All Project Submission for Customers in the *Rebate Center – Product View*

User Guide

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Overview

This document instructs Customers how to use the **Rebate Center – Product View** website to submit applications for **EE Deemed – Customer**, **Auto DR Calculated**, and **Auto DR Express** projects.

Using the Rebate Center – Product View Site

The **Rebate Center – Product View** allows you to apply for rebates on eligible equipment, or products. For each product, you will fill out a form with customer, site, and equipment details, then add the product to a shopping cart. A form can only include one installation site.

Applying for Multiple Rebates

If you are applying for multiple rebates at one time, you will fill out a form for each product/installation site combination. However, after the first form, fields that are common between the submissions will be pre-populated based on the values entered in the first submission – for example, if two products are being installed at the same site, site details will be pre-populated in the second application, and can be edited if needed.

If you are applying for rebates on the same equipment at multiple sites, the process is the same.

You can select which forms in the cart you want to include on an application.

Single Payment for Multiple Rebates

If you want to receive a single payment for multiple rebates, contact SCE after submitting your application. SCE can group applications together for payment. In this case, payment will be sent only after all products in a group are installed, reviewed, and approved.

Which program?

Note: You will not see any Programs listed unless you have at least one commercial account with SCE.

- The **EE Deemed – Customer** program allow customers to apply for rebates from a predefined list of specific Energy Efficient equipment
- **Demand Response (DR) programs** offer incentives to non-residential customers who reduce their electricity use when demand for electricity is high. Automated Demand Response (Auto DR) is an energy-saving technology that automatically reduces the amount of energy your business uses during a Demand Response (DR) event

- Depending on the product you select, you will either see Auto DR Express or Auto DR Calculated indicated on the UI. Throughout this document we will note any variances that you can expect to see between the two programs.
  - The **Auto DR Express** Program reduces or completely covers the purchase and installation costs of qualifying equipment to become Auto DR enabled. SCE will calculate your eligible reduction based on the customer's Facility Type, climate zone, and annual max demand. The incentive will cover up to 100% of the cost of the project or $300/kW, whichever is less
  - The **Auto DR Calculated** program allows customers to apply for rebates from a predefined list for specific equipment installation

Are you applying for On Bill Financing (OBF)?

OBF allows you to procure a loan from SCE to cover the project costs. This loan will be repaid in installments on your utility bill. **Only available for EE Deemed projects.**

If you are applying for OBF, you must submit the application before the equipment is installed (see below).

Is the Equipment Installed?

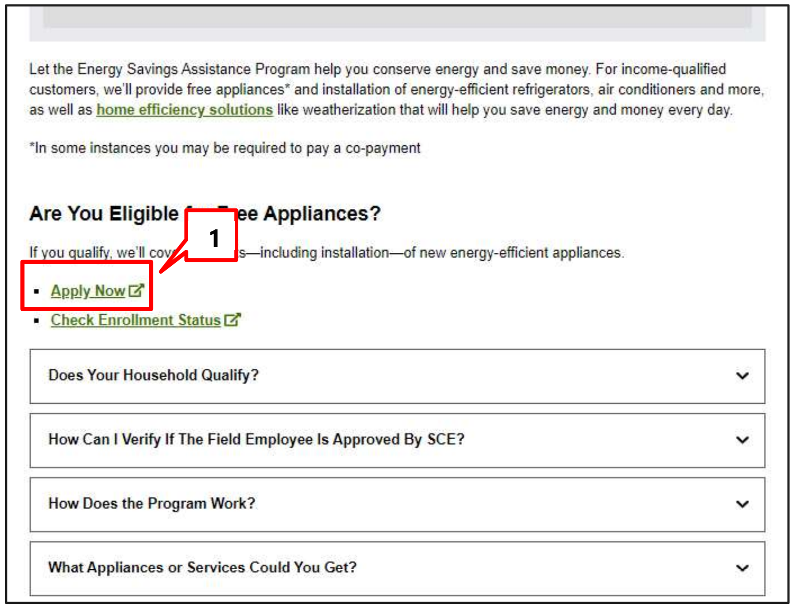
Product Not Yet Installed: If you are submitting an application before equipment installation, you will submit a **Reservation Request**. SCE will review and approve a reservation of funds. After installation you will return and enter information about the installation and payment. SCE will review and approve the payment (or return the application for revisions.) **All Auto DR projects begin with a Reservation Request.**

Product Installed: If you are submitting an application after product installation you will submit an **Incentive Request**, which includes installation and payment information. **Only available for EE Deemed projects.**

Access the Rebate Center

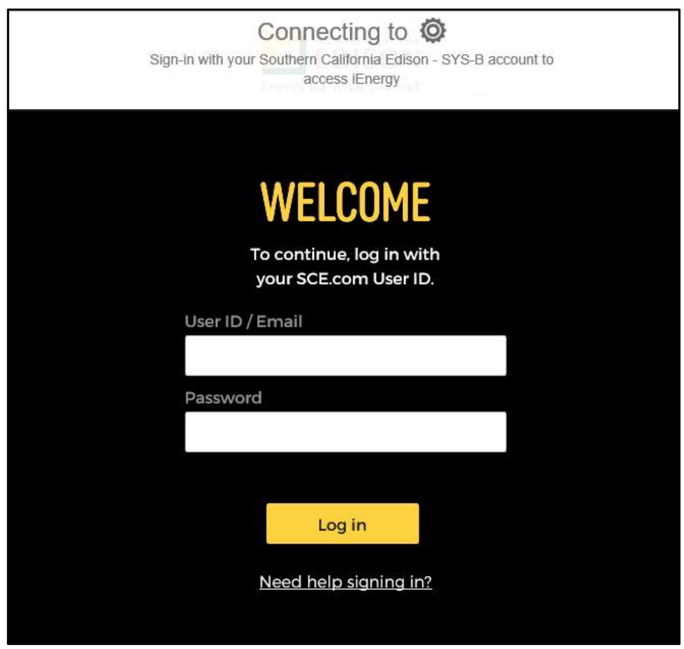
SCE Customers can access the Rebate Center website to submit and manage rebate applications by logging into *My Account* on sce.com.

1. On SCE.com, log into **My Account** and click **Apply Now**.

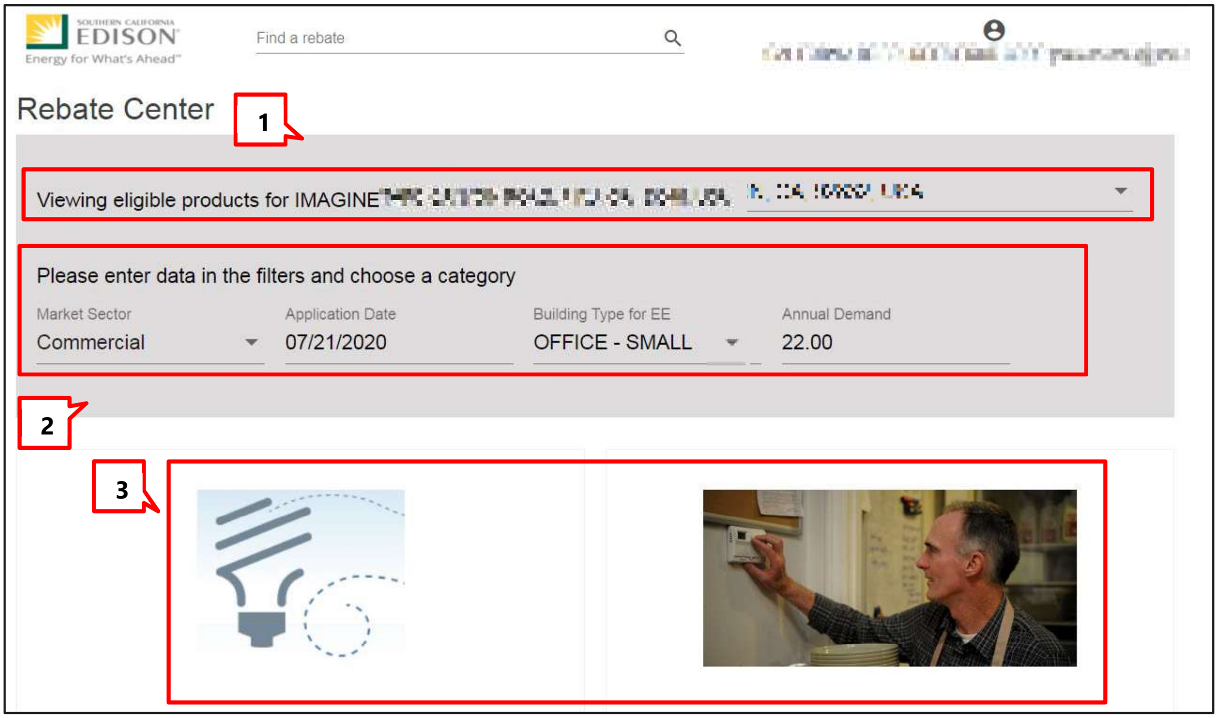


2. If you are not logged in, you will be prompted to log in when you click **Apply Now**. When login is completed, you will be automatically directed to the Rebate Center home page.

   The Rebate Center home page displays.



Rebate Center – Product View Home Page



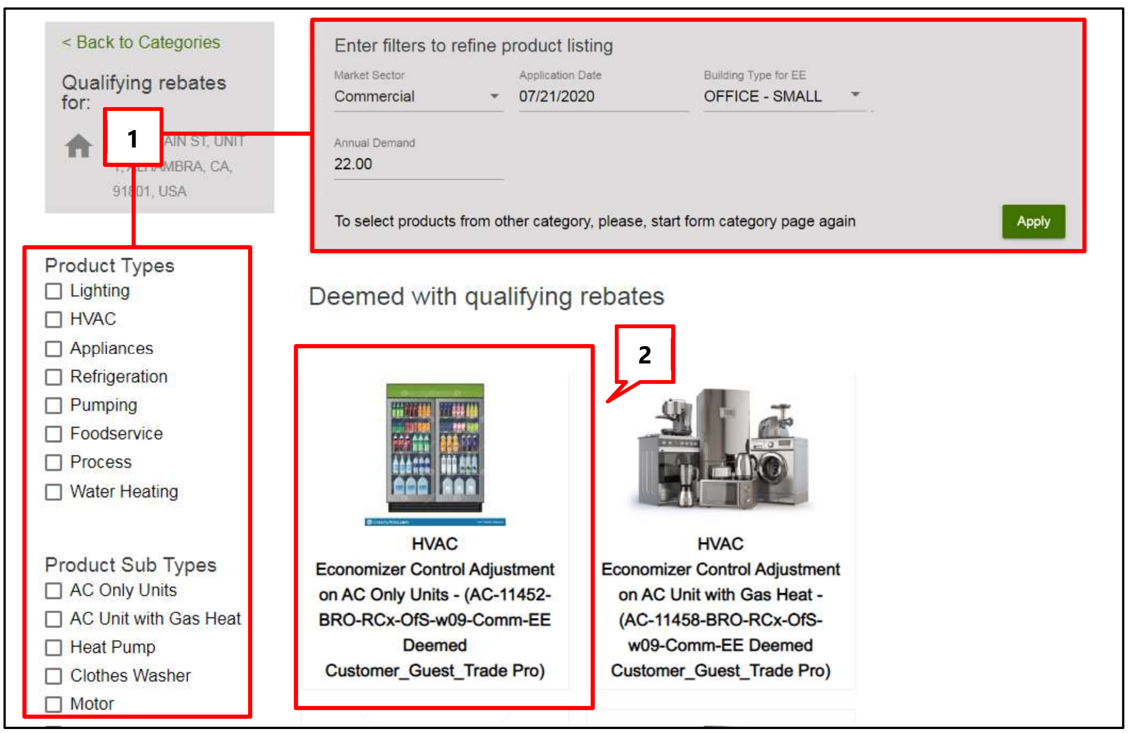
The Rebate Center home page displays product categories for which the selected customer site is eligible. Available products may vary by site.

1. **Site selection** – If you have more than one site, select from the dropdown.
2. **Data filters** – Use the data filters to refine results. The following table details which filters are available for each program.
    - **Market Sector –** Defaults to Commercial. Can update if needed
    - **Application Date –** Auto-populates with current date
    - **Climate Zone –** Derived from customer site information
    - **Building Type for EE** – Derived from customer site information
    - **Annual Demand** – Derived from customer site information
3. **Product selection** – Click on the product category you want to apply for.

Filter	Available for Program		
	Deemed - Customer	Auto DR Express	Auto DR Calculated
Market Sector	✓	✗	✗
Application Date	✓	✓	✓
Climate Zone	✓	✓	✗
Building Type for EE	✓	✓	✗
Annual Demand	✗	✓	✗

Select A Product

The next screen shows a list of products eligible for rebates.

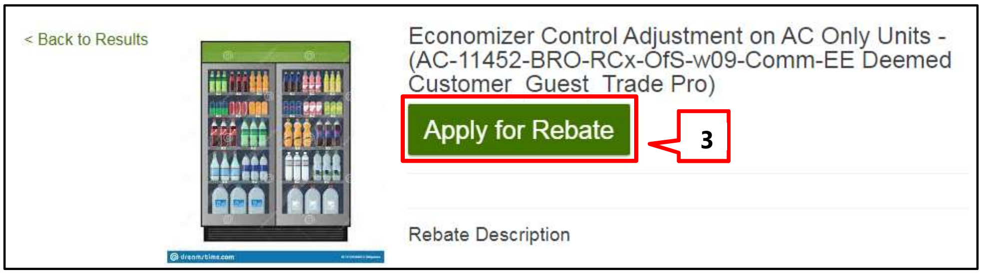


1. Refine results by using the filters at the top of the page and clicking **Apply**, or by selecting **Product Types** or **Sub Types** on the left.

   Note: Changing *Market Sector* or *Building Type* will affect which products are available.
2. Click on a product image to select a product.

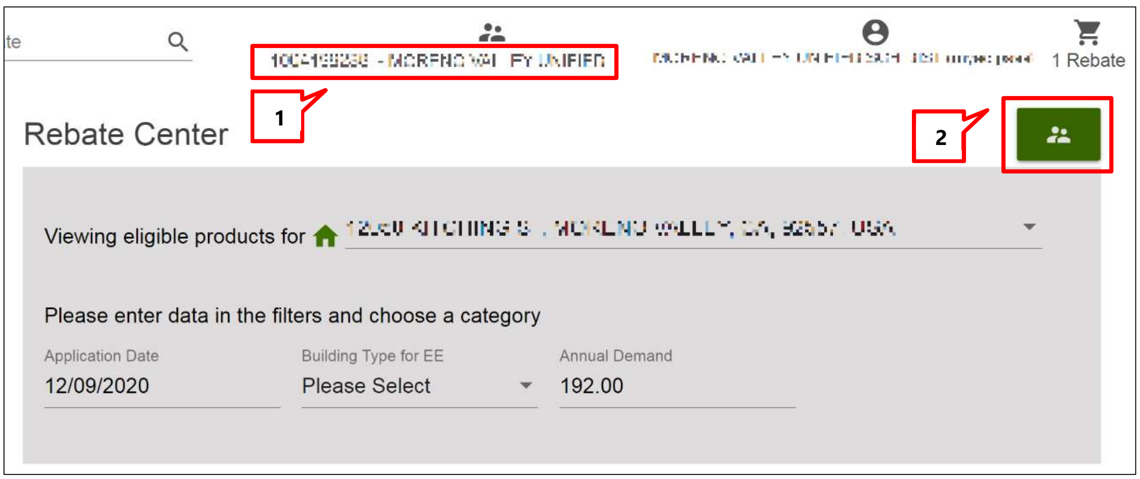
   The product details page displays.

3. Click **Apply for Rebate** to start the application.



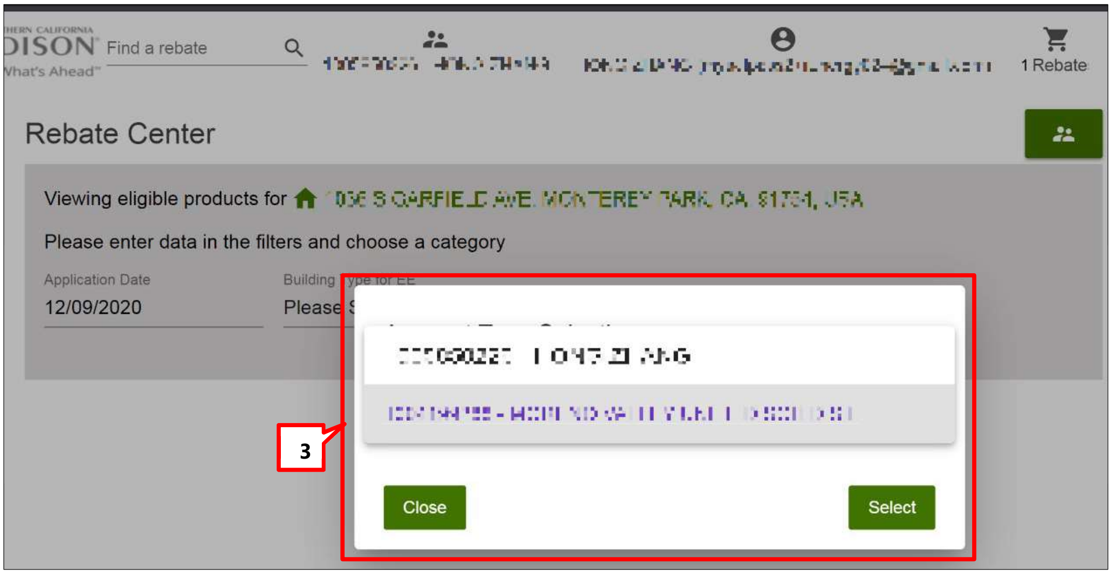
Accessing Multiple Accounts

When there are multiple user accounts associated with a single SCE.com account, and a user logs into the Rebate Center via SSO, they can access any of those accounts with the following steps:



1. The current account is indicated at the top of the UI by the account number and name.
2. To switch accounts, click on the **Switch Accounts** icon.

   A pop-up selection window displays.



3. In the pop-up window, click the desired account number then click **Select**.

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

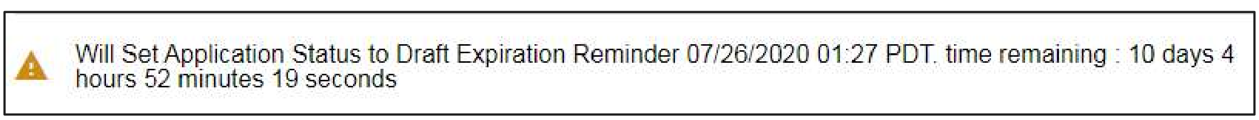
About the Application

Applications are divided into sections which may vary by program.

Throughout the application, required fields are marked with asterisks.

Greyed out fields are pre-populated and are read-only.

Expiration



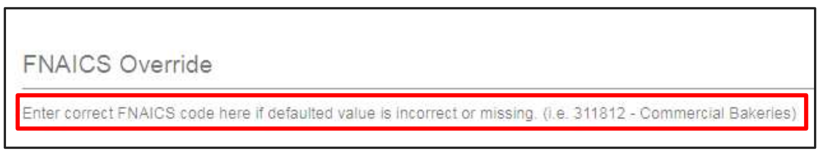
Once you start an application, you have 45 days to complete it. You will see an expiration countdown at the top of the application until it is submitted. If needed, you will receive a reminder email 15 days before the expiration.

