

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

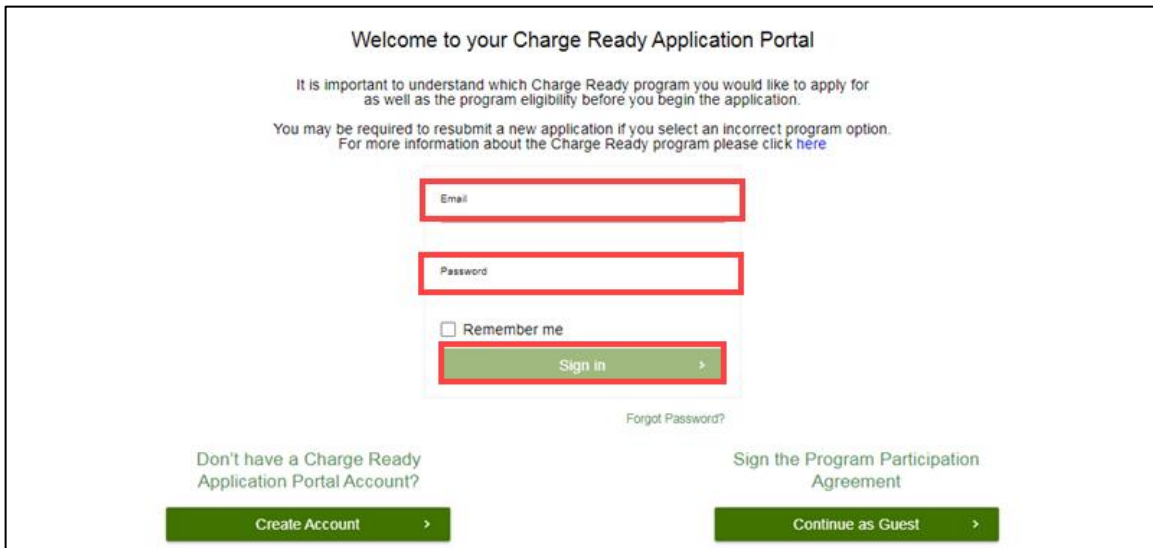
Accessing the Charge Ready Application Portal

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**.



Welcome to your Charge Ready Application Portal

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 application if you select an incorrect program option. For more information about the Charge Ready program please click [here](#).

Email

Password

Remember me

Sign in >

[Forgot Password?](#)

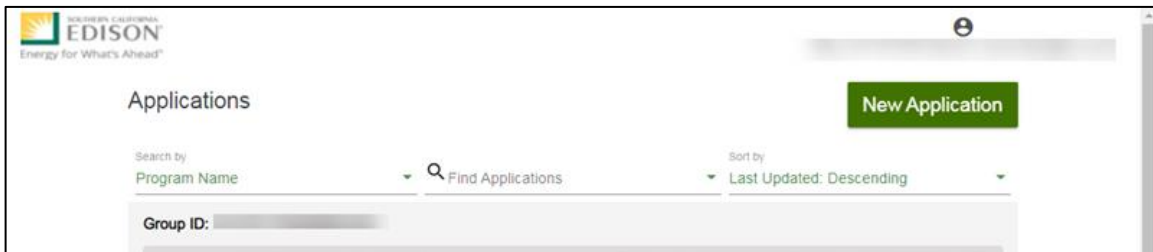
Don't have a Charge Ready Application Portal Account?

Create Account >

Sign the Program Participation Agreement

Continue as Guest >

The **Applications** page displays.



EDISON
Energy for What's Ahead®

Applications

New Application

Search by
Program Name

Find Applications

Sort by
Last Updated: Descending

Group ID: _____

Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals

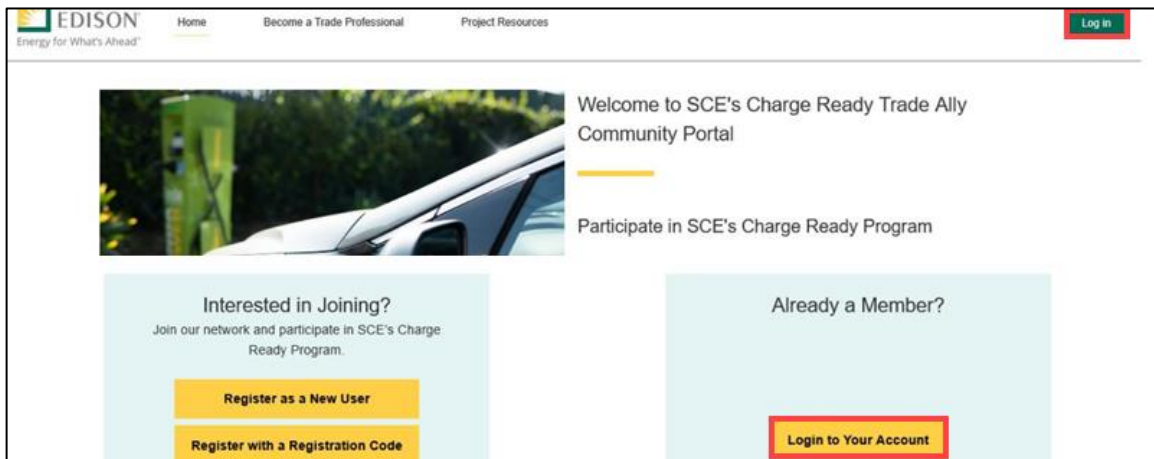
If you are a Charge Ready Trade Professional, you must have access to the Charge Ready Trade Ally Community (TAC) Portal. You and your company must also be approved by SCE to apply for rebates on behalf of the customer(s).

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

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

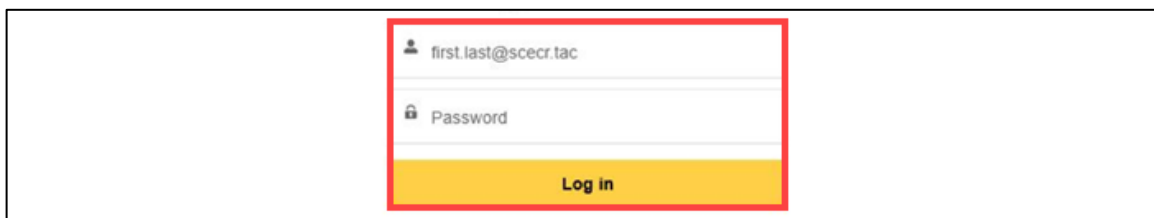
The **TAC landing page displays**.

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



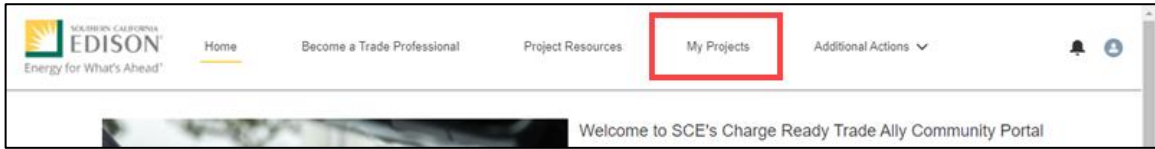
The **Login** page displays.

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



The **TAC Home Page displays**.

6. Select **My Projects**.

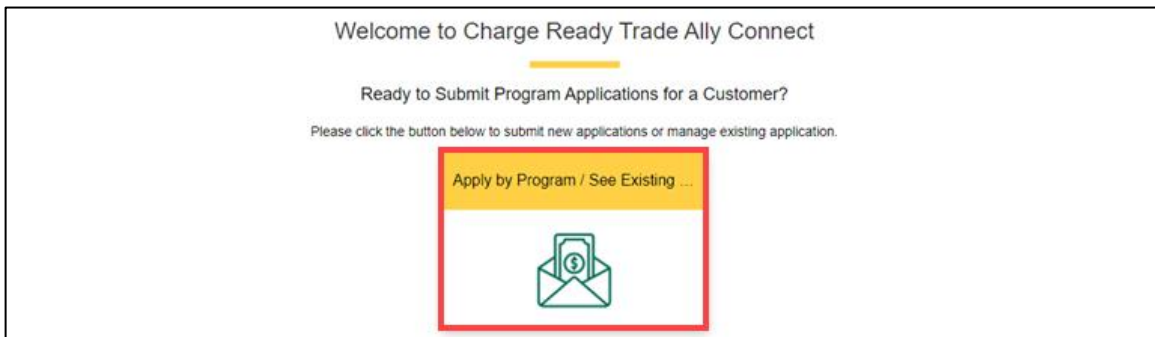


Note: If the My Projects tab is not on the screen, your company profile is not yet approved as a Charge Ready Trade Professional.

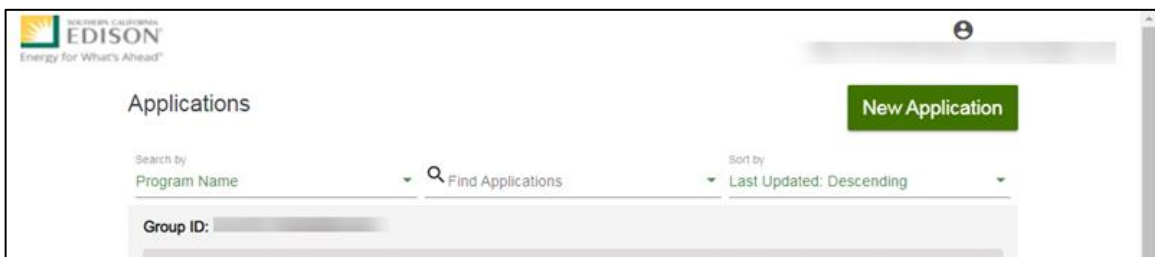


The **My Projects** page displays.

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.

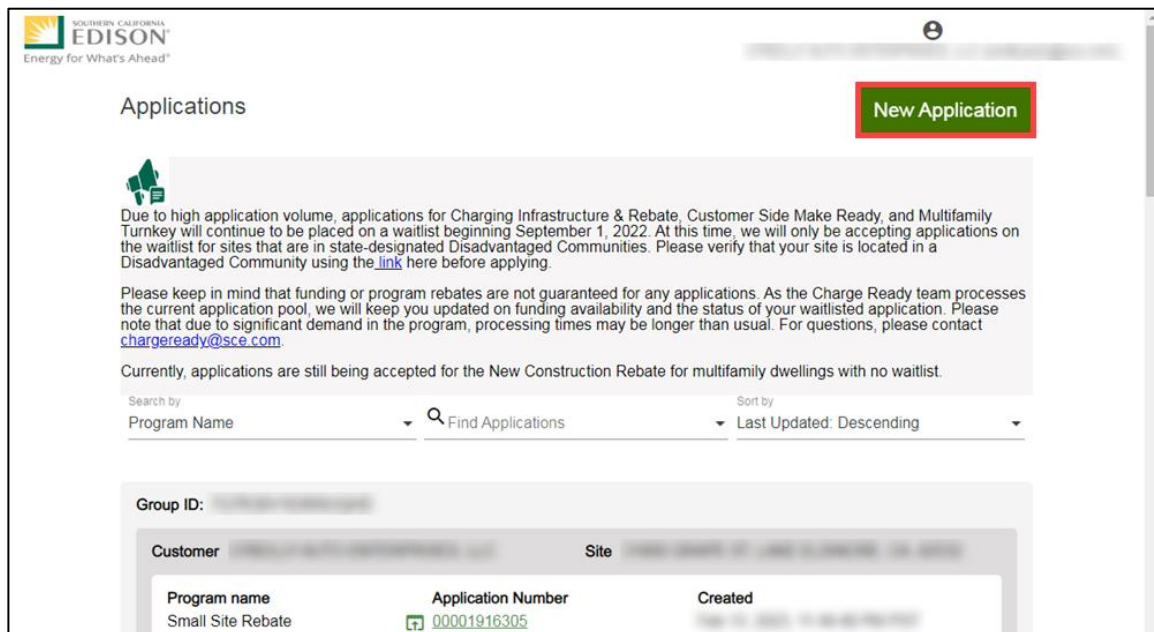
Once a Project Submission is complete, SCE determines the eligibility for program participation.

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**.

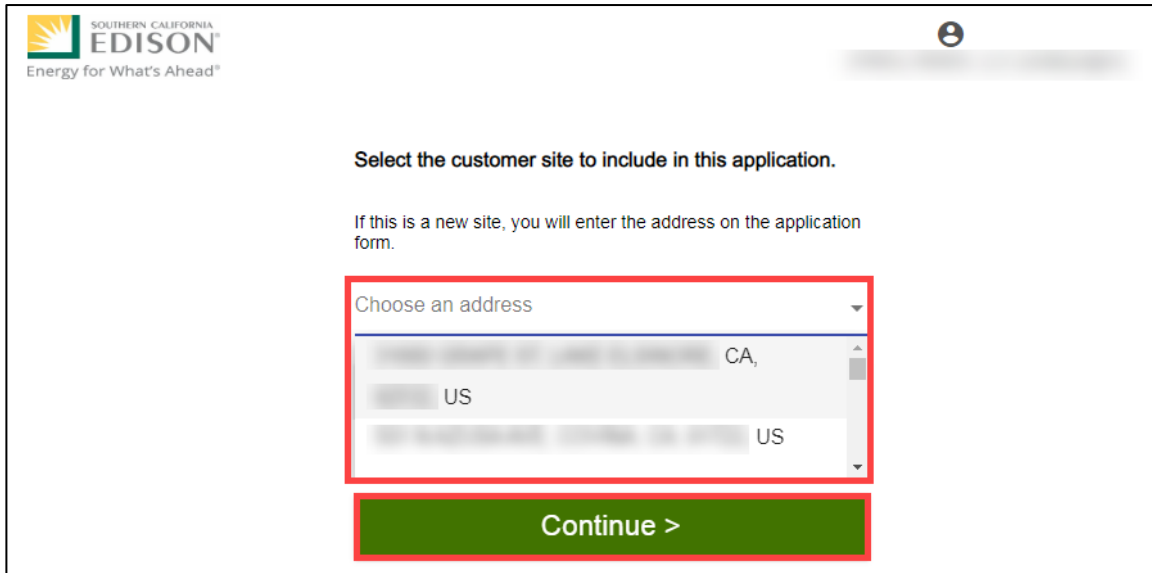


The **Select customer site to include in this application** page displays.

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.

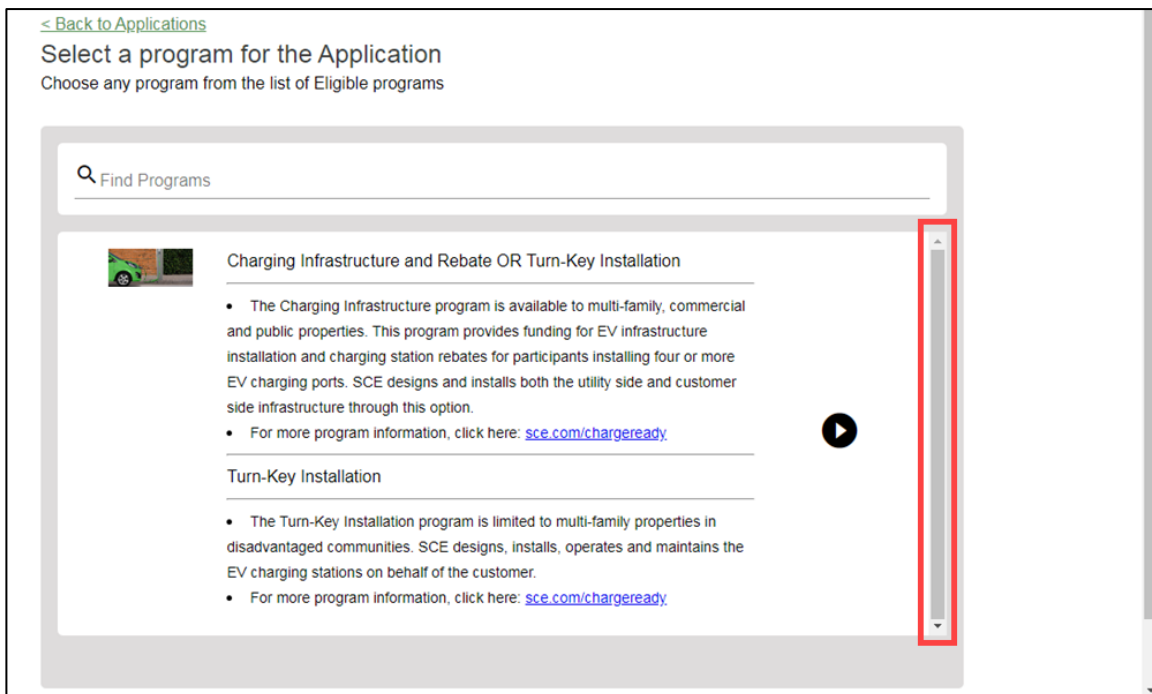
3. Click **Continue**.



The screenshot shows the Southern California Edison logo at the top left. The main heading is "Select the customer site to include in this application." Below this, a note states: "If this is a new site, you will enter the address on the application form." A red box highlights a drop-down menu labeled "Choose an address" which is open, showing three options: "12345678901234567890 CA", "12345678901234567890 US", and "12345678901234567890 US". Below the menu is a green button labeled "Continue >".

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

4. Scroll down.



The screenshot shows the "Select a program for the Application" page. At the top left, there is a link "< Back to Applications". The heading is "Select a program for the Application" with the subtext "Choose any program from the list of Eligible programs". Below this is a search bar labeled "Find Programs". A red box highlights a vertical scrollbar on the right side of the page, indicating that the user should scroll down. The page content includes a search bar, a list of programs, and a play button icon.

< Back to Applications

Select a program for the Application

Choose any program from the list of Eligible programs


Find Programs

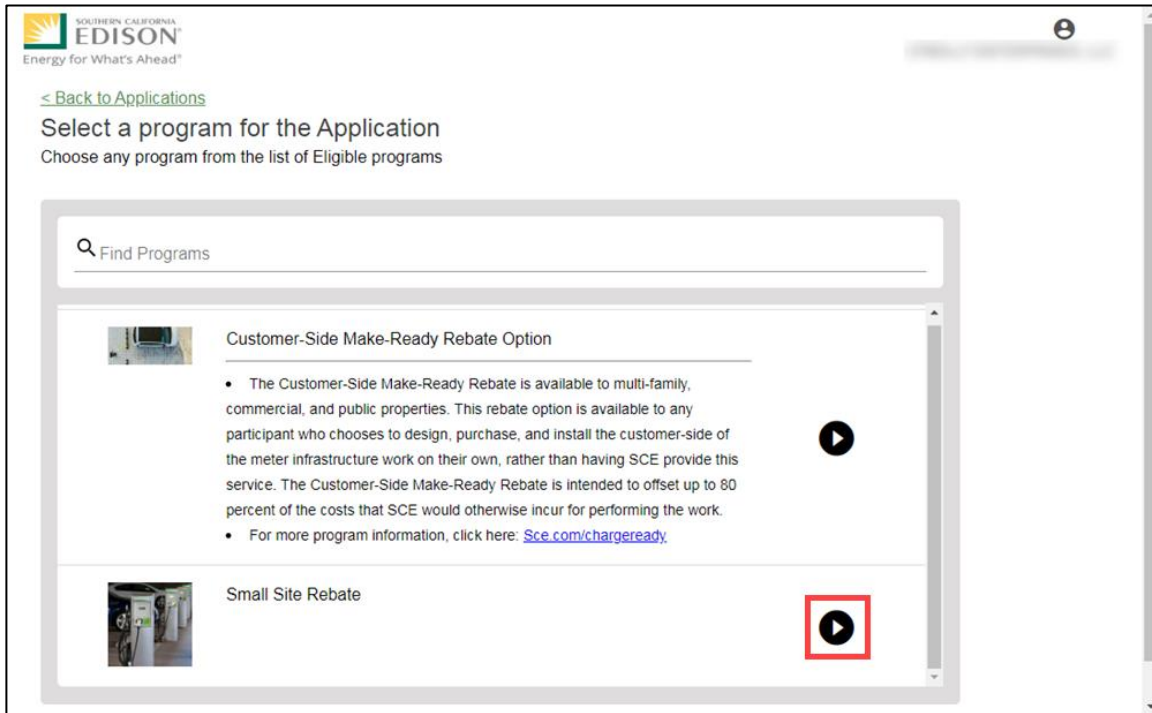
Charging Infrastructure and Rebate OR Turn-Key Installation

- The Charging Infrastructure program is available to multi-family, commercial and public properties. This program provides funding for EV infrastructure installation and charging station rebates for participants installing four or more EV charging ports. SCE designs and installs both the utility side and customer side infrastructure through this option.
- For more program information, click here: sce.com/chargeready

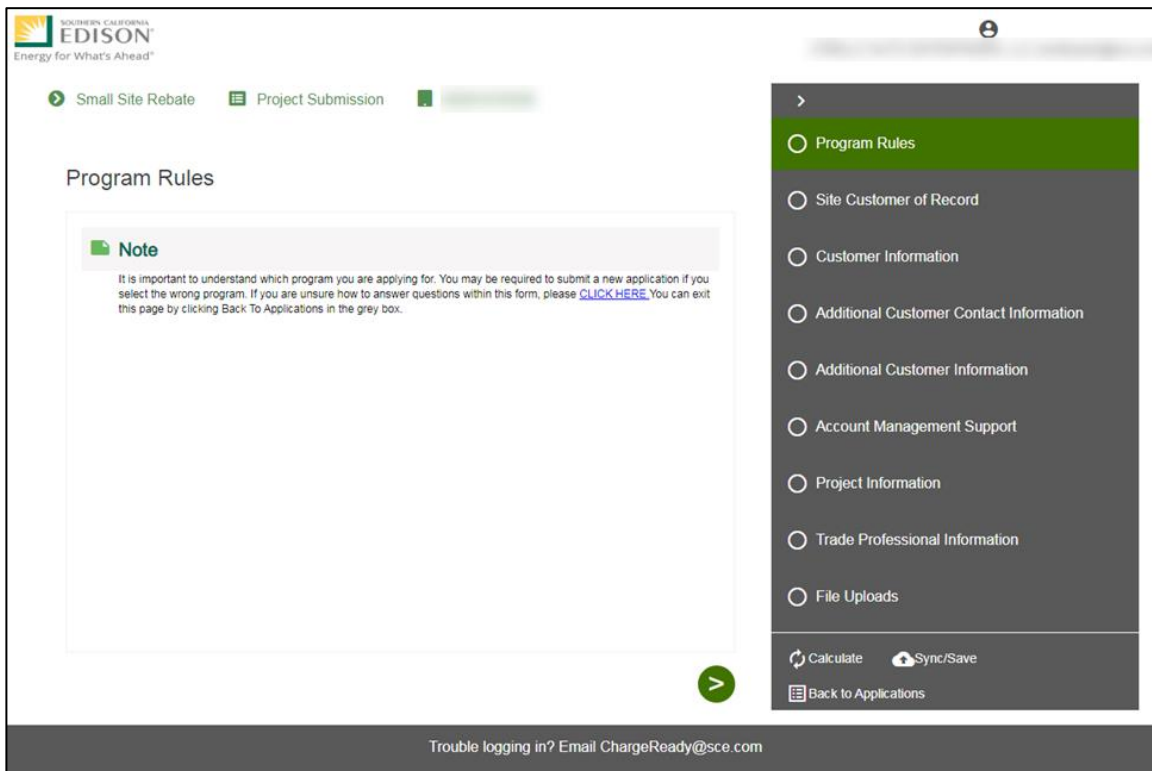
Turn-Key Installation


- The Turn-Key Installation program is limited to multi-family properties in disadvantaged communities. SCE designs, installs, operates and maintains the EV charging stations on behalf of the customer.
- For more program information, click here: sce.com/chargeready

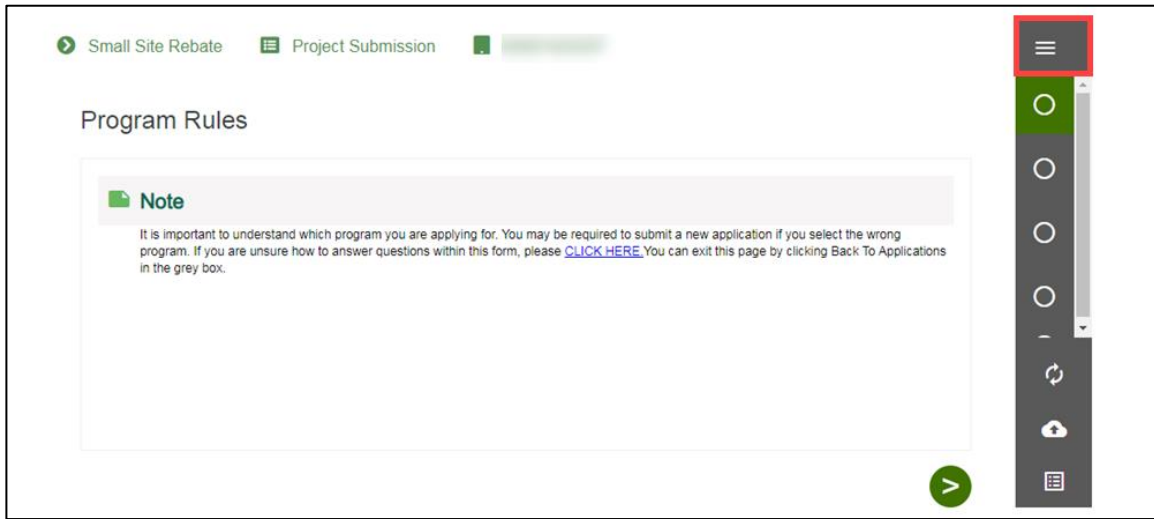
5. Click the  right arrow to select **Small Site Rebate**.



