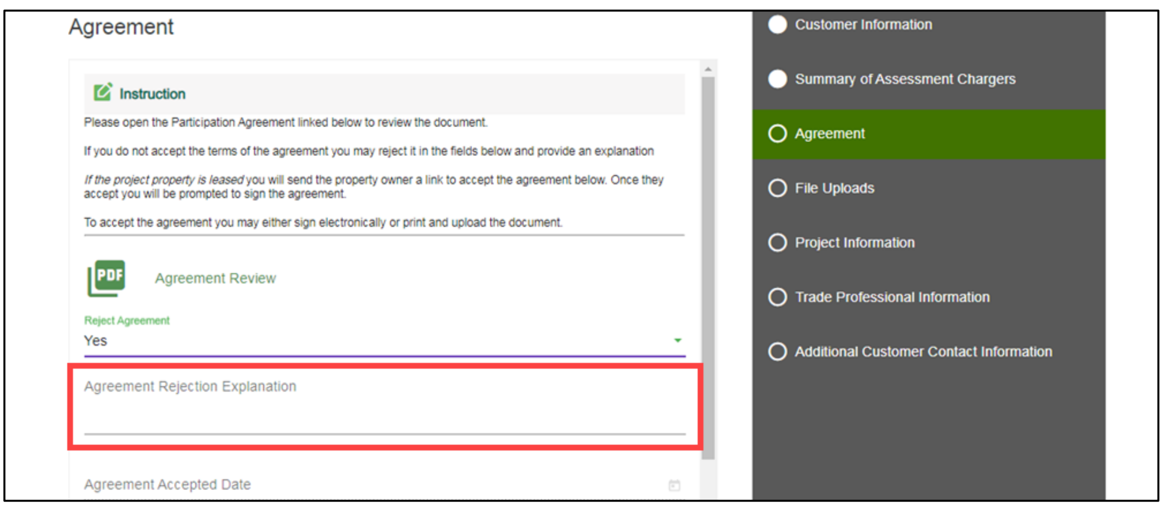
   Note: You can also download the Agreement Review.



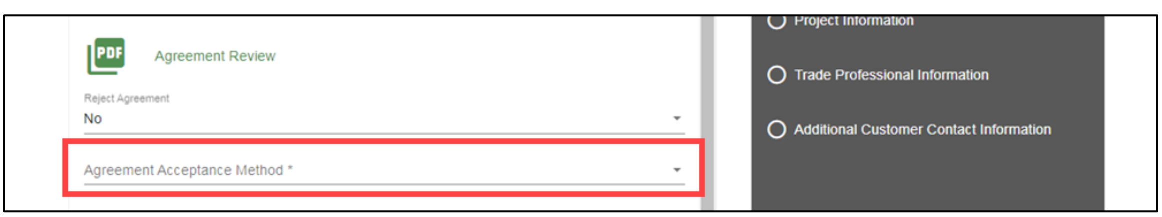
The **Agreement** page displays.

10. Select **Yes** or **No** under Reject Agreement.

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



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

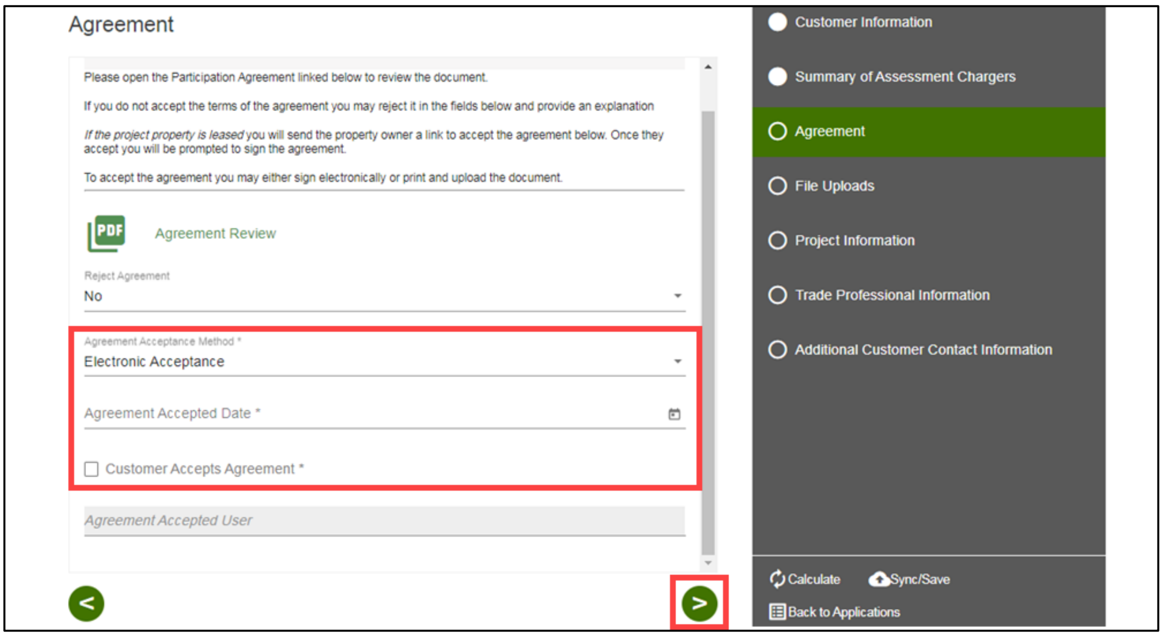


Electronic Acceptance

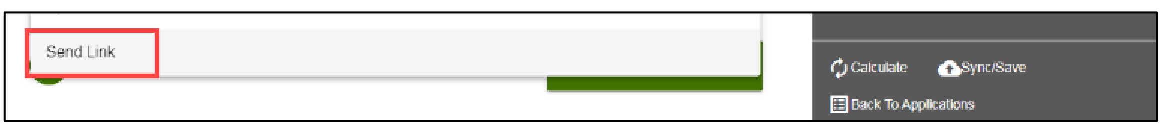
Note: Trade Pros submitting on behalf of customers are only able to Print and Upload the Agreement.

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

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



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

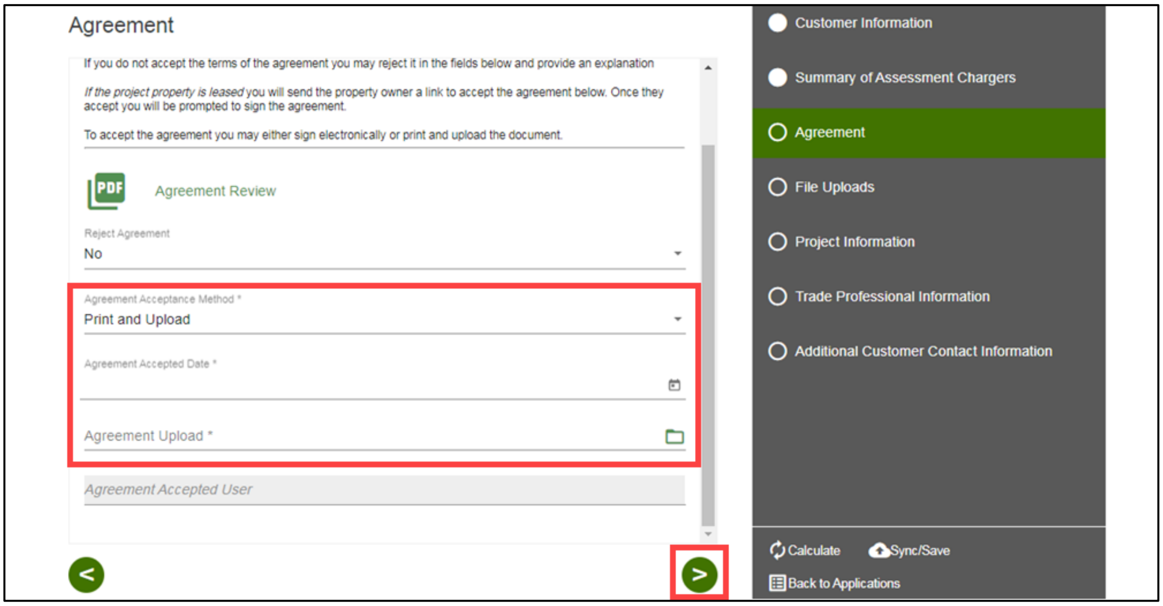


The **File Uploads** page displays.

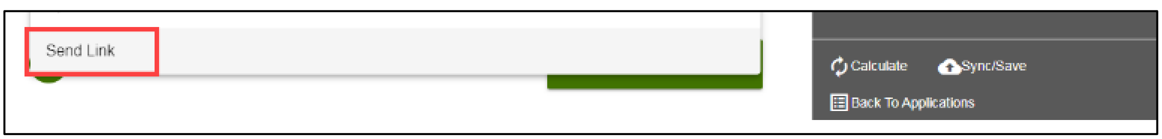
Print and Upload

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

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



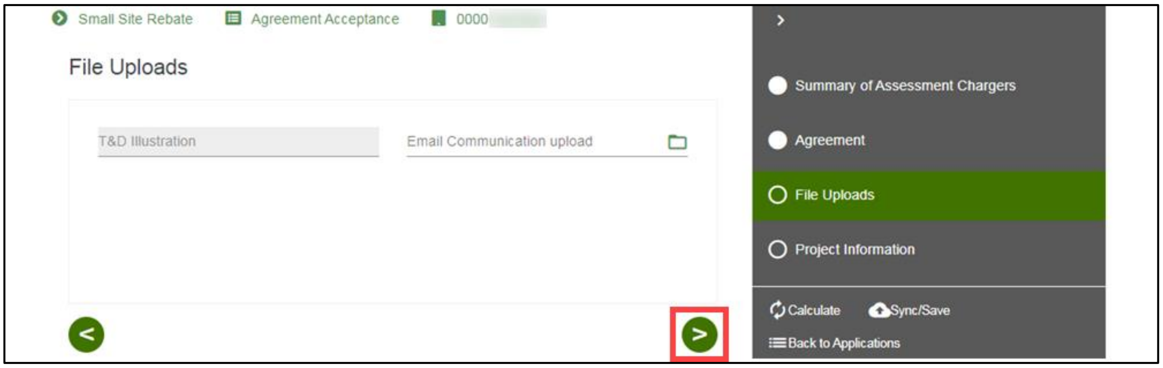
Note: If the Agreement requires a signature from the Property Owner, you will be prompted to send a link for their signature.



The **File Uploads** page displays.

File Uploads

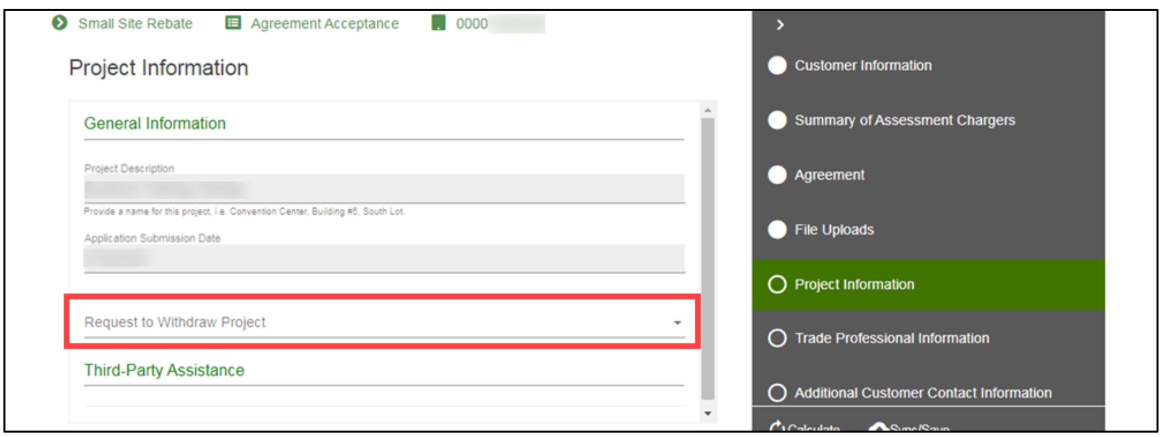
11. Upload an **Email Communication file**, if applicable.
12. Click the **Next** arrow.