Application Header

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

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

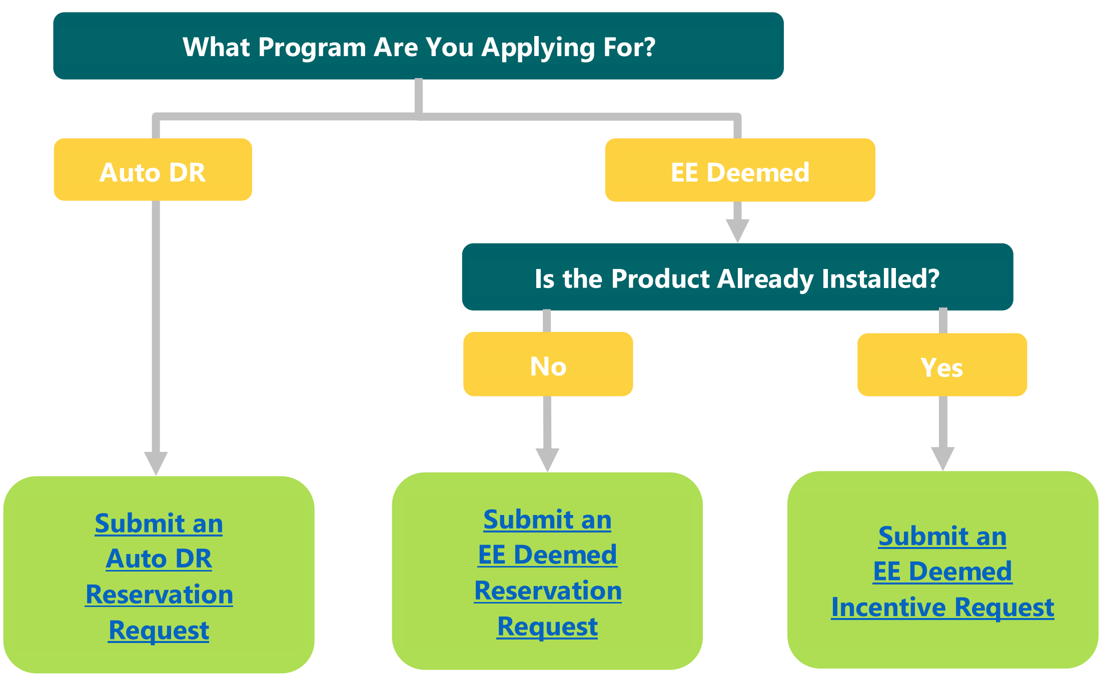
Tooltip/ Instructional Text



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

Select Program-Specific Instructions

Use the chart below to determine which instructions to use. Click on the link to go directly to the section. **Note**: If you are applying for OBF you must submit a reservation request.



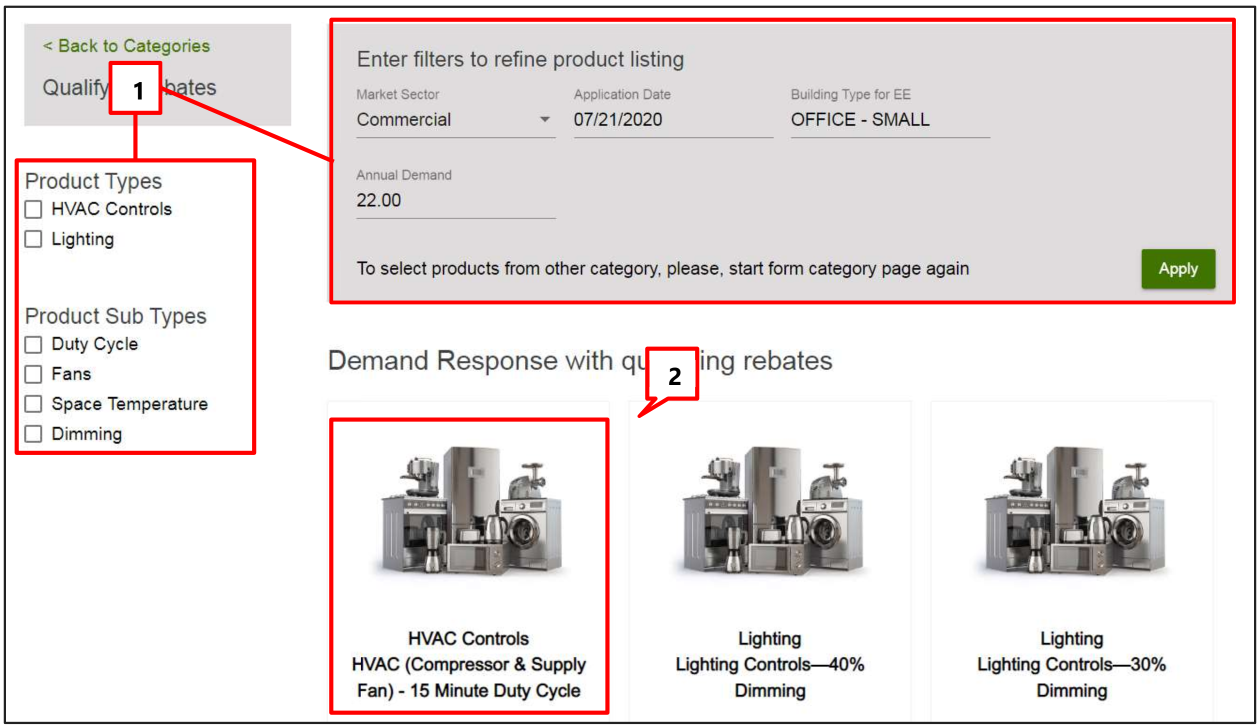
Auto DR Applications

Auto DR applications have two steps: **Reservation Request** (pre-installation) and **Pending Installation and Incentive Request** (post-installation). This section includes instructions for both steps.

Submit an Auto DR Reservation Request

Select an Auto DR Product

The next page shows a list of products eligible for rebates.



1. Refine results by using the filters at the top of the page and clicking **Apply**, or by selecting **Product Types** or **Sub Types** on the left.
2. Click on a product image to select a product.

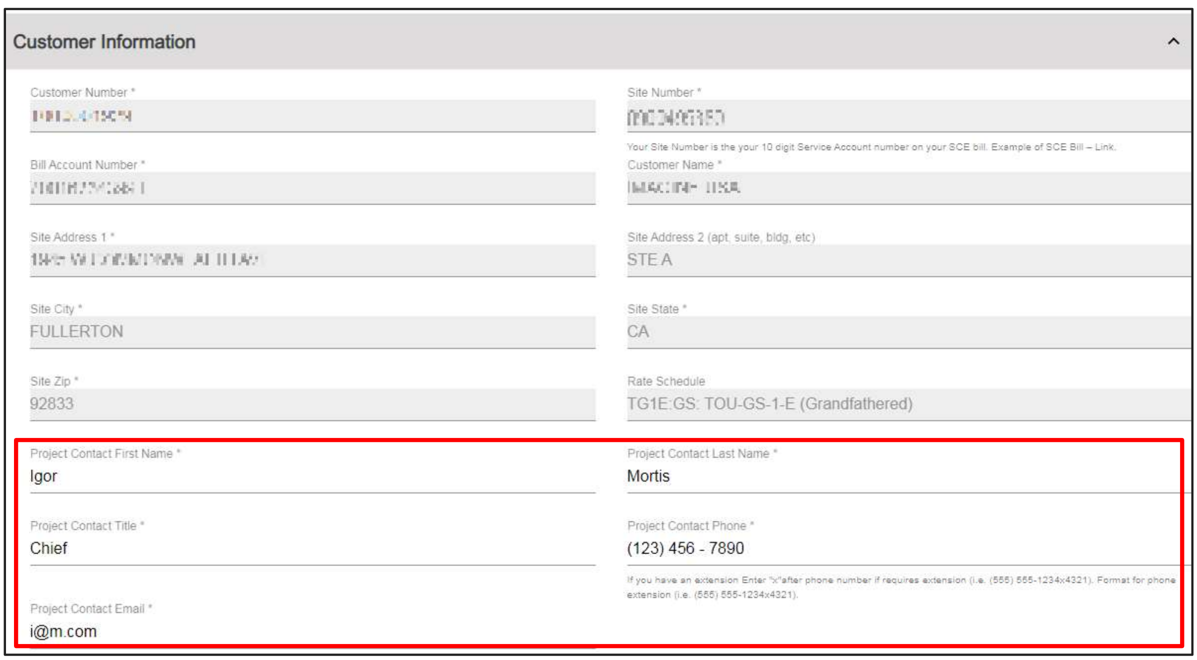
   The product details page displays.

3. After selecting the product, click **Apply for Rebate** to start the application.

   The application form displays.

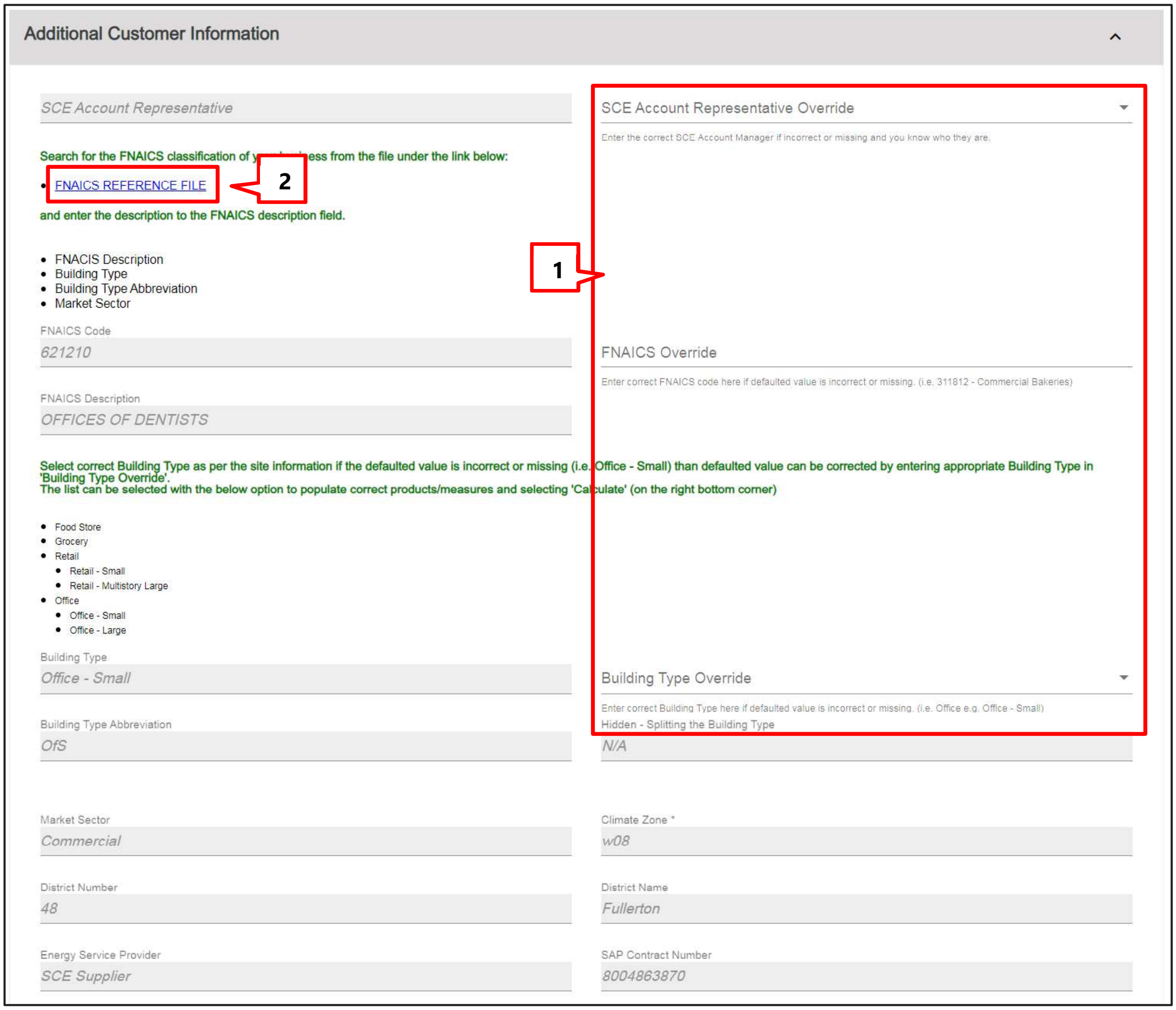
Auto DR Application Sections

Customer Information



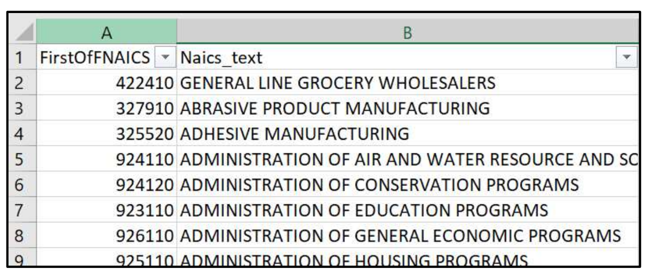
Read-only customer and site information auto-populates from iEnergy. Project contact information auto-populates based on the user logged in and can be edited.

Additional Customer Information



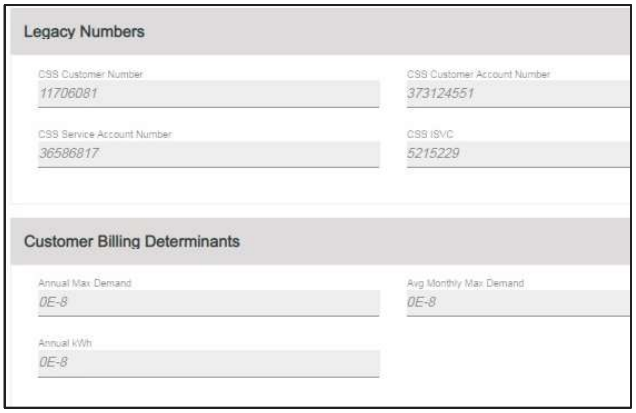
1. Most of the values in this section are read-only. You can update **Account Representative**, **FNAICS**, or **Building Type** values if needed.

2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCE FILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown at right.



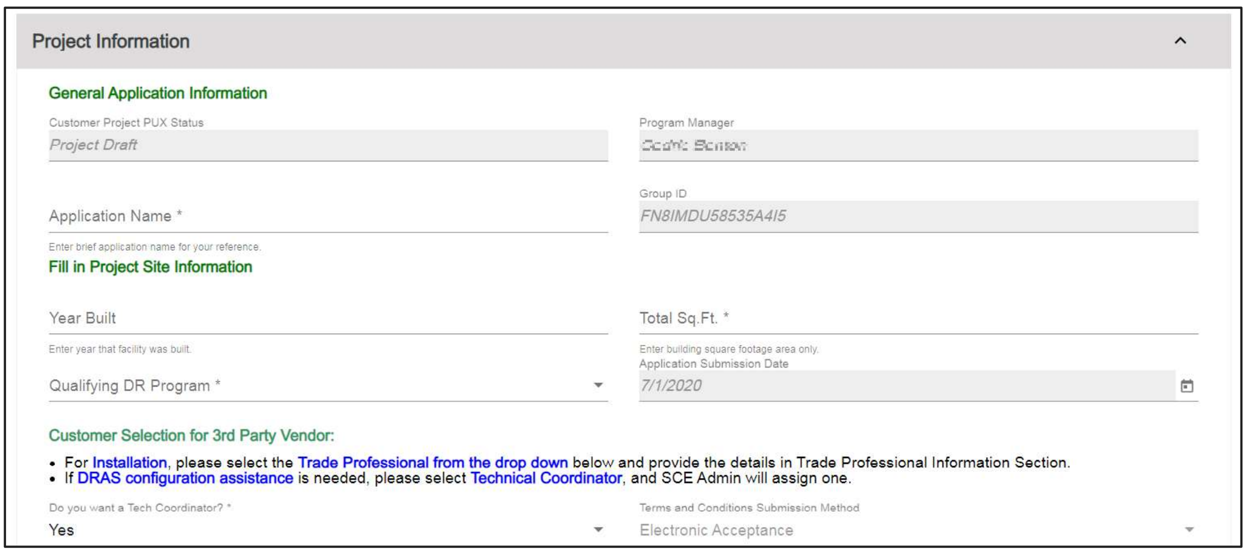
	A	B
1	FirstOfFNAICS	Naics_text
2	422410	GENERAL LINE GROCERY WHOLESALERS
3	327910	ABRASIVE PRODUCT MANUFACTURING
4	325520	ADHESIVE MANUFACTURING
5	924110	ADMINISTRATION OF AIR AND WATER RESOURCE AND SC
6	924120	ADMINISTRATION OF CONSERVATION PROGRAMS
7	923110	ADMINISTRATION OF EDUCATION PROGRAMS
8	926110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

Legacy Numbers and Customer Billing Determinants



These sections display read-only fields with customer account information populated by the system.

Project Information

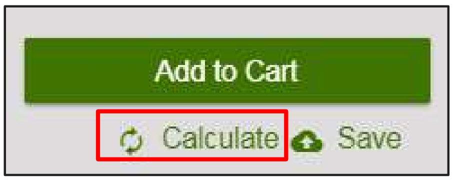


The following table describes key fields in the Project Information section.

Field	Required	Action
Application Name	Yes	Name the application
Total Sq. Ft.	Yes	Enter the site total square footage
Qualifying DR Program	Yes	Select a DR program if the customer is enrolled: • **CPP** (Critical Peak Pricing) • **RTP** (Real Time Pricing) • **CBP** (Capacity Bidding Program) • **DRAM** (Demand Response Auction Mechanism) • **Not currently enrolled**

Are you using a Trade Pro?	Yes	Select **Yes** if you are using a Trade Pro for the project. (An additional section will display on the form.) Otherwise, select **No**
Do you want a Tech Coordinator?	Yes	Select **Yes** if using a Tech Coordinator for the project. Otherwise, select **No**
Terms and Conditions Submission Method		N/A: In the Reservation request this is automatically set to **Electronic Submission**

Table of fields in the Project Information Section



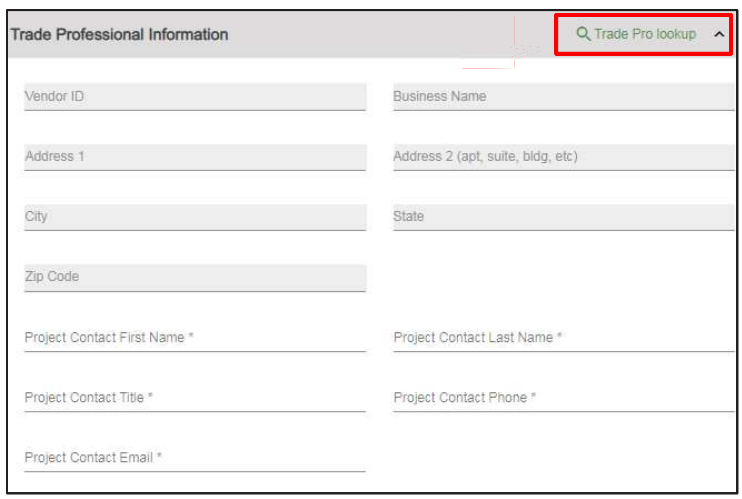
When you have entered all the required values, click the **Calculate** button in the header to populate dependent sections and fields.

Trade Professional Information

This section displays if you indicated in Project Information section that you are using a Trade Pro for your installation.

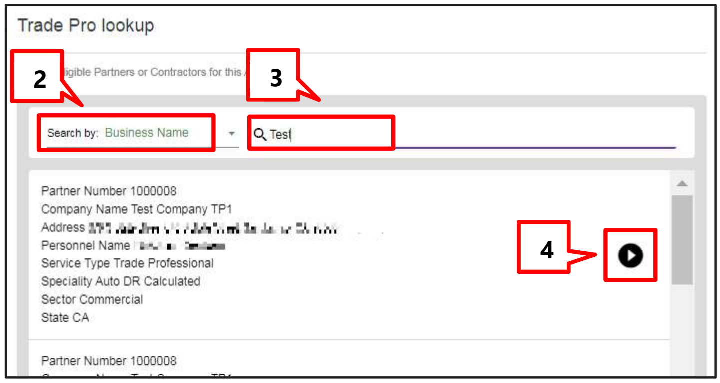
1. Click **Trade Pro lookup** to find a Trade Pro.

   The Trade Pro lookup screen displays.