The **Program Rules** page displays.




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

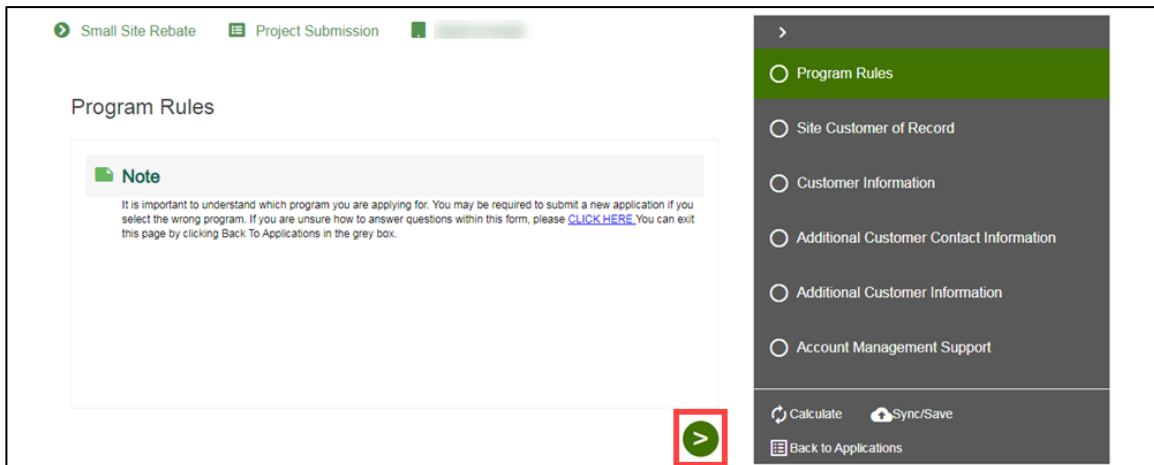


Once the Program Rules page displays, you will complete all the required fields.


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

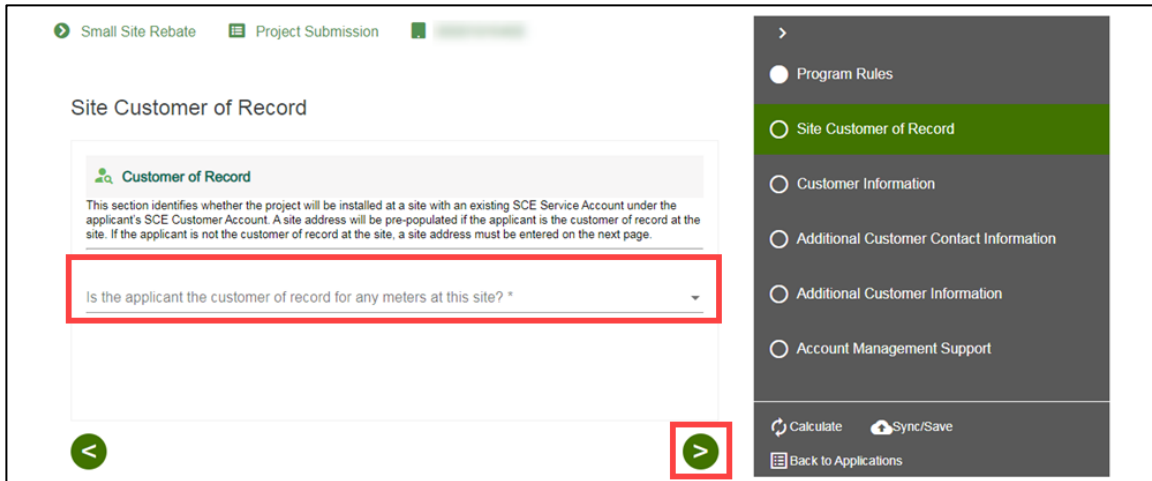
Program Rules

6. Review the **Program Rules**.
7. Click the  **Next** arrow.




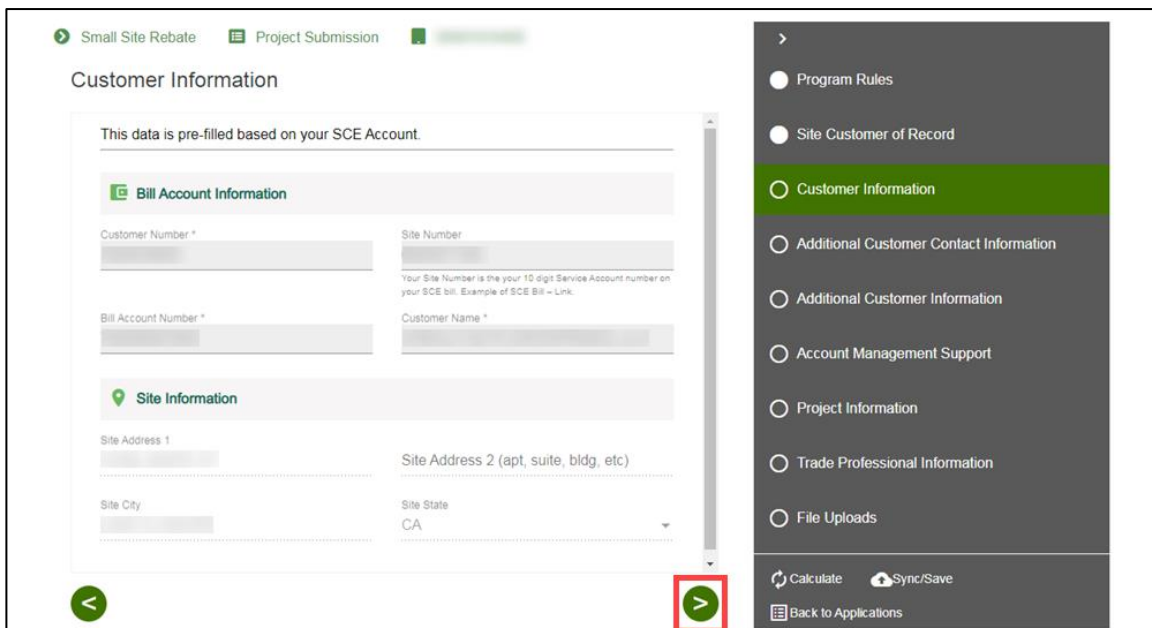
Site Customer of Record

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.

The screenshot shows the 'Additional Customer Contact Information' form. The 'Project Contact Information' section is highlighted with a red box. It includes the following fields:

- Project Contact First Name *
- Project Contact Last Name *
- Project Contact Title *
- Project Contact Phone *
- Project Contact Email * (with a note: "This email address will be used to provide notifications for this project.")

Below this section is the 'Site Contact Information' section, which includes a dropdown menu for 'Customer Project Contact different from...'.

The right-hand sidebar contains a list of menu items: Program Rules, Site Customer of Record, Customer Information, **Additional Customer Contact Information** (highlighted in green), Additional Customer Information, Account Management Support, Project Information, Trade Professional Information, and File Uploads. At the bottom of the sidebar are buttons for Calculate, Sync/Save, and Back to Applications.

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

The screenshot shows the 'Additional Customer Contact Information' form. The 'Site Contact Information' section is highlighted with a red box. It includes the following fields:

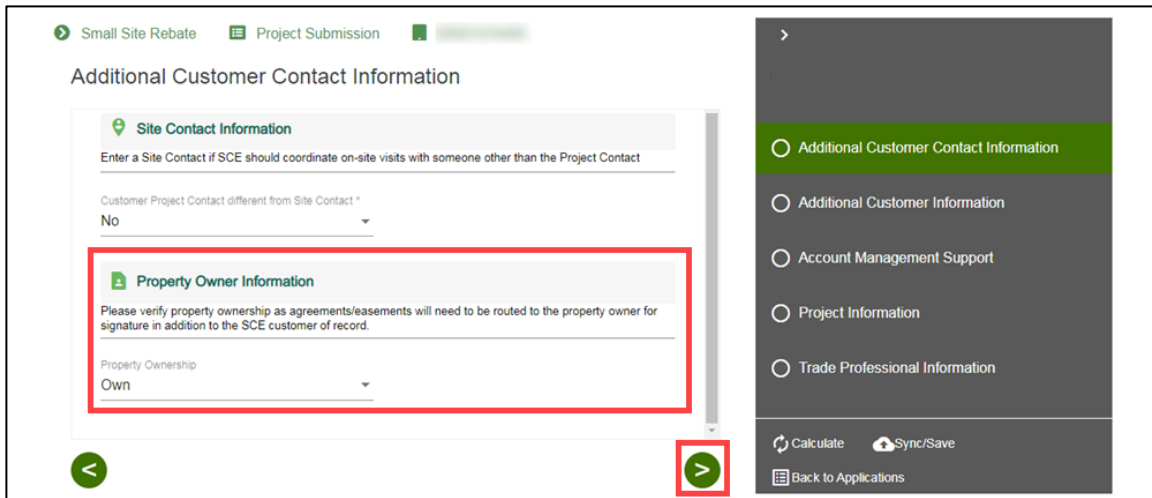
- Customer Project Contact different from Site Contact * (dropdown menu with 'Yes' selected)
- Site Contact First Name *
- Site Contact Last Name *
- Site Contact Title *
- Site Contact Phone *
- Site Contact Email *

The right-hand sidebar is identical to the previous screenshot, with the 'Additional Customer Contact Information' menu item highlighted in green.

If Property is Own

15. Select Own.

16. Click the  **Next** arrow.

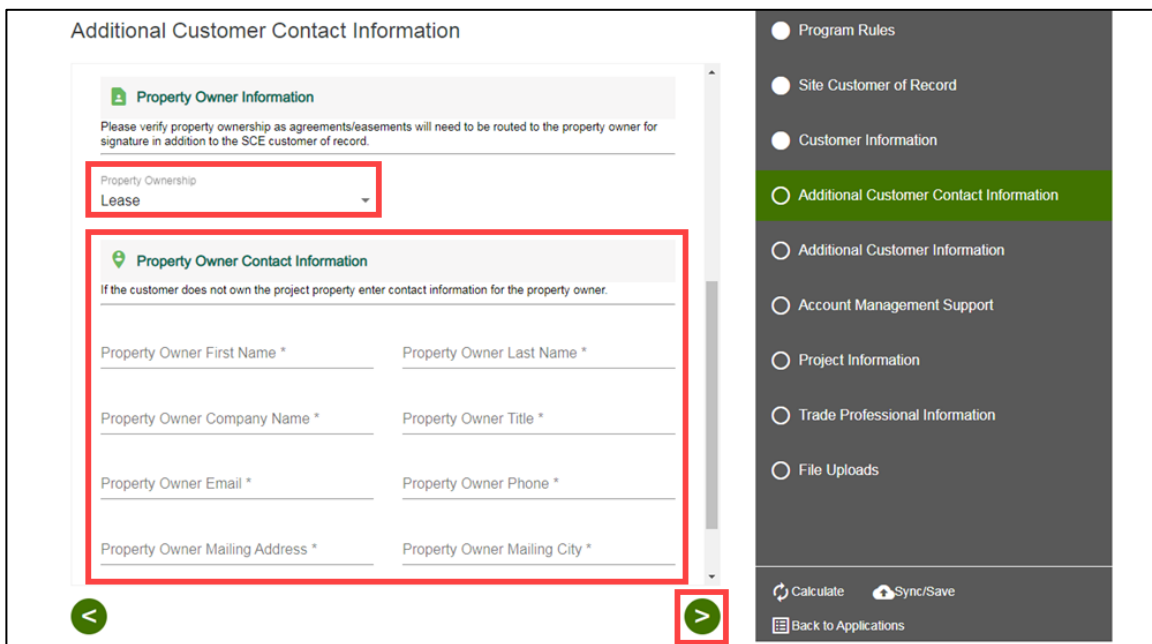


If Property is Lease

15. Select **Lease**.

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

17. Click the  **Next** arrow.

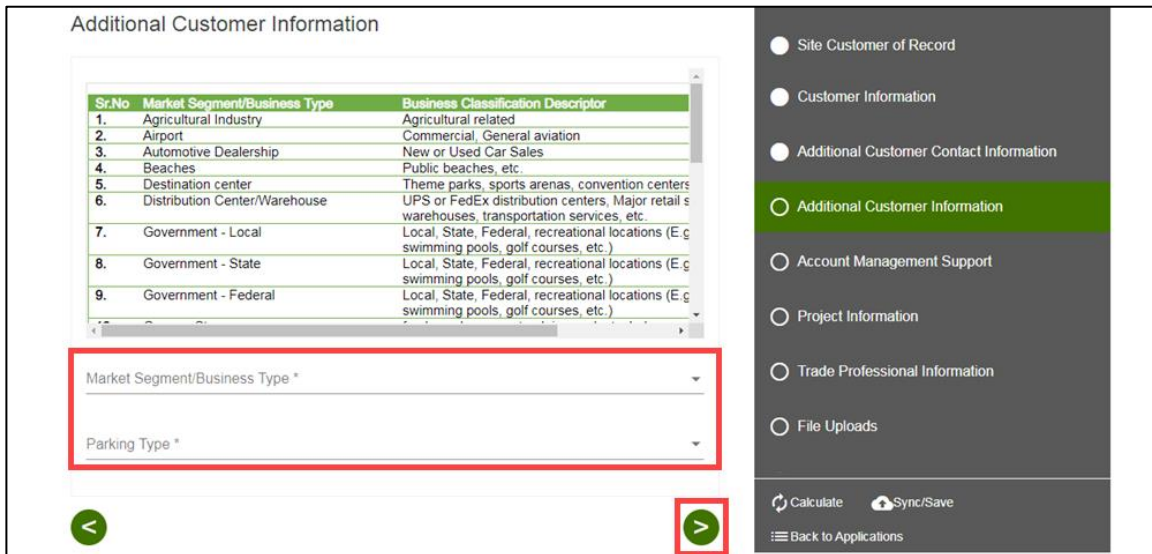


Additional Customer Information

18. Enter the **Market Segment/Business Type**.

19. Enter the **Parking Type**.

20. Click the  **Next** arrow.



Additional Customer Information

Sr.No	Market Segment/Business Type	Business Classification Descriptor
1.	Agricultural Industry	Agricultural related
2.	Airport	Commercial, General aviation
3.	Automotive Dealership	New or Used Car Sales
4.	Beaches	Public beaches, etc.
5.	Destination center	Theme parks, sports arenas, convention centers
6.	Distribution Center/Warehouse	UPS or FedEx distribution centers, Major retail s warehouses, transportation services, etc.
7.	Government - Local	Local, State, Federal, recreational locations (E g swimming pools, golf courses, etc.)
8.	Government - State	Local, State, Federal, recreational locations (E g swimming pools, golf courses, etc.)
9.	Government - Federal	Local, State, Federal, recreational locations (E g swimming pools, golf courses, etc.)

Market Segment/Business Type *

Parking Type *

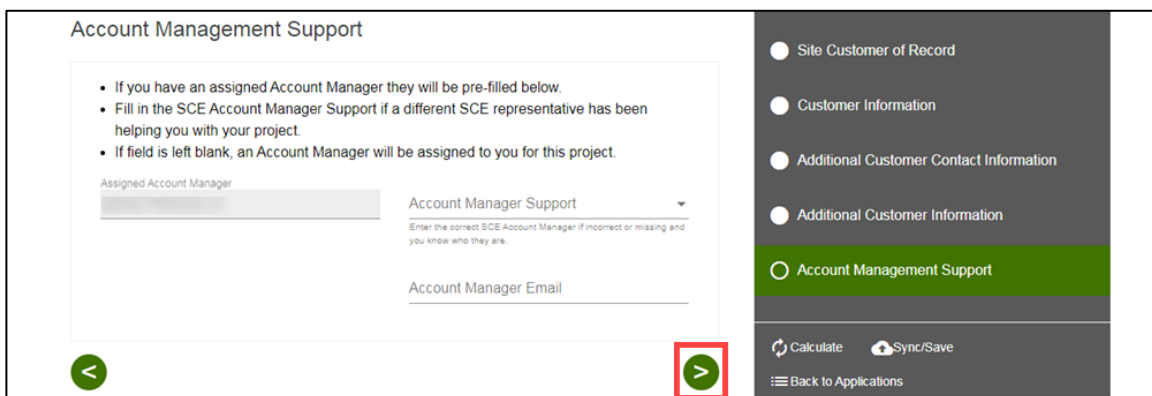
Calculate Sync/Save Back to Applications

Account Management Support

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

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

22. Click the  **Next** arrow.



Account Management Support

- If you have an assigned Account Manager they will be pre-filled below.
- Fill in the SCE Account Manager Support if a different SCE representative has been helping you with your project.
- If field is left blank, an Account Manager will be assigned to you for this project.

Assigned Account Manager

Account Manager Support

Account Manager Email

Calculate Sync/Save Back to Applications

Project Information

23. Complete the **Site Information**.

24. Scroll down.

The screenshot shows the 'Project Information' form. The 'Site Information' section is highlighted with a red box. It includes fields for Group ID, Project Description (with a note: 'Provide a name for this project. i.e. Convention Center Building #5, South Lot'), Application Submission Date, and a dropdown menu for 'How did you hear about the Charge Ready program? *'. Below this is the 'Third-Party Assistance' section. On the right, a sidebar menu shows 'Project Information' selected.

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.

The screenshot shows the 'Project Information' form. The 'Third-Party Assistance' section is highlighted with a red box. It includes a dropdown menu for 'Are you using a Charge Ready Trade Pro? *' with 'Yes' selected. Below this is a text area for 'What charging station vendor(s) are you considering? *'. Below this is the 'Charging Station Information' section. On the right, a sidebar menu shows 'Project Information' selected.

27. Complete the **Charging Station Information**.

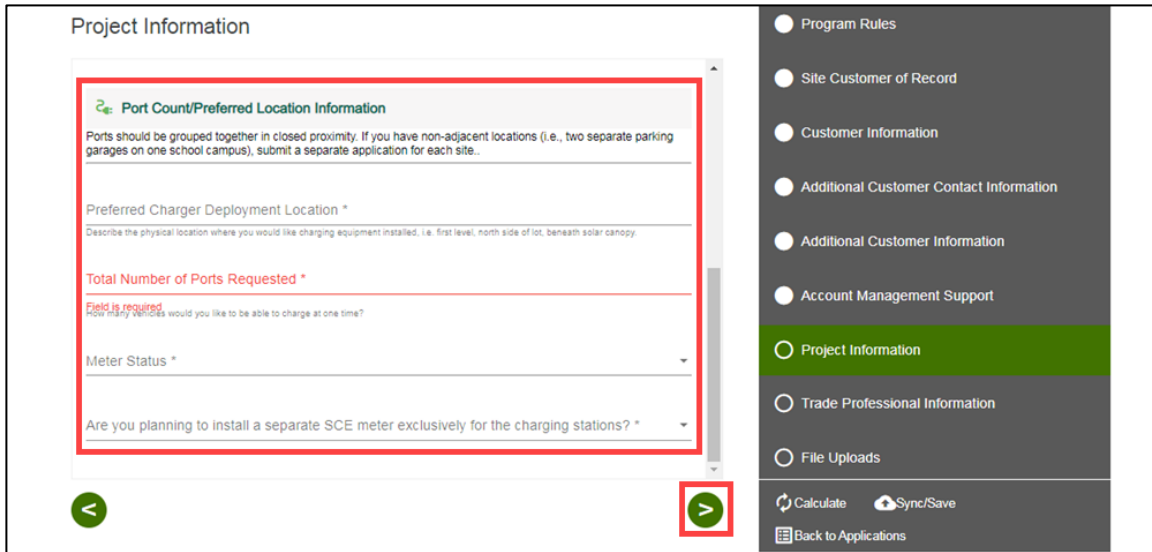
28. Scroll down.