The **Project Information** page displays.

Project Information

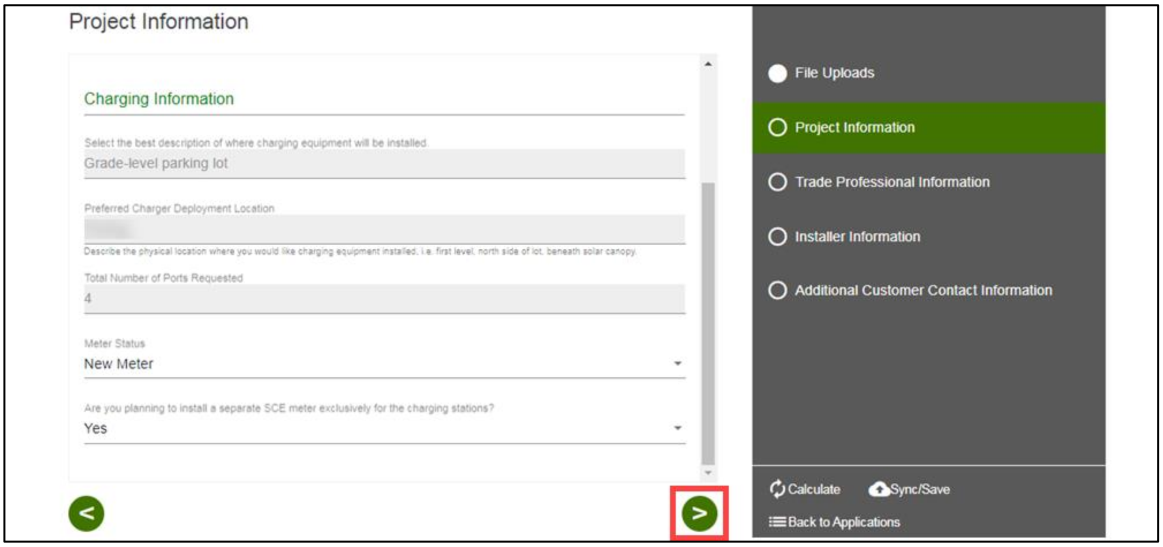
13. Select Yes or No under **Request to Withdraw Project**.



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

15. Confirm the **Charging Information** is correct.

16. Click the **>** **Next** arrow.

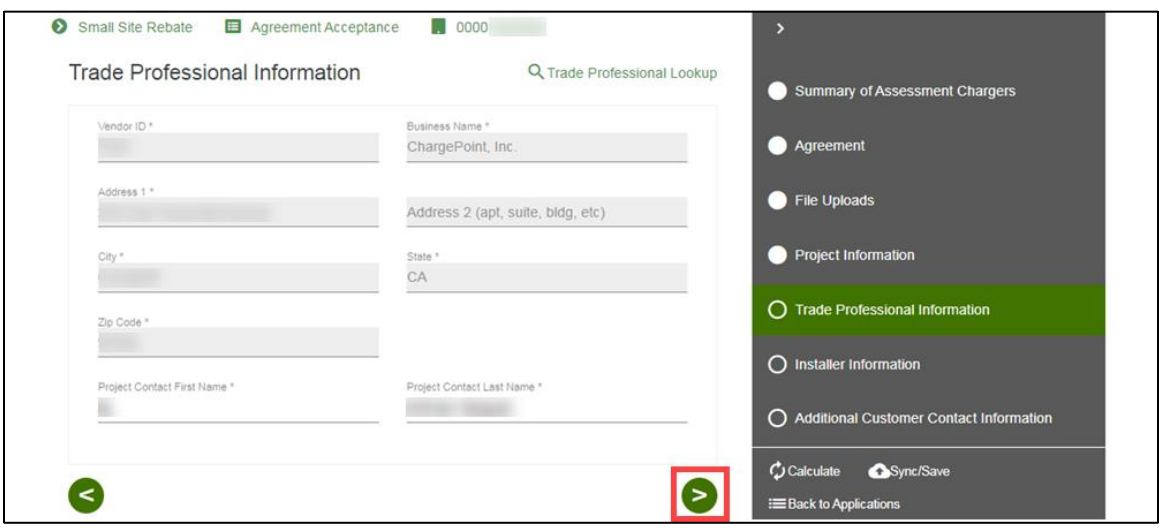


The **Trade Professional Information** page displays.

Trade Professional Information

17. Verify the **Trade Professional Information**.

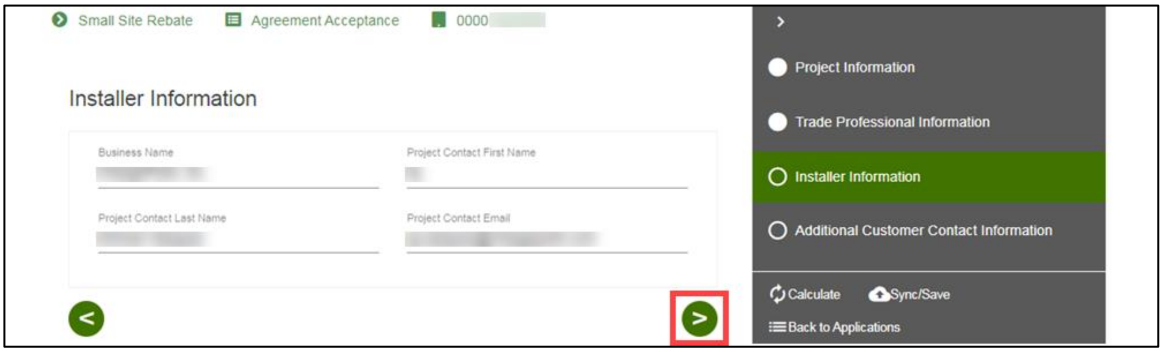
18. Click the **>** **Next** arrow.



The **Installer Information** or **Additional Customer Contact Information** page displays.

Installer Information, if applicable

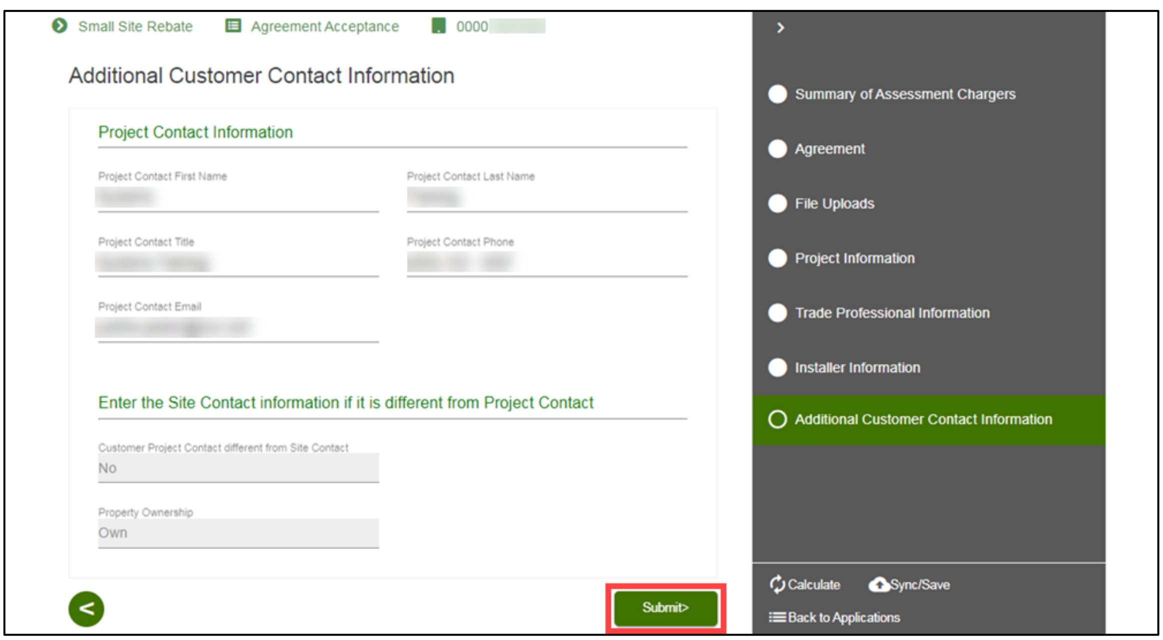
19. Verify the **Installer Information**.
20. Click the **Next** arrow.



The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

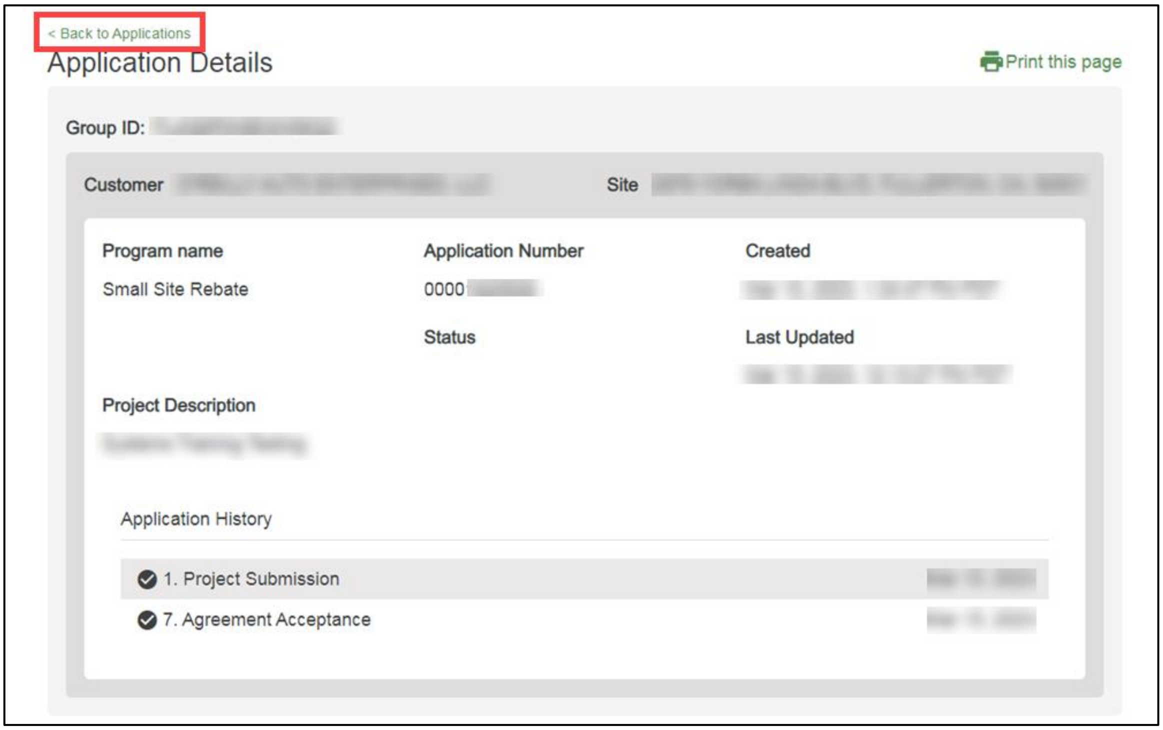


The **Application Details** page displays.

Application Details

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

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



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

Site Plan

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

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

- Specifies the overall site plan.

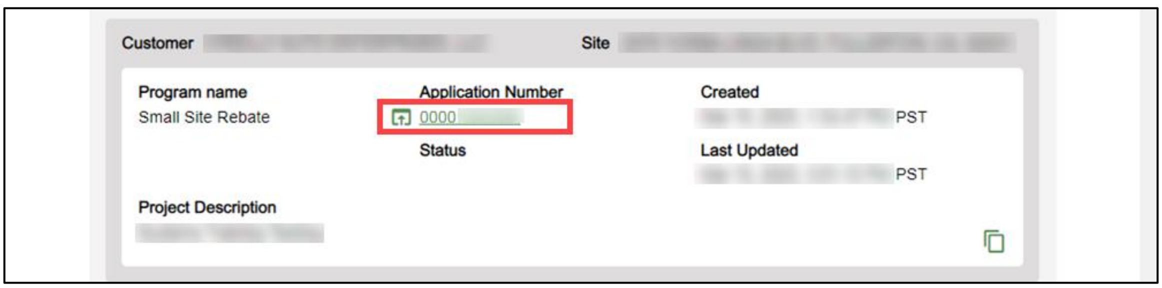
Once a Site Plan is complete, SCE reviews the site plan.