2. Select a search parameter: **Business Name** or **Vendor ID**.
3. Type a value in the search field. The results populate automatically.
4. Click the arrow next to the partner you want to add as the payee.

   You may see multiple entries for a company if they have multiple personnel in the system.



The Trade Pro details populate. (Not shown.) Update contact information as needed.

If a Trade Pro does not appear in this search, contact them and let them know that they need to register as a Trade Pro with SCE. In this case, the options for the current application are:

- Submit the project without a Trade Pro
- Select a different registered Trade Pro
- Leave the application in draft mode until the Trade Pro registers (the application will stay open for 30 days)

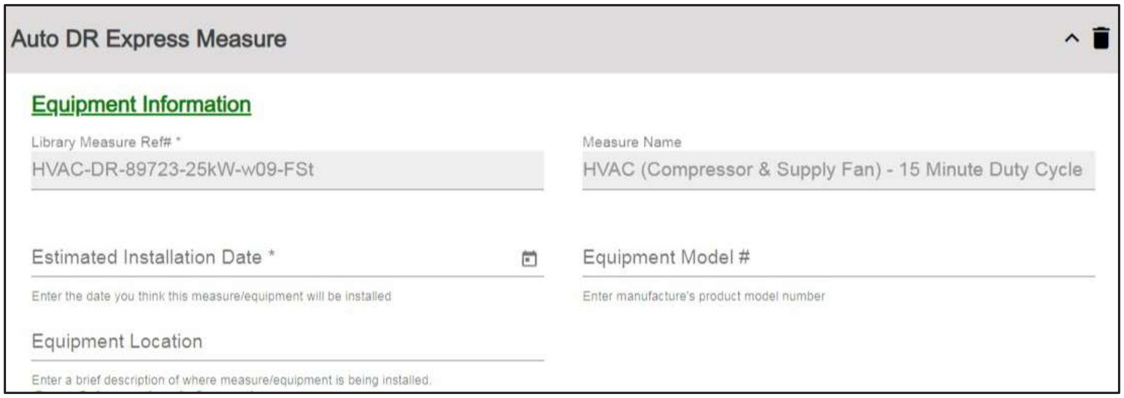
Product Details

In the iEnergy system, products are referred to as "measures." Since more than one product/measure can be included on an application, there is a "measure container" section to which each product is added. For Demand Response rebates this section of the form is named either **Auto DR Express Measure** or **Auto DR Calculated Measure**.

In this section, enter information about the product, project costs, and kWh savings information. If you have selected multiple products, you will enter details separately for each one.

There are two subsections: **Equipment Information** and **Cost & Incentive Information**. The fields for each are described separately below.

Equipment Information

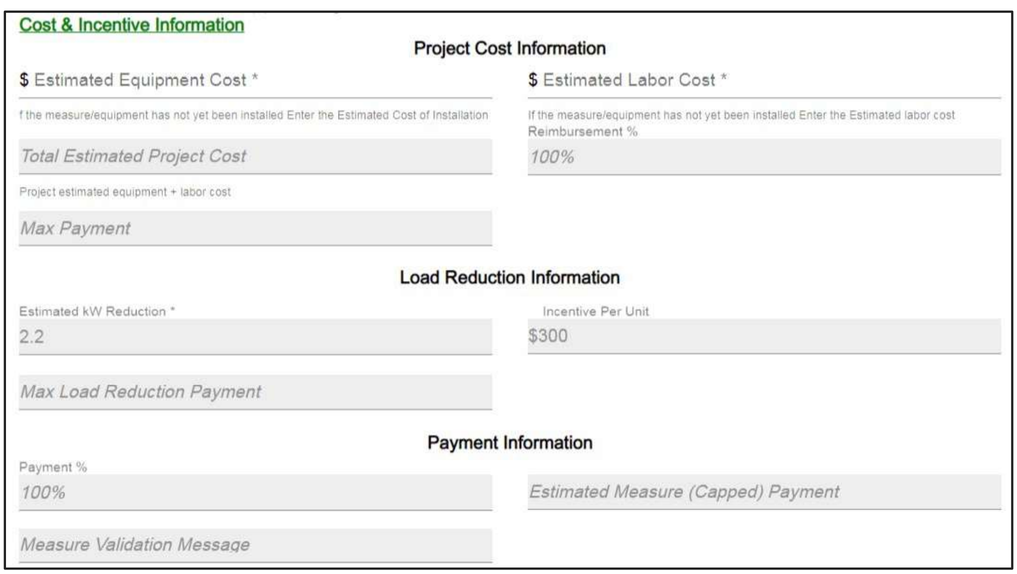


The following table describes key fields in the Equipment Information subsection.

Equipment Information Field	Required	Action Required
Estimated Installation Date	Yes	Enter the date you think this equipment will be installed
Equipment Model #	No	Enter the manufacturer's product model number
Equipment Location	No	Enter a brief description of where the equipment is being installed

Table of editable fields in Measures Equipment Information subsection

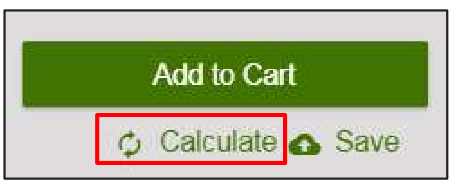
Cost & Incentive Information



The following table describes key fields in the Cost & Incentive Information subsection

Field	Required	Action Required
Estimated Equipment Cost	Yes	If the measure has not been installed, enter the estimated cost of installation
Estimated Labor Cost	Yes	If the measure has not been installed, enter the estimated labor cost
Total Estimated Project Cost		N/A - Populated by the system. You can click Calculate to populate these values when the required values are entered
Reimbursement %		
Max Payment		
Estimated kW Reduction		
Incentive Per Unit		
Payment %		
Estimated Measure (Capped) Payment		
Measure Validation Message		

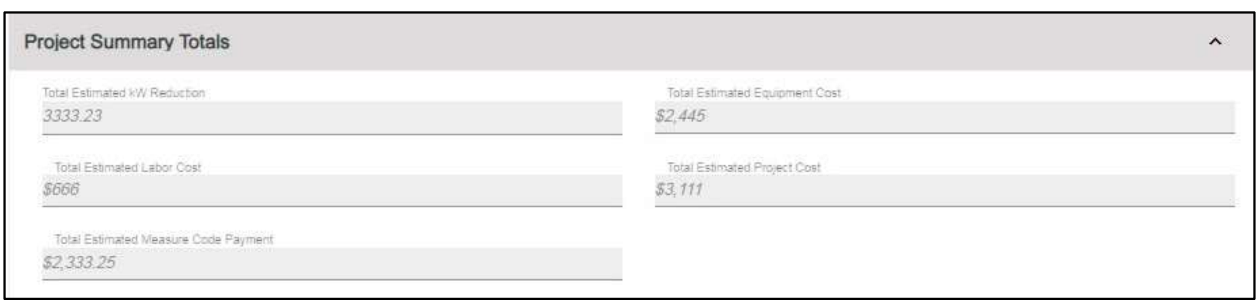
Table of fields in Measures Cost & Incentive Information subsection



Click the **Calculate** button to populate the fields.

*The **Cost & Incentive Information** and **Project Summary Totals** fields auto-populate.*

Project Summary Totals

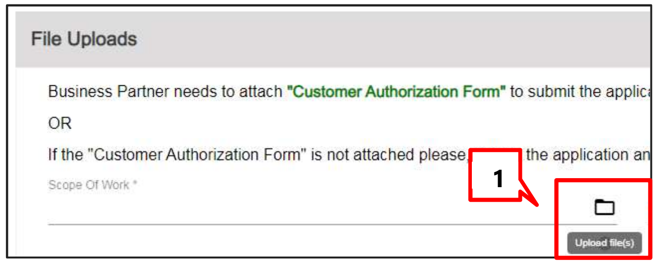


Project Summary Totals fields populate when the application is calculated. All fields in this section are read-only.

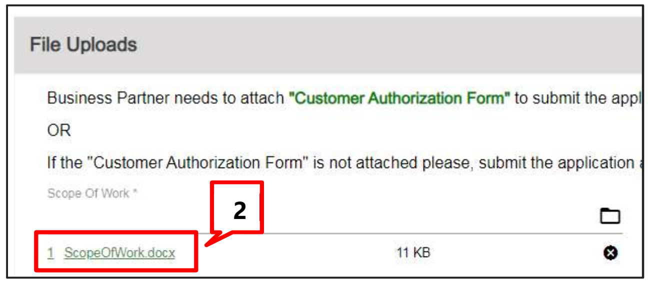
File Uploads

Upload the **Scope of Work** document.

1. Click on the **file icon** to locate and select a file on your computer.

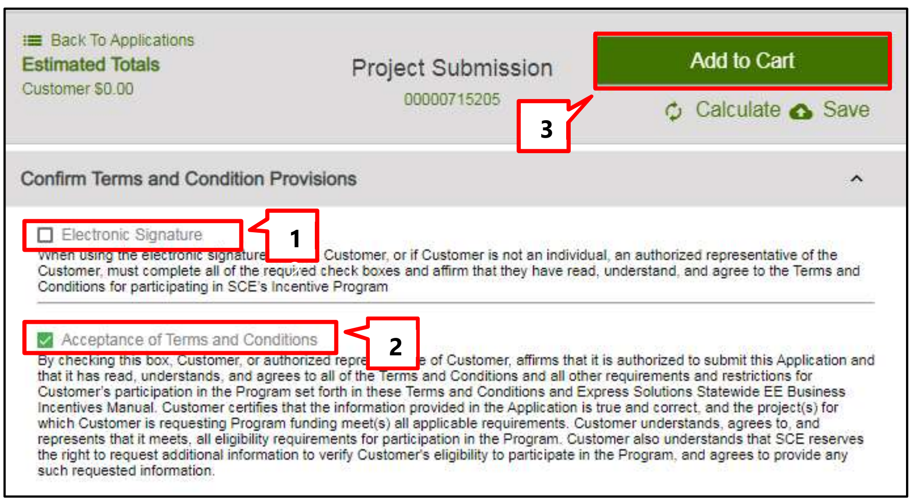


2. The uploaded file will display under the field.



Terms and Conditions

1. Click the **Electronic Signature** checkbox to sign the application.
2. Confirm that the **Acceptance of Terms and Conditions** checkbox is checked.
3. Scroll to the top of the page and click **Add to Cart.**

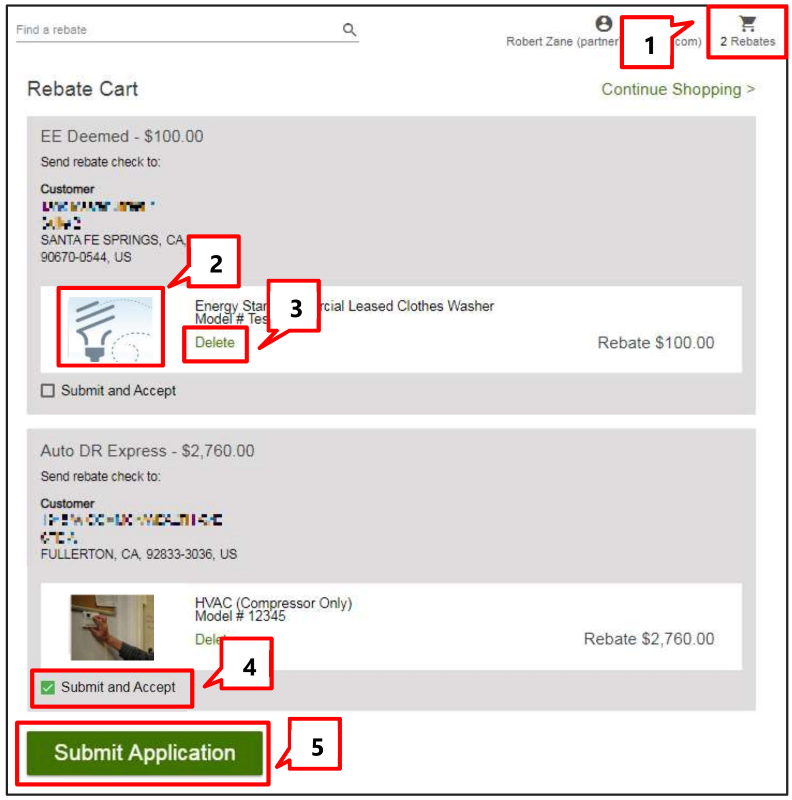


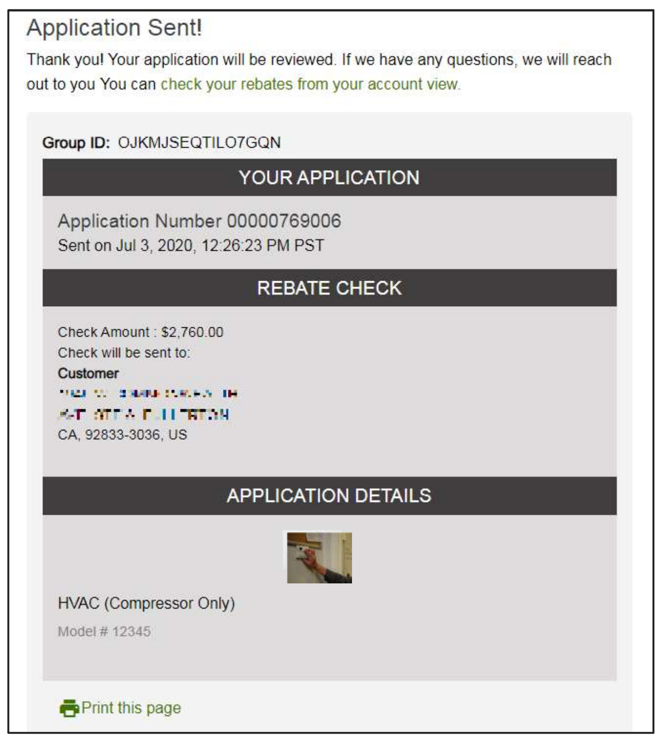
The Rebate Cart screen displays.

Submit and Manage Applications (Auto DR)

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
2. To edit an application before it is submitted, click the image.
3. To delete an application, click **Delete**.
4. Click the **Submit and Accept** checkbox for any application you are ready to submit.
5. Click **Submit Application**.

   A printable confirmation screen displays.





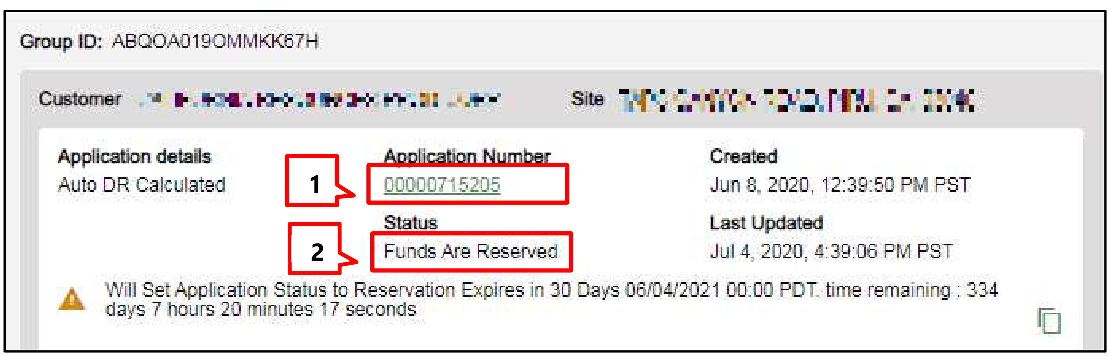
Update Auto DR Application After Reservation Is Approved

After the reservation is approved, the Applicant has the following options, which are covered in detail in this section.

- **Incentive Request** – If the product is installed, update the application with installation information and request an incentive payment
- **Withdrawal** – Request project withdrawal
- **Reservation Extension** – To avoid cancelling the project when the reservation expires, request an extension to the reservation expiration date. This routes the project back to SCE, where an Approver can:
  - Accept the reservation extension
  - Modify the reservation extension to a different expiration date
  - Reject the reservation extension and enforce the current expiration date
  - Reject the reservation extension and cancel the project

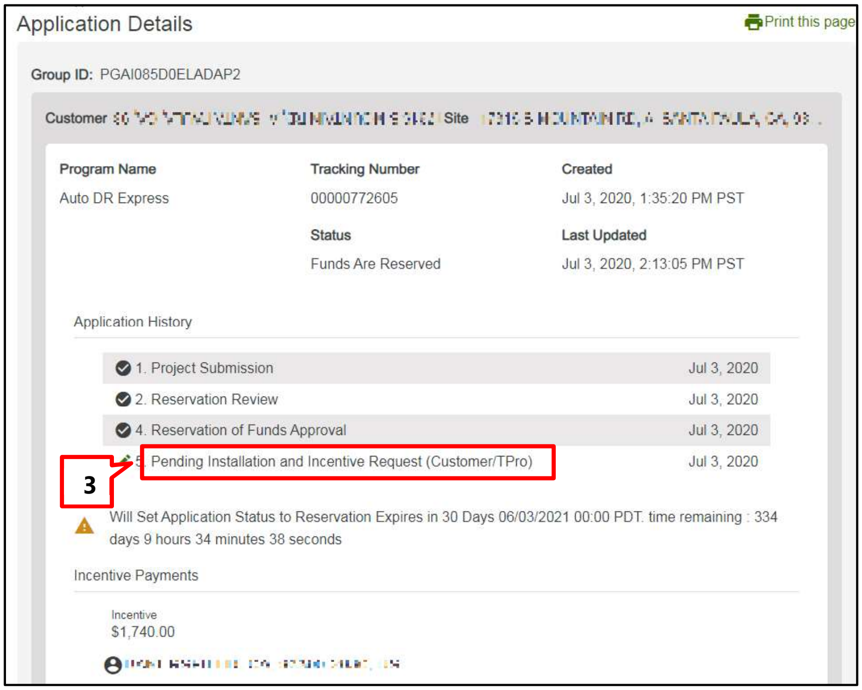
All these options are managed by updating the **Pending Installation and Incentive Request** form.

Open the Application



1. The **Status** should be **Funds Are Reserved**.
2. Click the **Application Number** to open the application.

   The Application Details screen displays.



3. Click the form name **Pending Installation and Incentive Request (Customer/TPro)** to open the application at the current form.

   The form displays.

Project Information

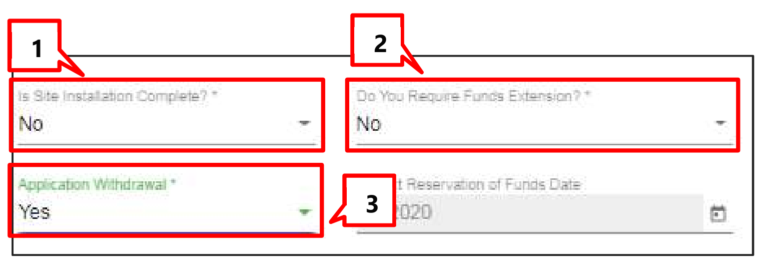
In the Project Information section, you must update information about the site installation and the terms and conditions submission method. You can also update other information if needed.

As described above, the three options are to withdraw a project, request a reservation extension, or submit an incentive request. These are determined by selections in the Project Information section and are detailed below.

To Withdraw a Project

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

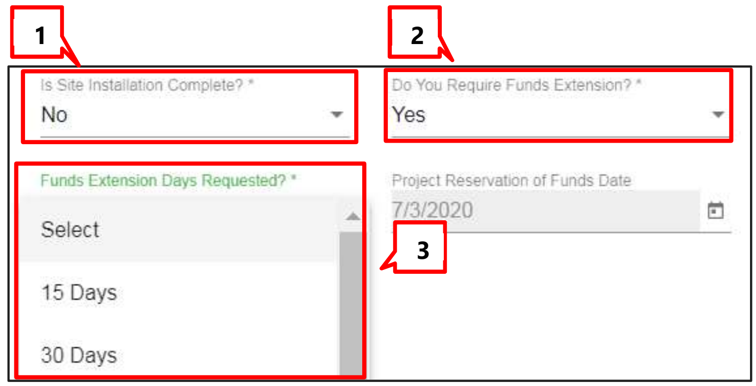
1. **Is Site Installation Complete**: Select **No.**
2. **Do You Require Funds Extension?**: Select **No.**
3. **Application Withdrawal**: Select **Yes.**



To Request a Reservation of Funds Extension

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

1. **Is Site Installation Complete**: Select **No**.
2. **Do You Require Funds Extension**: Select **Yes.**
3. **Funds Extension Days**: Select the extension length from the dropdown.
4. **Estimated Incentive Request Date (not shown)**: Use the calendar dropdown to select the date that you think you will enter the post-installation information.