The screenshot shows the 'Project Information' form. The 'Charging Station Information' section is highlighted with a red box. It includes a dropdown menu for 'Are there site access restrictions? *' with 'No' selected. Below this is a text area for 'Describe any safety, access, or security restriction applicable to the site.' Below this is a text area for 'Additional Project Information *' with a note: 'Any other construction projects that may affect a Charge Ready site, charger location options, construction timing restrictions.' Below this is a dropdown menu for 'Select the best description of where charging equipment will be installed. *'. On the right, a sidebar menu shows 'Project Information' selected.

29. Complete 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.



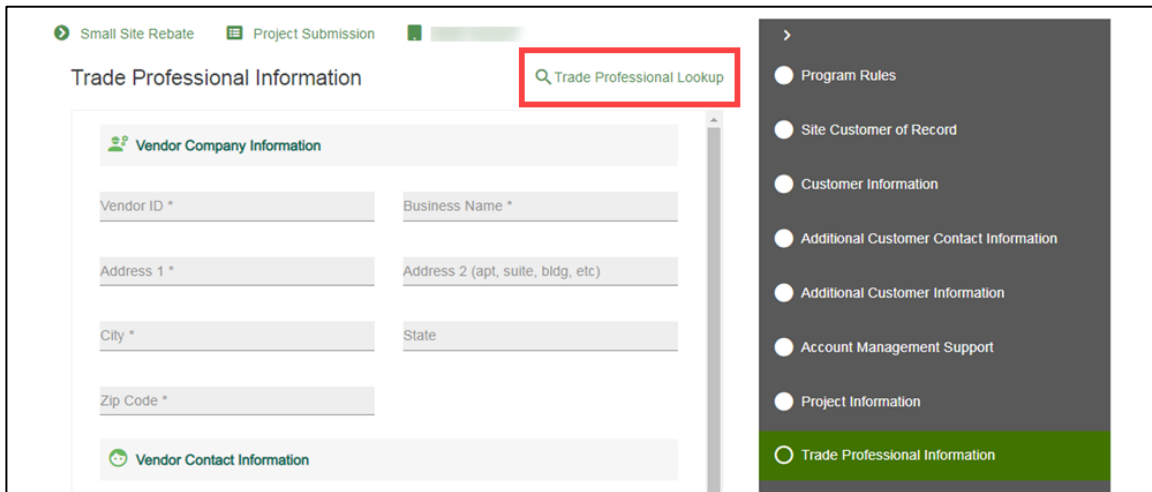
If you request 4 ports, it will only give you the option to select a New Meter.



Trade Professional Information, if applicable

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

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



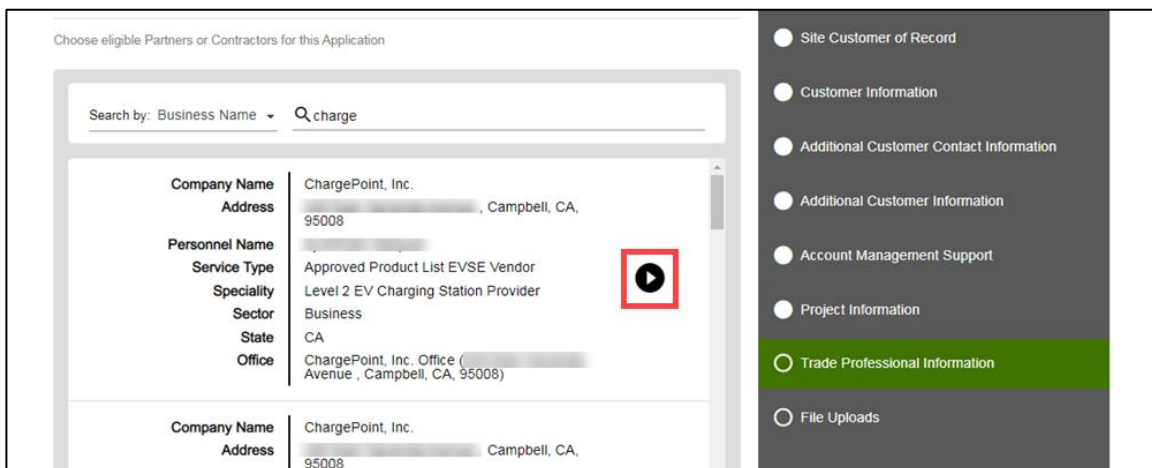
The **lookup** displays.

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**.

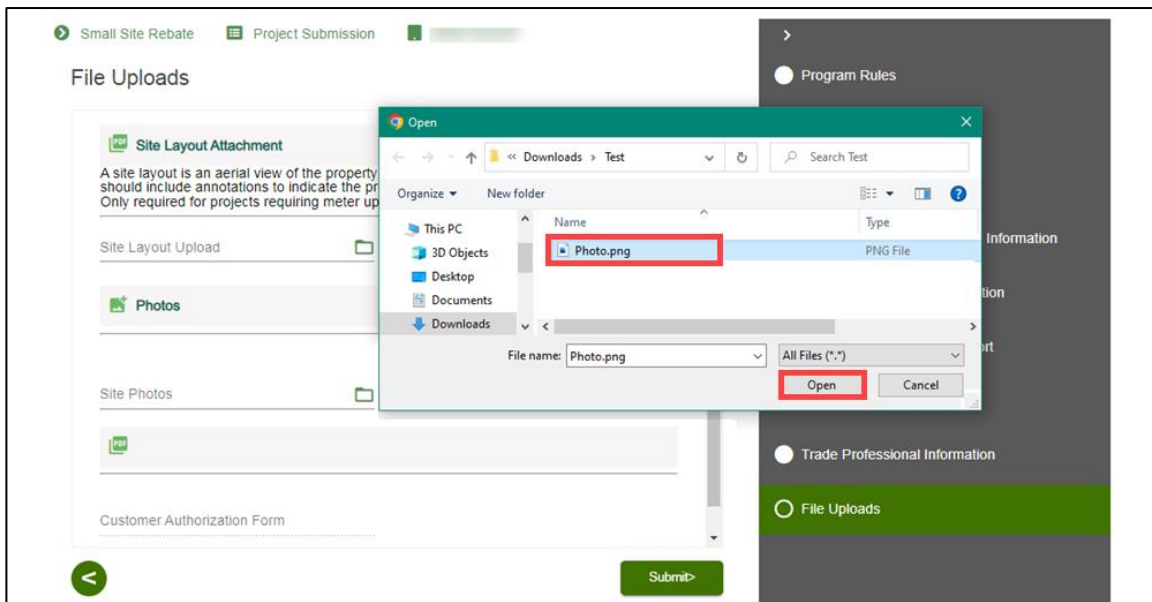
35. Click the  **Next** arrow.

File Uploads

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

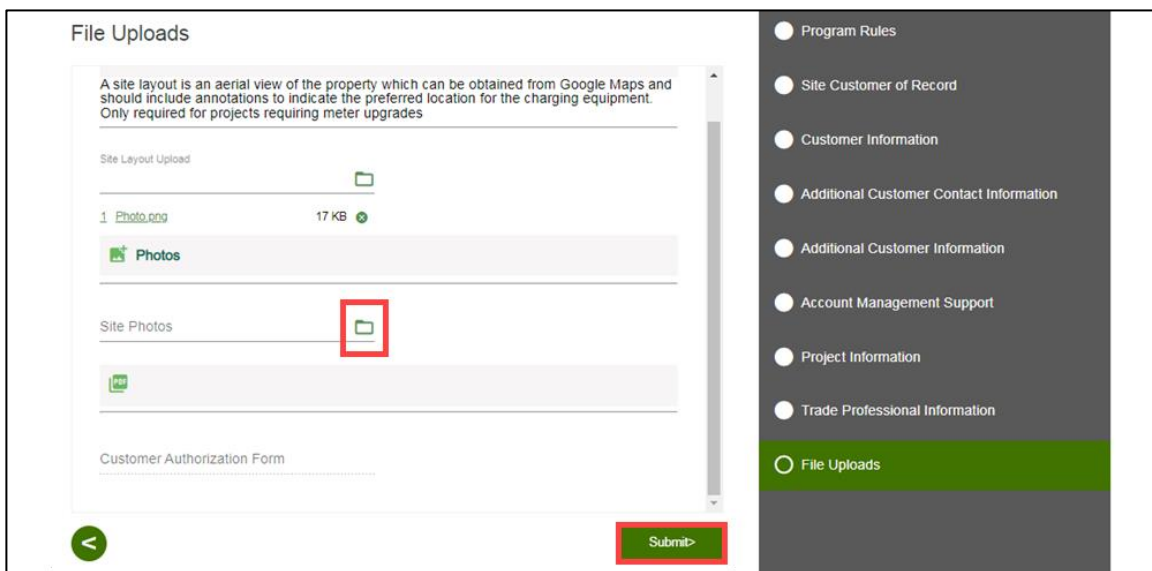
The **Open pop-up window** displays.

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



The file uploads.

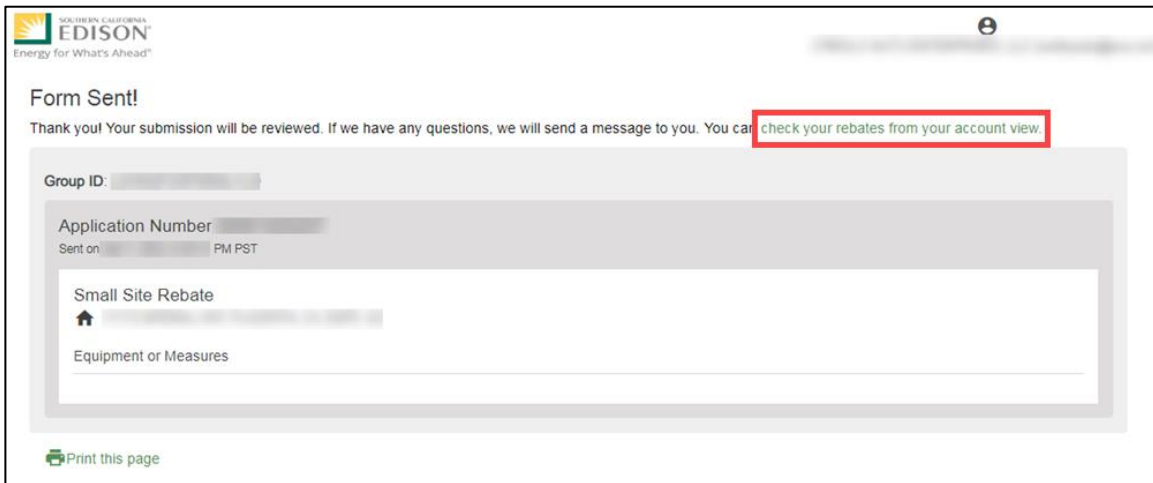
- 39. Select the  **Folder** icon to upload **Site Photos**.
- 40. Click **Submit**.



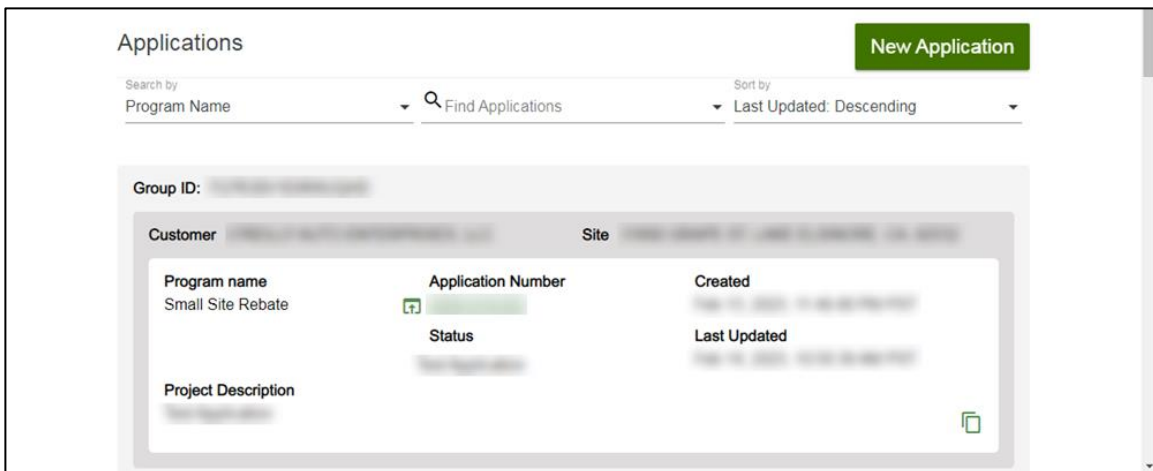
Form Sent!

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.

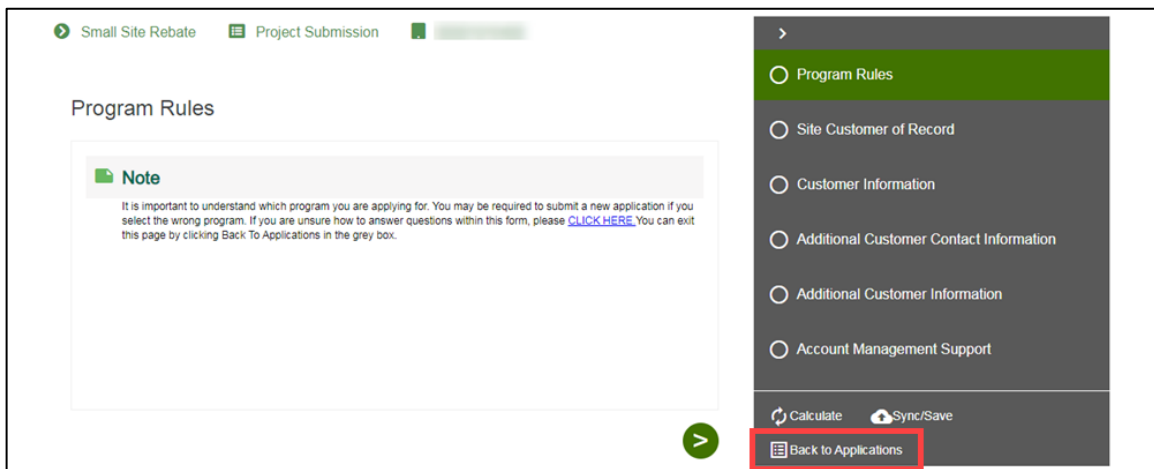
Applications in Draft Status

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

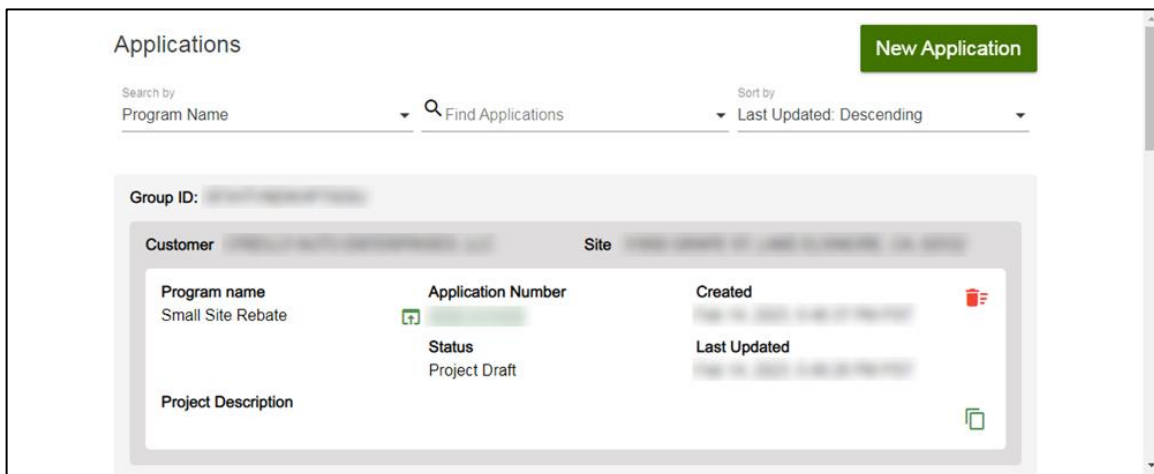
Saving an Application in Draft Status

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

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



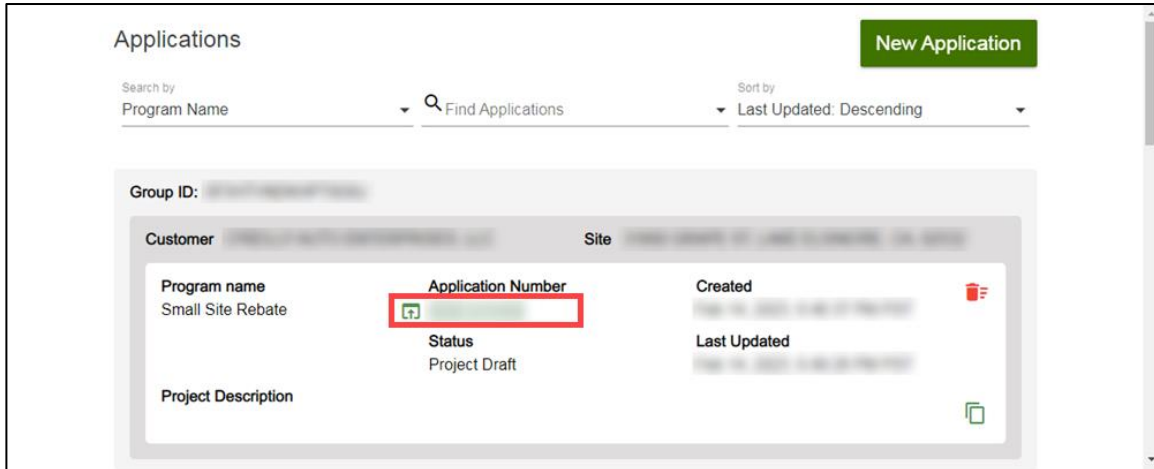
The **Applications** page displays.



Editing an Application in Draft Status

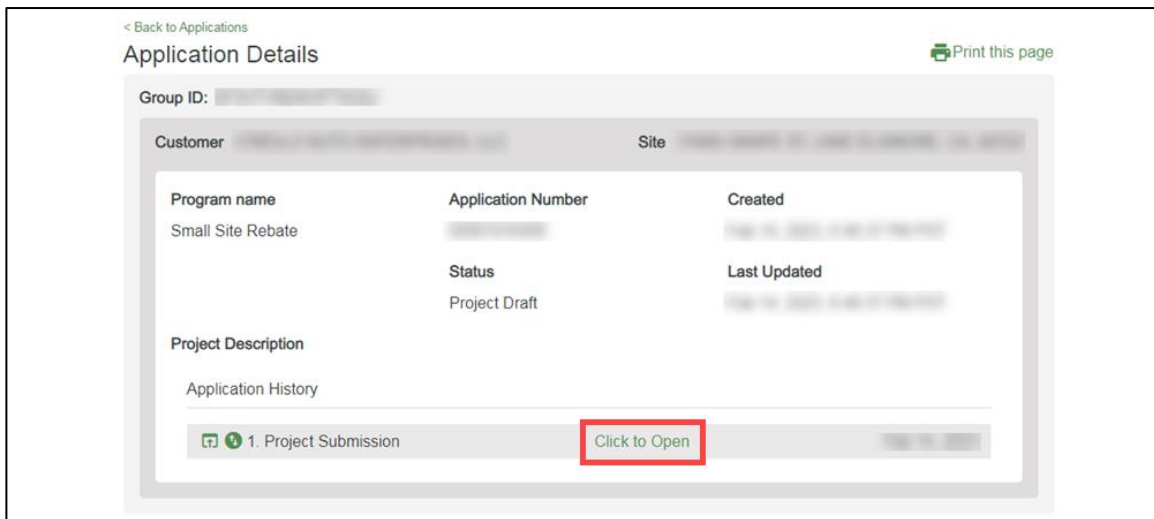
To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.



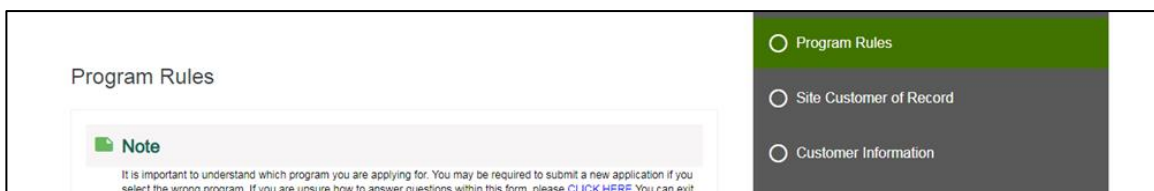
The **Application Details** page displays.

2. Select **Click to Open**.



The **Program Rules** page displays.