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

Completing the Site Plan Form

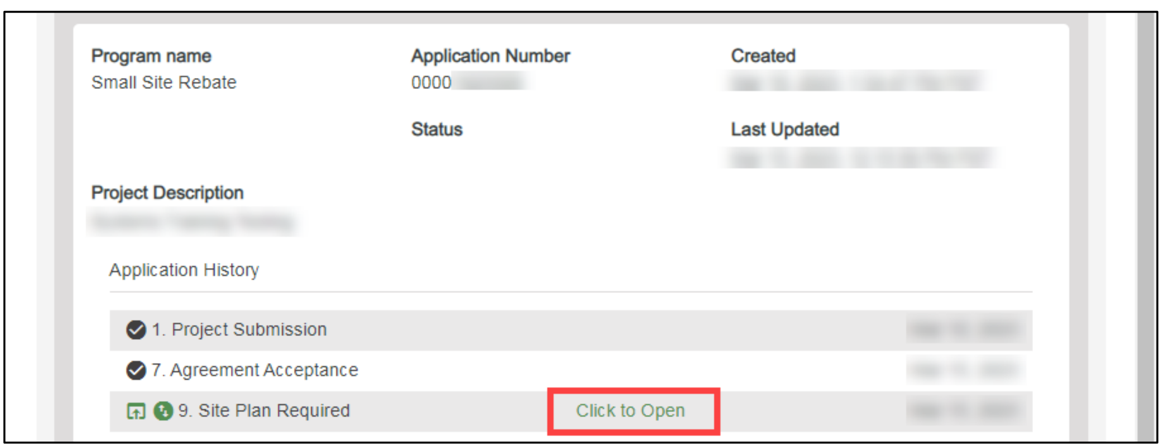
To complete the Site Plan, follow the steps below:

1. Select the **Application Number**.



   The **Application Details** page displays.

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



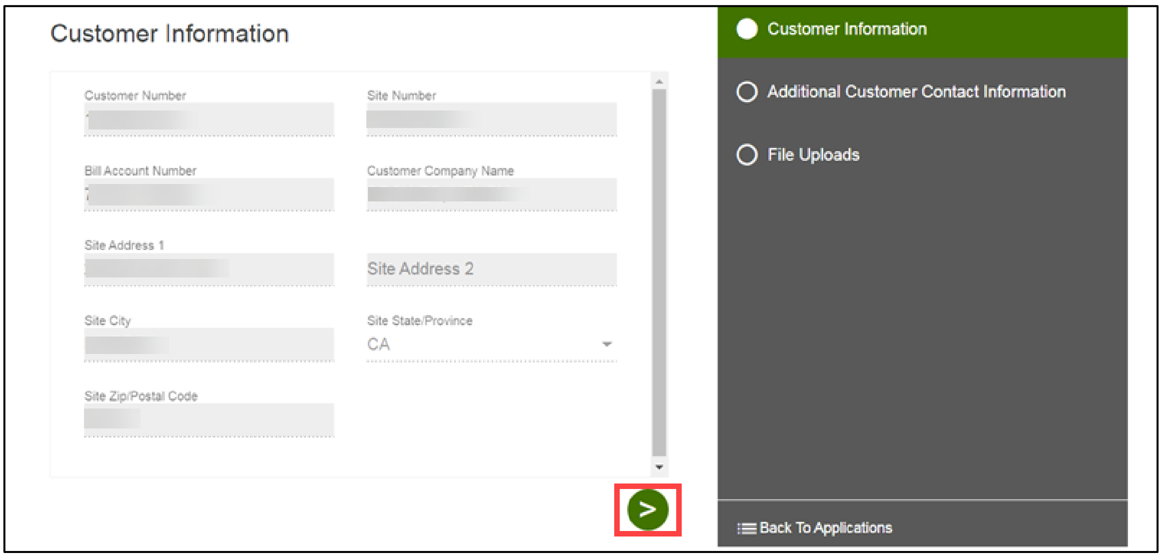
The **Customer Information** page displays.

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

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

Customer Information

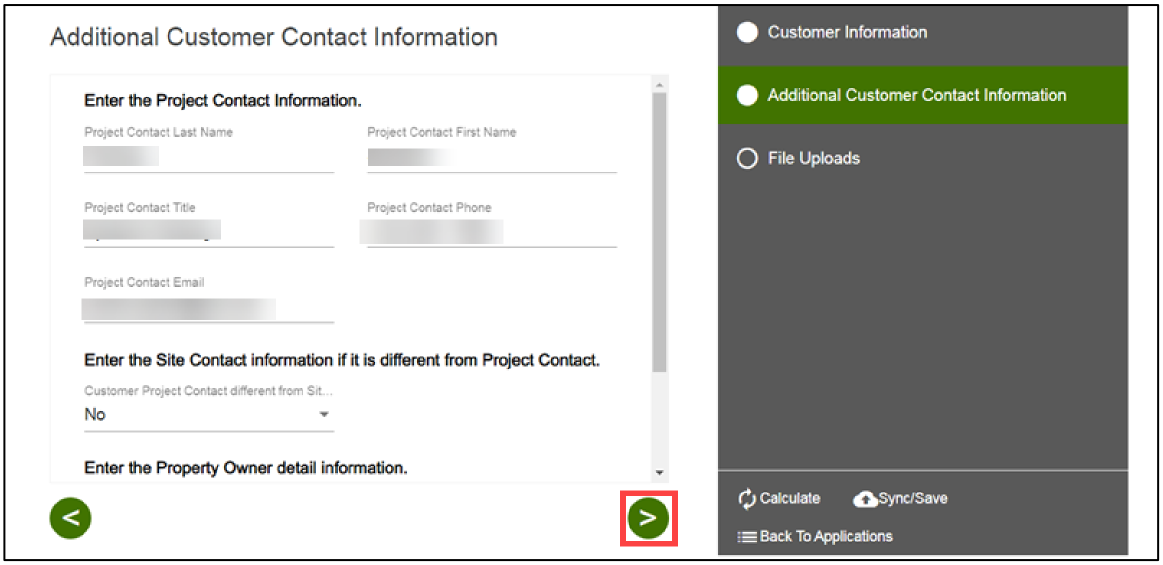
3. Verify the **Customer Information**.
4. Click the **Next** arrow.



The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

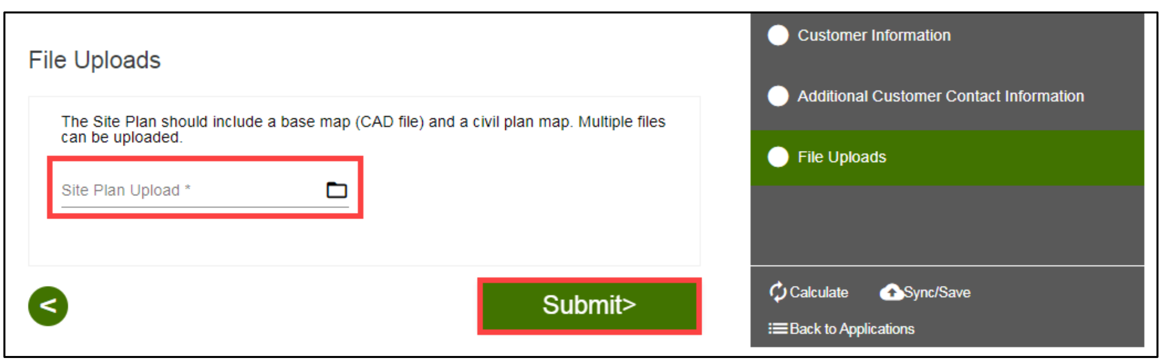


The **File Uploads** page displays.

File Uploads

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

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

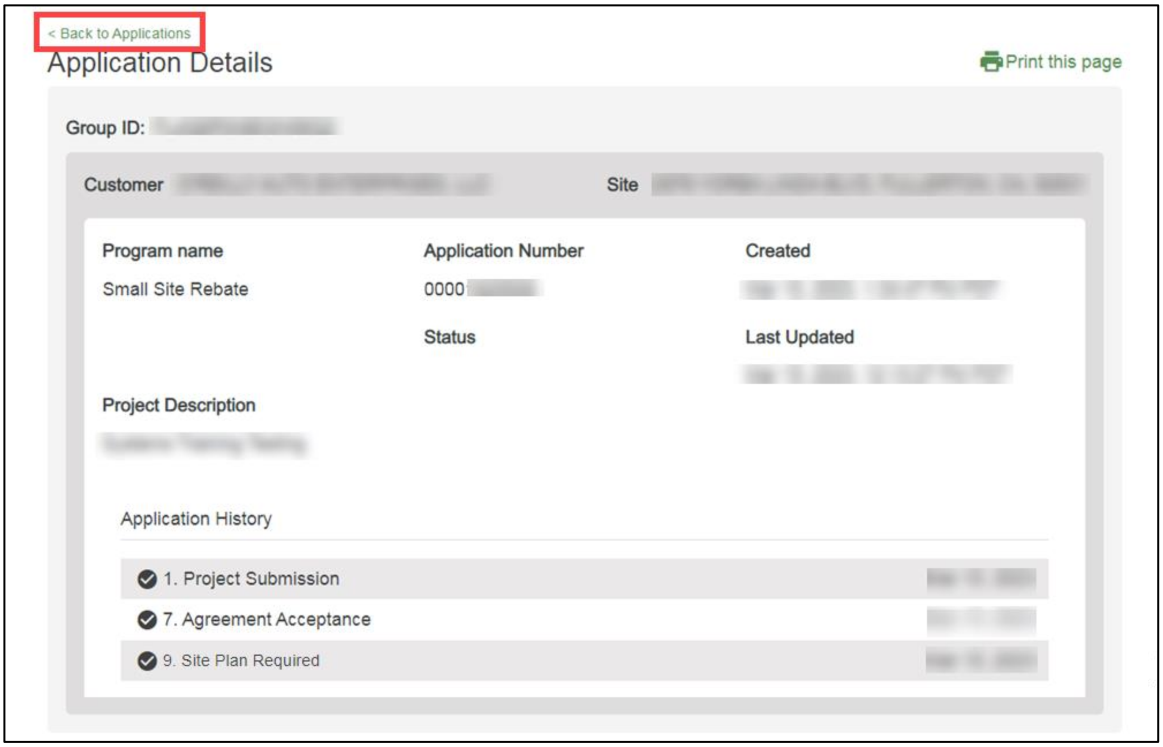


The **Application Details** page displays.

Application Details

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

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



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

Design Acceptance

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

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

- Specifies the design of the site plan

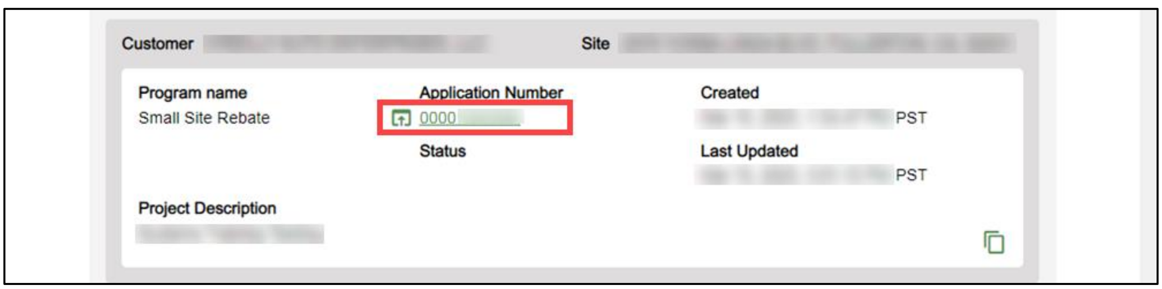
Once a Design Acceptance is complete, SCE begins work on project requirements.