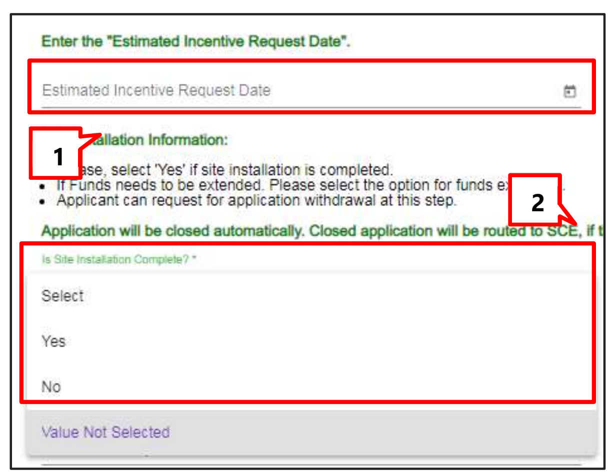


To Proceed With an Incentive Request

To proceed with the Incentive Request, you will update information in different sections of the form, as explained below.

Project Information

1. Enter the **Estimated Incentive Request Date**.
2. Select **Yes** from the **Is Site Installation Complete?** dropdown.



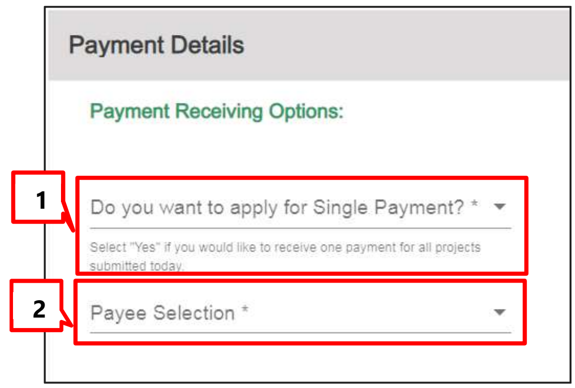
3. Enter the number of **Installed Annual Operating Hours**.

Continued on the next page.

4. Use the **Terms and Conditions Submission Method** dropdown to select:

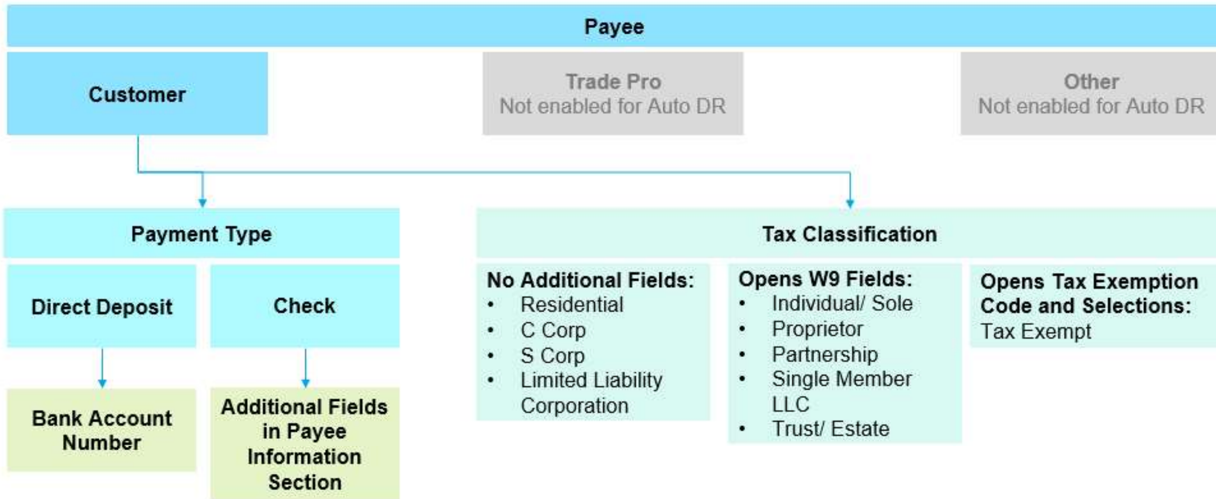
   ♦ **Electronic Acceptance** – You will accept terms and conditions in the form
   ♦ **Print and Upload** – You must upload a signed copy of the terms and conditions

Payment Details



1. Do you want to apply for Single Payment?
   - **Yes** – Payments for all projects with the same Group ID are included together. Group ID is managed by SCE. To request that projects be grouped for payment, email *AutoDR@sce.com*
   - **No** – The payment for this project will be sent separately
2. Payee Selection: Select **Customer**. (Th is the only available option for Auto DR rebates.)

The process flow below shows which sections and fields are required for each payee selection option.



When **Payee Selection** is **Customer**: **Payment Type** and **Tax Classification** fields display.

About Payment Type

Check: An additional **Payee Information** section displays. The Customer or Trade Pro will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer or Trade Pro user can enter or update it.

Direct Deposit: An additional **Bank Account Number** field displays. The customer selects from a dropdown that includes a list of bank accounts on file for the customer. Each bank account is designated by its last four digits only.

About Tax Classification Fields

Regardless of payment type, Customers must select a Tax Classification. As shown in the workflow above, the different tax classifications cause additional fields to display:

- These selections do not open any additional fields:
  - **Residential**
  - **C Corp**
  - **S Corp**
  - **Limited Liability** Corporation
- The following selections open a set of W9 Fields:

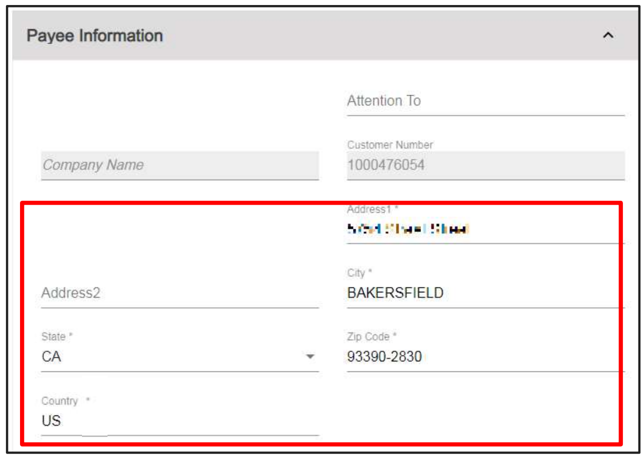
- **Individual/ Sole**
- **Proprietor**
- **Partnership**
- **Single Member LLC**
- **Trust/ Estate**

♦ The **Tax Exempt** selection opens a Tax Exemption Code and Selections field

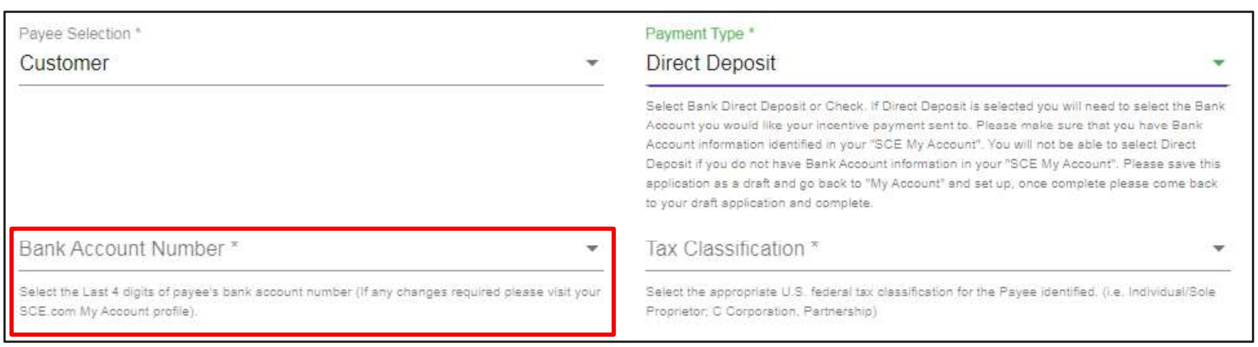
Scenario 1: Payee is Customer and Payment Type is Check

Note: This scenario does not address tax classification selections. These are covered separately from payment type.
In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

Note: **Country Code** must be two digits. Enter "US" for United States or "CA" for Canada.



Scenario 2: Payee is Customer and Payment Type is Direct Deposit



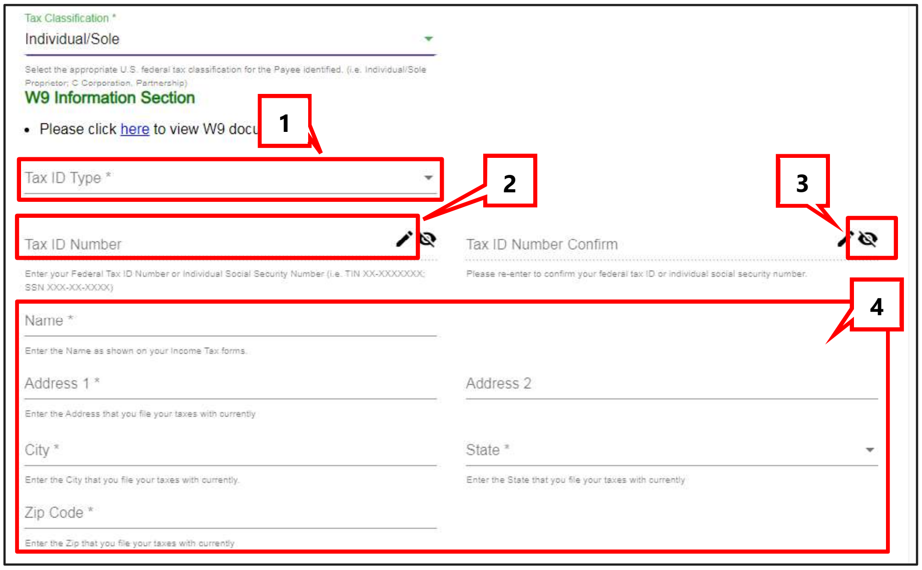
An additional **Bank Account Number** field displays.

♦ The dropdown displays the last four digits of the bank account(s) the customer has added to MyAccount on SCE.com

♦ If there are no bank accounts available, a pop up will note that no bank accounts are available for this customer. Notify the customer that they need to add the account to My Account on SCE.com, after which it will display in iEnergy

- In this case, the Payee Information section will display two auto-populated fields: **Company Name** and **Company Number**. (Not shown)

Scenario 3: Payee is Customer and Tax Classification opens W9 fields



1. Use the **Tax ID Type** dropdown to select EIN or SSN.

   Enter the Tax ID and Tax ID confirmation.
2. Click the **pencil icon** in the **Tax ID Number** and **Tax ID Number Confirm** fields enter the value. The value is not shown on the form.
3. Click the **eye icon** to view the **Tax ID Number** values.
4. Enter the tax contact information.

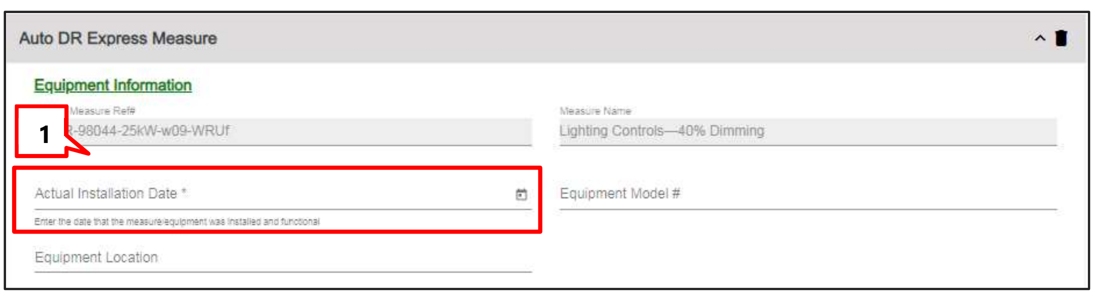
Scenario 4: Payee is Customer and Tax Classification is Tax Exempt

An additional Tax Exemption Code subsection displays.

1. The customer or Trade Pro selects a reason code. (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **Tax Exempt Reason** field.

This concludes the payment/payee details scenarios.

Product/ Measure



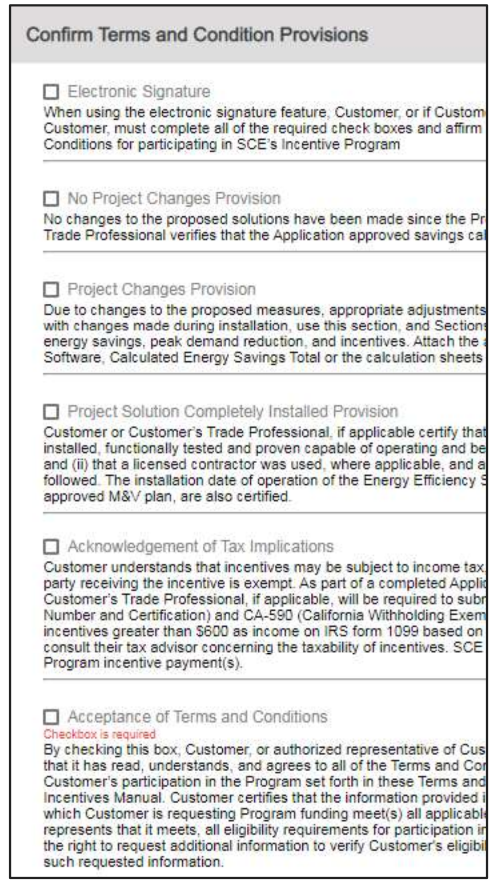
1. Enter the **Actual Installation Date** (required).

Note: **Equipment Model #** and **Equipment Location** are optional fields.

Terms and Conditions – Electronic Submission

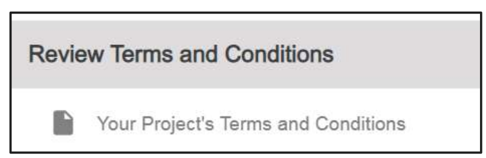
This section displays when the Terms and Conditions Submission Method is Electronic Acceptance. Check all applicable checkboxes.

- **Electronic Signature**
- **No Project Changes Provision** – If no changes have been made since the Reservation Request
- **Project Changes Provision** – If changes have been made since the Reservation Request
- **Project Solution Completely Installed Provision**
- **Acknowledgement of Tax Implications** – Displays if payment involves a W9
- **Acceptance of Terms and Conditions**

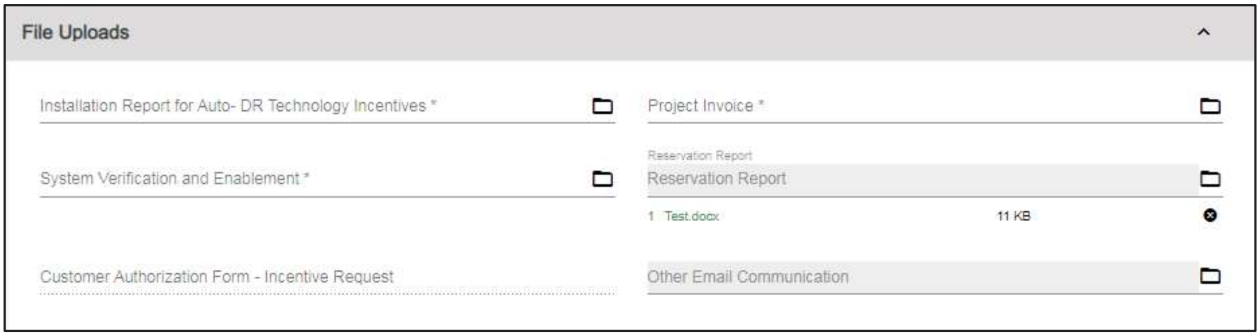


Terms and Conditions – Print and Upload

This section displays when the **Terms and Conditions Submission Method** is **Print and Upload**. Click the icon to view the terms and condition in a new browser tab.



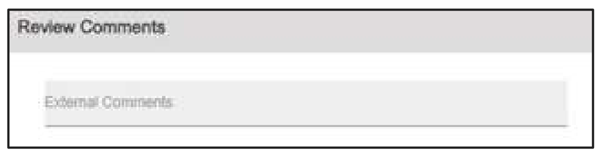
File Uploads



- Required file uploads are:
  - **Installation Report for Auto DR Technology Incentives**
  - **System Verification and Enablement**
  - **Project Invoice**
- If the **Terms and Conditions Submission Method** is **Print and Upload**, the **Customer Authorization Form – Incentive Request** is required

Review Comments

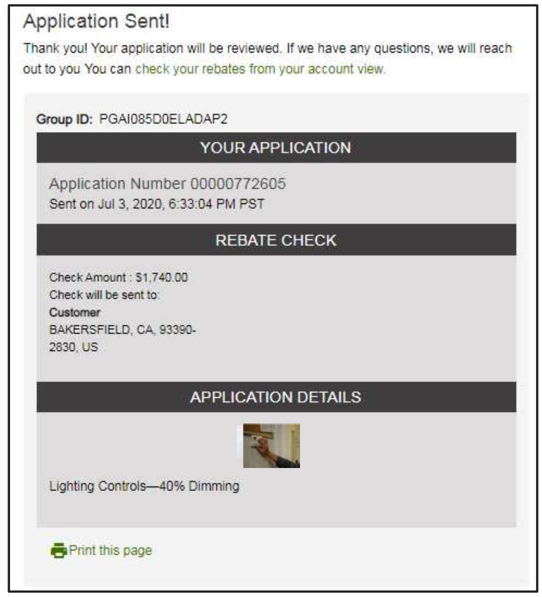
Any comments from the SCE team will appear in the External Comments field.



Submit the application

Click **Submit** in the header.

The confirmation screen displays.



This concludes the section on updating an Auto DR application after installation.