3. Complete the application.



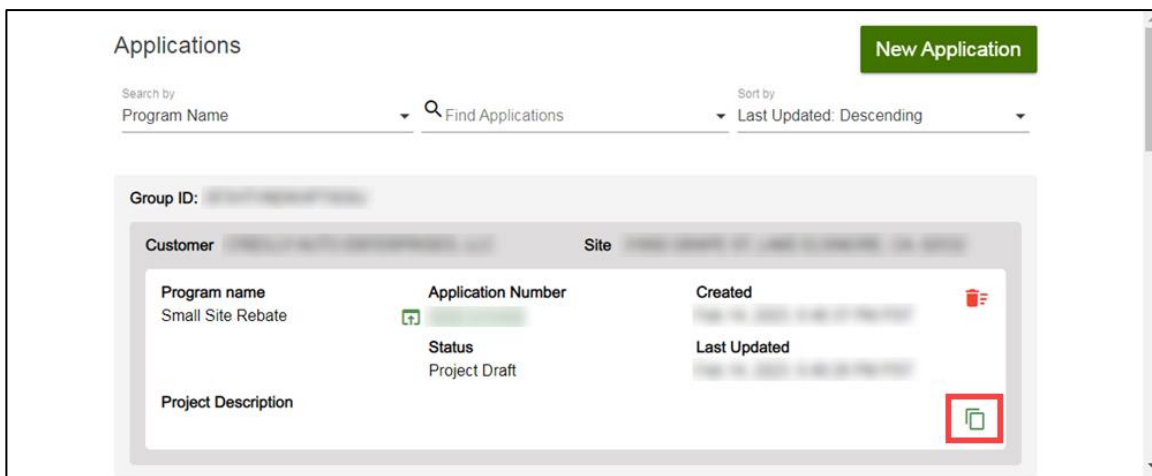
Duplicating an Application

You can duplicate an application in the following statuses:

- ◆ Draft
- ◆ Submitted
- ◆ Withdrawn
- ◆ Complete

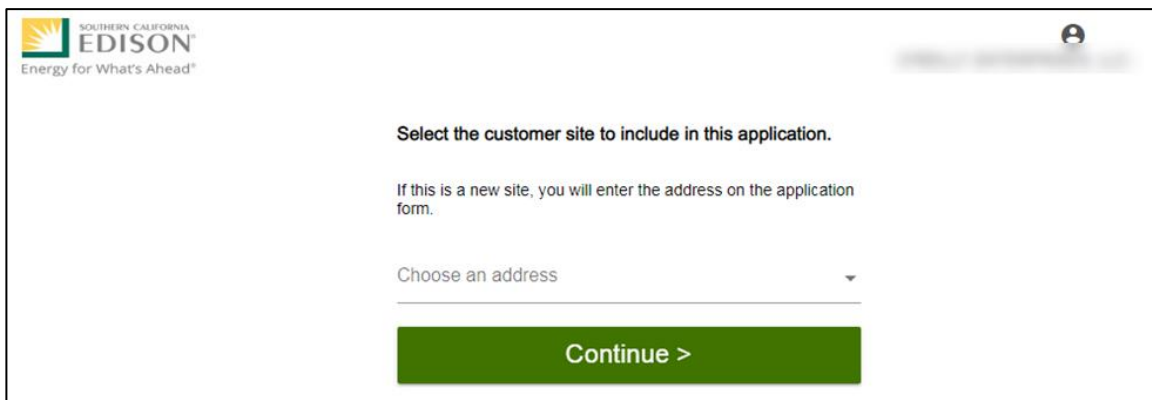
To duplicate an application, follow the steps below:

1. Click the  **Duplicate** icon.




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

2. Complete the application.



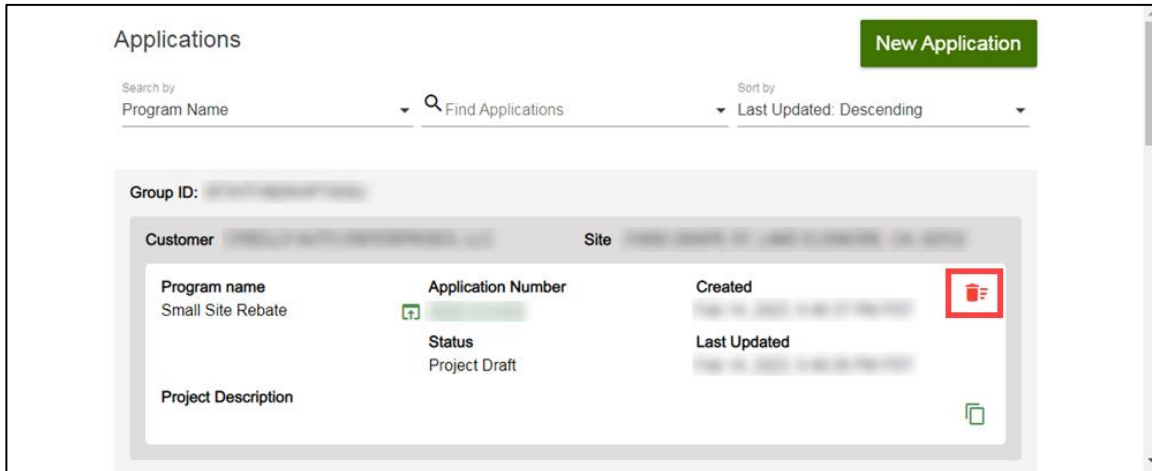
Discarding a Draft Application

You can delete an application in *Draft* status.

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

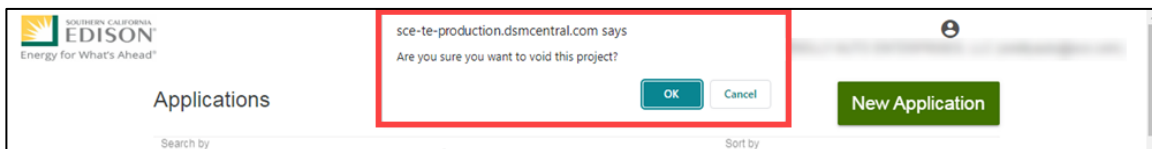
To delete an application, follow the steps below:

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

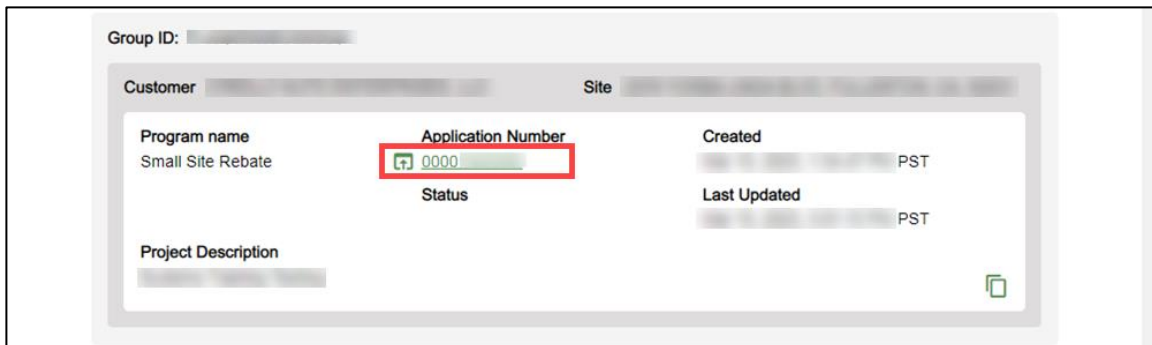
Once an Agreement Acceptance is complete, SCE executes and reserves project funds.

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**.

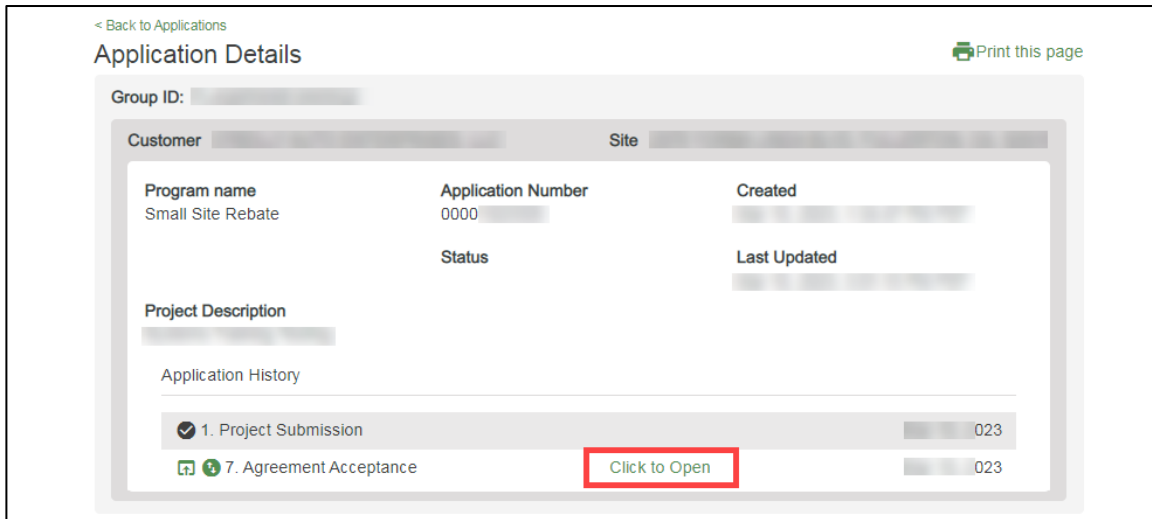


The screenshot displays the 'Application Details' page. At the top, there are fields for 'Group ID', 'Customer', and 'Site'. Below these, a table lists application details. The 'Application Number' field, containing '0000', is highlighted with a red box. Other fields include 'Program name' (Small Site Rebate), 'Status', 'Created' (PST), and 'Last Updated' (PST). A 'Project Description' field is also visible at the bottom left, and a copy icon is at the bottom right.

Program name	Application Number	Created
Small Site Rebate	0000	PST
	Status	Last Updated
		PST

The **Application Details** page displays.

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



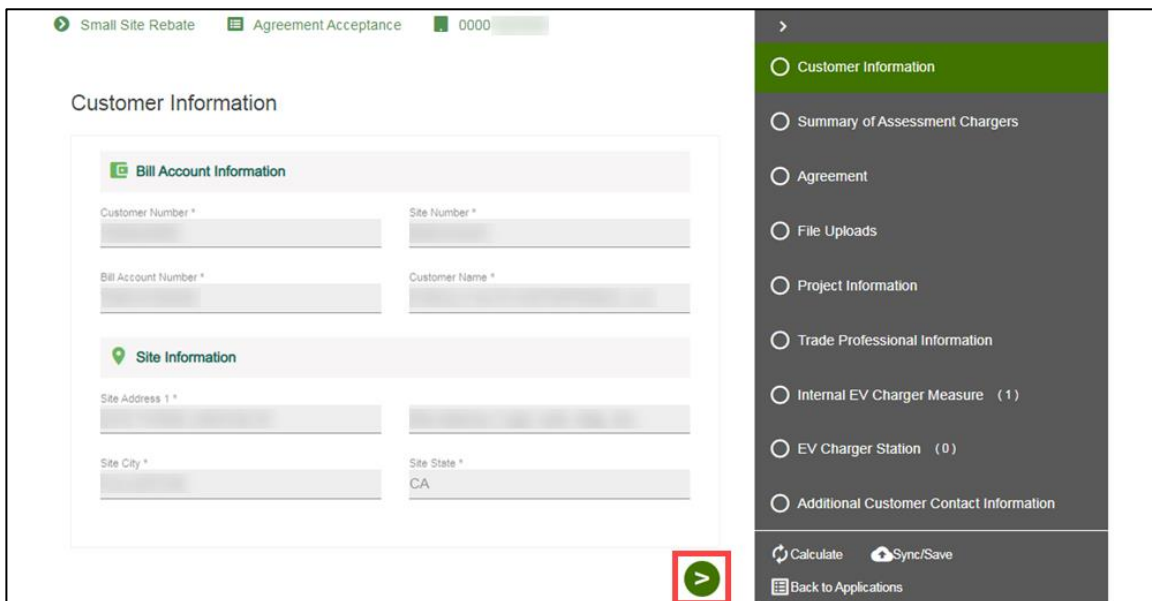
The **Customer Information** page displays.

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

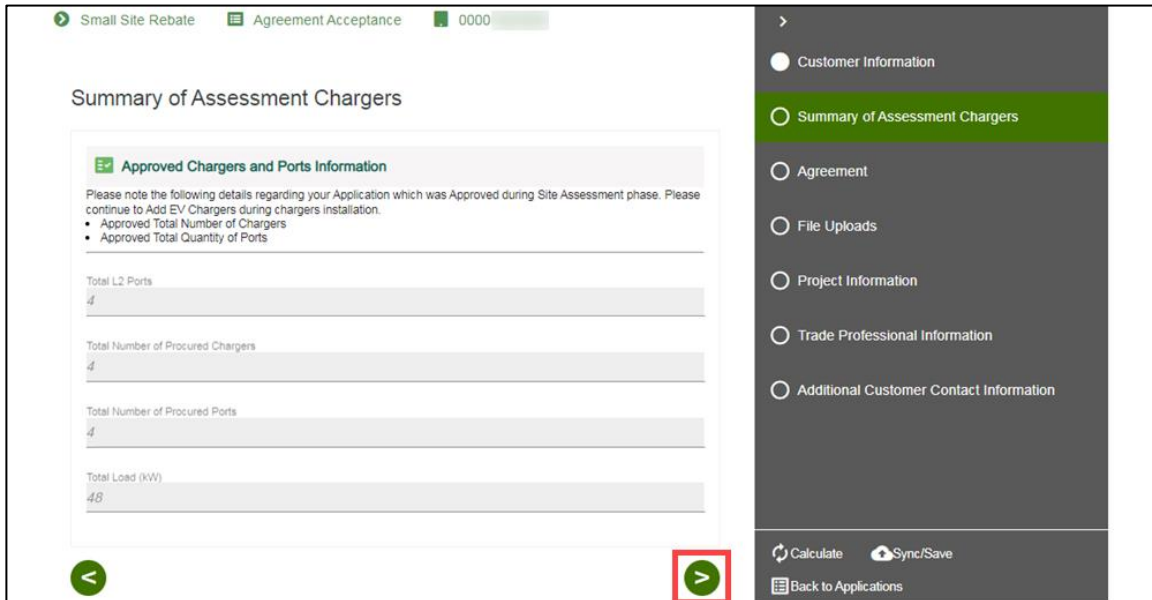
3. Verify the **Customer Information**.
4. Click the **> Next** arrow.



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

Summary of Assessment Chargers

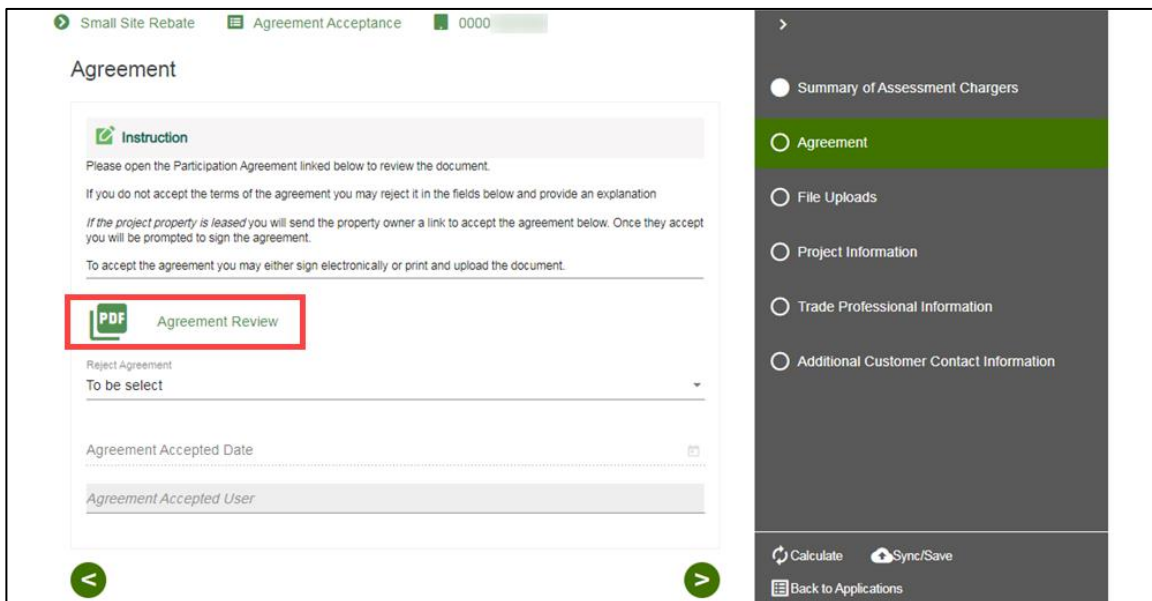
5. Verify the **Summary of Assessment Chargers**.
6. Click the  **Next** arrow.



The **Agreement** page displays.

Agreement

7. Select **PDF Agreement Review**.



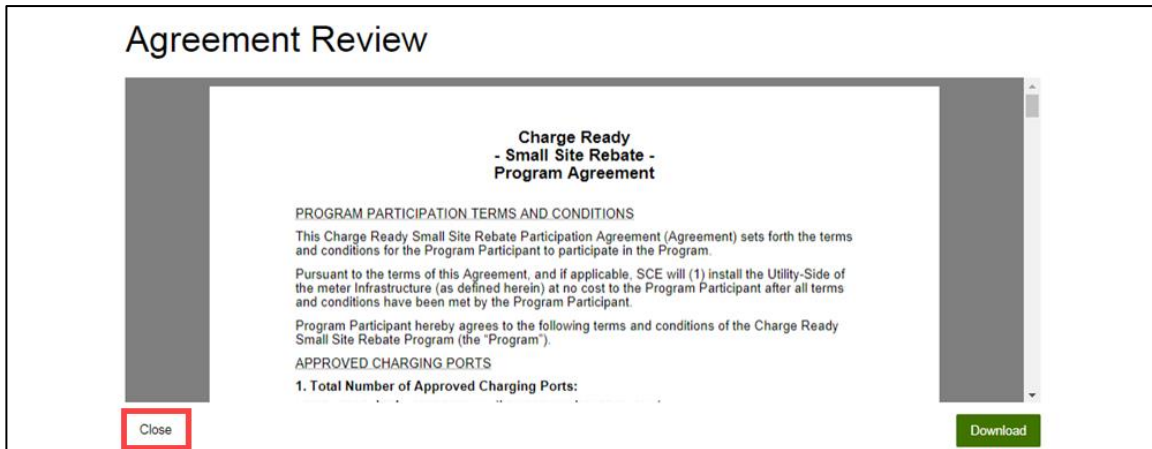
An **Agreement** window displays.

- Review the agreement.

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

- Select **Close**.

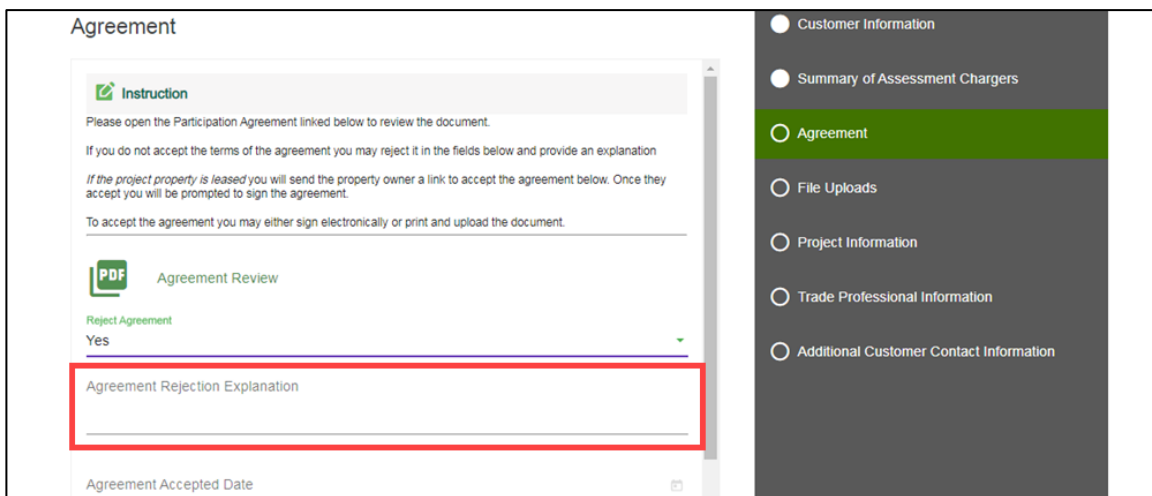
Note: You can also download the Agreement Review.



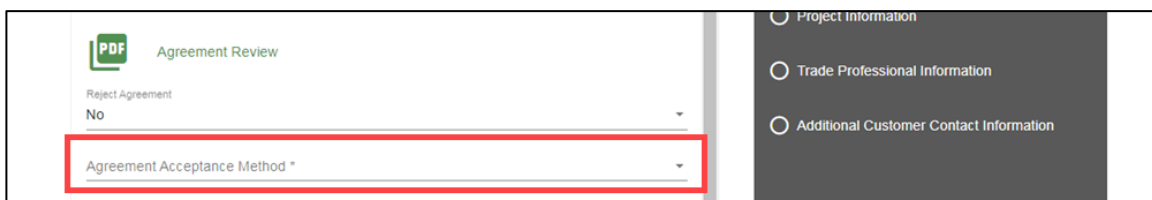
The **Agreement** page displays.

- 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**.

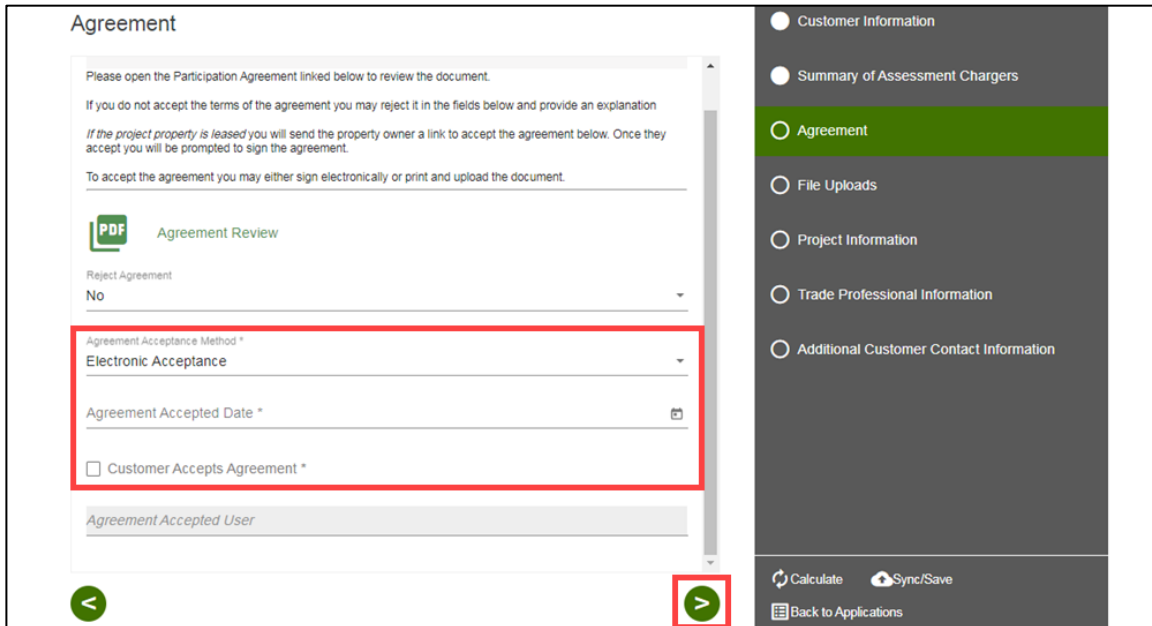


Electronic Acceptance

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.




Agreement

Please open the Participation Agreement linked below to review the document.

If you do not accept the terms of the agreement you may reject it in the fields below and provide an explanation

If the project property is leased you will send the property owner a link to accept the agreement below. Once they accept you will be prompted to sign the agreement.

To accept the agreement you may either sign electronically or print and upload the document.