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

Completing the Design Acceptance Form

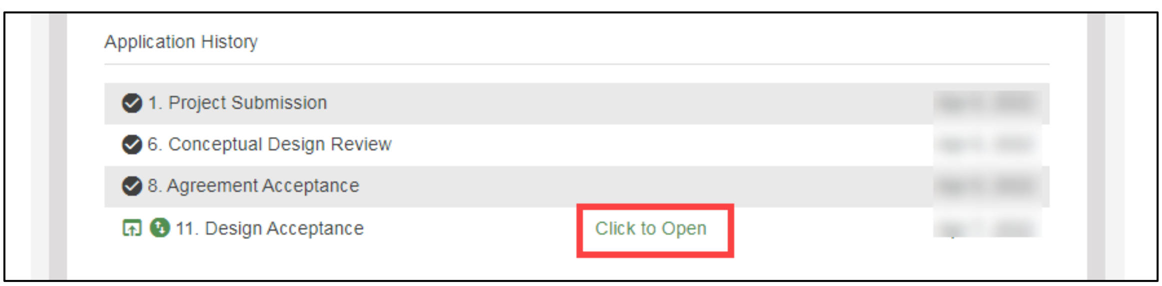
To complete the Design Acceptance, follow the steps below:

1. Select the **Application Number**.



   The **Application Details** page displays.

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



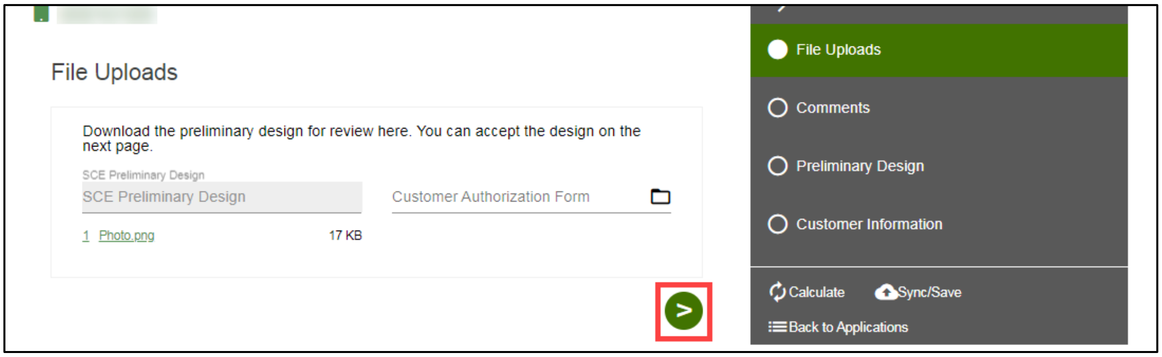
   The **File Uploads** page displays.

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

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

File Uploads

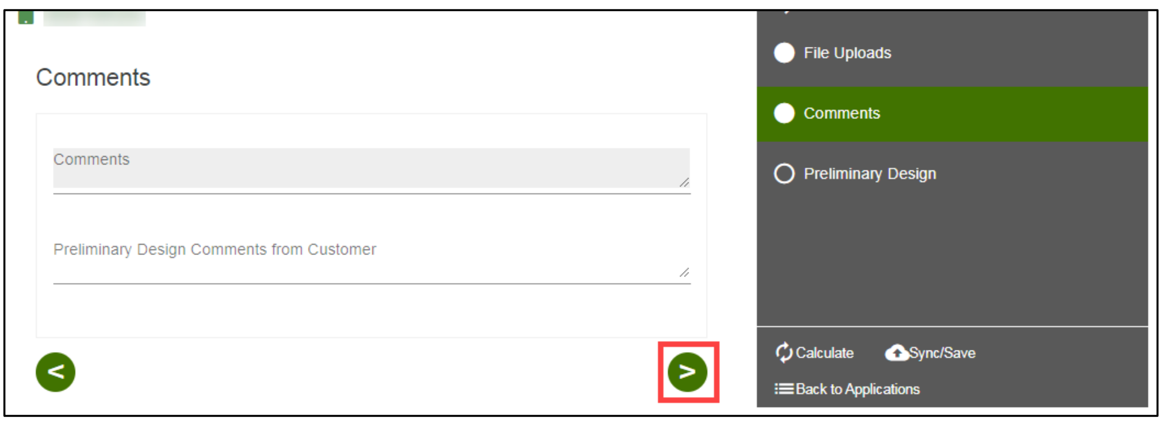
3. Verify the **File Uploads**.
4. Click the > **Next** arrow.



The **Comments** page displays.

Comments

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

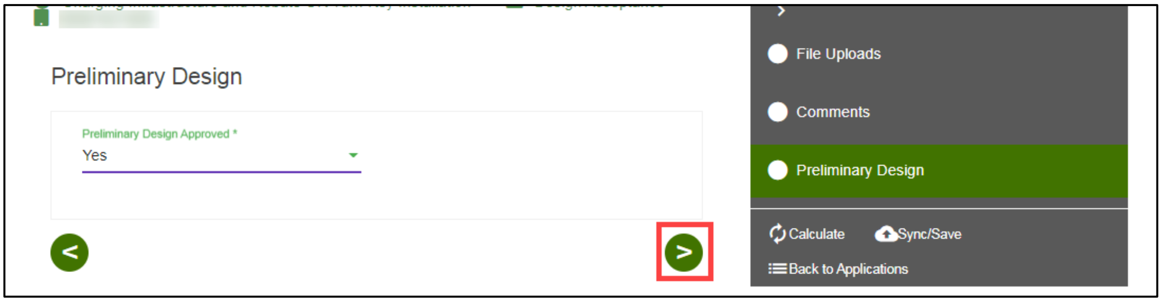


The **Preliminary Design** page displays.

Preliminary Design

7. Select **Yes** or **No** for Preliminary Design Approved.

8. Click the **Next** arrow.



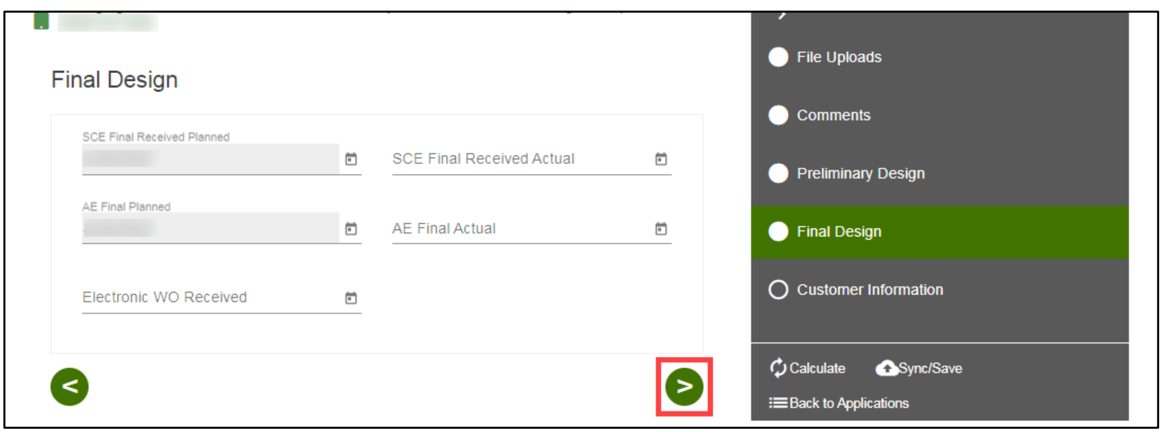
Note: If Preliminary Design Approved is No, enter a **Revision Reason**.

The **Final Design** page displays.

Final Design

9. Upload the applicable files.

10. Click the **Next** arrow.

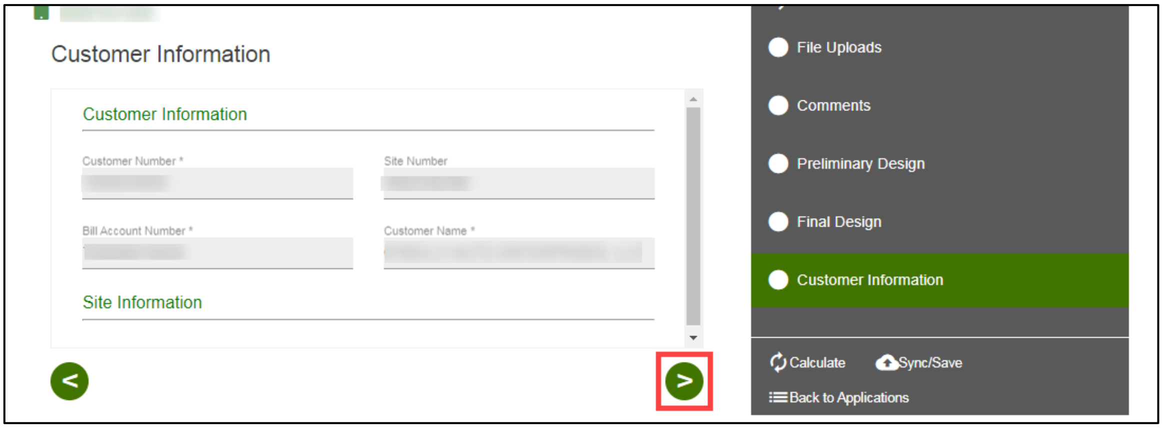


The **Customer Information** page displays.

Customer Information

11. Verify the **Customer Information**.

12. Click the **Next** arrow.

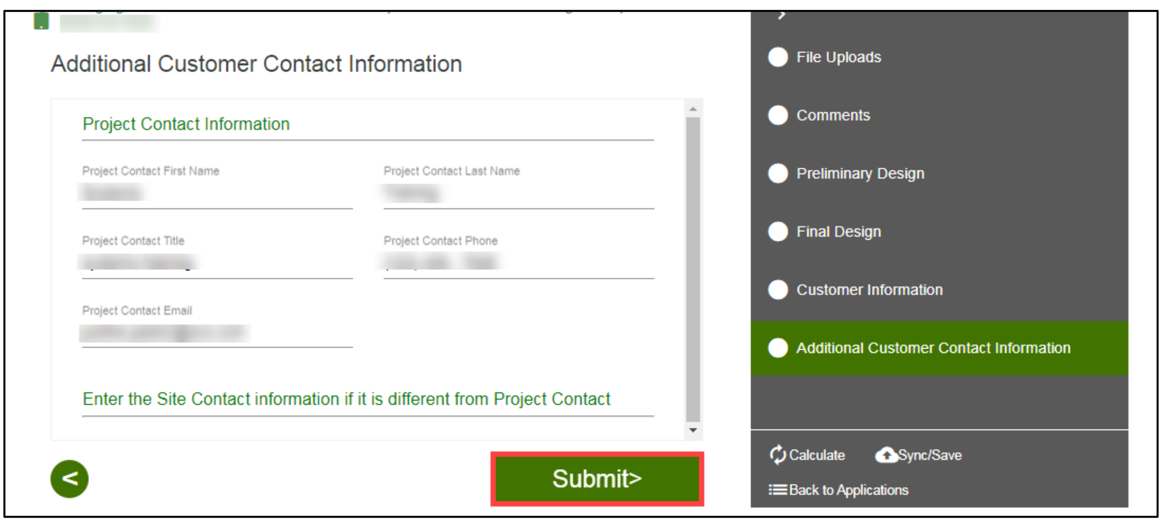


The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

13. Verify the **Additional Customer Contact Information**.

14. Select **Submit**.

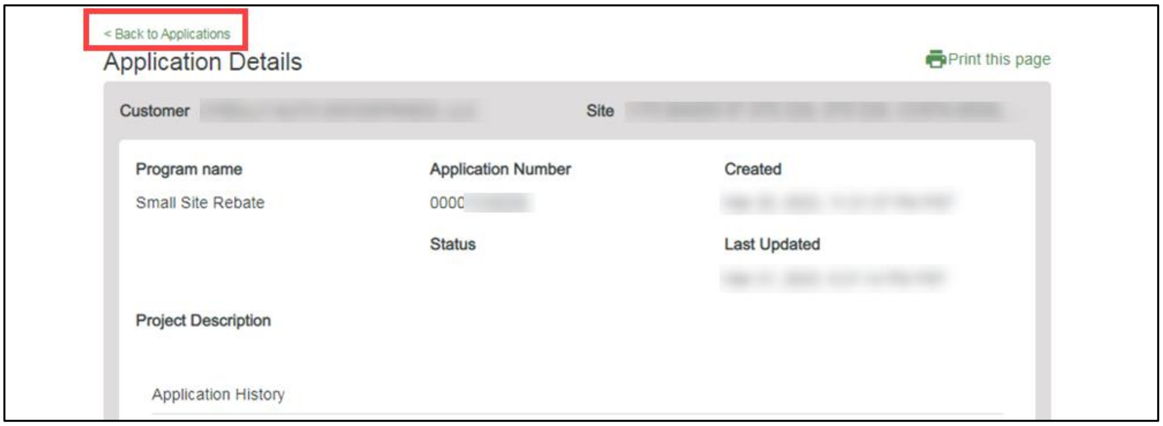


The **Application Details** page displays.