Deemed Applications

This section includes two sets of instructions:

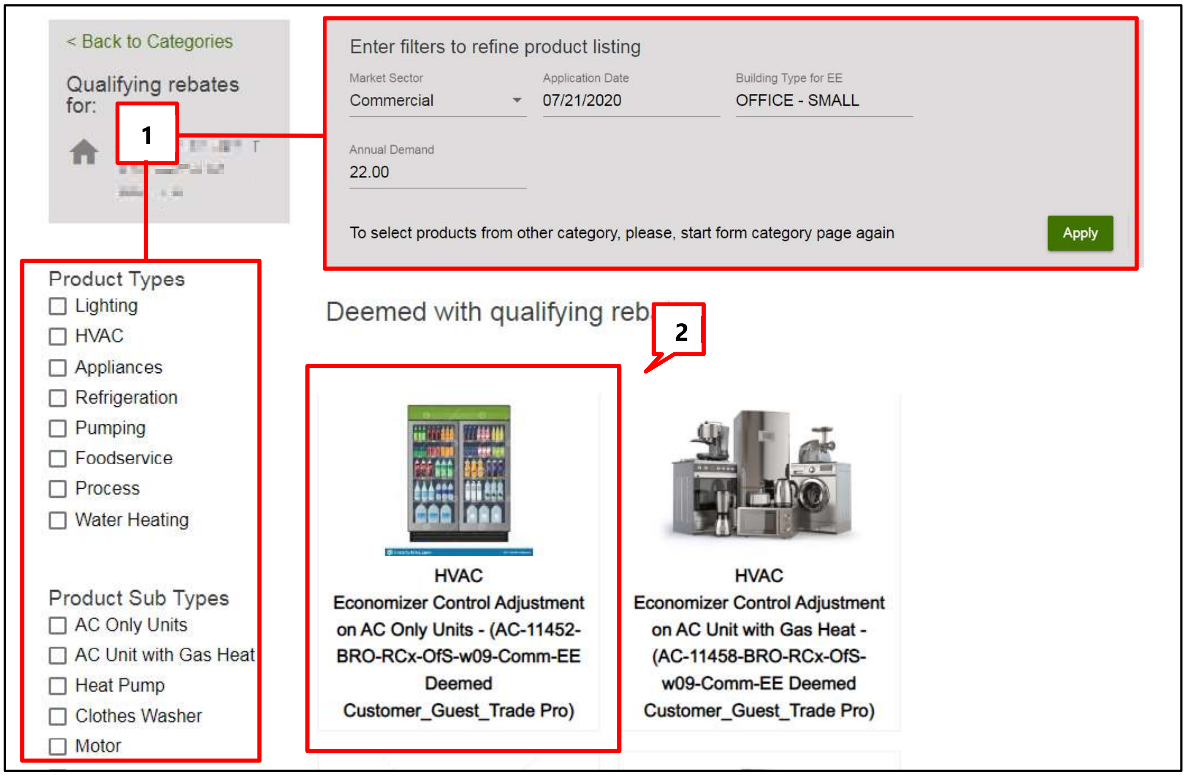
Reservation Request: If you are submitting an application before installation, submit a Reservation Request. After installation, you will complete a second form – Pending Installation and Incentive Request.

Note: If you are applying for OBF you must begin with a Reservation Request.

Incentive Request: If you are submitting an application after product installation you will submit an Incentive Request, which includes installation and payment information.

Deemed Reservation Request

Select a Deemed Product

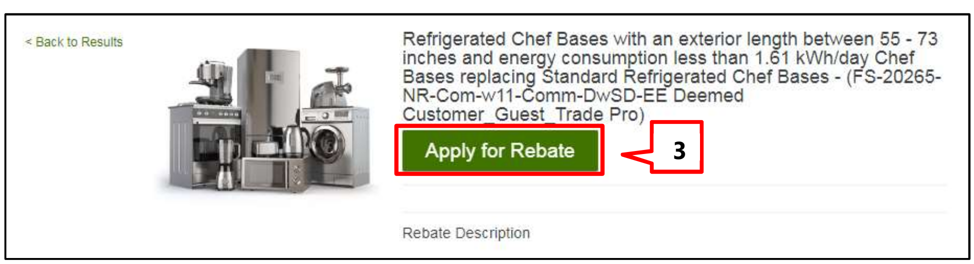


After selecting the product category, the next page shows a list of products eligible for rebates.

1. Refine results by using the filters at the top of the page and clicking **Apply**, or by selecting **Product Types** or **Sub Types** on the left.
2. Click on a product image to select a product.

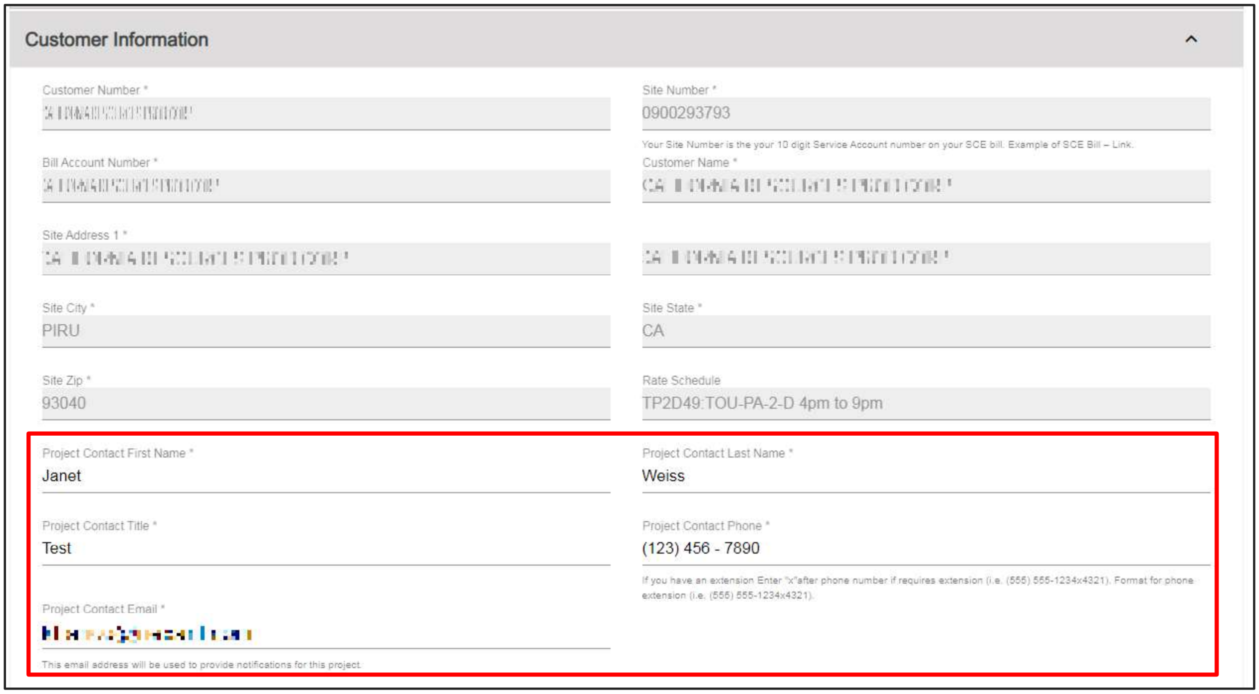
   The product details page displays.

3. After selecting the product, click **Apply for Rebate** to start the application.



Deemed Reservation Request Application Sections

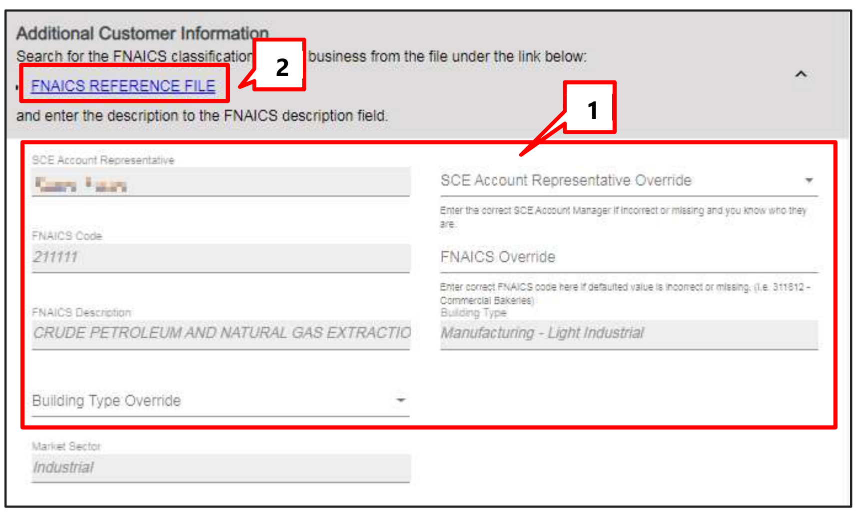
Customer Information



Read-only Customer and Site information auto-populates from iEnergy. Project contact information auto-populates based on the user logged in and can be edited.

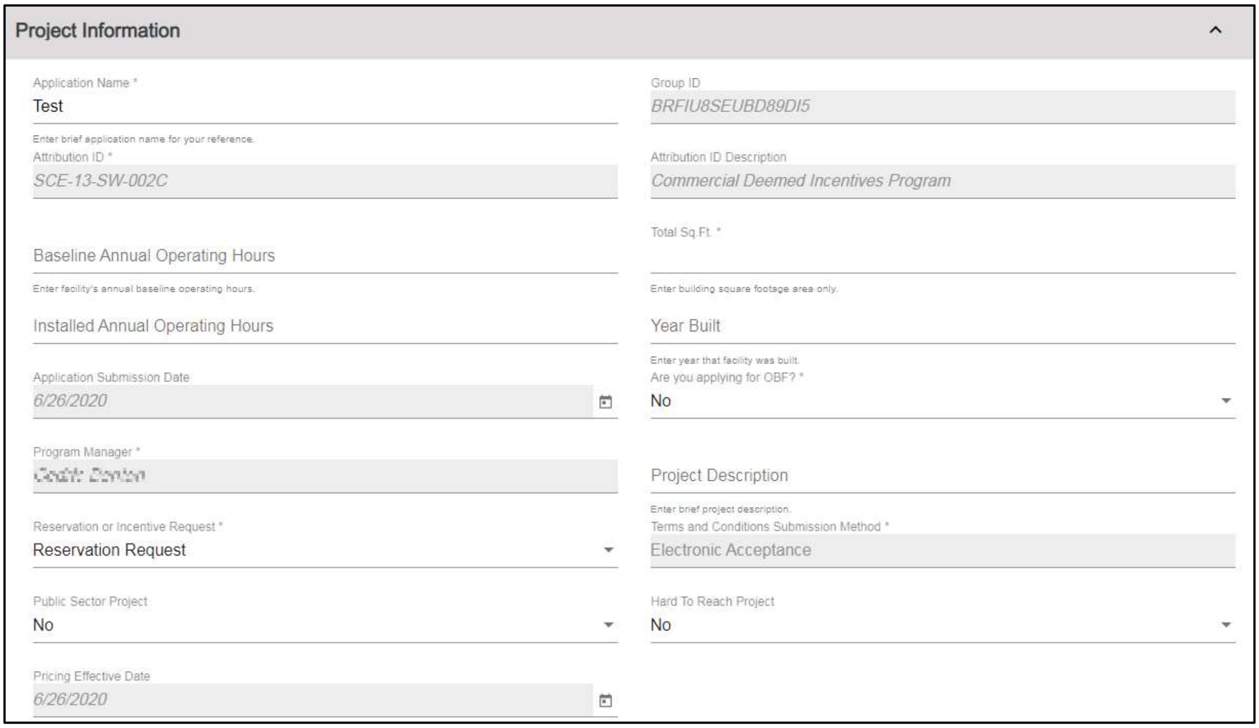
Additional Customer Information

1. If the **Account Representative**, **FNAICS**, or **Building Type** values are missing or incorrect, update them here.
2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCE FILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown below



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

Project Information

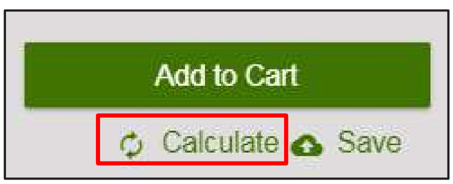


The following table describes key fields in the Project Information section.

Field	Required	Action Required
Application Name	Yes	Name the application
Baseline Operating Hours	No	Enter facility's annual baseline operating hours
Total Sq. Ft.	Yes	Enter the site total square footage
Installed Annual Operating Hours	No	Enter the installed annual operating hours
Year Built	No	Enter the construction year of the site

Are you applying for OBF?	Yes	Select **Yes** or **No.** If **Yes**, an OBF provision is added to Terms and Conditions On Bill Financing (OBF) allows you to procure a loan from SCE to cover the project costs. This loan will be repaid in installments on your utility bill
Project Description	No	Enter a brief project description
Reservation or Incentive Request	Yes	Select **Reservation Request**
Terms and Conditions Submission Method		N/A: In the Reservation request this is automatically set to **Electronic Submission.**
Public Sector Project	No	Specify whether the project is a public sector project
Hard to Reach Project	No	Specify whether the installation is in a hard to reach location
Are you using a Trade Pro?	Yes	Select **Yes** if you are using a Trade Pro for the project. Otherwise, select **No.**

Table of fields in the Project Information Section



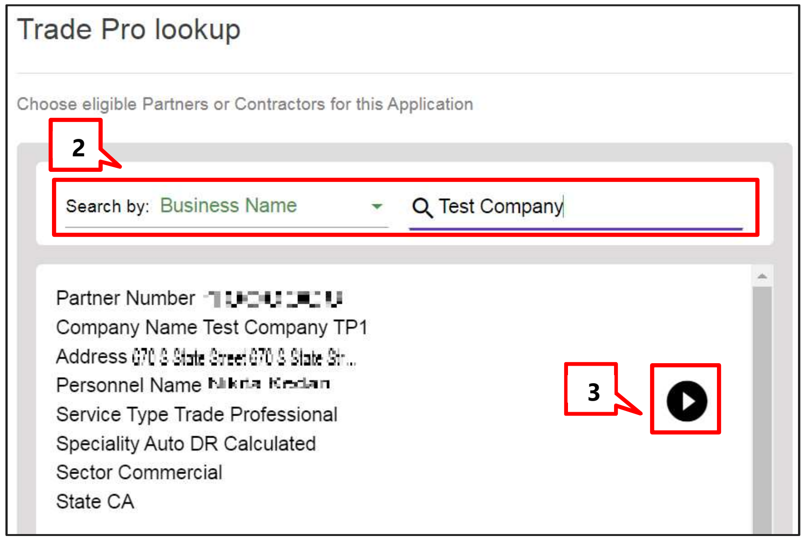
When you have entered all the required values, click the **Calculate** button to populate dependent sections and fields.

Trade Professional Information

This section displays if use of a Trade Pro was indicated in the Project Information section.

1. Click the **Trade Pro lookup** link in the section header to search for a Trade Pro.

2. Select a search parameter (**Business Name** or **Vendor ID**) and type a keyword. Results populate automatically.
3. Select the Trade Pro from the results and click on the arrow.



If a Trade Pro does not appear in this search, contact them and let them know that they need to register as a Trade Pro with SCE. In this case, the options for the current application are:

- Submit the project without a TP
- Select another registered TP
- Leave the application in draft mode until the TP registers (the application will stay open for 30 days)

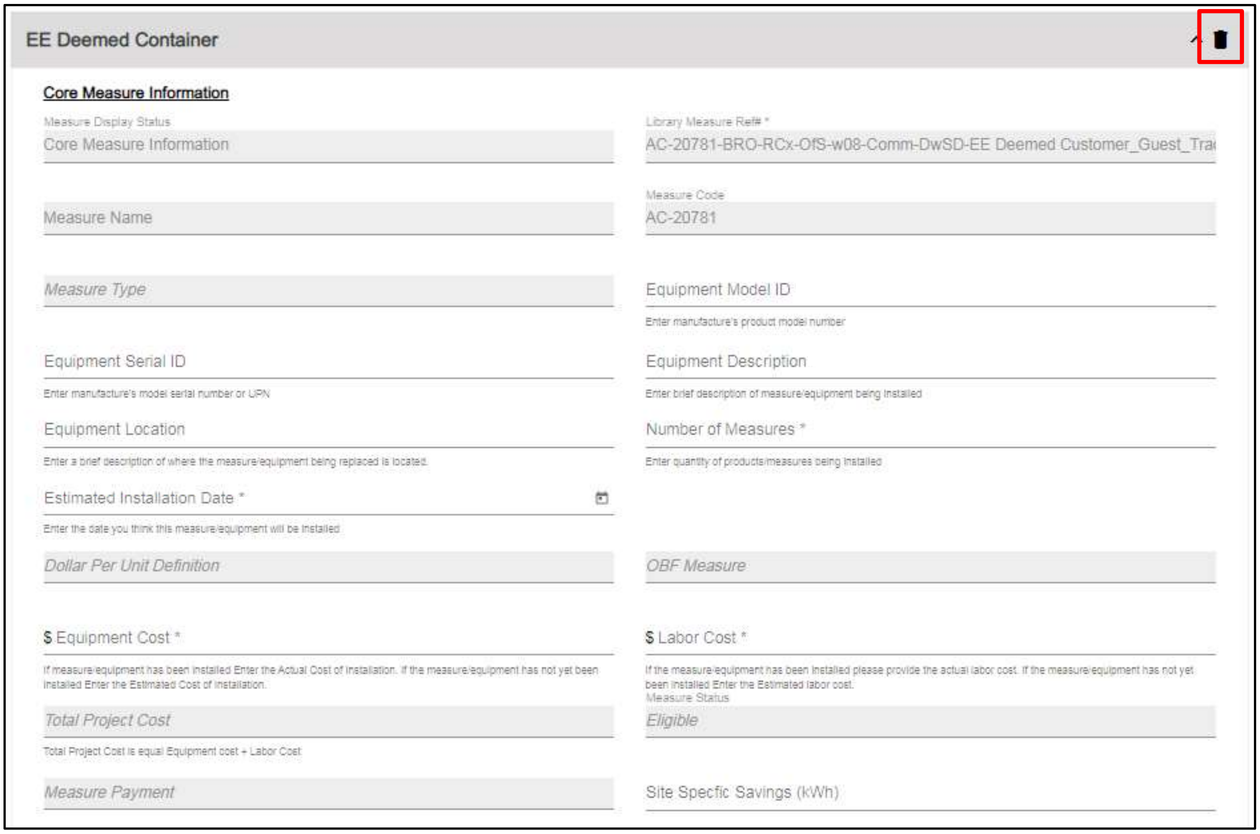
Product Details

In the iEnergy system, products are referred to as “measures”. Since more than one product/measure can be included on an application, there is a “measure container” section to which each product is added. For Deemed projects this section of the application is named **EE Deemed Container**.

In this section, enter information about the product, project costs, and kWh savings information. If you have selected multiple products, you will enter details separately for each one.

Click **Calculate** to populate the **Total Project Cost** and **Measure Payment** fields.

Note: Click the **trash can icon** in the section header to remove a product from the application. (See the screenshot below.)



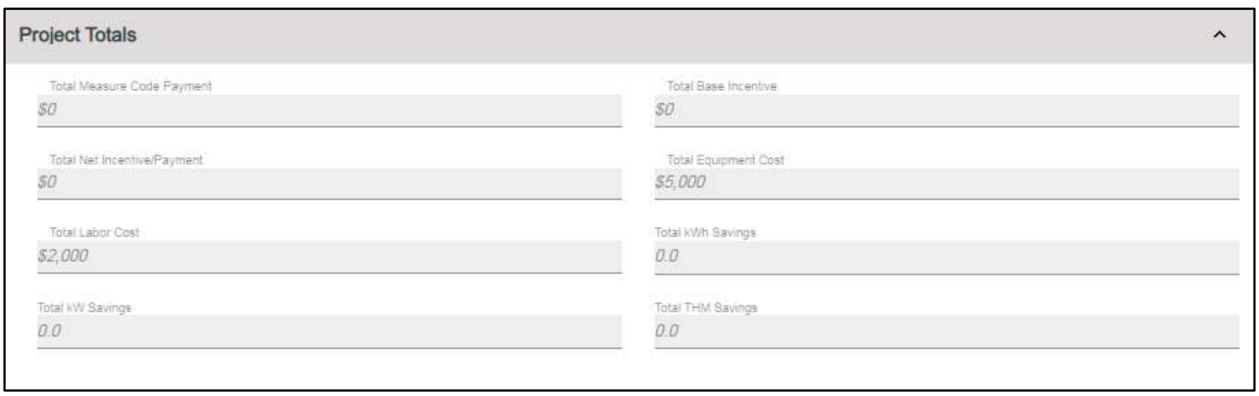
The following table describes key fields in the EE Deemed Measure Container section.