 Agreement Review


Reject Agreement
No

Agreement Acceptance Method *
Electronic Acceptance

Agreement Accepted Date *

Customer Accepts Agreement *


Agreement Accepted User



Customer Information
Summary of Assessment Chargers
Agreement
File Uploads
Project Information
Trade Professional Information
Additional Customer Contact Information

Calculate Sync/Save
Back to Applications

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




Send Link

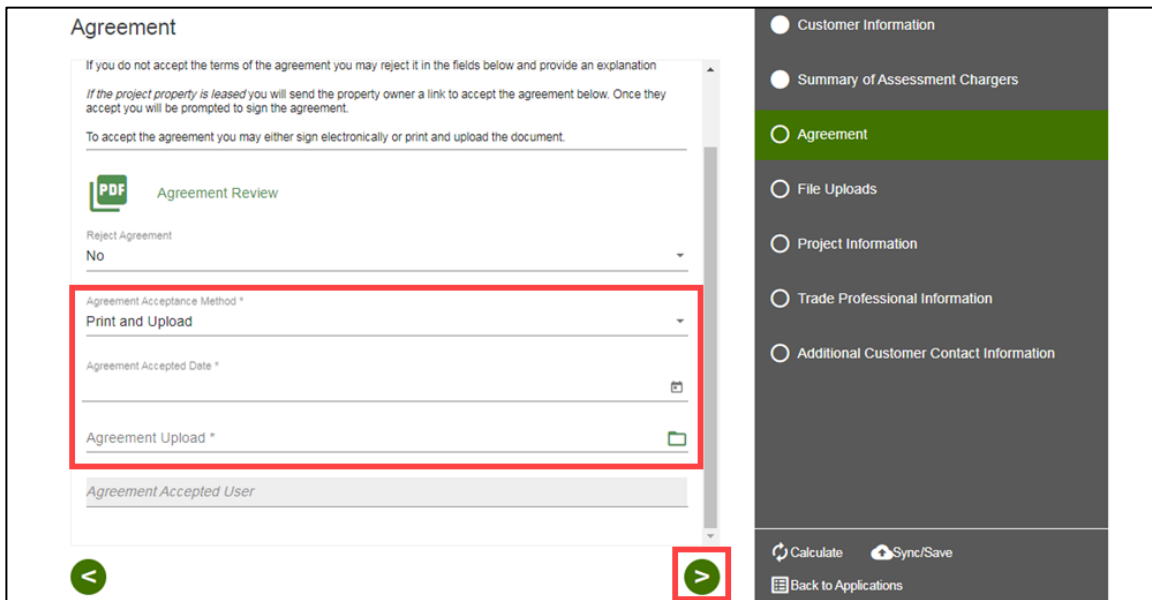
Calculate Sync/Save
Back to Applications

The **File Uploads** page displays.

Print and Upload

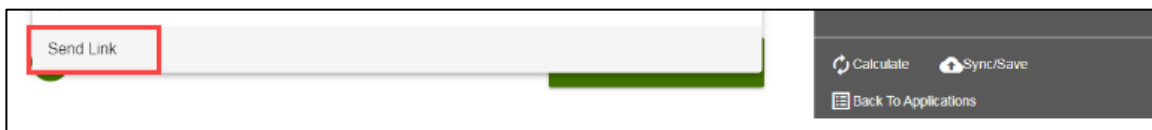
If the Agreement Acceptance Method is Print and Upload, follow the steps below:

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



The screenshot shows the 'Agreement' form. The 'Agreement Acceptance Method' dropdown is set to 'Print and Upload'. The 'Agreement Upload' field is empty. The 'Next' arrow icon is highlighted with a red box. The sidebar on the right shows the 'Agreement' step selected.


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

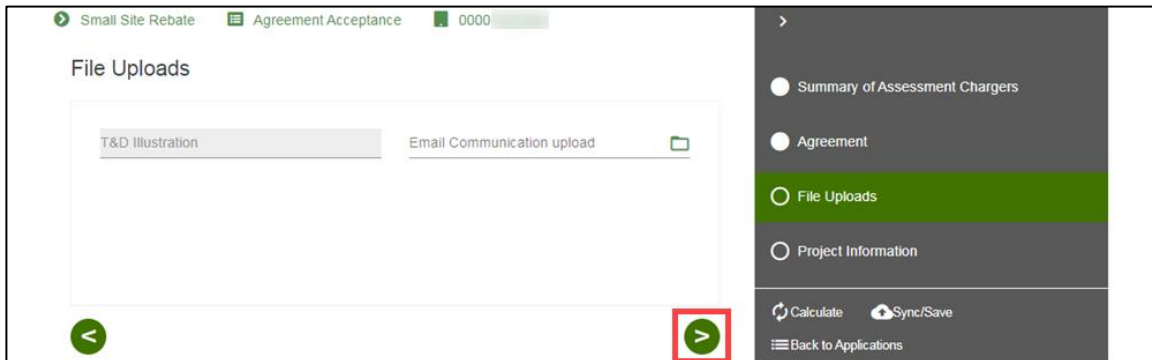


The screenshot shows a 'Send Link' button highlighted with a red box. The 'Next' arrow icon is also visible.

The **File Uploads** page displays.

File Uploads

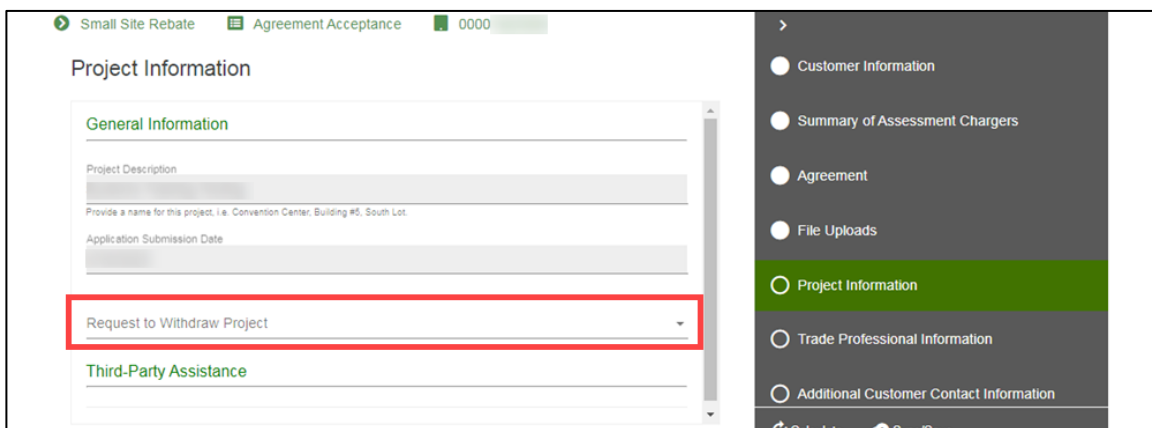
11. Upload an **Email Communication file**, if applicable.
12. Click the  **Next** arrow.



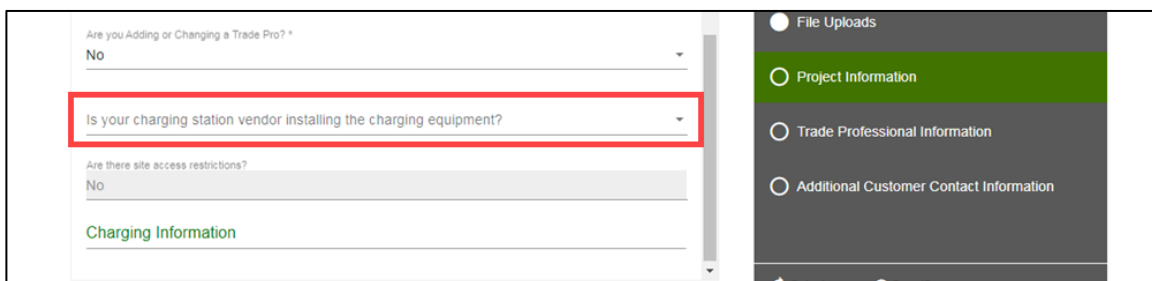
The **Project Information** page displays.

Project Information

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

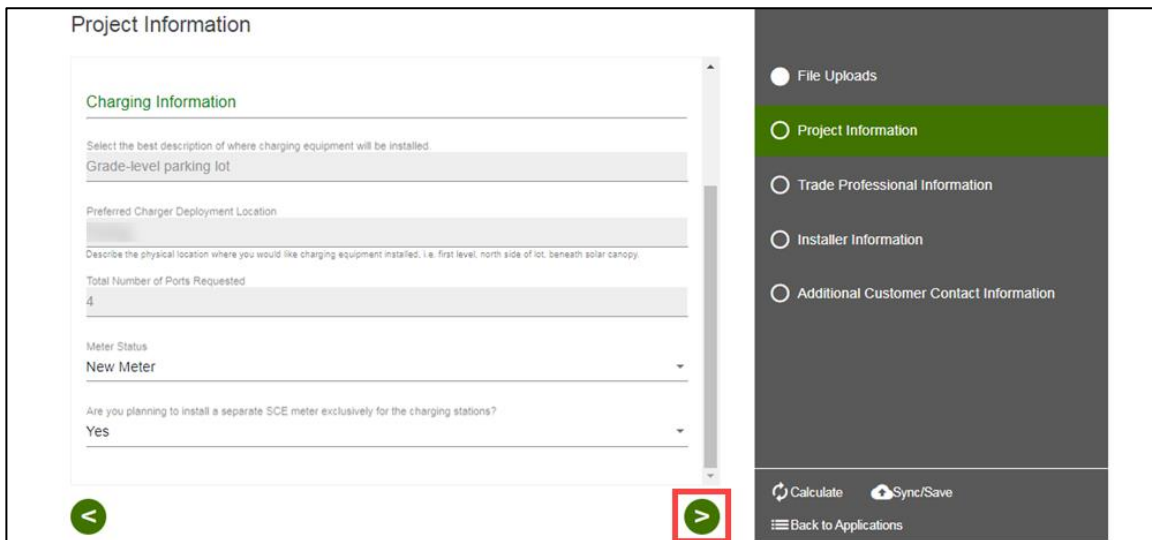


14. Select Yes or No under **Is your charging station vendor installing the charging equipment**.



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

16. Click the  **Next** arrow.

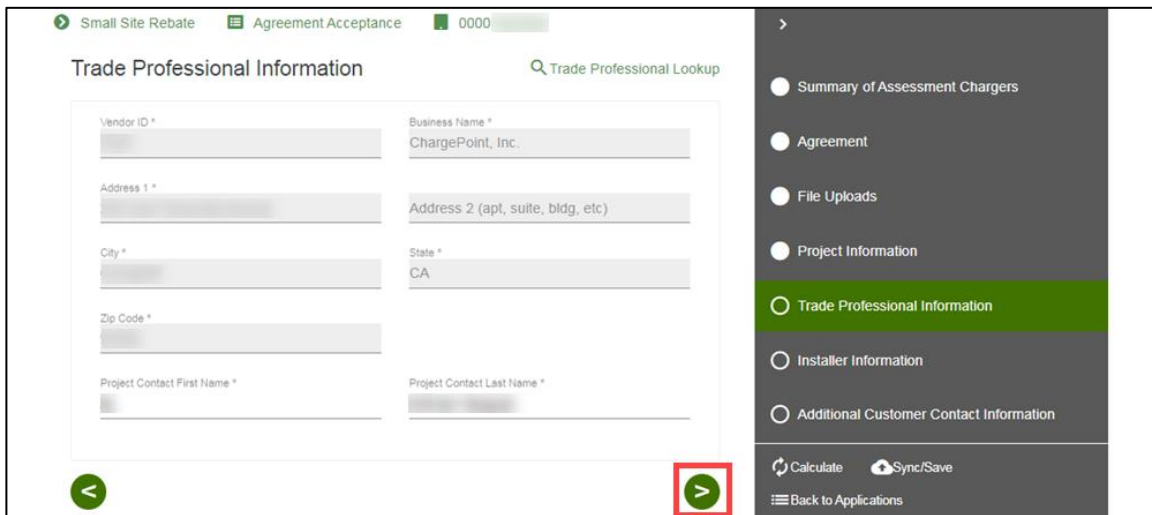


The **Trade Professional Information** page displays.

Trade Professional Information

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

18. Click the  **Next** arrow.

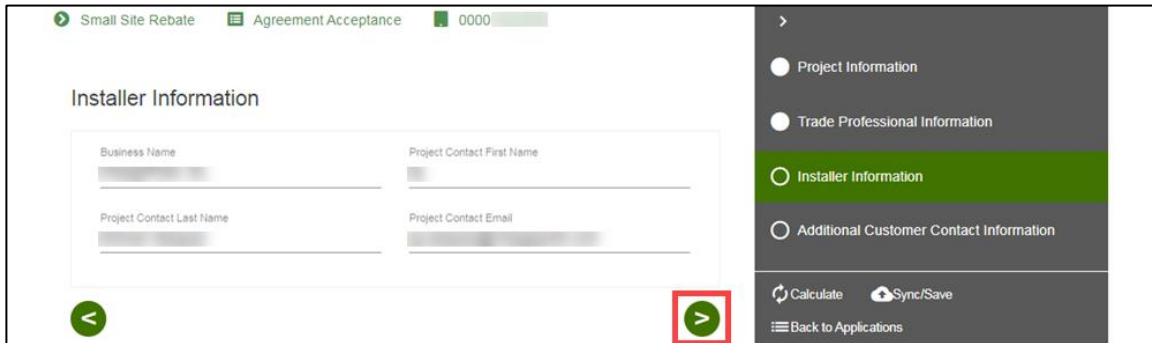


The **Installer Information** or **Additional Customer Contact Information** page displays.

Installer Information, if applicable

19. Verify the **Installer Information**.

20. Click the  **Next** arrow.





Small Site Rebate Agreement Acceptance 0000

Installer Information

Business Name Project Contact First Name

Project Contact Last Name Project Contact Email

Project Information

Trade Professional Information

Installer Information

Additional Customer Contact Information

Calculate Sync/Save

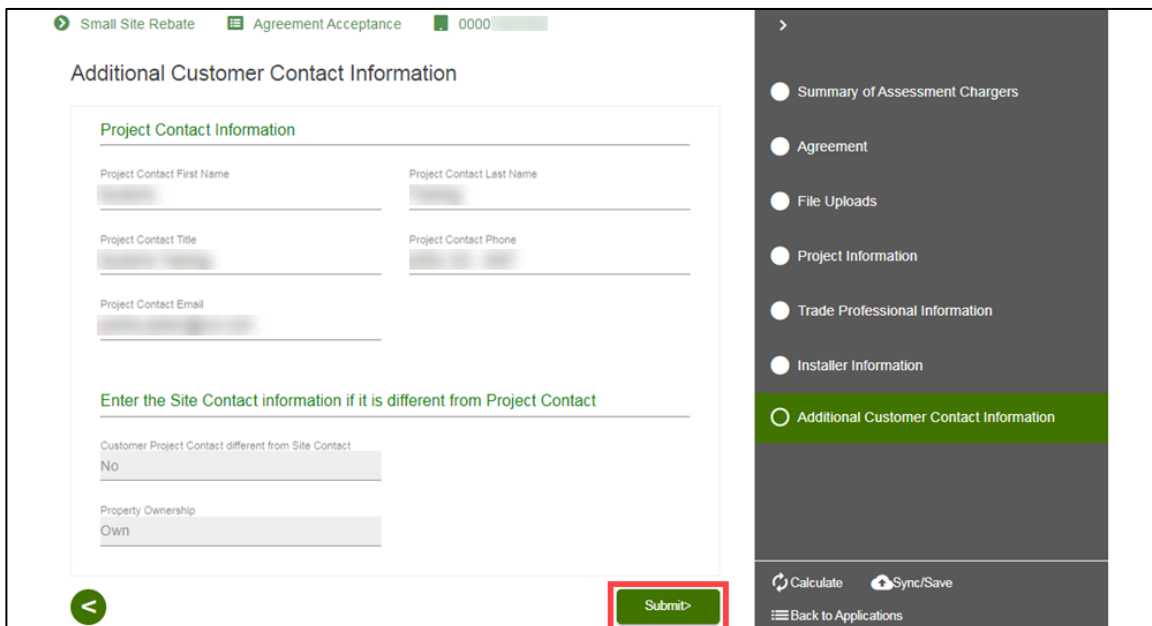
Back to Applications

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

Additional Customer Contact Information

21. Verify the **Customer Contact Information**.

22. Select **Submit**.



Small Site Rebate Agreement Acceptance 0000

Additional Customer Contact Information

Project Contact Information

Project Contact First Name Project Contact Last Name



Project Contact Title Project Contact Phone

Project Contact Email

Enter the Site Contact information if it is different from Project Contact

Customer Project Contact different from Site Contact
No

Property Ownership
Own

Summary of Assessment Chargers

Agreement

File Uploads

Project Information

Trade Professional Information

Installer Information

Additional Customer Contact Information

Calculate Sync/Save

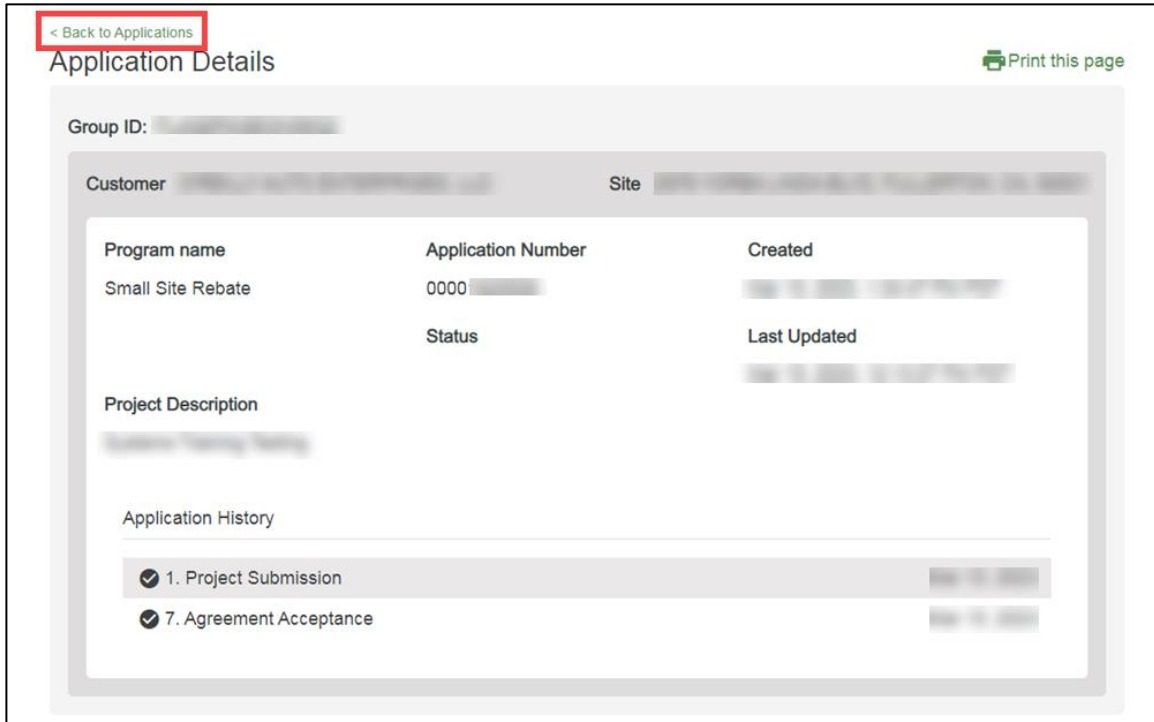
Back to Applications

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.

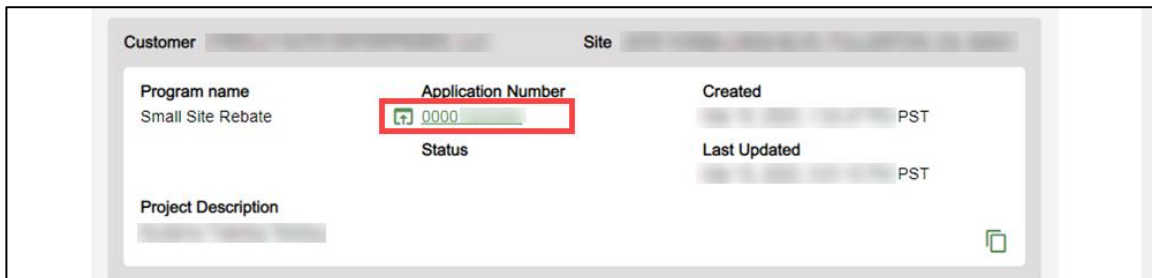
Once a Site Plan is complete, SCE reviews the site plan.

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

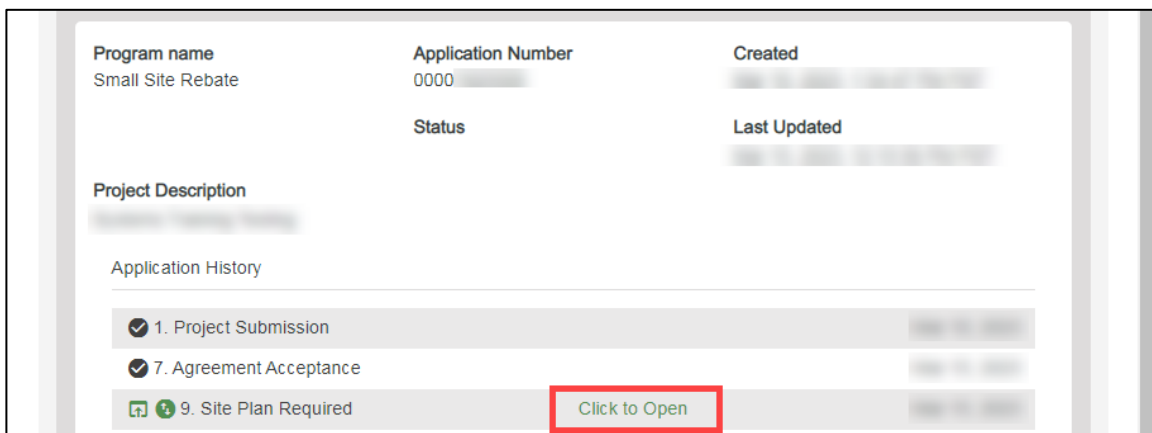
To complete the Site Plan, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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




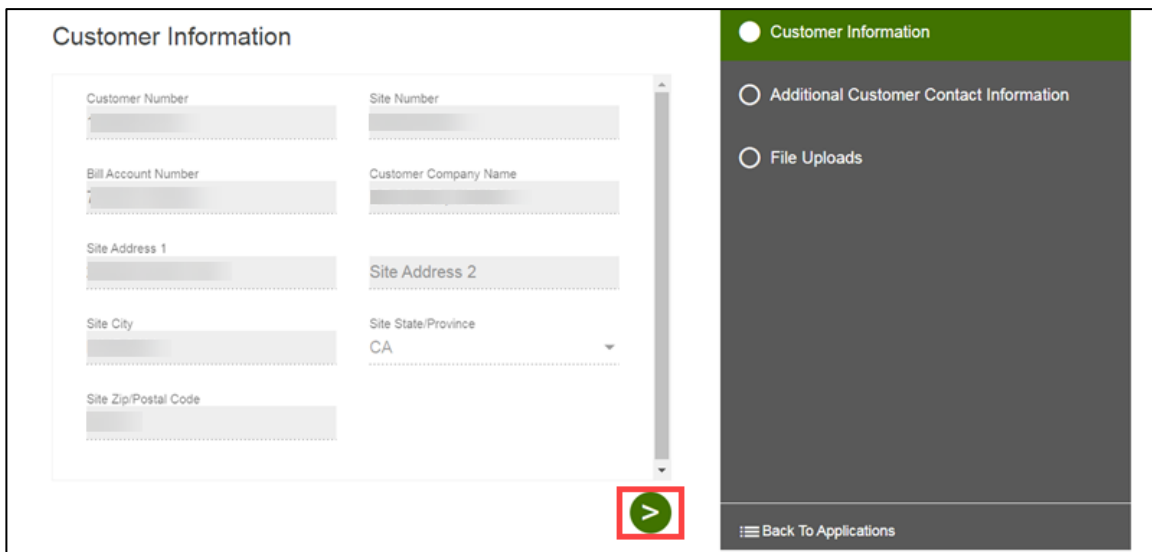
The **Customer Information** page displays.