Application Details

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

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



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

Pending Installation and Incentive Request

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

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

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

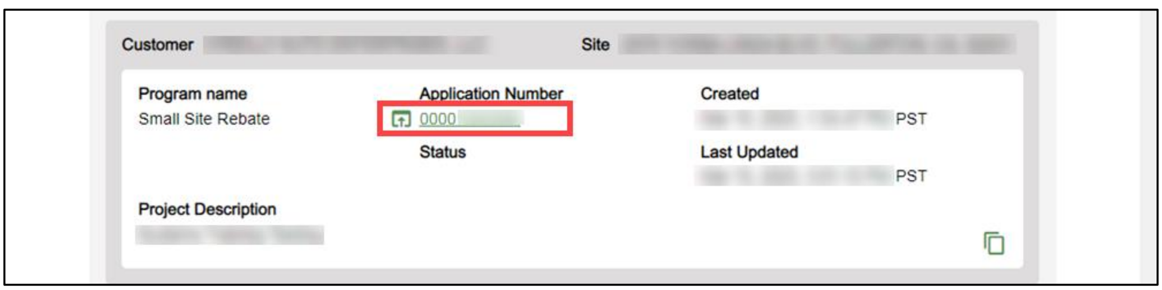
Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

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

Completing the Pending Installation and Incentive Request Form

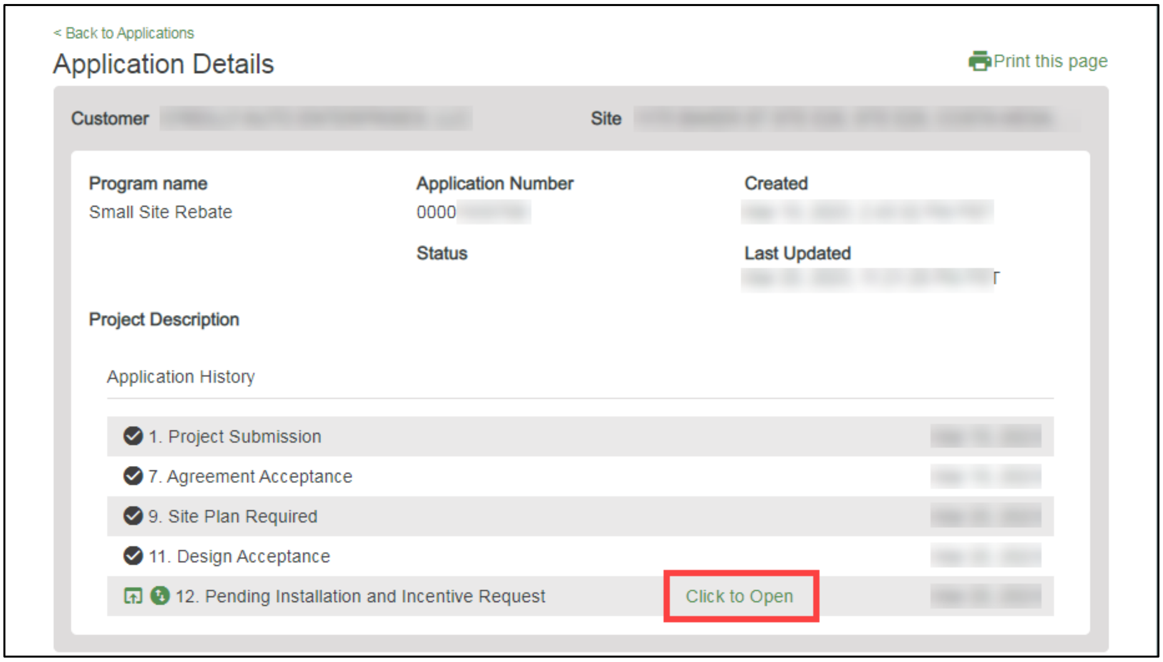
To complete the Pending Installation and Incentive Request form, follow the steps below.

1. Select the **Application Number**.



The **Application Details** page displays.

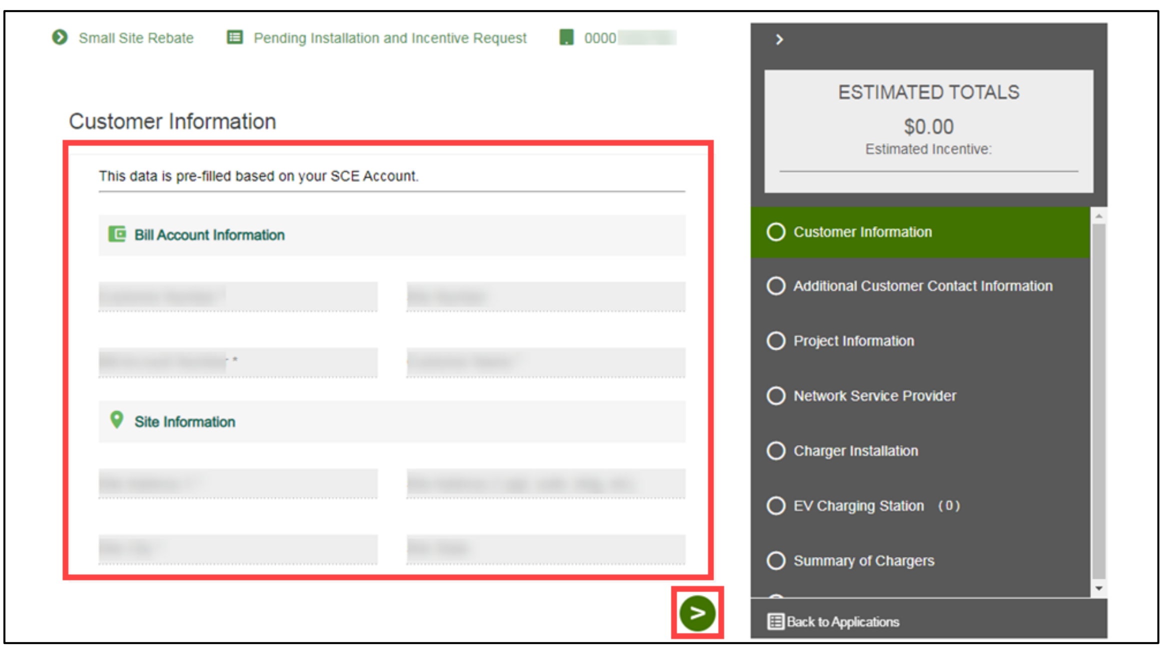
2. Select **Click to Open** under 12. Pending Installation and Incentive Request.



The **Customer Information** page displays.

Customer Information

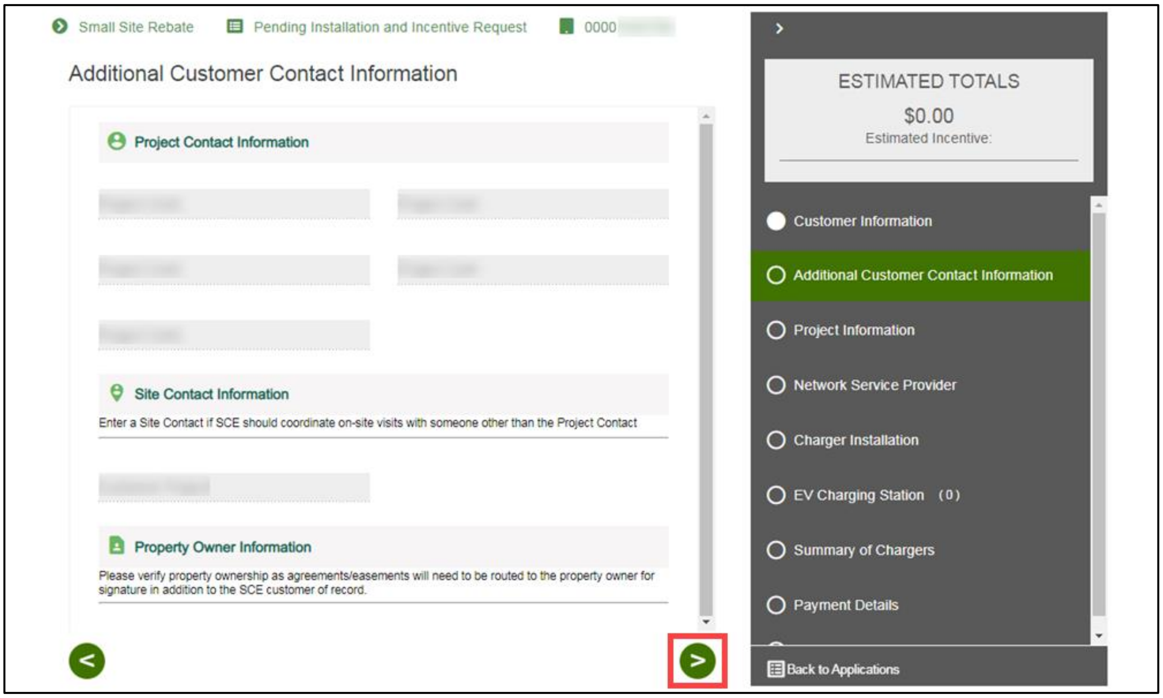
3. Confirm the **Bill Account Information** and **Site Information**.
4. Click the **Next** arrow.



The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

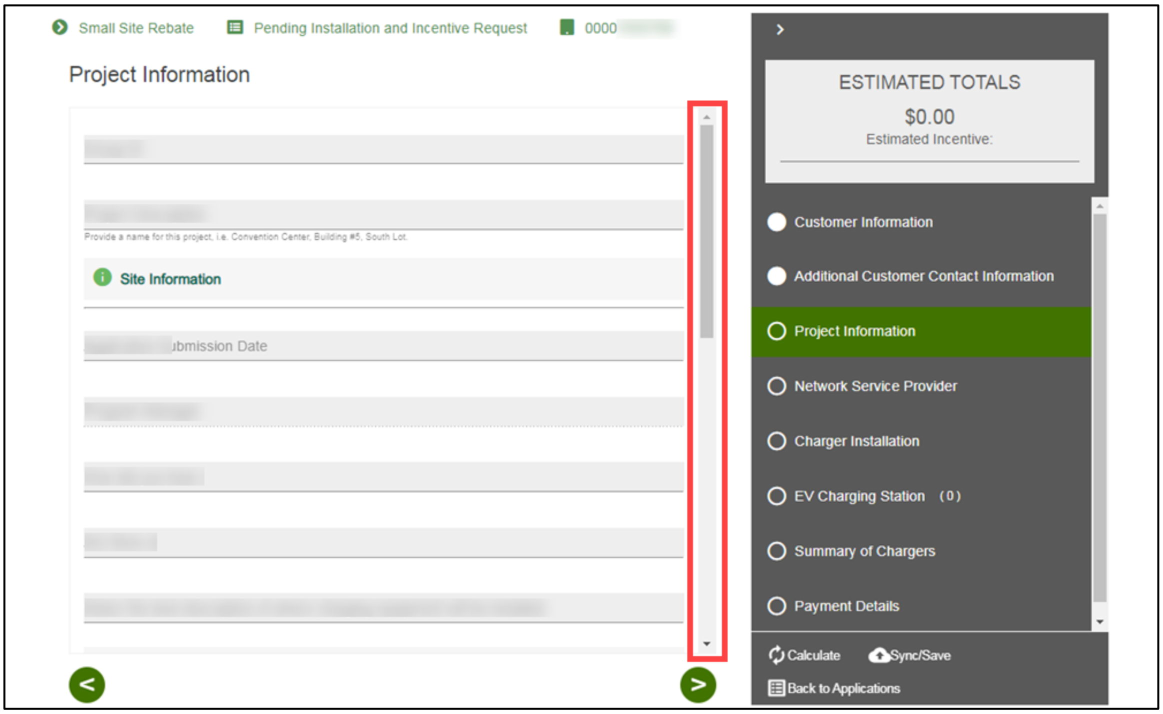
5. Verify the **Project Contact Information**, **Site Contact Information**, and **Property Owner Information**.
6. Click the > **Next** arrow.