Measure Details Field	Required	Action Required
Equipment Model ID#	No	Enter the manufacturer's product model number
Equipment Serial ID #	No	Enter the manufacturer's model serial number or UPN
Equipment Description	No	Enter a brief description of the measure/equipment being installed
Equipment Location	No	Enter a brief description of where the equipment is being installed
Number of Measures	Yes	Enter the quantity of products/measures being installed

Estimated Installation Date	Yes	Enter the date that the measure/equipment was installed and functional
Equipment Cost	Yes	If measure/equipment has been installed, enter the Actual Cost of Installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of Installation
Labor Cost	Yes	If the measure/equipment has been installed, please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost
Purchase Date	Yes	Enter the date the measure/equipment was purchased

Table of fields in the EE Deemed Container measure details section

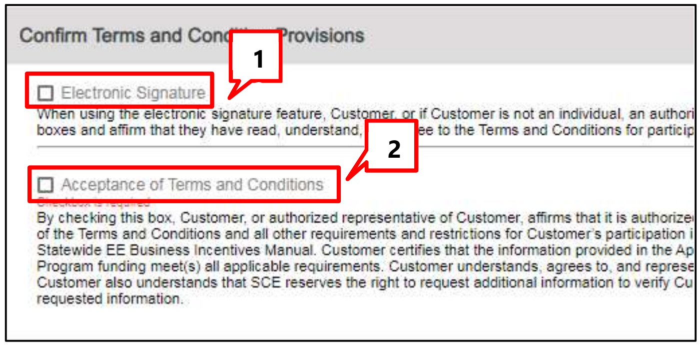
Project Totals



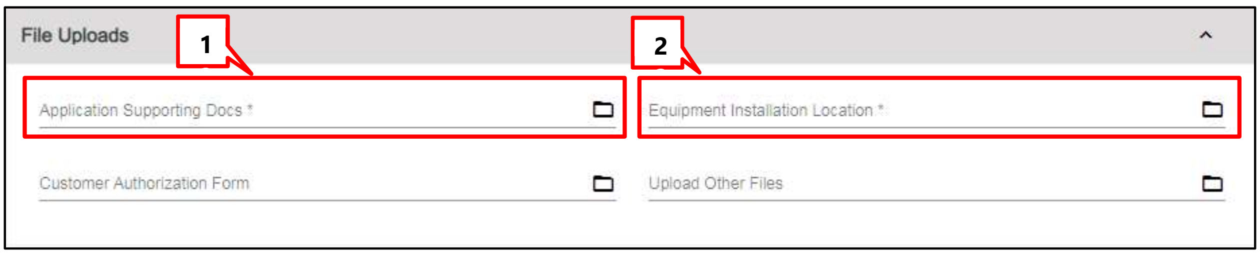
Project Totals is a read-only section that displays calculated values based on the project information entered.

Confirm Terms and Conditions Provisions

1. Click the **Electronic Signature** checkbox to sign the application.
2. Click the **Acceptance of Terms and Conditions** checkbox.



File Uploads



1. Upload **Application Supporting Docs.**
2. Upload the **Equipment Installation Location** document.

Add to Cart

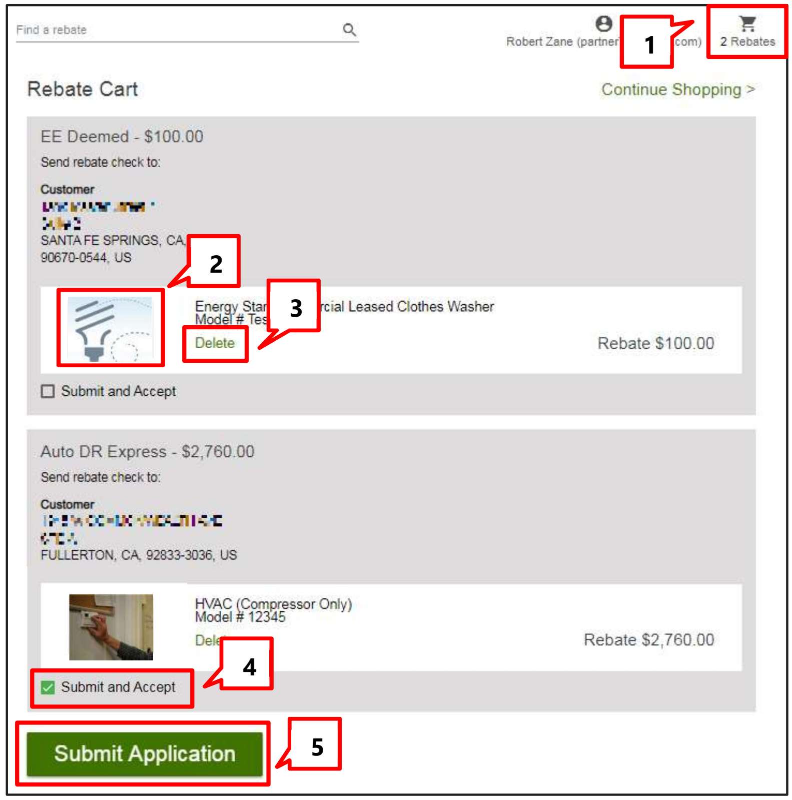
Click the **Add to Cart** button in the header.

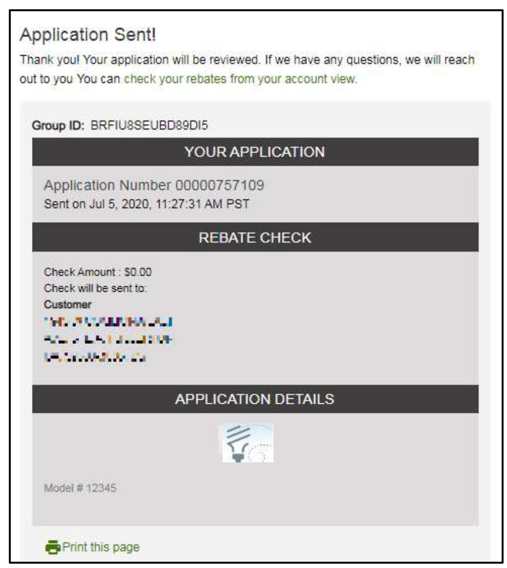
*The **Rebate Cart** screen displays.*

Submit and Manage Applications (Deemed)

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
2. To edit an application before it is submitted, click the image.
3. To delete an application, click **Delete**.
4. Click the Submit and Accept checkbox for any application you are ready to submit.
5. Click **Submit Application**.

   A printable confirmation page displays. (See below.)





The system sends an email with the project details.

Hello Igor Mortis,

Thank you for submitting your Project 00000757109 installed at [redacted] FULLERTON,CA ,92833. We are currently reviewing your application and will contact you if additional information is required.

Project Summary	
Application ID:	00000757109
Group ID:	BRFIU8SEUBD89DI5
Application Name:	Test
Customer Name:	[redacted]
Customer Number:	[redacted]
Contract Number:	8004863870
Site Address:	[redacted]
	STE A
	FULLERTON, CA, 92833

SCE Estimated Reservation Summary

Measure Name	Number of Measures	Unit of Measure	Quantity	Base Price Per Unit	Base Incentive	*Max Incentive	**Estimated Incentive Amount
Evaporator Coil Cleaning on Small Pkg AC system with No TXV DX Equipment replacing and a functional, uncleaned evaporator coil - (AC-20781-BRO-RCx-OfS-w08-Comm-DwSD-EE Deemed Customer_Guest_Trade Pro)	10	1	10		0.00	7000.00	0.00
Total Estimated Reservation Amount							$0.00

*Measures cannot be paid at more than 100% of Equipment/Incremental Cost
**Incentive amount is determined between the lowest of base incentive and max incentive

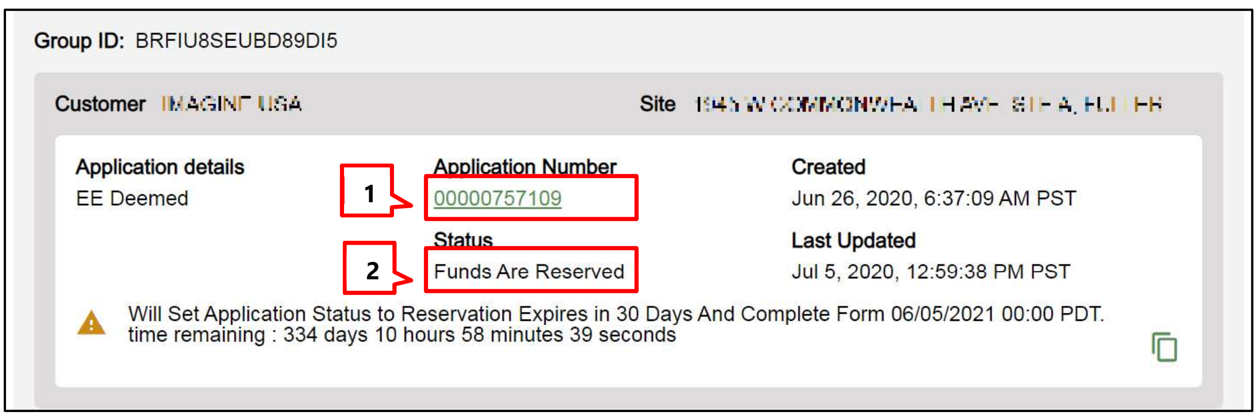
If you have any questions, please contact us at (626) 635-6015 Monday through Friday, from 8:00 a.m. to 5:00 p.m., or send an e-mail to BusinessIncentives@sce.com. Please have your Application Number available for reference when you call and include it in any e-mail correspondence.

Update Deemed Application After Reservation Is Approved

After the reservation is approved, the Applicant has the following options, which are covered in detail in this section. These are done by updating the Pending Installation and Incentive Request form.

- **Incentive Request** – If the product is installed, update the application with installation information and request incentive payment
- **Withdrawal** – If the applicant decides to not pursue the project, they should withdraw the project at this point
- **Reservation Extension** – To avoid cancelling the project when the reservation expires, the customer or representative can request an extension to the reservation expiration date at this point. This routes the project back to SCE, where an Approver can:
  - Accept the reservation extension
  - Modify the reservation extension to a different expiration date
  - Reject the reservation extension and enforce the current expiration date
  - Reject the reservation extension and cancel the project

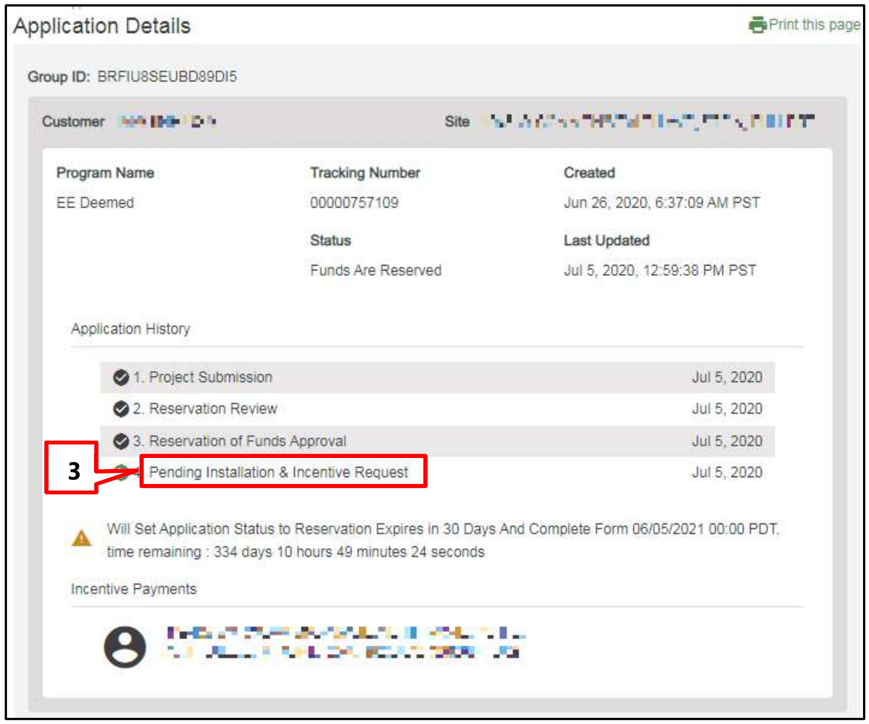
Open the Application



1. The Application should have the **Status**: **Funds Are Reserved**.
2. Click the **Application Number** to open the application.

   The Application Details screen displays.

3. Click the form name **Pending Installation & Incentive Request** to open the application at the current form.



Project Information

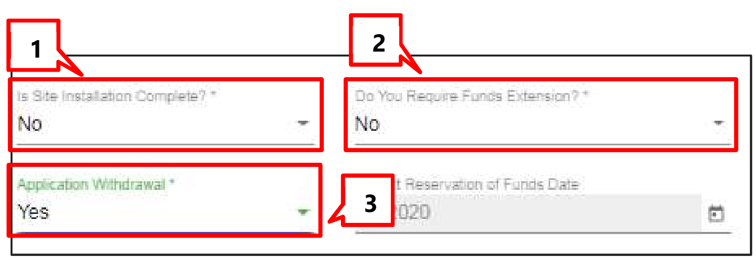
In the Project Information section, you must update information about the site installation and the terms and conditions submission method. You can also update other information if needed.

As described above, the three options are to withdraw a project, request a reservation extension, or submit an incentive request. These are determined by selections in the Project Information section and are detailed below.

To Withdraw a Project

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

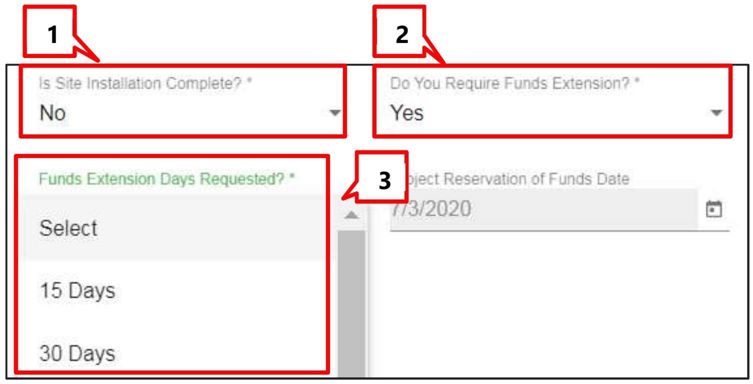
1. **Is Site Installation Complete**: Select **No.**
2. **Do You Require Funds Extension?**: Select **No.**
3. **Application Withdrawal**: Select **Yes.**



To Request Reservation of Funds Extension

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

1. **Is Site Installation Complete**: Select **No**.
2. **Do You Require Funds Extension?**: Select **Yes.**
3. **Funds Extension Days**: Select the extension length from the dropdown.
4. **Estimated Incentive Request Date**: Use the calendar dropdown (not shown) to select the date that you think you will enter the post-installation information.

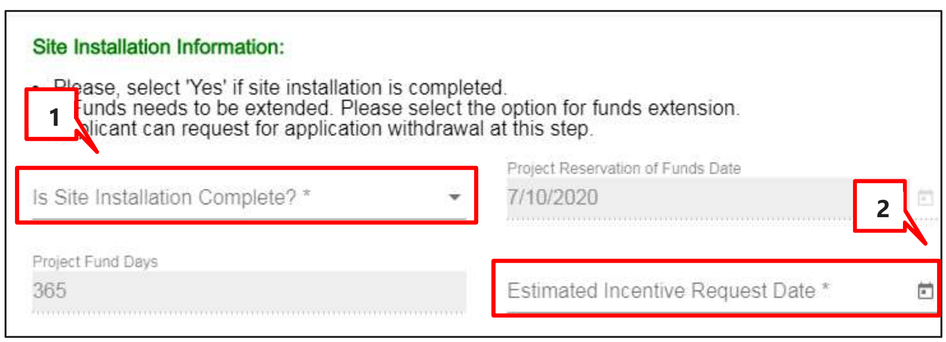


To Proceed With an Incentive Request

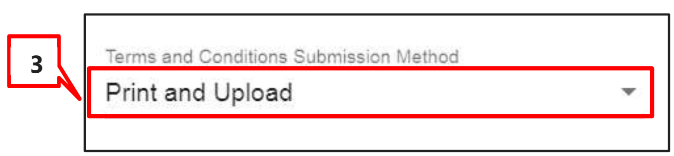
To proceed with the Incentive Request, you will update information in different sections of the form, as explained below.

Project Information

1. Select **Yes** from the **Is Site Installation Complete?** dropdown.
2. Enter the **Estimated Incentive Request Date.**



3. Use the **Terms and Conditions Submission Method** dropdown to select:



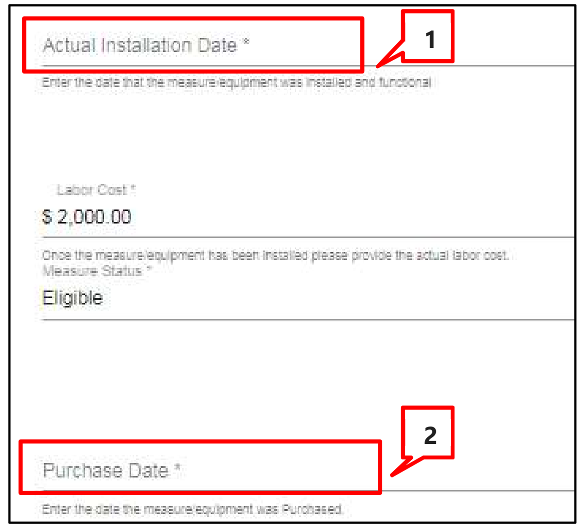
- **Print and Upload** – You must upload a copy of the signed terms and conditions
- **Electronic Acceptance** – You will accept terms and conditions in the form

Product/ Measure

In the EE Deemed Container section update the following fields:

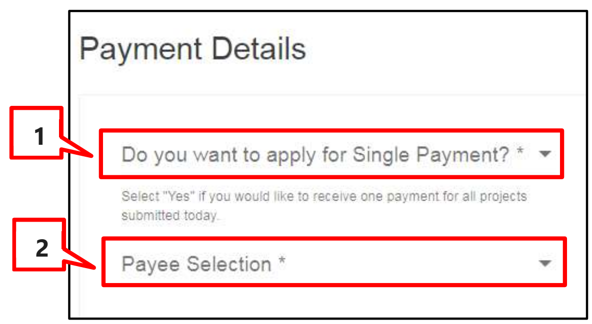
1. Enter the **Actual Installation Date** (required).
2. Enter the equipment **Purchase Date** (required).

Other product details can be updated if needed.



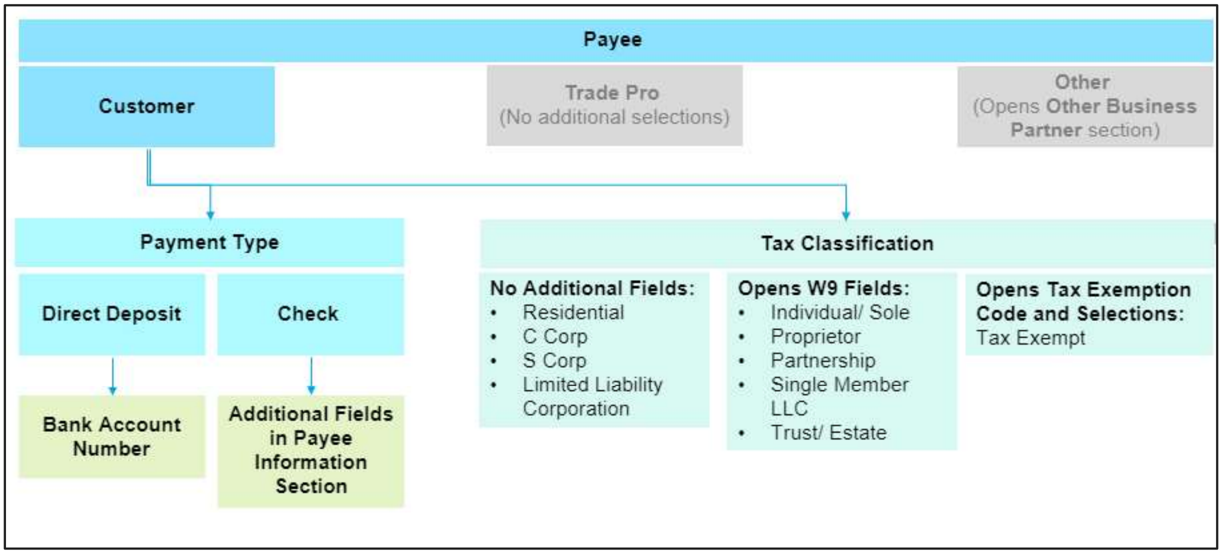
Payment Details

1. Do you want to apply for Single Payment?
   - **Yes** – Payments for all projects with the same Group ID are included together. Group ID is managed by SCE. To request that projects be grouped for payment, email *BusinessIncentives@sce.com*
   - **No** – The payment for this project will be sent separately



2. **Payee Selection**: Select **Customer**, **Trade Pro**, or **Other**. Depending on this selection, other required fields may display. The following section details the requirements for each possible payee scenario.