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

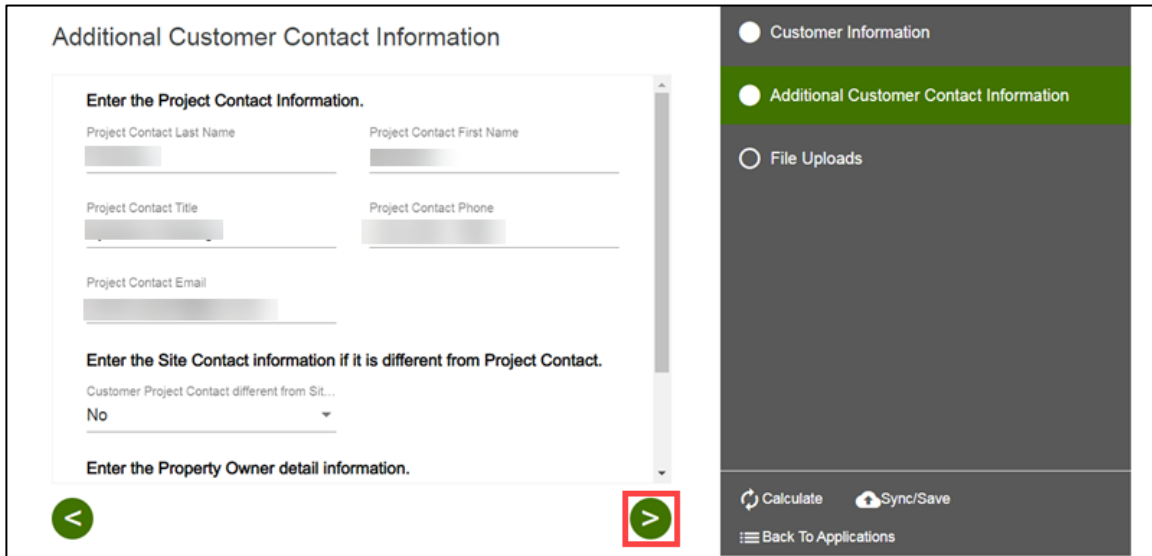
3. Verify the **Customer Information**.
4. Click the  **Next** arrow.



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

Additional Customer Contact Information

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

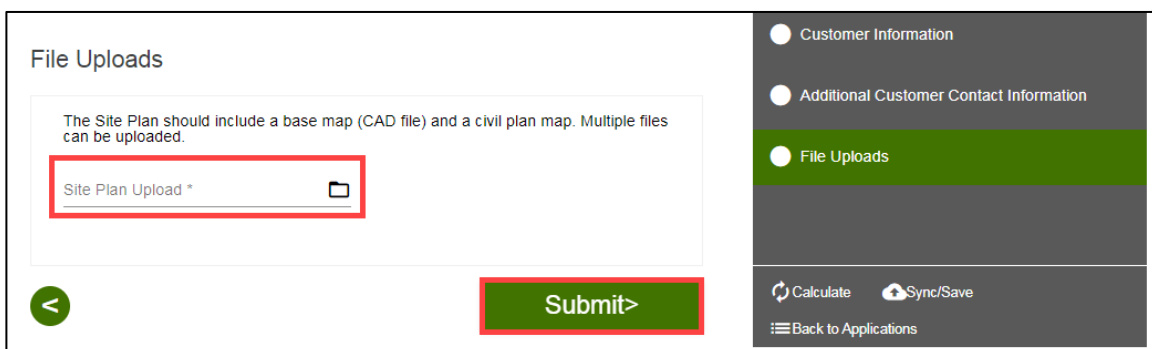


The **File Uploads** page displays.

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.

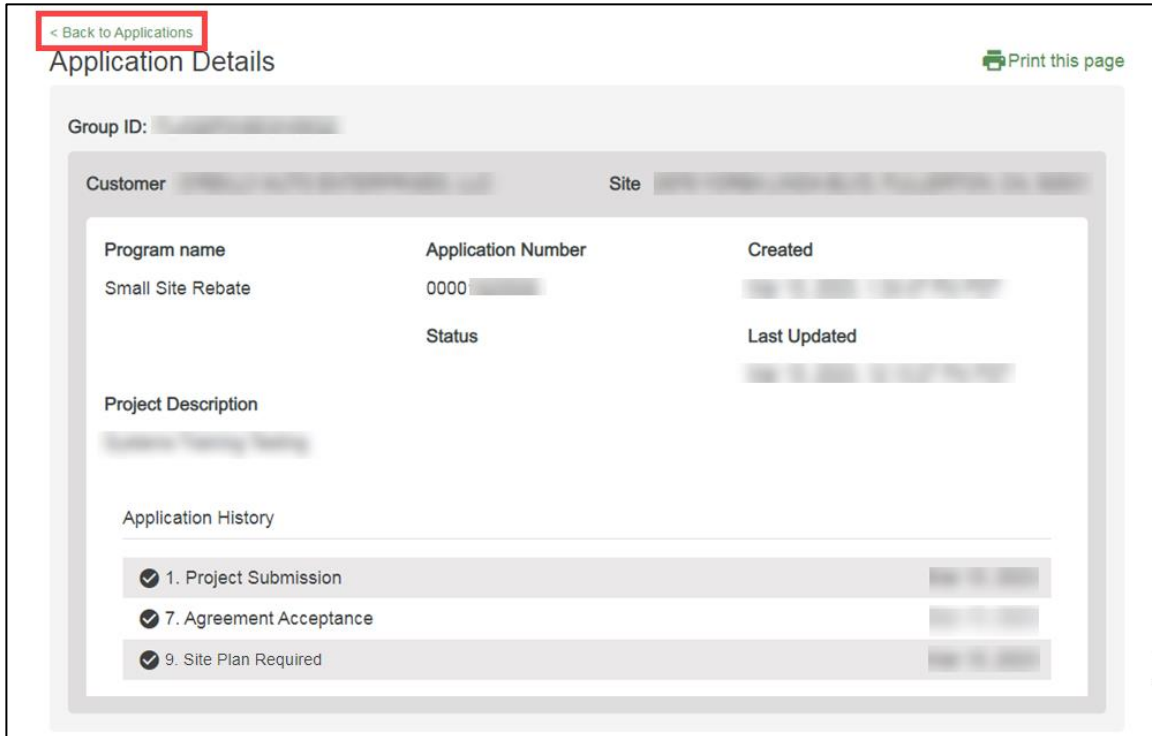


The **Application Details** page displays.

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

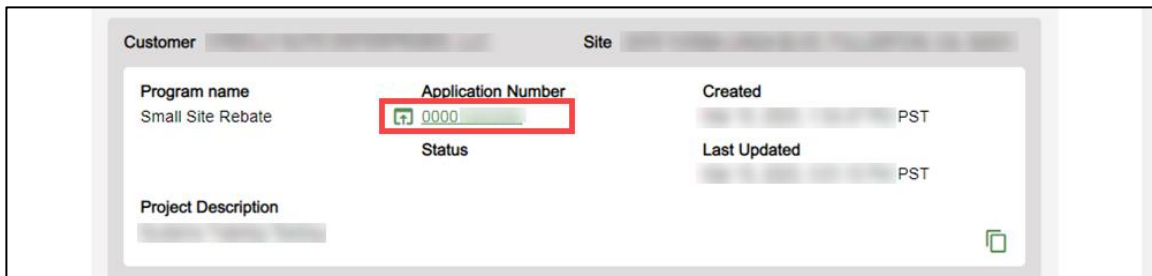
Once a Design Acceptance is complete, SCE begins work on project requirements.

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

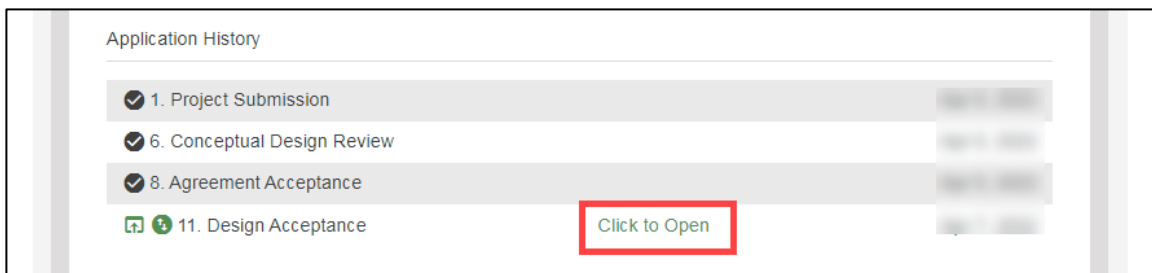
To complete the Design Acceptance, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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




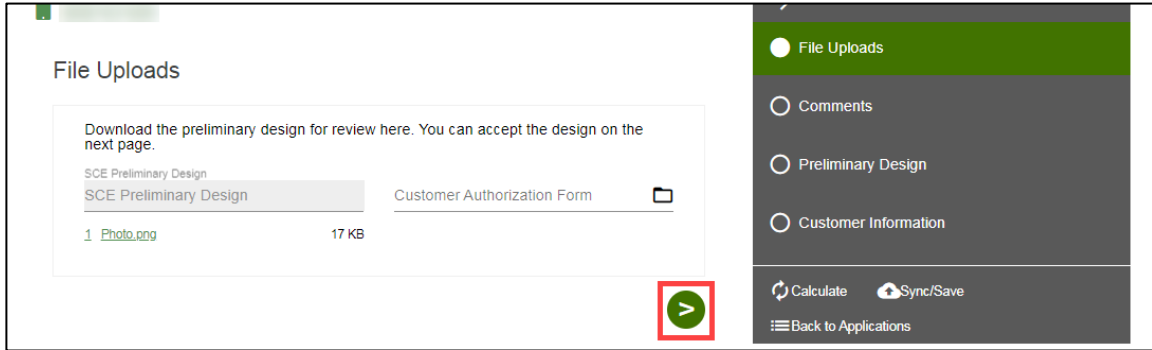
The **File Uploads** page displays.

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

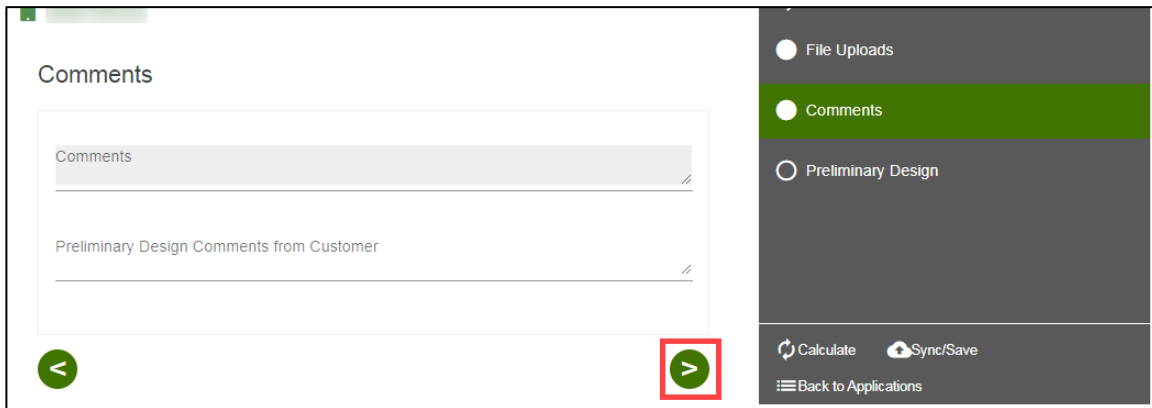
3. Verify the **File Uploads**.
4. Click the  **Next** arrow.



The **Comments** page displays.


Comments

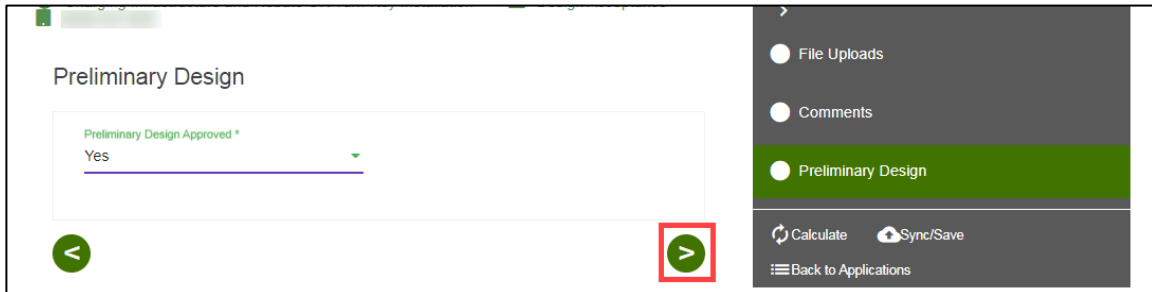
5. Enter **Preliminary Design Comments from Customer**, if needed.
6. Click the  **Next** arrow.



The **Preliminary Design** page displays.

Preliminary Design

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



The screenshot shows the 'Preliminary Design' form. The 'Preliminary Design Approved *' dropdown menu is set to 'Yes'. A green circle with a white right-pointing arrow is highlighted with a red box, indicating the 'Next' button. The sidebar on the right shows 'Preliminary Design' as the active section, with other options like 'File Uploads', 'Comments', 'Calculate', 'Sync/Save', and 'Back to Applications'.


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

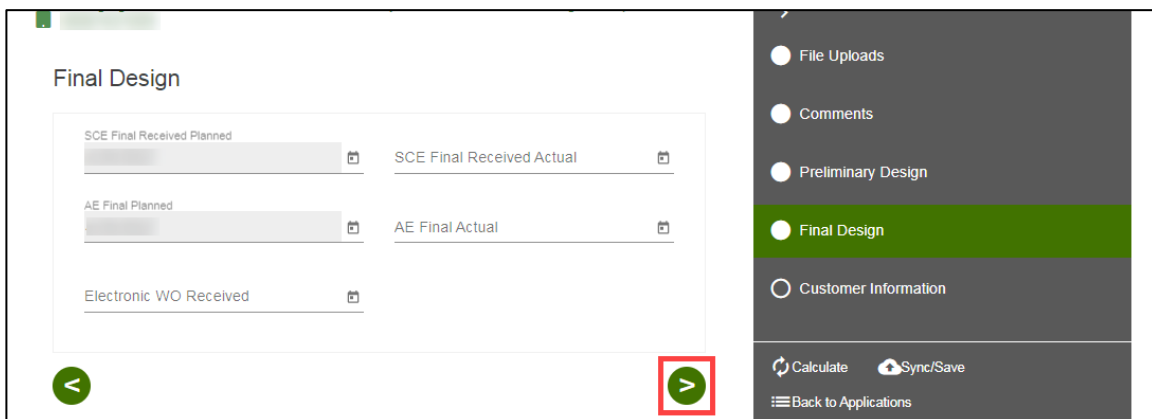


The screenshot shows the 'Preliminary Design' form with 'No' selected in the 'Preliminary Design Approved *' dropdown. A red box highlights the 'Revision Reason' text input field. The sidebar on the right is the same as in the previous screenshot.

The **Final Design** page displays.

Final Design

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



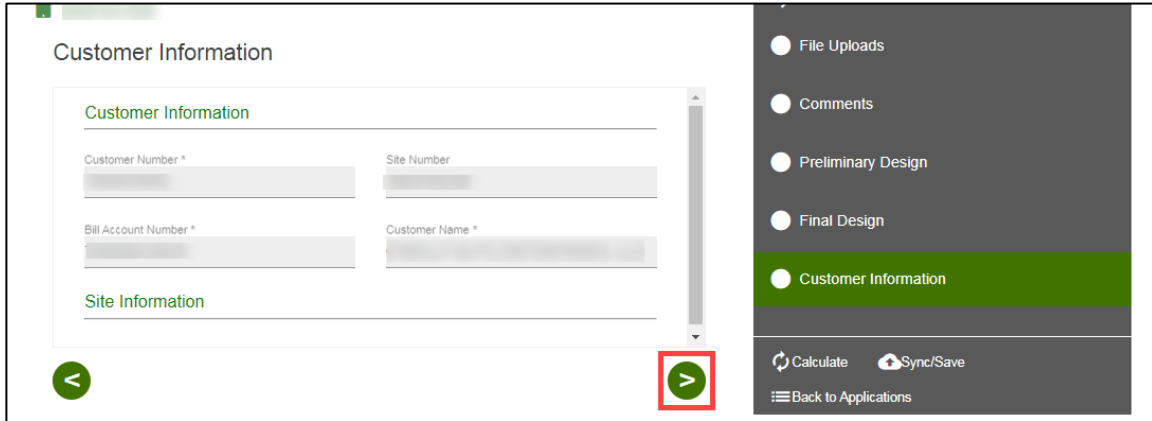
The screenshot shows the 'Final Design' form. It contains several input fields: 'SCE Final Received Planned', 'SCE Final Received Actual', 'AE Final Planned', 'AE Final Actual', and 'Electronic WO Received'. A green circle with a white right-pointing arrow is highlighted with a red box, indicating the 'Next' button. The sidebar on the right shows 'Final Design' as the active section, with other options like 'File Uploads', 'Comments', 'Preliminary Design', 'Customer Information', 'Calculate', 'Sync/Save', and 'Back to Applications'.

The **Customer Information** page displays.

Customer Information

11. Verify the **Customer Information**.

12. Click the  **Next** arrow.

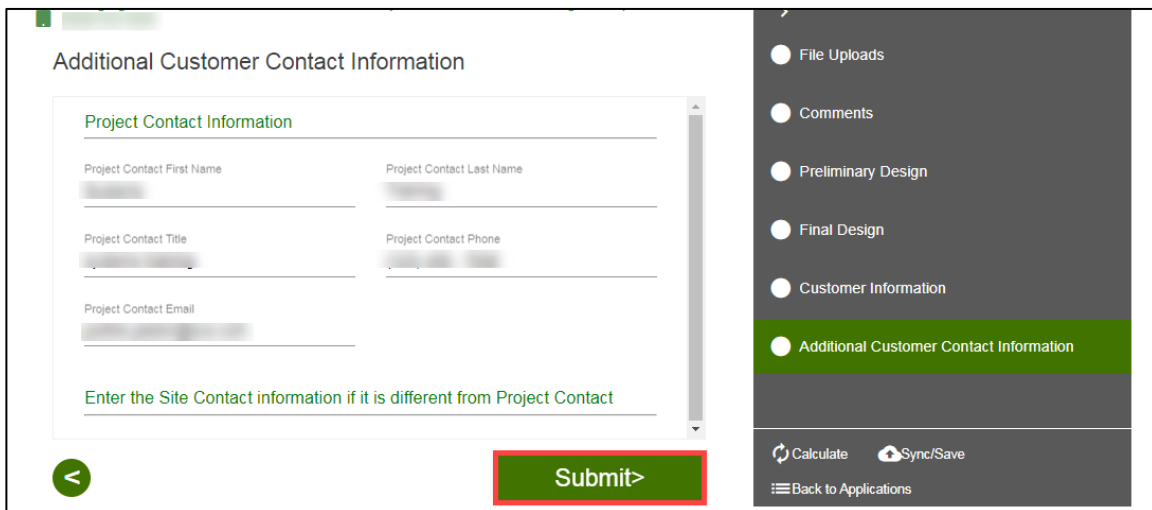


The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

14. Select **Submit**.

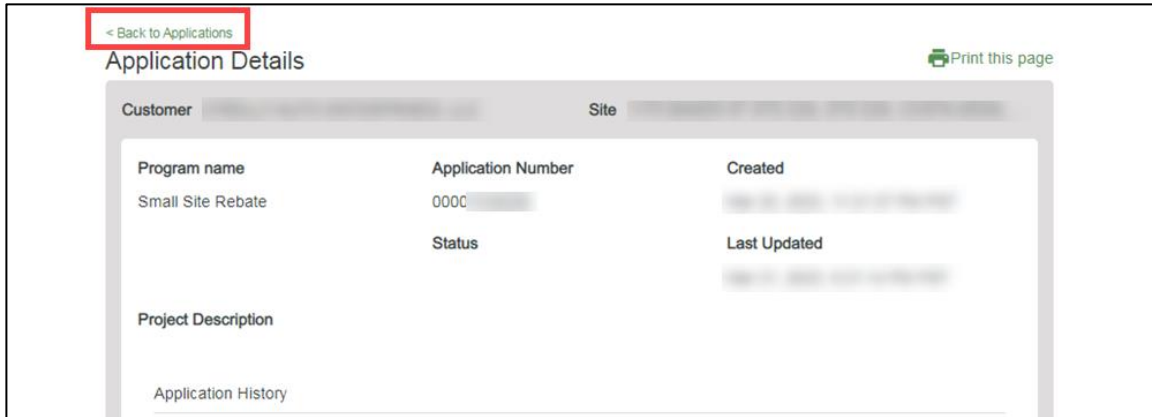


The **Application Details** page displays.

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.



The screenshot shows the 'Application Details' page. At the top left, there is a link '< Back to Applications' highlighted with a red box. To the right of the title is a 'Print this page' icon. Below the title, there are two input fields for 'Customer' and 'Site'. The main content area contains a table with the following columns: 'Program name', 'Application Number', 'Created', 'Status', and 'Last Updated'. The 'Program name' is 'Small Site Rebate' and the 'Application Number' is '0000'. Below the table is a 'Project Description' field and an 'Application History' section.