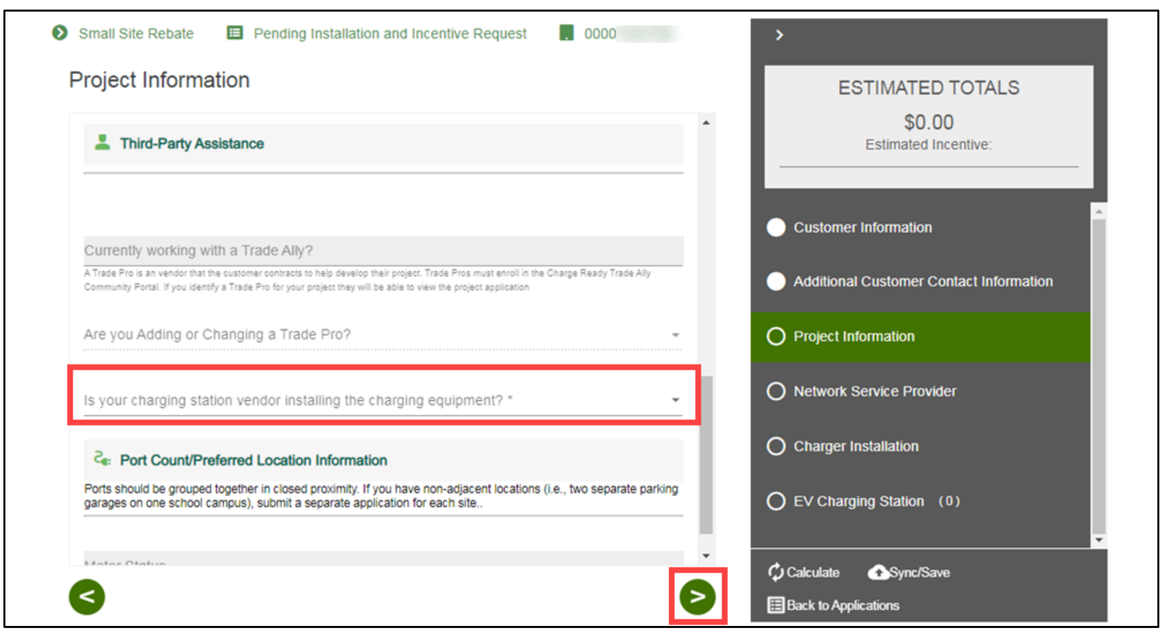
The **Project Information** page displays.

Project Information

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



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

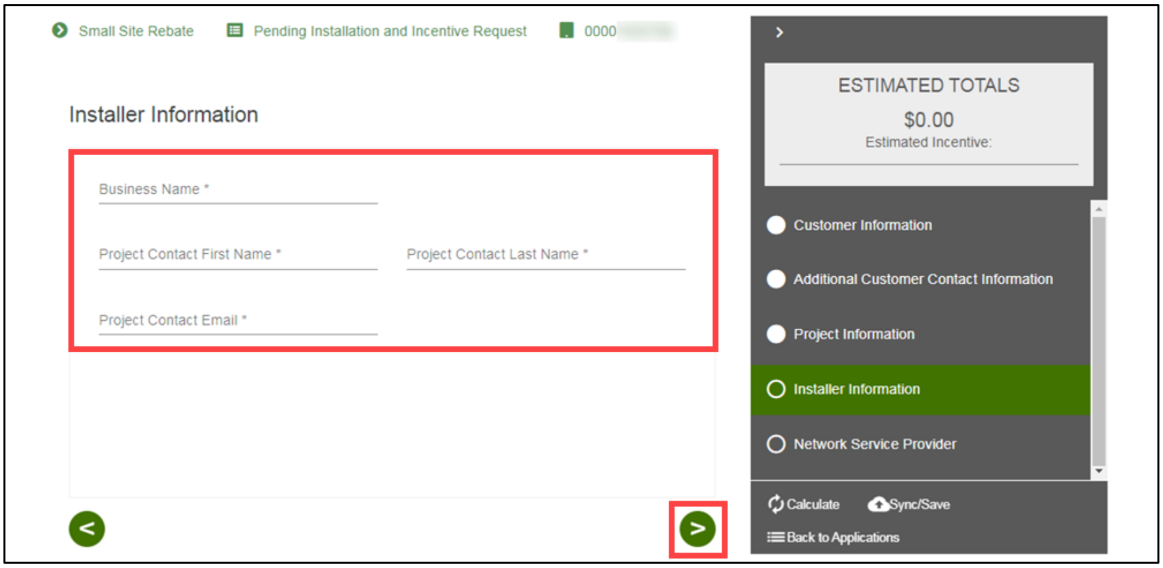


The **Installer Information** or **Network Service Provider** page displays.

Installer Information

11. Enter the **Installer Information**, if applicable.

12. Click the **Next** arrow.

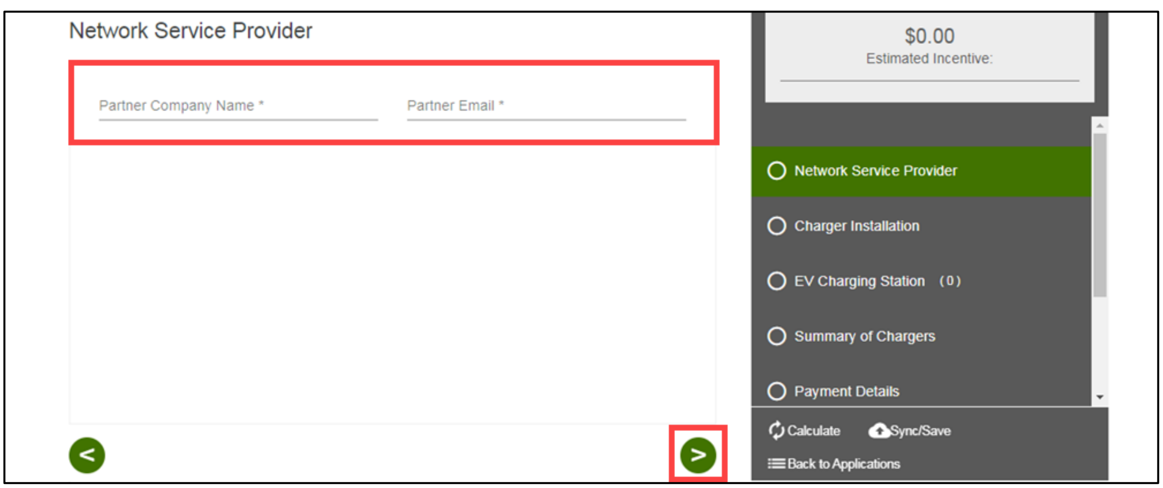


The **Network Service Provider Information** page displays.

Network Service Provider

13. Enter the **Partner Company Name** and **Partner Email**.

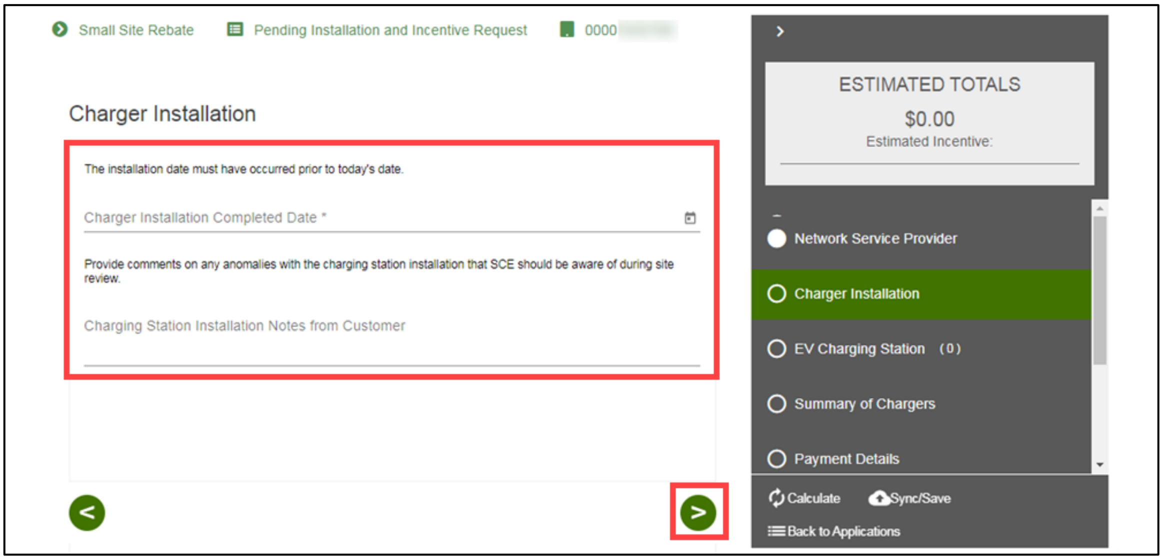
14. Click the **Next** arrow.



The **Charger Installation** page displays.

Charger Installation

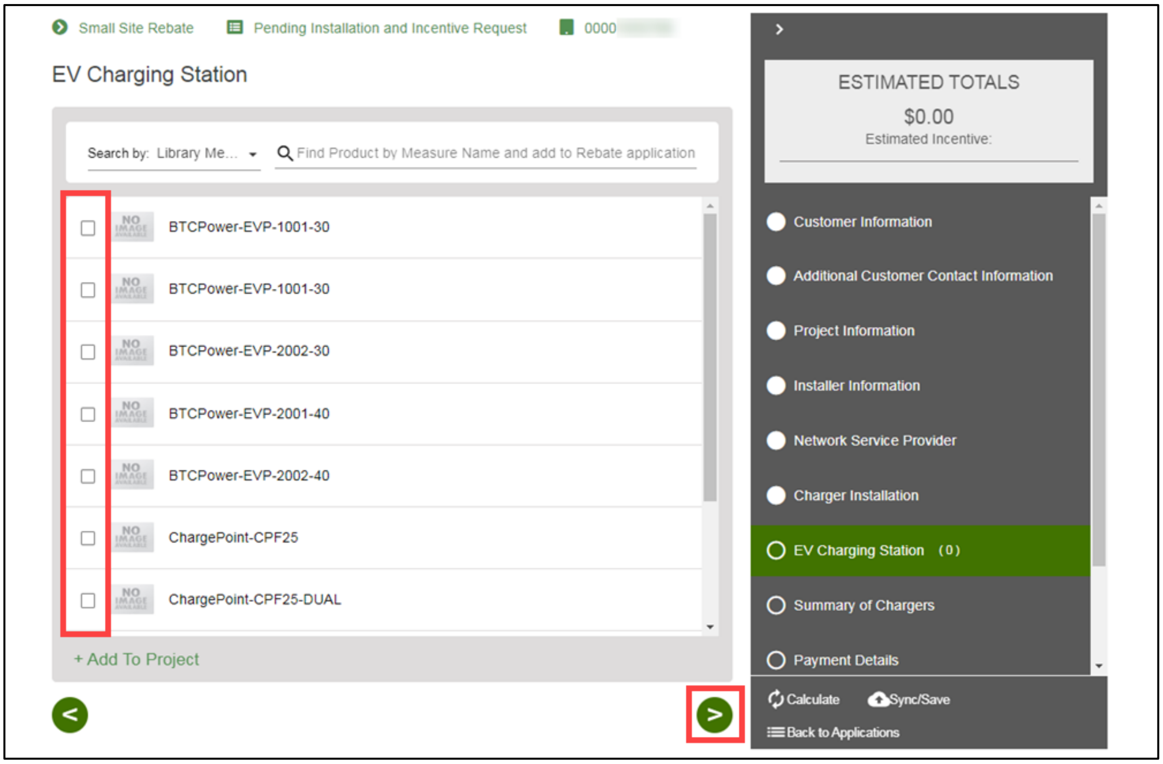
15. Enter the **Charger Installation Completed Date**.
16. Enter notes, if applicable.
17. Click the **Next** arrow.