The process flow below shows which sections and fields are required for each payee selection option.



When **Payee Selection** is **Customer**, **Payment Type** and **Tax Classification** fields display.

About Payment Type

Check: An additional **Payee Information** section displays. The Customer or Trade Pro will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer or Trade Pro user can enter or update it.

Direct Deposit: An additional **Bank Account Number** field displays. The customer selects from a dropdown that includes a list of bank accounts on file for the customer. Each bank account is designated by its last four digits only.

About Tax Classification Fields

Regardless of payment type, Customers must select a Tax Classification. As shown in the workflow above, the different tax classifications cause additional fields to display:

- These selections do not open any additional fields:
  - **Residential**
  - **C Corp**
  - **S Corp**

- **Limited Liability** Corporation

♦ These selections open a set of W9 Fields:

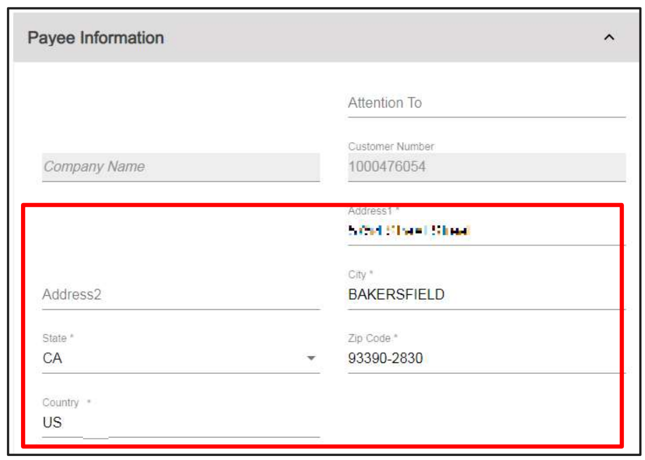
- **Individual/ Sole**
- **Proprietor**
- **Partnership**
- **Single Member LLC**
- **Trust/ Estate**

♦ This selection opens a Tax Exemption Code and Selections field: **Tax Exempt**

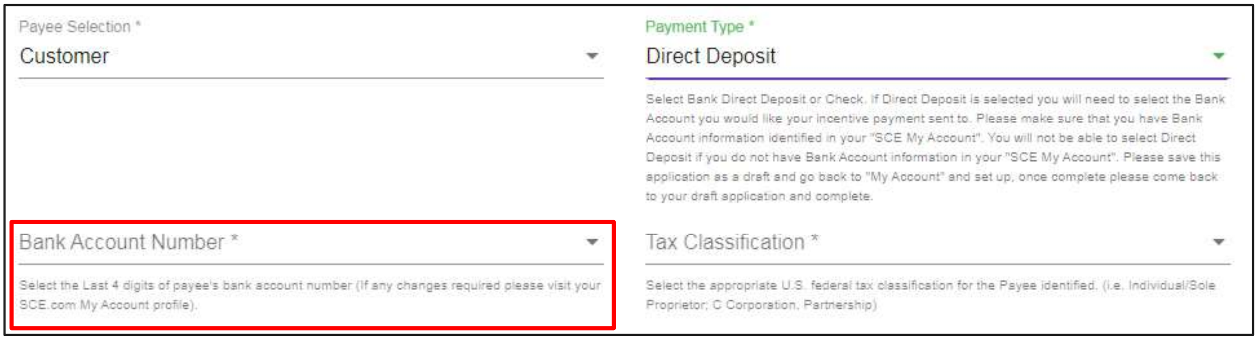
Scenario 1: Payee is Customer and Payment Type is Check

Note: This scenario does not address tax classification selections. These are covered separately from payment type.
In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

Note: **Country Code** must be two digits. Enter "US" for United States or "CA" for Canada.



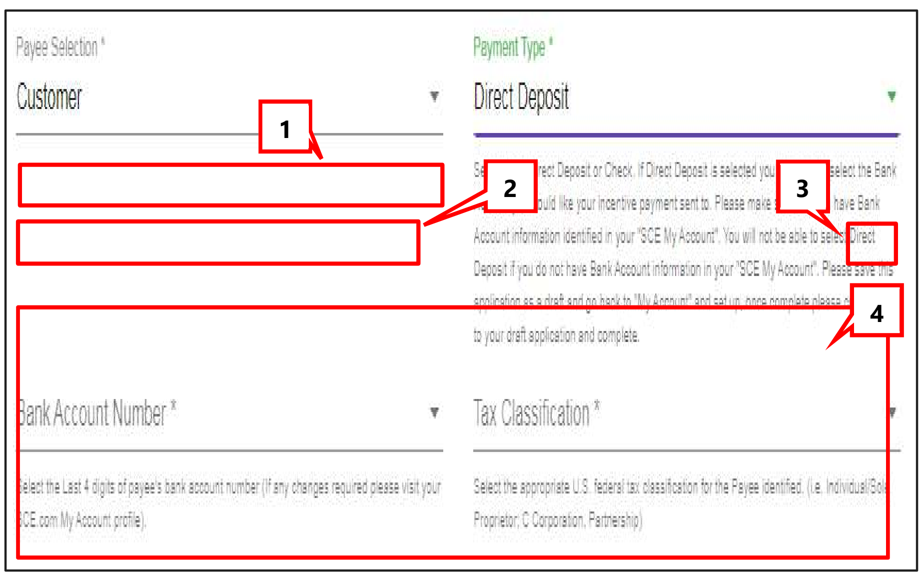
Payment Type Scenario 2: Payee is Customer and Payment Type is Direct Deposit



An additional **Bank Account Number** field displays.

- The dropdown displays the last four digits of the bank account(s) the customer has added to MyAccount on SCE.com
- If there are no bank accounts available, a pop up will note that no bank accounts are available for this customer. Notify the customer that they need to add the account to My Account on SCE.com, after which it will display in iEnergy
- In this case, the Payee Information section will display two auto-populated fields: **Company Name** and **Company Number**. (Not shown)

Scenario 3: Payee is Customer and Tax Classification opens W9 fields



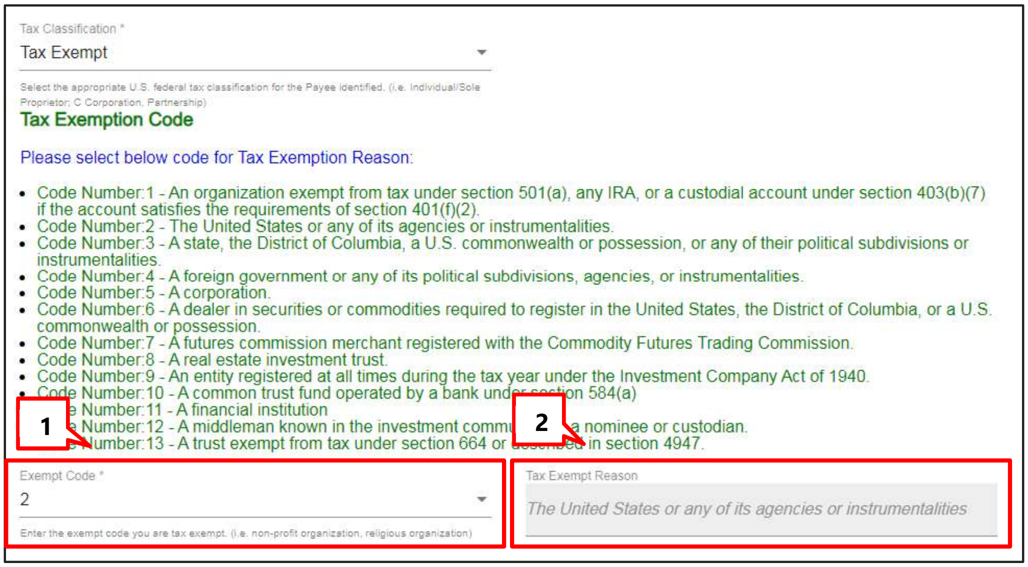
1. Use the **Tax ID Type** dropdown to select EIN or SSN.

   Enter the Tax ID and Tax ID confirmation.

2. Click the **pencil icon** in the **Tax ID Number** and **Tax ID Number Confirm** fields enter the value. The value is not shown on the form.
3. Click the **eye icon** to view the **Tax ID Number** values.
4. Enter the tax contact information.

Scenario 4: Payee is Customer and Tax Classification is Tax Exempt

An additional Tax Exemption Code subsection displays.



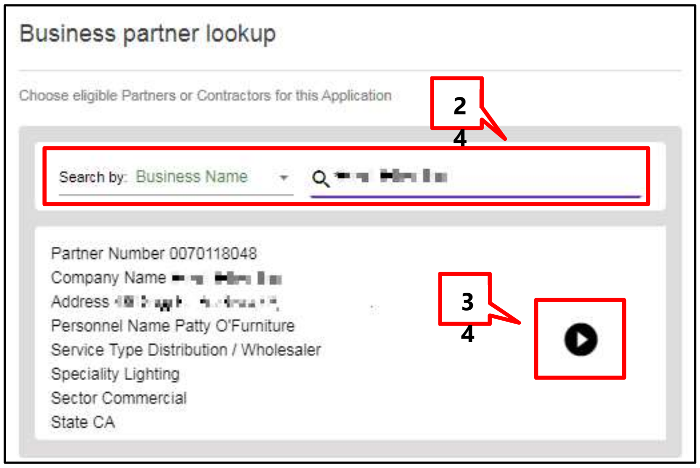
1. The customer or Trade Pro selects a reason code. (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **Tax Exempt Reason** field.

Scenario 5: Payee is Trade Pro

When **Payee Selection** is the **Trade Pro,** then the Payee Information section is auto-populated with the selected Trade Pro **Company Name Vendor ID**. (Not shown.)

Scenario 6: Payee is Other

When **Payee Selection** is **Other,** the **Other Business Partner Information** section displays. Look up a business partner.



1. Click **Partner lookup** in the section header.

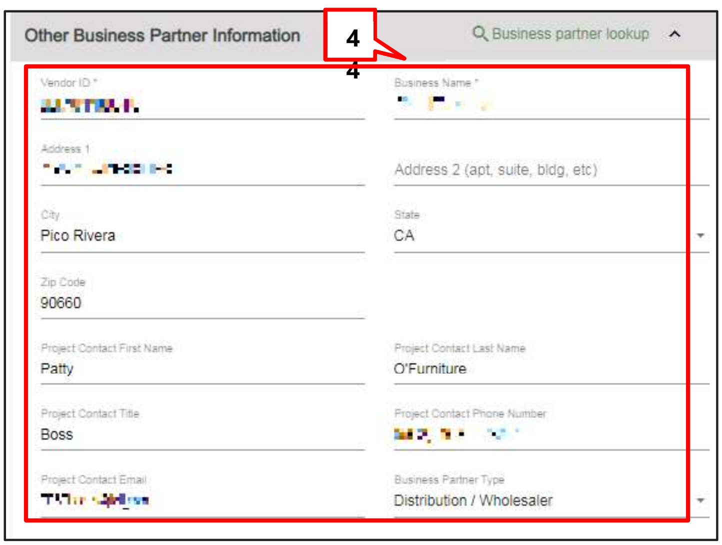
   The Partner lookup screen displays.

2. Select a search parameter: **Business Name** or **Vendor ID** and type a value in the search field. The results populate automatically.

3. Click the arrow next to the partner you want to add as the payee.

4. The business partner details populate.

   *The **Payee Information** section will auto-populate with the selected partner's **Company Name** and **Vendor ID**.*

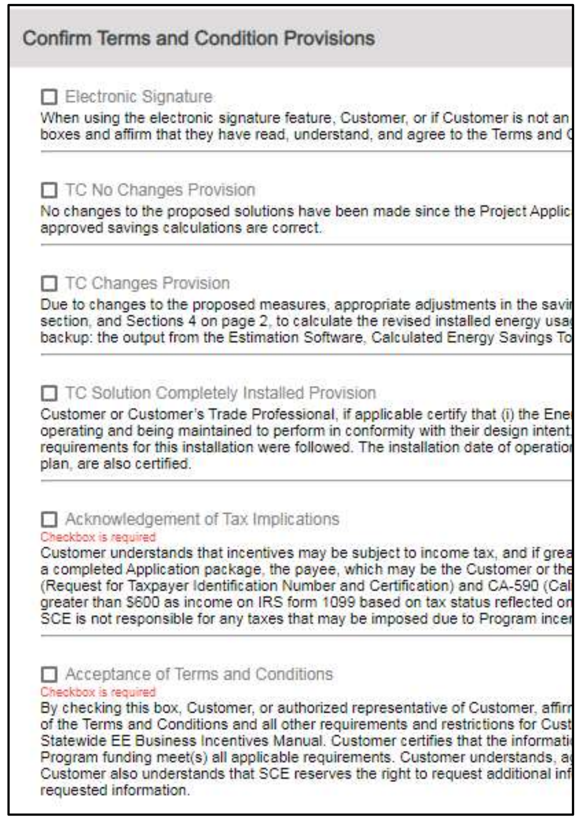


This concludes the payment/payee details scenarios.

Terms and Conditions – Electronic Submission

This section displays when the Terms and Conditions Submission Method is Electronic Acceptance. Click all applicable checkboxes:

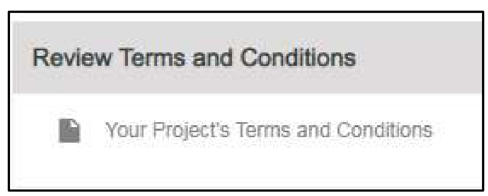
- **Electronic Signature**
- **TC No Changes Provision** – If no changes have been made since the Reservation Request
- **TC Changes Provision** – If changes have been made since the Reservation Request
- **TC Solution Completely Installed Provision**
- **Acknowledgement of Tax Implications** – If W9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



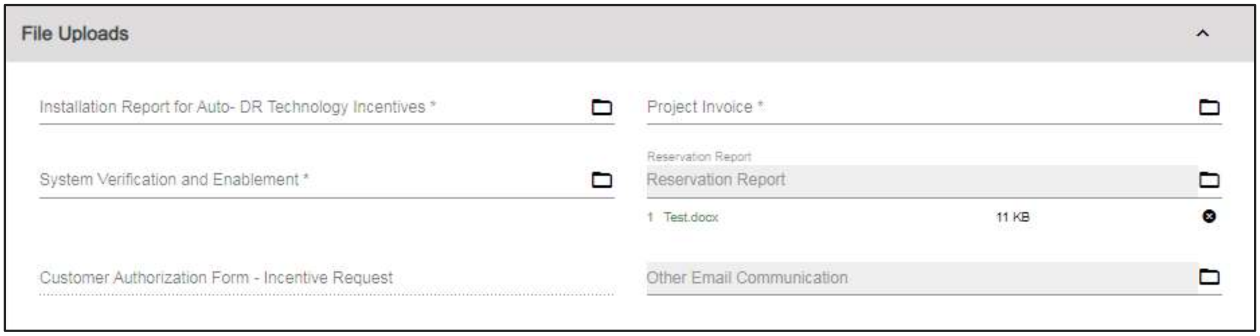
Terms and Conditions – Print and Upload

This section will be displayed when the **Terms and Conditions Submission Method** is **Print and Upload**.

Click on the file to open the terms and conditions in a new browser tab.



File Uploads



- Required file uploads are:
  - Installation Report for Auto DR Technology Incentives
  - System Verification and Enablement
  - Project Invoice
- If the **Terms and Conditions Submission Method** is **Print and Upload**, the **Customer Authorization Form – Incentive Request** is required

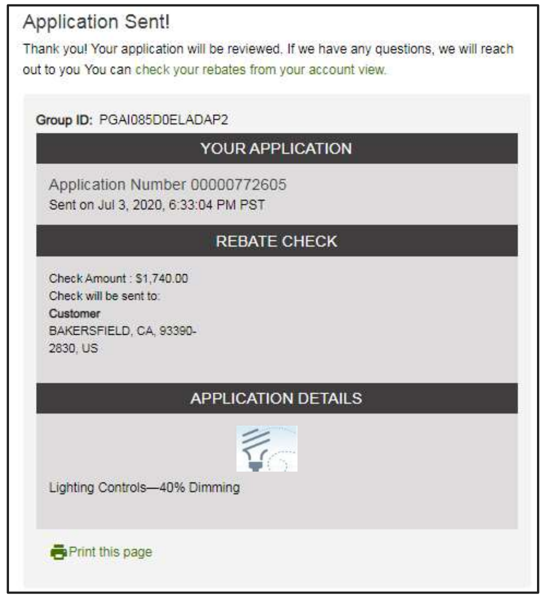
Review Comments

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

Click **Submit** in the header.

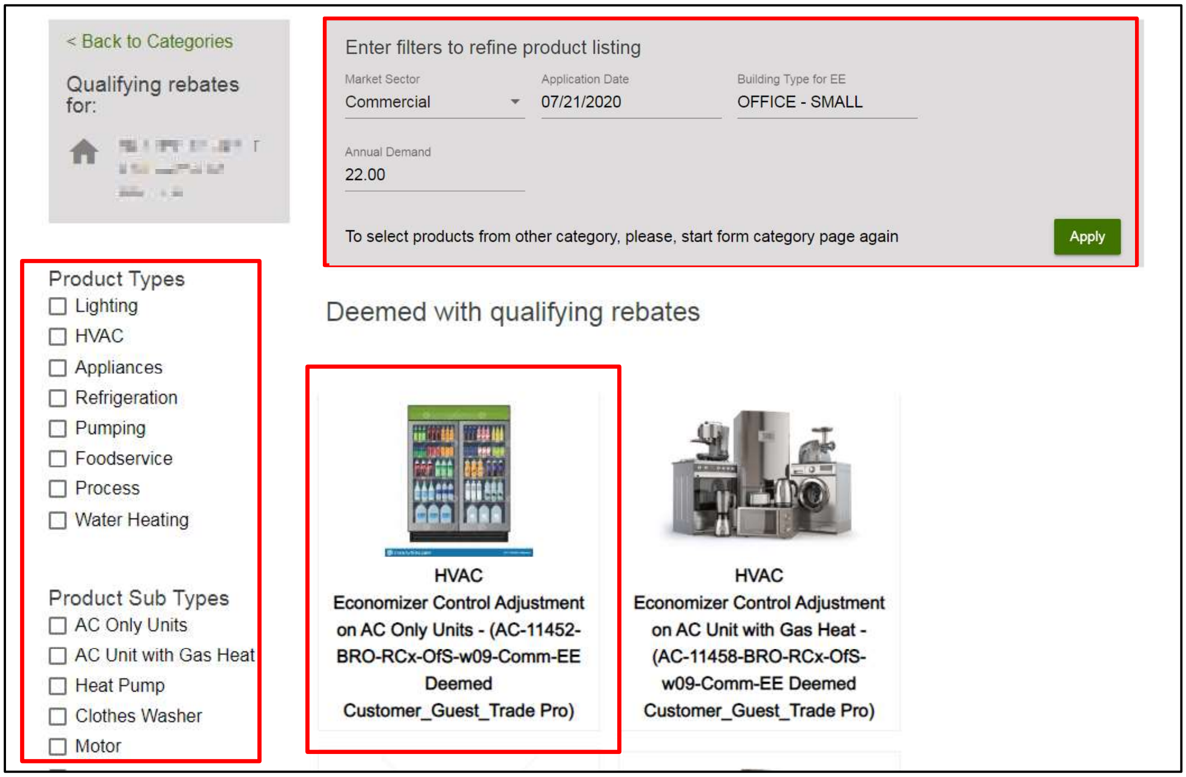
The confirmation screen displays.