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

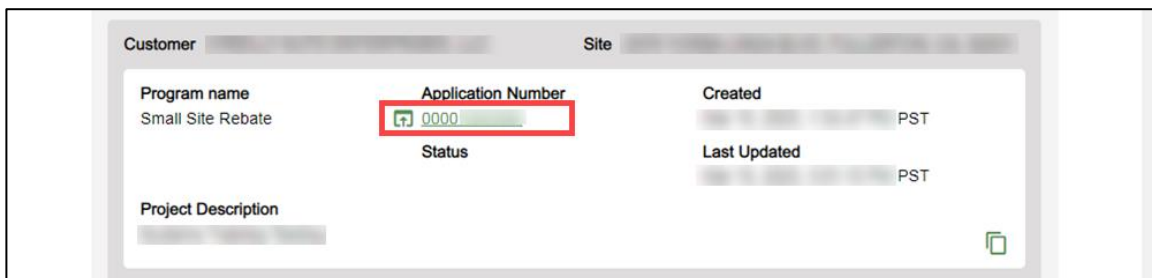
Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

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.

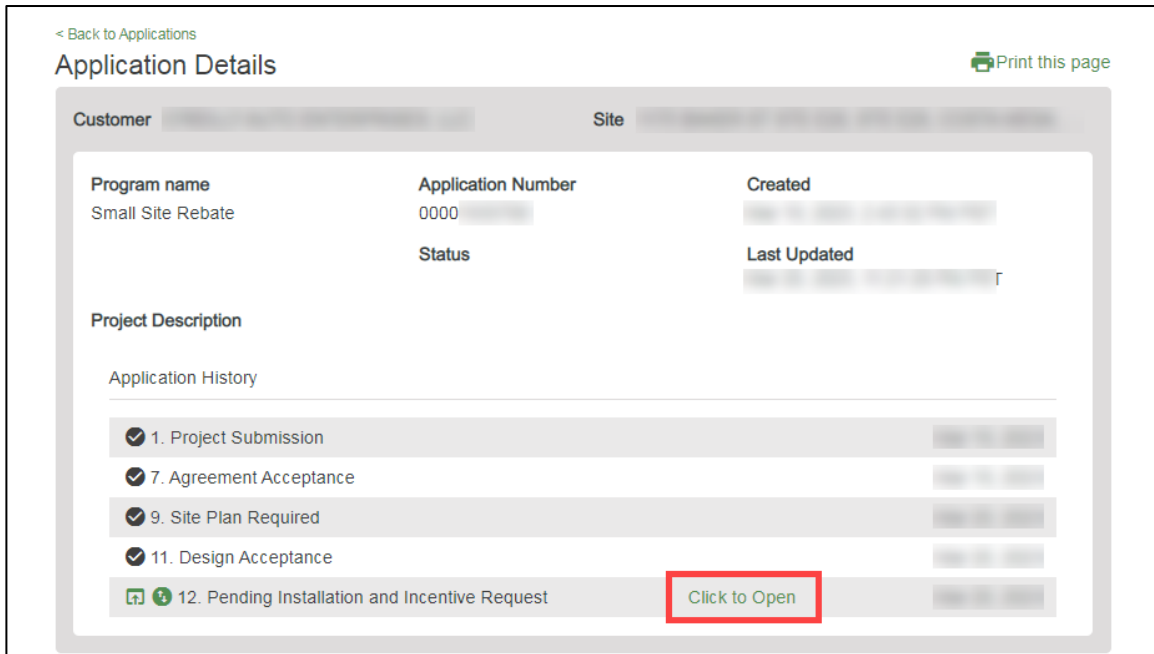
1. Select the **Application Number**.



The screenshot shows a web interface for 'Application Details'. At the top, there are fields for 'Customer' and 'Site'. Below these, there is a table with the following columns: 'Program name', 'Application Number', 'Created', 'Status', and 'Last Updated'. The 'Application Number' field contains the value '0000' and is highlighted with a red rectangular box. The 'Created' and 'Last Updated' fields both show a date and the time 'PST'. Below the table, there is a 'Project Description' field with a text input area and a copy icon on the right.

The **Application Details** page displays.

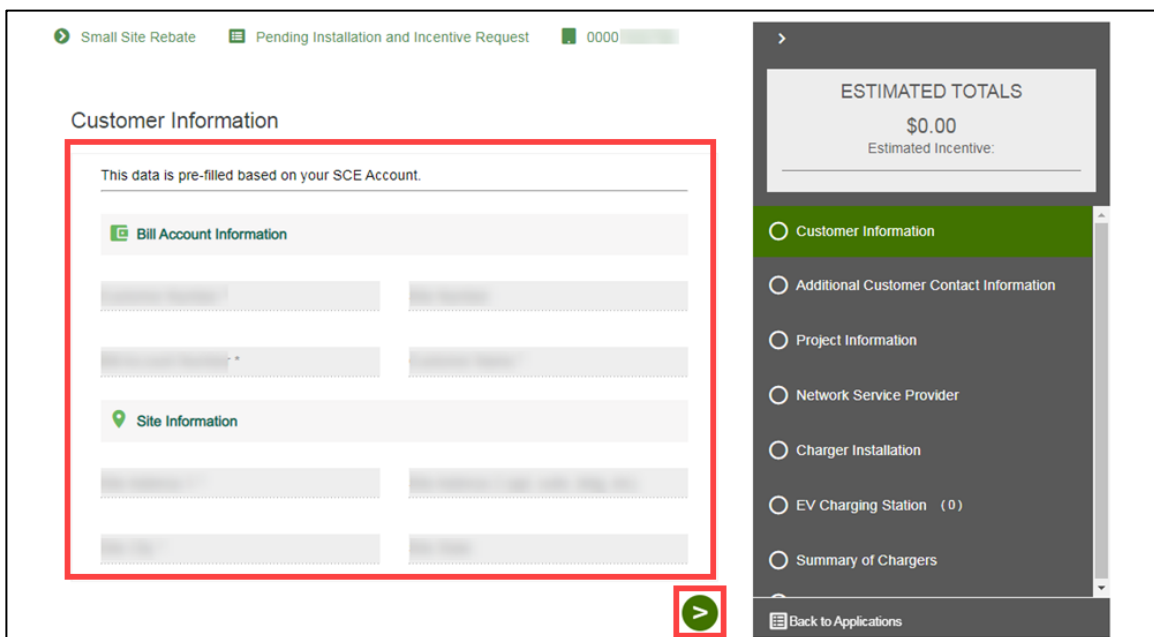
2. Select **Click to Open** under 12. Pending Installation and Incentive Request.



The **Customer Information** page displays.

Customer Information

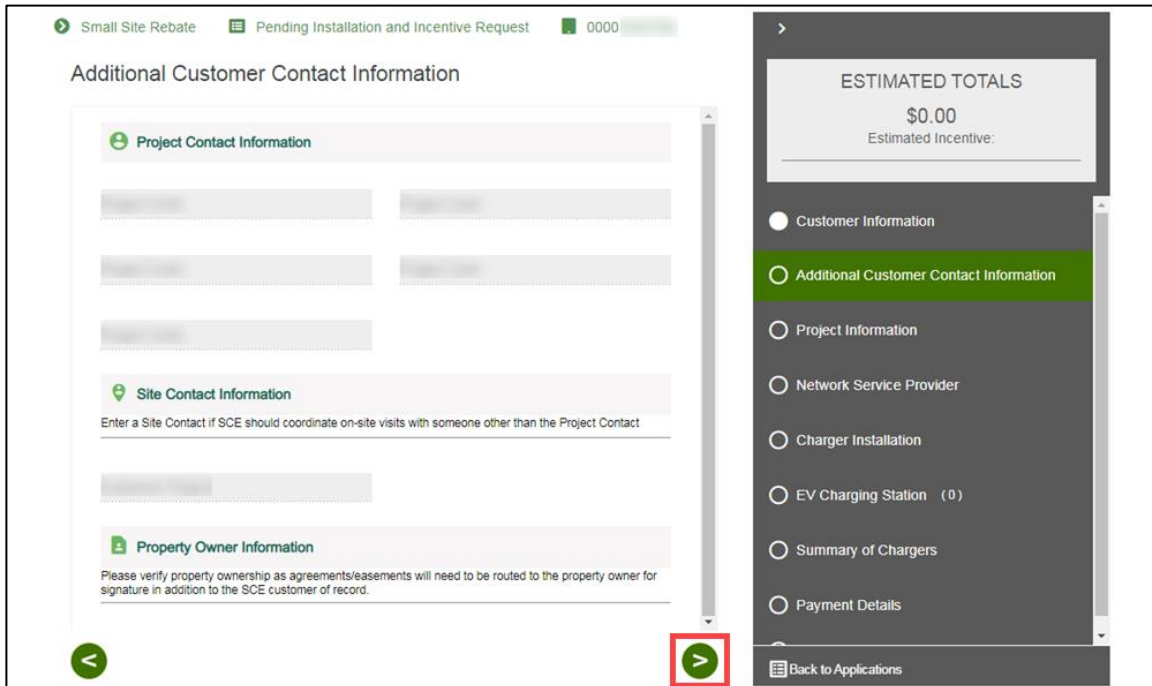
3. Confirm the **Bill Account Information** and **Site Information**.
4. Click the **> Next** arrow.



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.



Small Site Rebate Pending Installation and Incentive Request 0000

Additional Customer Contact Information

Project Contact Information

Site Contact Information
Enter a Site Contact if SCE should coordinate on-site visits with someone other than the Project Contact

Property Owner Information
Please verify property ownership as agreements/easements will need to be routed to the property owner for signature in addition to the SCE customer of record.

ESTIMATED TOTALS
\$0.00
Estimated Incentive:

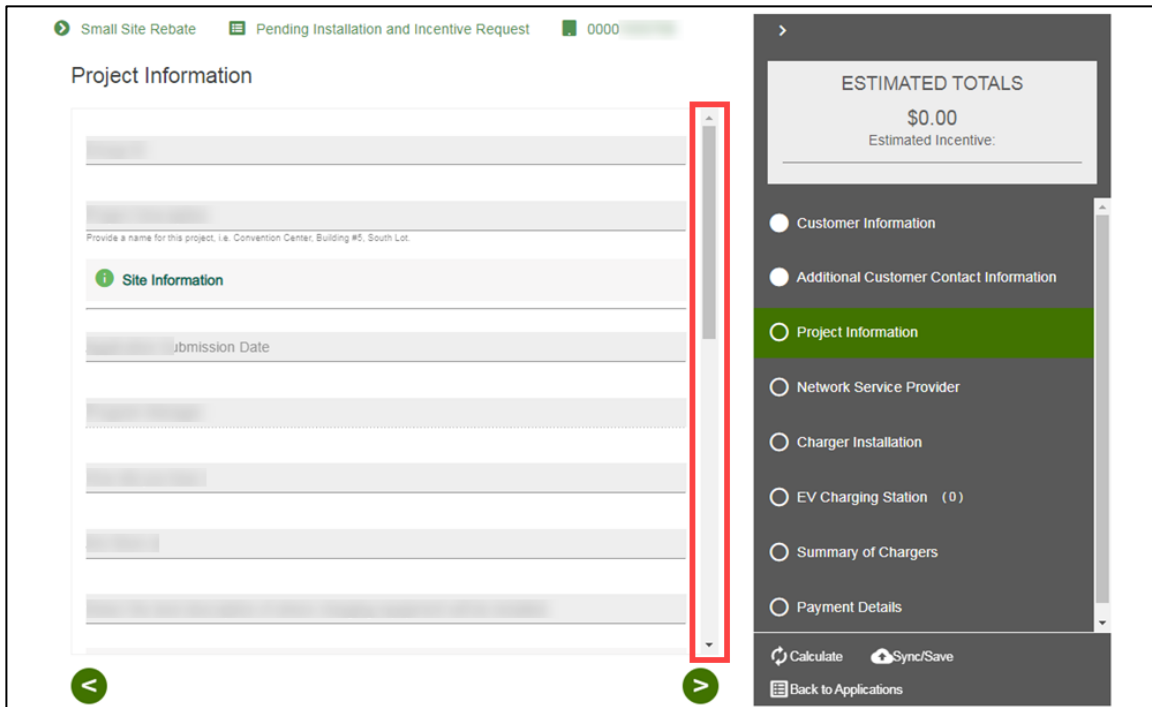
- Customer Information
- Additional Customer Contact Information
- Project Information
- Network Service Provider
- Charger Installation
- EV Charging Station (0)
- Summary of Chargers
- Payment Details

Back to Applications

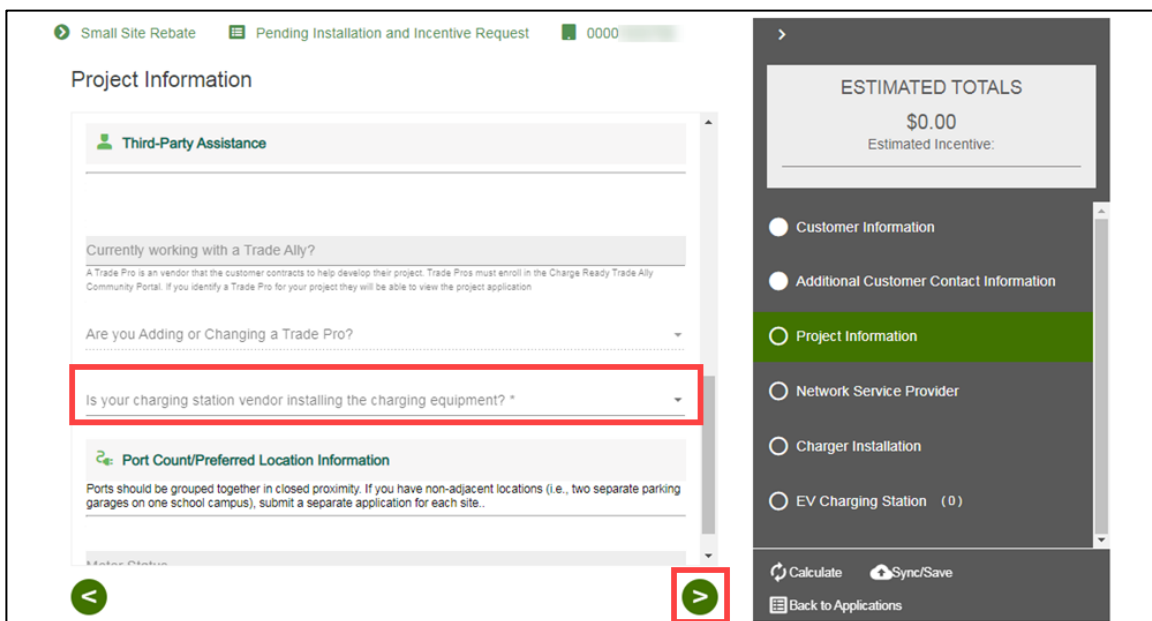
The **Project Information** page displays.

Project Information

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




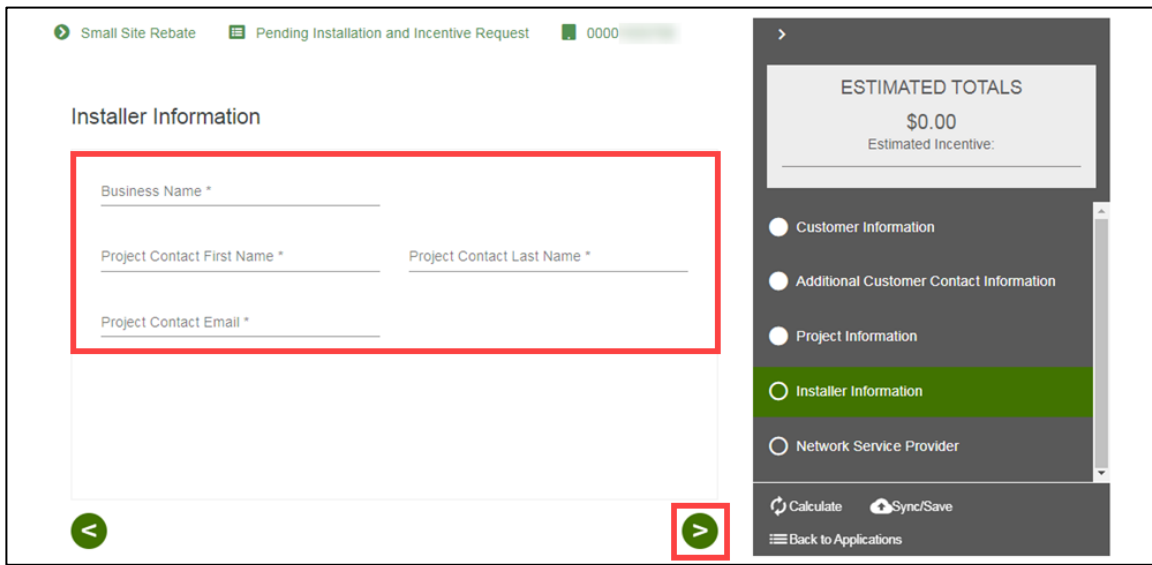
9. Select Yes or No under **Is your charging vendor installing the charging equipment?**
10. Click the **Next** arrow.



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


Installer Information

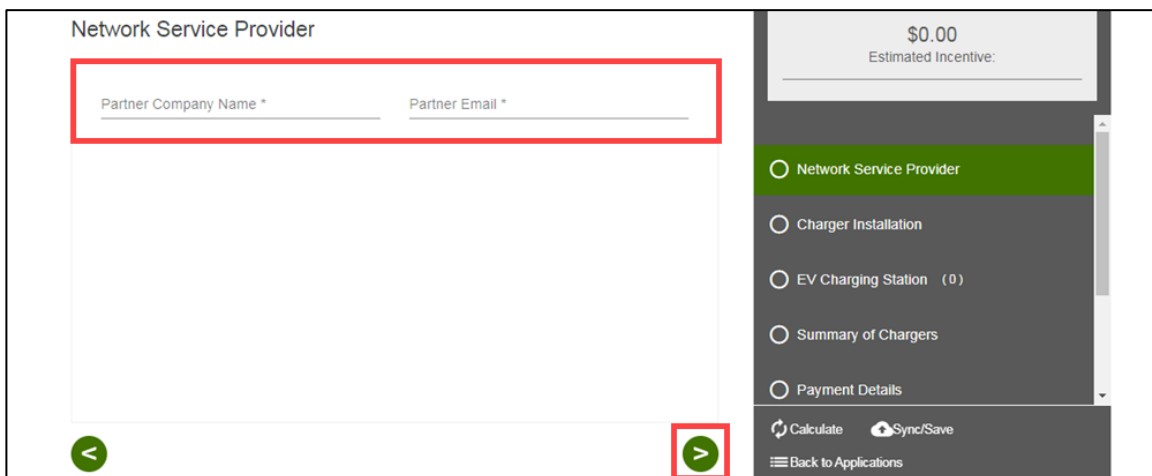
11. Enter the **Installer Information**, if applicable.
12. Click the  **Next** arrow.



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

Network Service Provider

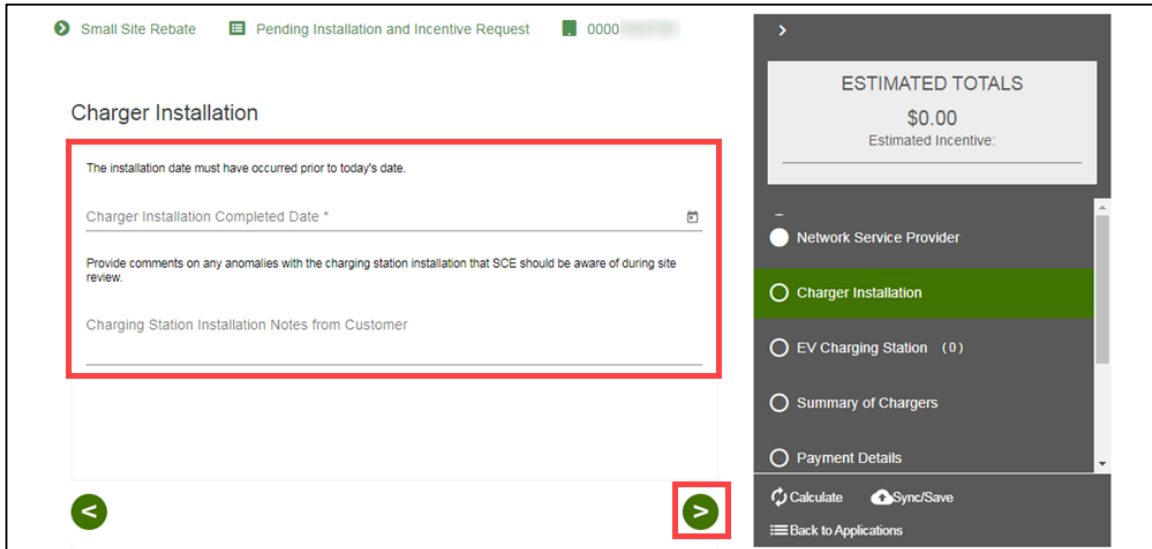
13. Enter the **Partner Company Name** and **Partner Email**.
14. Click the  **Next** arrow.



The **Charger Installation** page displays.

Charger Installation

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



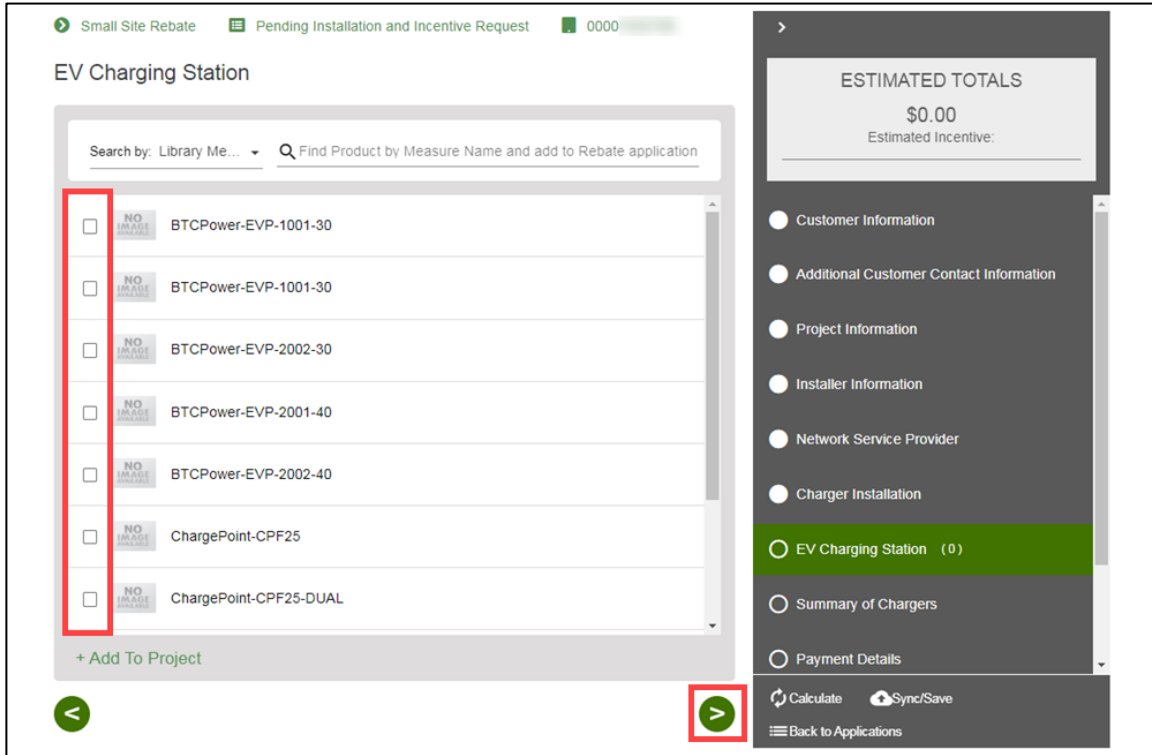
The screenshot displays the 'Charger Installation' page. At the top, there are navigation elements: 'Small Site Rebate', 'Pending Installation and Incentive Request', and a user ID '0000'. The main form area is titled 'Charger Installation' and contains a warning message: 'The installation date must have occurred prior to today's date.' Below this is a text input field for 'Charger Installation Completed Date *' with a calendar icon. Underneath is a text area for 'Provide comments on any anomalies with the charging station installation that SCE should be aware of during site review.' and another text area for 'Charging Station Installation Notes from Customer'. At the bottom of the form, there are two green circular arrows: a left arrow and a right arrow. The right arrow is highlighted with a red box. To the right of the form is a sidebar with a dark background. It features a section titled 'ESTIMATED TOTALS' showing '\$0.00' and 'Estimated Incentive:'. Below this is a list of options: 'Network Service Provider', 'Charger Installation' (which is selected and highlighted in green), 'EV Charging Station (0)', 'Summary of Chargers', and 'Payment Details'. At the bottom of the sidebar are buttons for 'Calculate', 'Sync/Save', and 'Back to Applications'.