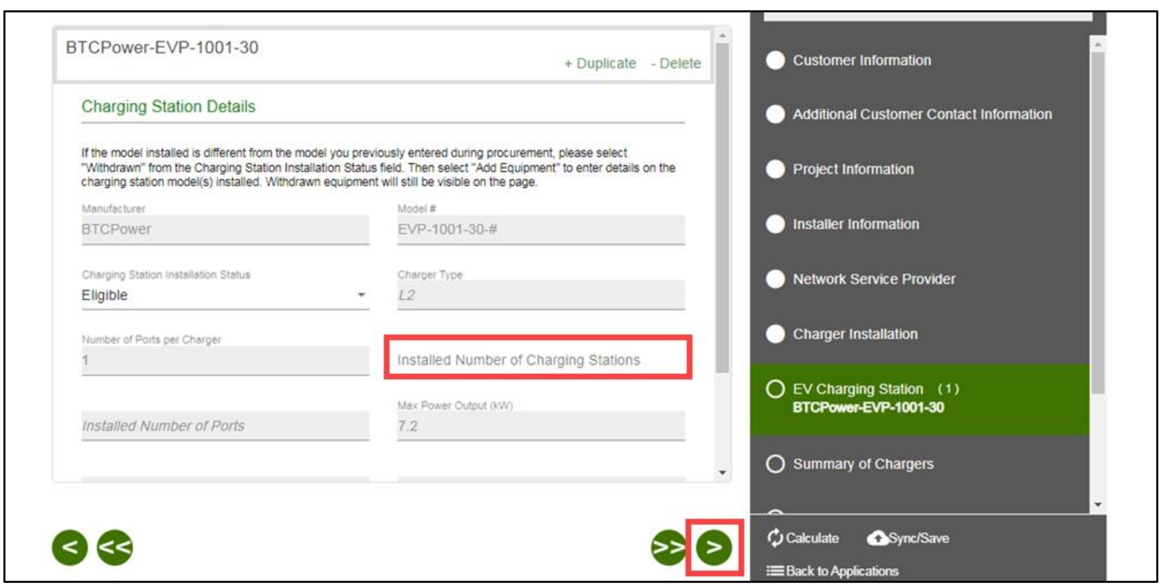
The **EV Charging Station** page displays.

EV Charging Station

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



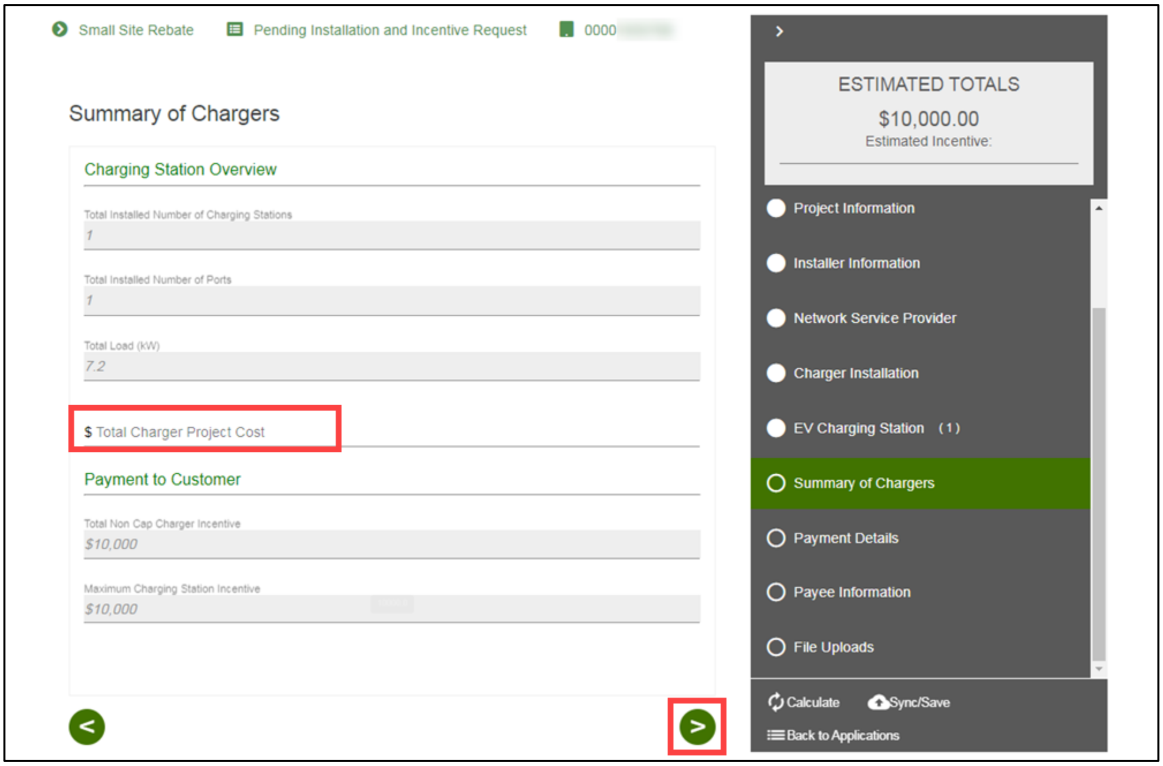
20. Enter the **Installed Number of Charging Stations**.
21. Click the **Next** arrow.



The **Summary of Chargers** page displays.

Summary of Chargers

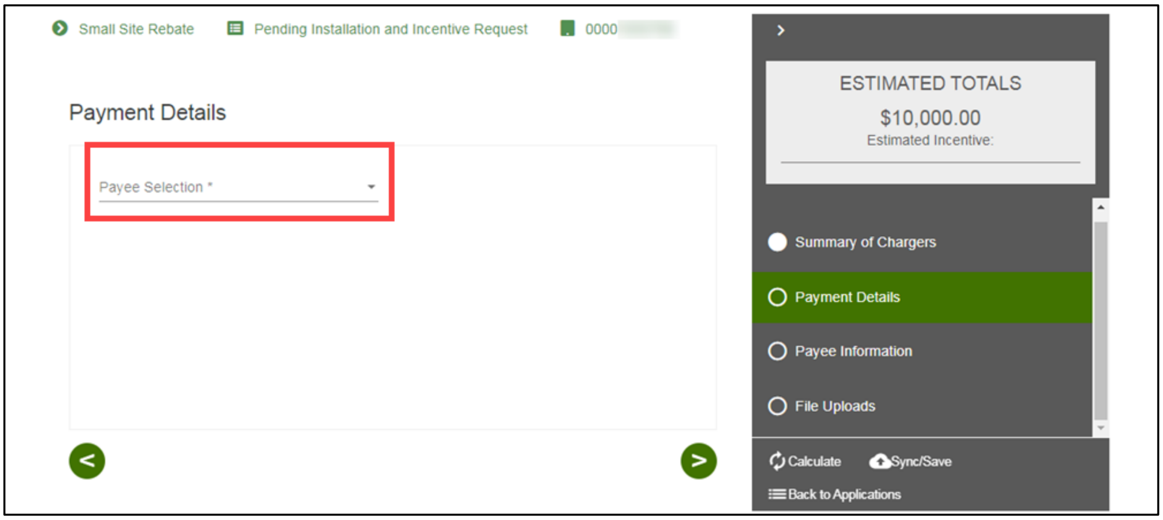
22. Enter the **Total Charger Project Cost**.
23. Click the  **Next** arrow.



The **Payment Details** page displays.

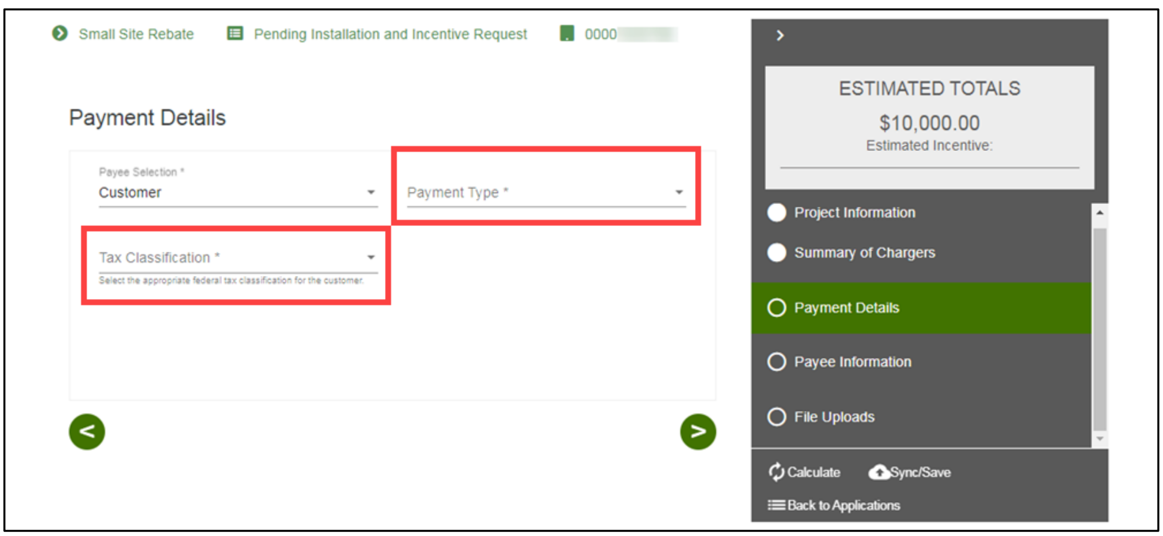
Payment Details

24. Select a **Payee Selection**.



Additional fields display.

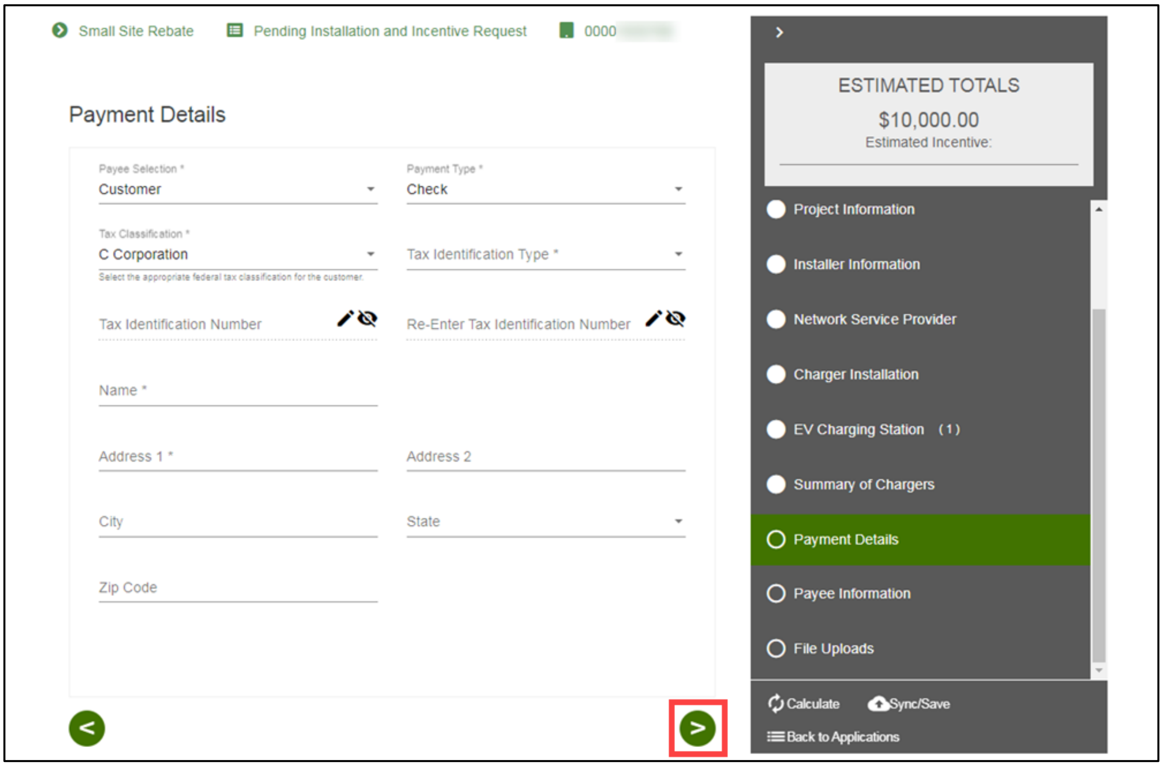
25. Select the **Payment Type**.
26. Select the **Tax Classification**.



Additional fields display.

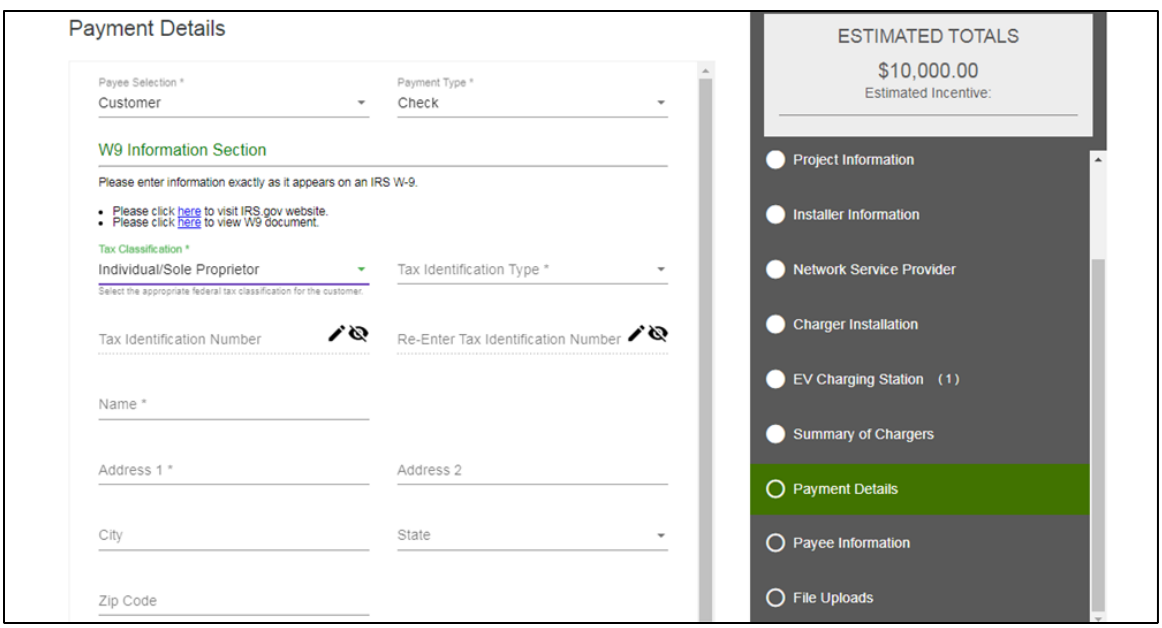
27. Complete the required information.

28. Click the **Next** arrow.



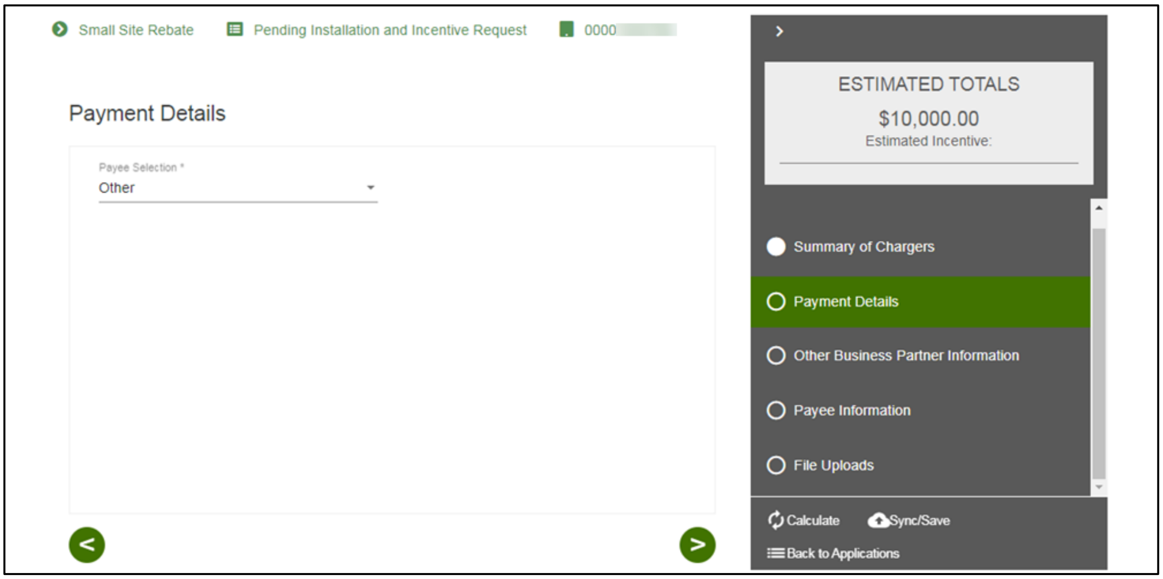
The **Payee Information** page displays.

Note: Certain Tax Classifications require more information.



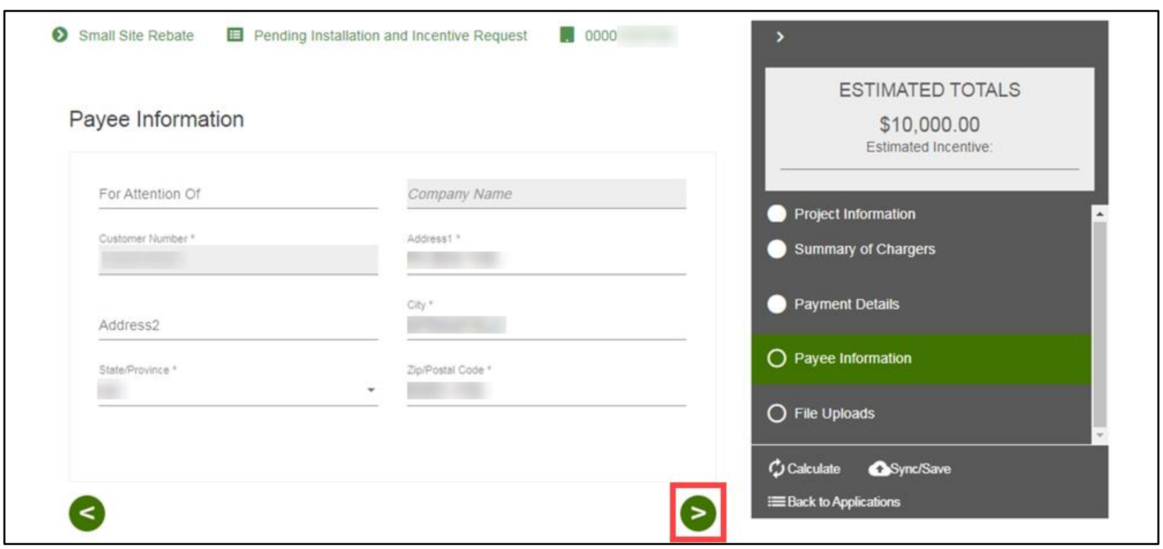
Other Payee Selection

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



Payee Information

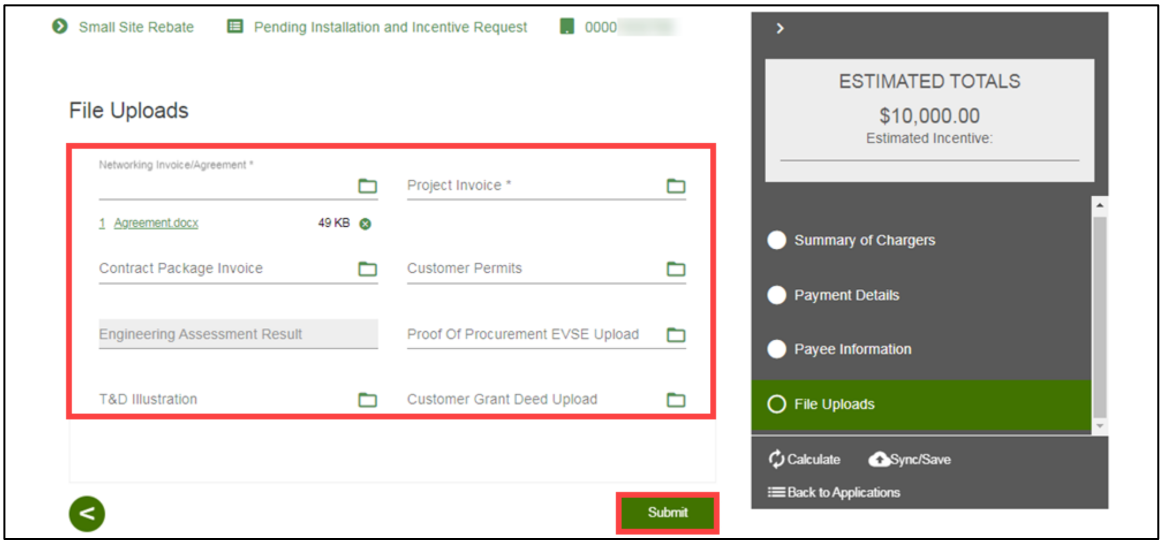
29. Enter and verify the required information.
30. Click the **Next** arrow.



The **File Uploads** page displays.

File Uploads

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

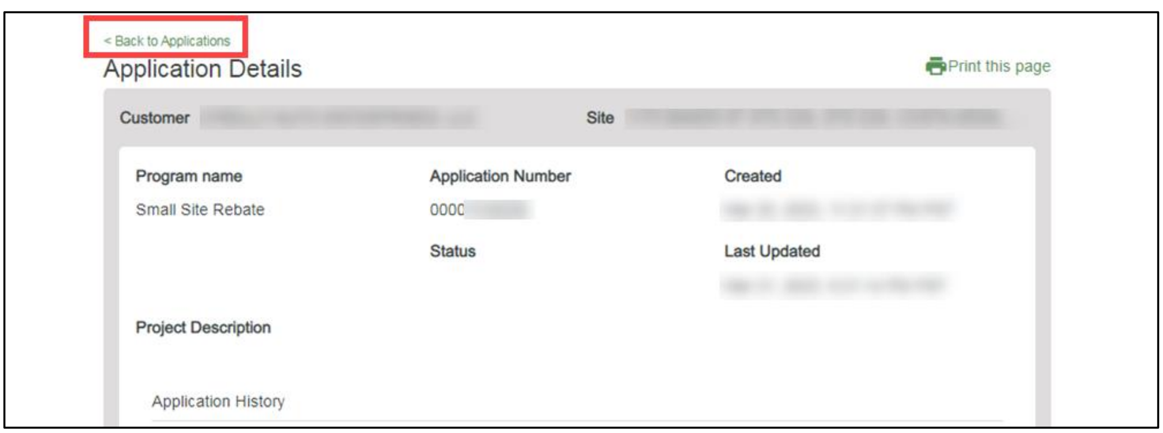


The **Application Details** page displays.

Application Details

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

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



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