The **EV Charging Station** page displays.

EV Charging Station

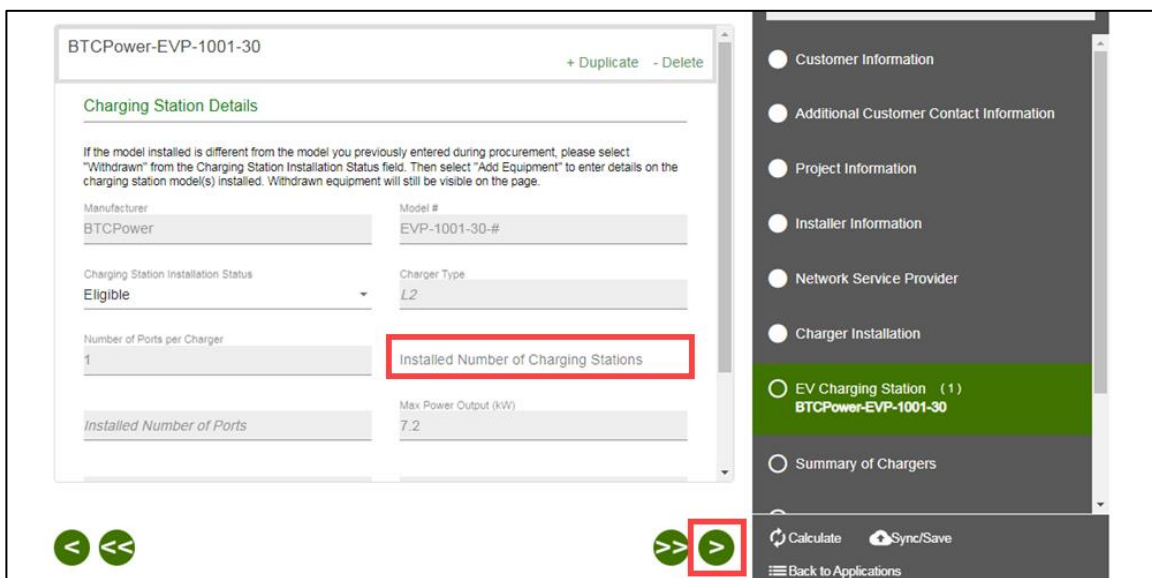
18. Select the applicable product.

19. Click the  **Next** arrow.



20. Enter the **Installed Number of Charging Stations**.

21. Click the  **Next** arrow.

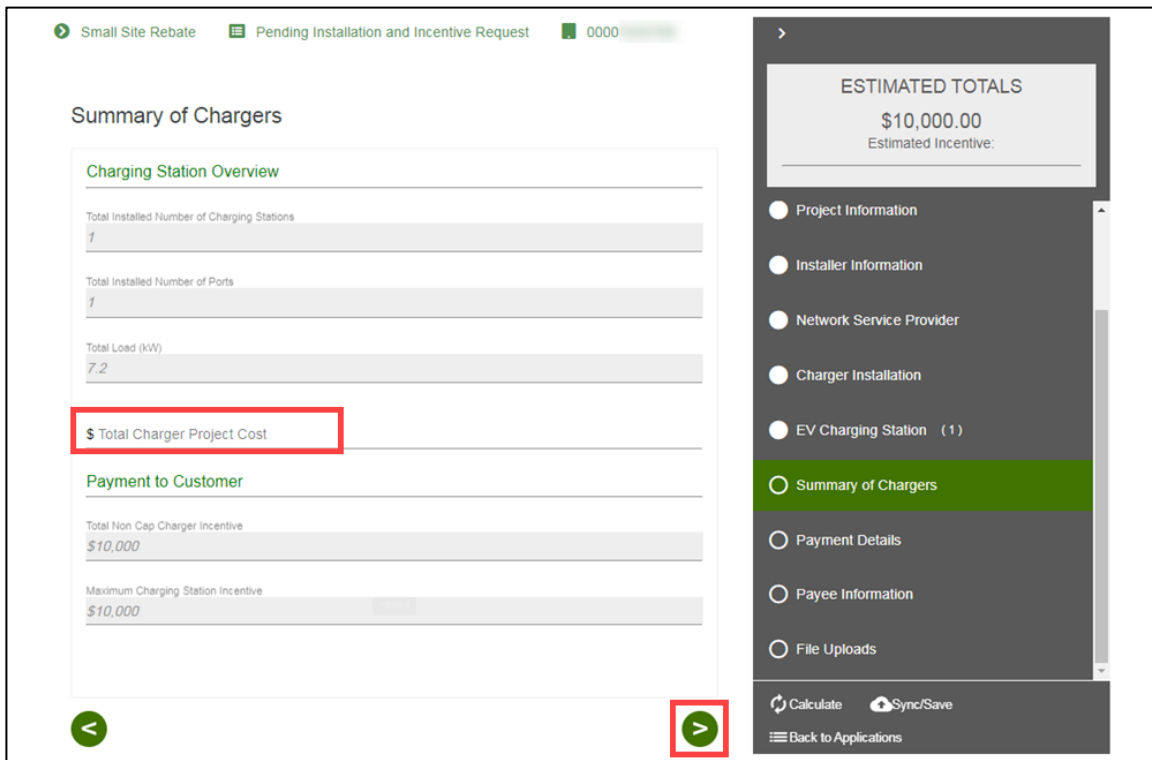


The **Summary of Chargers** page displays.

Summary of Chargers

22. Enter the **Total Charger Project Cost**.

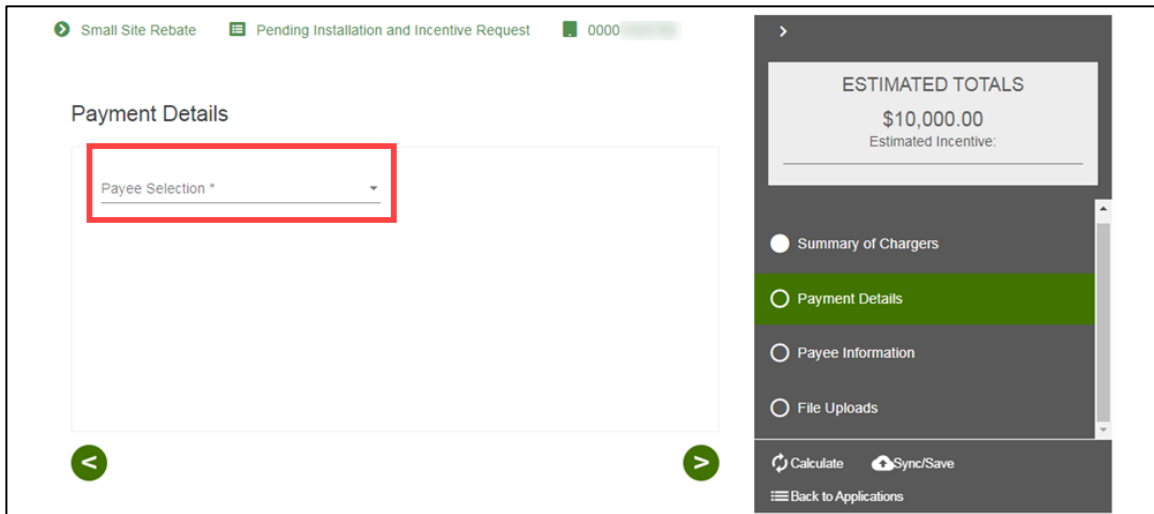
23. Click the  **Next** arrow.



The **Payment Details** page displays.

Payment Details

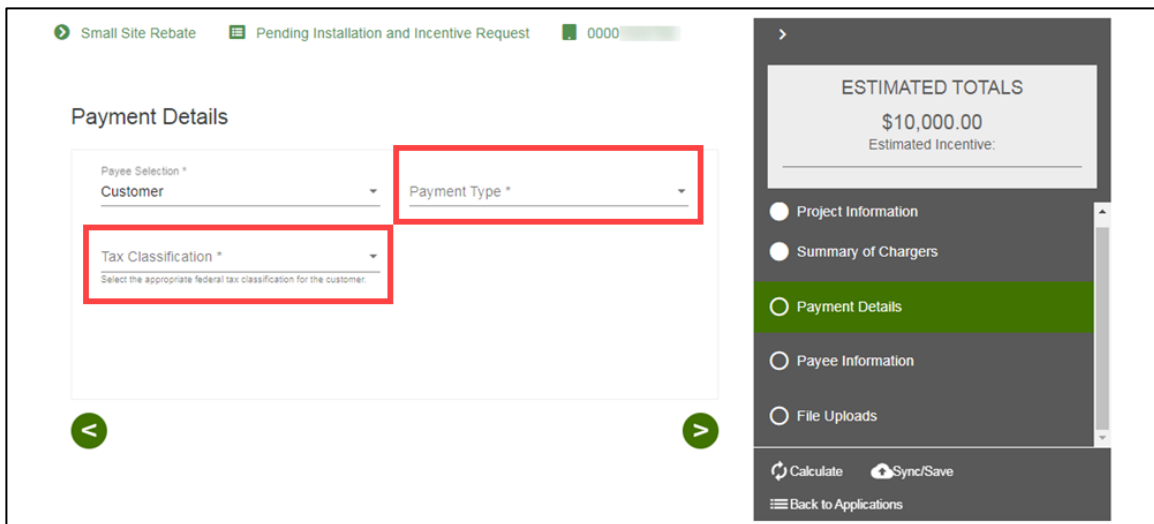
24. Select a **Payee Selection**.



Additional fields display.

25. Select the **Payment Type**.

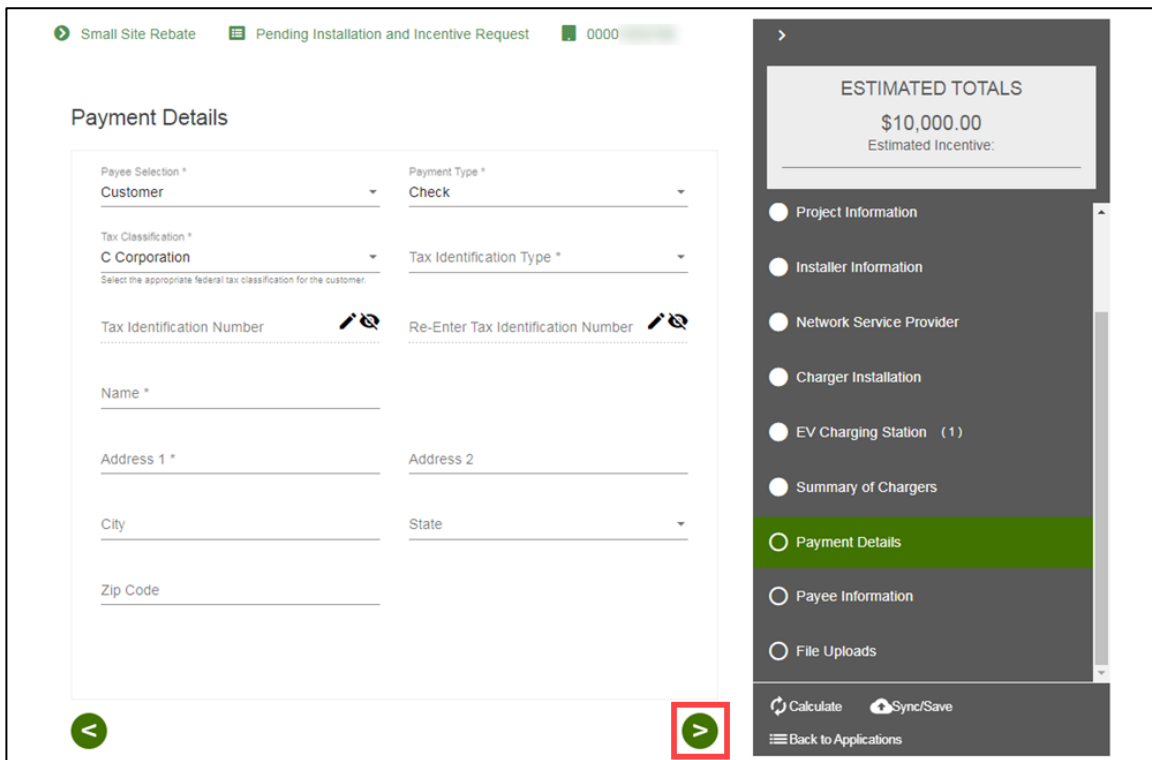
26. Select the **Tax Classification**.



Additional fields display.

27. Complete the required information.

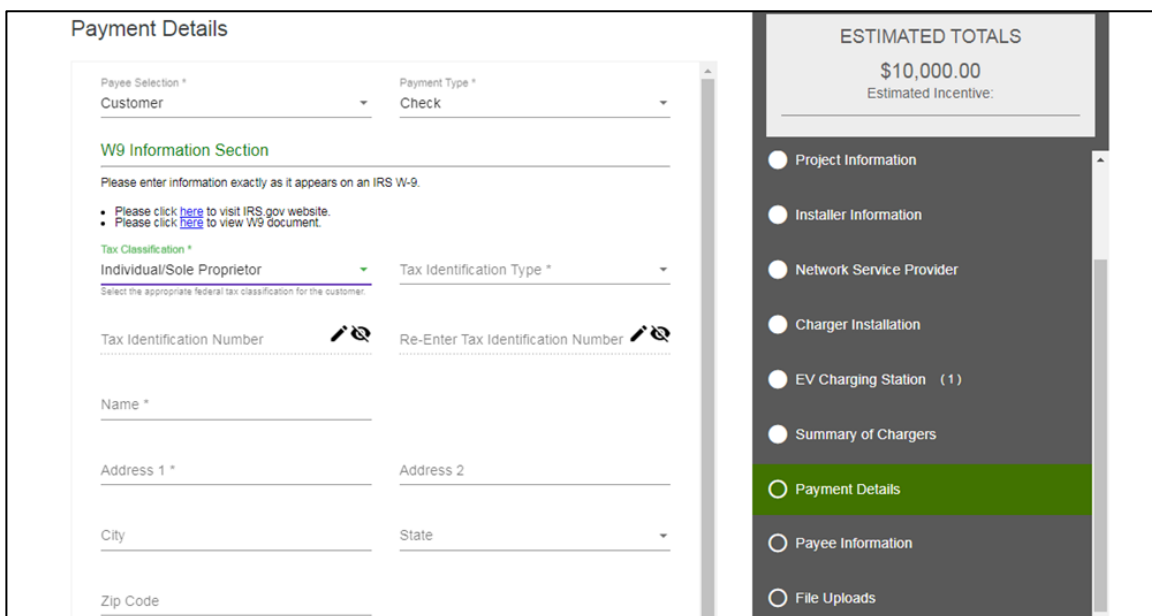
28. Click the  **Next** arrow.



The screenshot shows the 'Payment Details' form in the application. At the top, there are navigation elements: 'Small Site Rebate', 'Pending Installation and Incentive Request', and a progress indicator '0000'. The form fields include: 'Payee Selection *' (Customer), 'Payment Type *' (Check), 'Tax Classification *' (C Corporation), 'Tax Identification Type *', 'Tax Identification Number', 'Re-Enter Tax Identification Number', 'Name *', 'Address 1 *', 'Address 2', 'City', 'State', and 'Zip Code'. On the right side, there is a sidebar with 'ESTIMATED TOTALS' of \$10,000.00 and a list of menu items: Project Information, Installer Information, Network Service Provider, Charger Installation, EV Charging Station (1), Summary of Chargers, Payment Details (highlighted in green), Payee Information, and File Uploads. At the bottom right, there are buttons for 'Calculate', 'Sync/Save', and 'Back to Applications'. A red box highlights the green 'Next' arrow button at the bottom right of the form.

The **Payee Information** page displays.

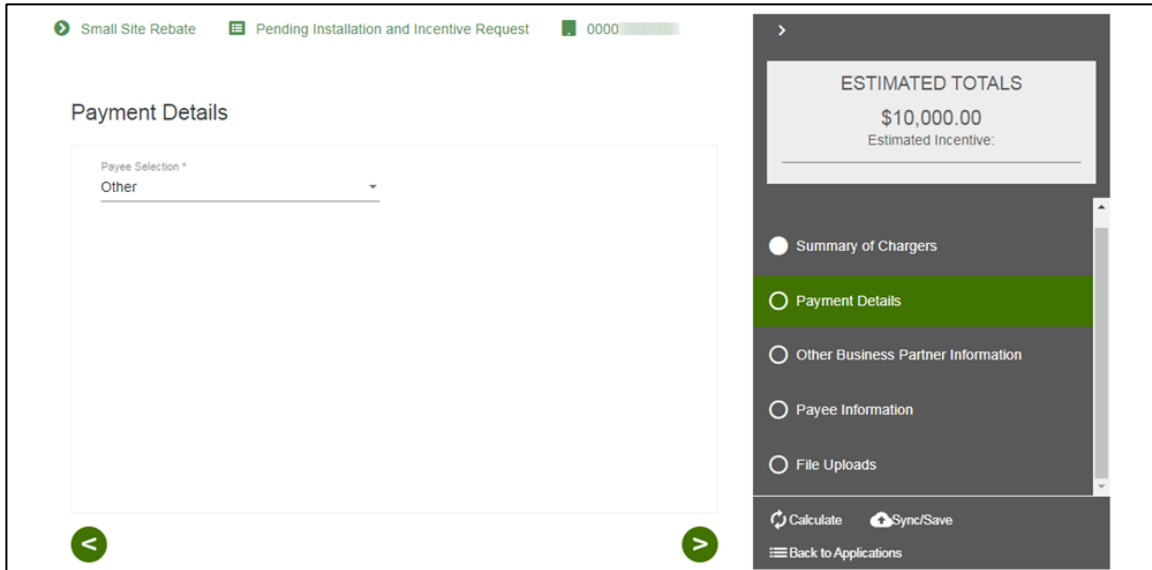
Note: Certain Tax Classifications require more information.



This screenshot shows the 'Payment Details' form with the 'W9 Information Section' highlighted in green. The section contains the text: 'Please enter information exactly as it appears on an IRS W-9.' and two bullet points: 'Please click [here](#) to visit IRS.gov website.' and 'Please click [here](#) to view W9 document.' The 'Tax Classification *' dropdown is now set to 'Individual/Sole Proprietor'. The rest of the form fields and the sidebar on the right are the same as in the previous screenshot.

Other Payee Selection

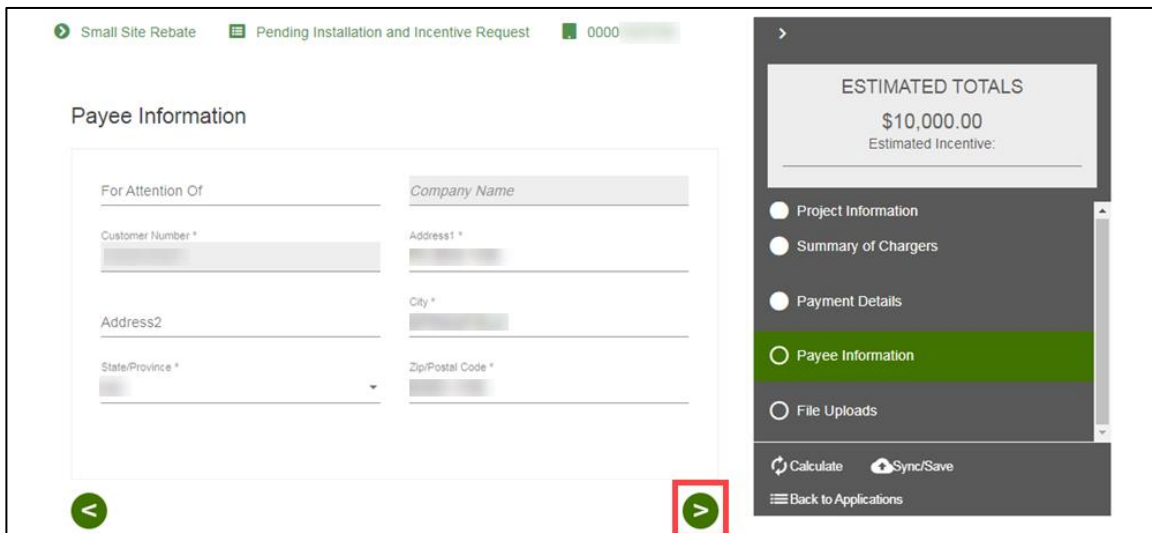
If the Payee Selection is Other, the Other Business Partner Information page displays on the right-hand side menu.



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**.

Small Site Rebate Pending Installation and Incentive Request 0000

File Uploads

Networking Invoice/Agreement *	Project Invoice *
1 Agreement.docx 49 KB	
Contract Package Invoice	Customer Permits
Engineering Assessment Result	Proof Of Procurement EVSE Upload
T&D Illustration	Customer Grant Deed Upload

Submit

ESTIMATED TOTALS
\$10,000.00
Estimated Incentive:

- Summary of Chargers
- Payment Details
- Payee Information
- File Uploads

Calculate Sync/Save Back to Applications

The **Application Details** page displays.

Application Details

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

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

< Back to Applications

Application Details

Print this page

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

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