This concludes the section on applying for a Deemed rebate beginning with a Reservation Request.



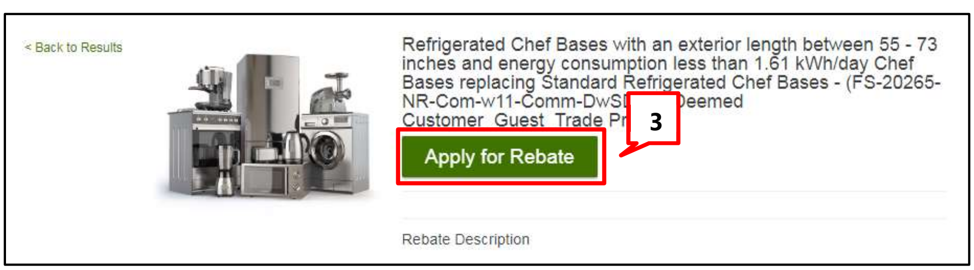
Submit a Deemed Incentive Request

Select a Deemed Product



1. On the product selection page, refine results by using one or both of the following methods:
   - Using the filters at the top of the page
   - Selecting **Product Type** and **Product Sub Type** checkboxes to the left of the page
2. Click on the product.

   The product details page displays.



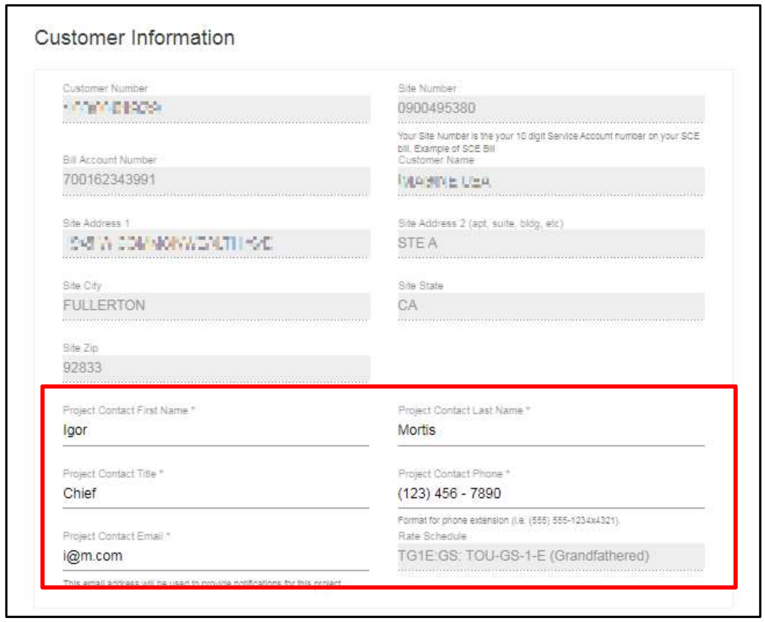
3. After selecting the product, click **Apply for Rebate** to start the application.

Deemed Incentive Request Application Sections

Customer Information

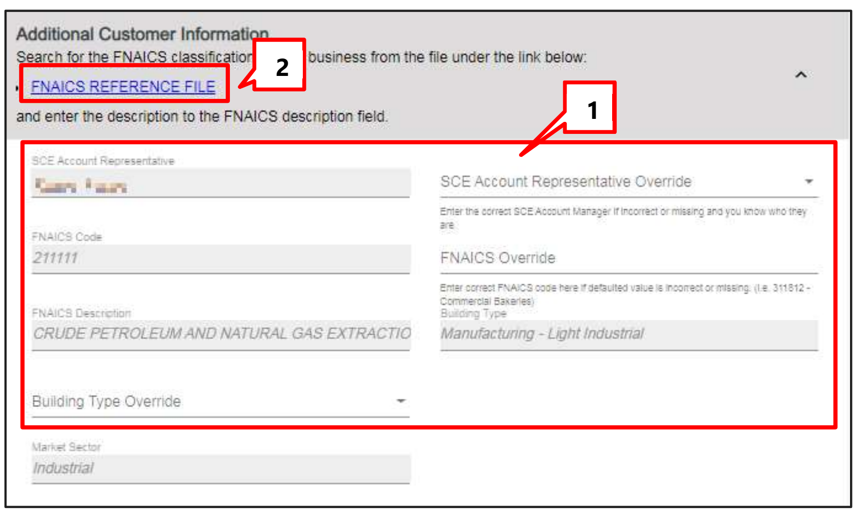
Most of the customer and site information is auto-populated from iEnergy and not editable.

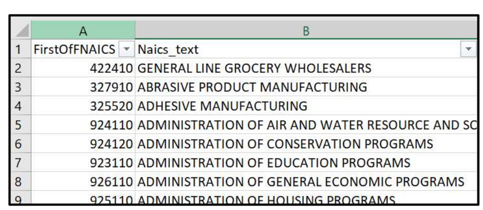
Project contact information is auto-populated and can be updated as needed.



Additional Customer Information

1. If the **Account Representative**, **FNAICS**, or **Building Type** values are missing or incorrect, update them here.
2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCE FILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown below right.

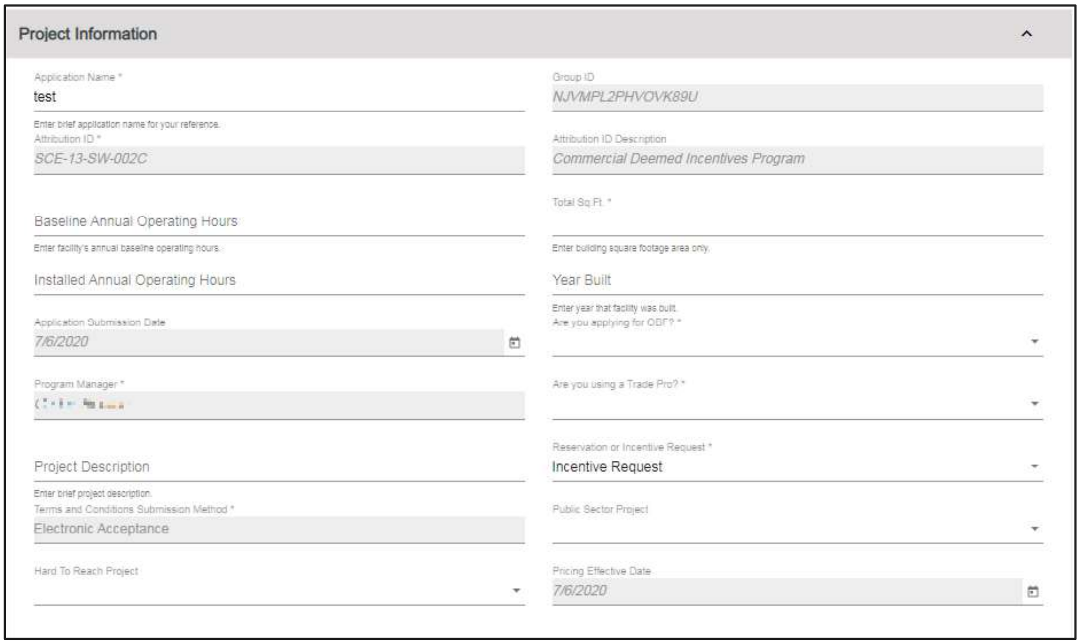




	A	B
1	FirstOfFNAICS	Naics_text
2	422410	GENERAL LINE GROCERY WHOLESALERS
3	327910	ABRASIVE PRODUCT MANUFACTURING
4	325520	ADHESIVE MANUFACTURING
5	924110	ADMINISTRATION OF AIR AND WATER RESOURCE AND SC
6	924120	ADMINISTRATION OF CONSERVATION PROGRAMS
7	923110	ADMINISTRATION OF EDUCATION PROGRAMS
8	926110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

Project Information

Enter information about the project.



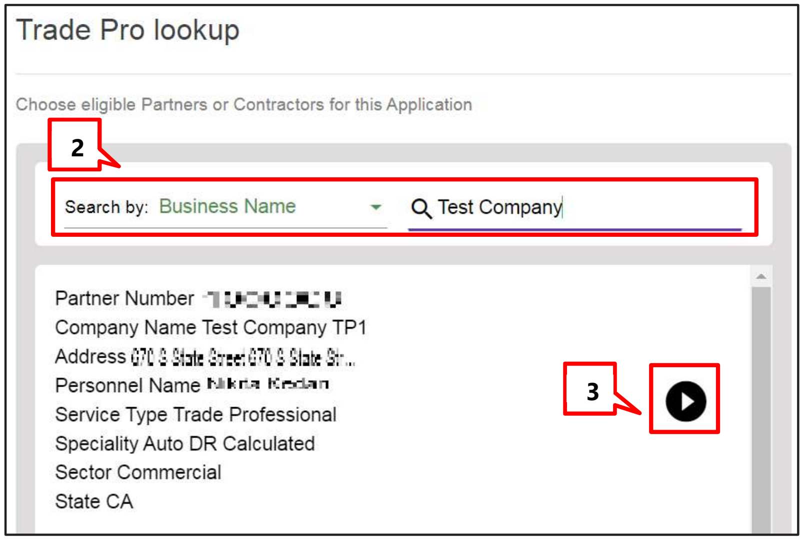
The following table describes key fields in the Project Information section.

Field	Required	Description of Action
Application Name	Yes	Name the application
Total Sq. Ft.	Yes	Enter the square footage of the installation site
Are you applying for OBF?	Yes	Select **No**. (OBF is not available for incentive requests)
Reservation or Incentive Request	Yes	Select **Incentive Request.** A new **Payment Details** section is added to the application
Terms and Conditions Submission Method	Yes	Specify the method by which you will accept the terms and conditions - **Electronic Signature**: Sign in the form - **Print and Upload**: Upload a signed form
Baseline Operating Hours	No	Enter baseline operating hours
Installed Annual Operating Hours	No	Enter installed annual operating hours
Year Built	No	Enter year of site construction
Project Description	No	Enter a project description
Public Sector Project	No	Designate if is a public sector project
Hard to Reach Project	No	Designate whether project is located in a hard to reach location

Trade Professional Information

This section displays if use of a Trade Pro was indicated in the Project Information section.

1. Click the **Trade Pro lookup** link in the section header to search for a Trade Pro.
2. Select a search parameter (**Business Name** or **Vendor ID**).
3. Type a keyword. Results populate automatically.
4. Select the Trade Pro from the results and click on the arrow.

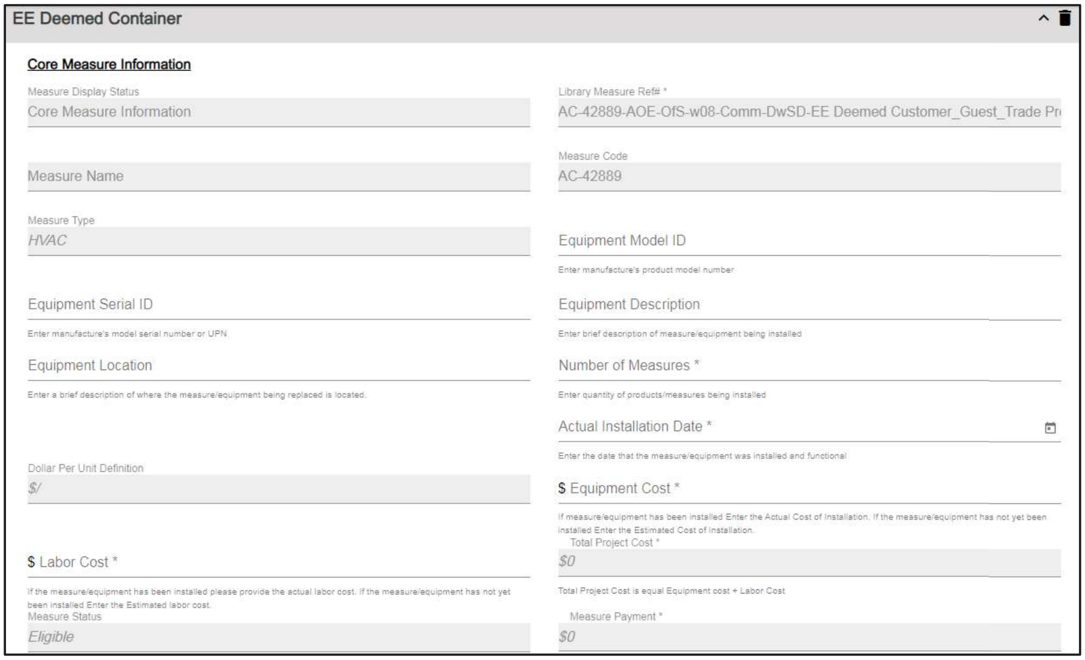


If a Trade Pro does not appear in this search, contact them and let them know that they need to register as a Trade Pro with SCE. In this case, the options for the current application are:

- Submit the project without a TP
- Select another registered TP
- Leave the application in draft mode until the TP registers (the application will stay open for 30 days)

Product Details

Note: For Deemed products this section is called **EE Deemed Container**.



In this section, enter information about the product, equipment, and project costs. If you have selected multiple products, you will enter details separately for each installed product/measure. The following table details the editable fields in this section.

When all the information has been entered, click **Calculate** at the bottom right of the page to populate the **Total Project Cost** and **Measure Payment** fields.

Measure Details Field	Required	Action Required
Equipment Model ID#	No	Enter the manufacturer's product model number
Equipment Serial ID #	No	Enter the manufacturer's model serial number or UPN
Equipment Description	No	Enter a brief description of the measure/equipment being installed
Equipment Location	No	Enter a brief description of where the equipment is being installed
Number of Measures	Yes	Enter the quantity of products/measures being installed
Actual Installation Date	Yes	Enter the date that the measure/equipment was installed and functional

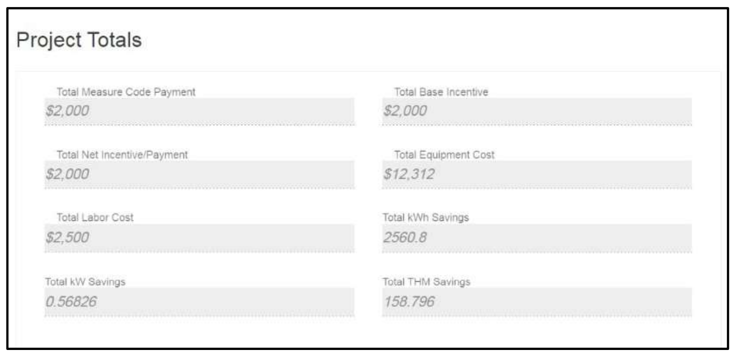
Equipment Cost	Yes	If measure/equipment has been installed, enter the Actual Cost of Installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of Installation
Labor Cost	Yes	If the measure/equipment has been installed please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost
Purchase Date	Yes	Enter the date the measure/equipment was purchased

Table of editable fields in the EE Deemed Container measure details section

Project Totals

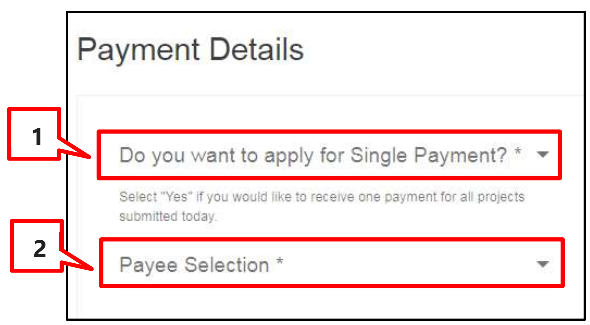
Project totals is a read only section that displays calculated values based on the project information entered.

The Project Totals section sums key values for all products/measures contained within this application.



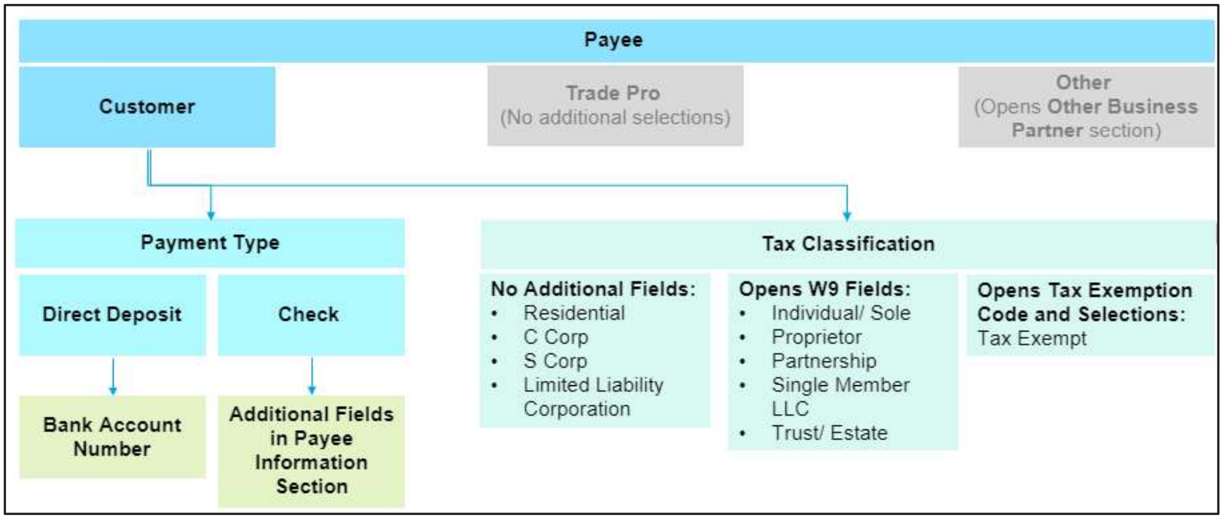
Payment Details

1. **Do you want to apply for Single Payment?**
   - **Yes** – Payments for all projects with the same Group ID are included together. Group ID is managed by SCE. To request that projects be grouped for payment, email *BusinessIncentives@sce.com*
   - **No** – The payment for this project will be sent separately



2. **Payee Selection**: Select Customer, Trade Pro, or Other. Depending on this selection, other required fields may display. The following section details the requirements for each possible payee scenario.

The process flow below shows which sections and fields are required for each payee selection option.



When **Payee Selection** is **Customer**, additional fields display:

- Payment Type
- Tax Classification

About Payment Type

- **Check**: An additional **Payee Information** section displays. The Customer or Trade Pro will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer or Trade Pro user can enter or update it.
- **Direct Deposit:** An additional **Bank Account Number** field displays. The customer selects from a dropdown that includes a list of bank accounts on file for the customer. Each bank account is designated by its last four digits only.

About *Tax Classification*

Regardless of payment type, Customers must select a tax classification. As shown in the workflow above, the different tax classifications cause additional fields to display:

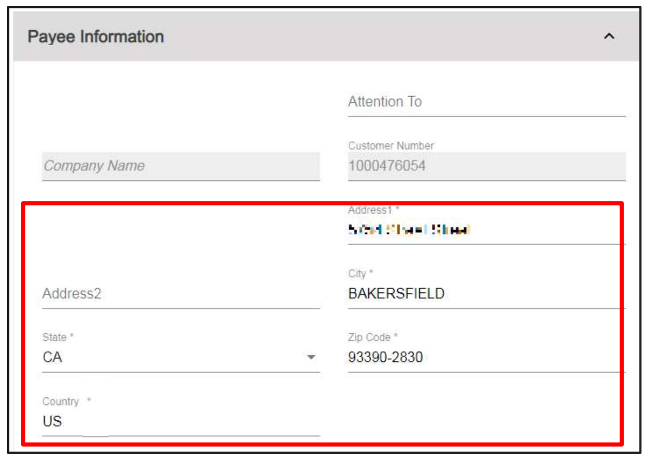
- These selections do not open any additional fields:
  - **Residential**
  - **C Corp**
  - **S Corp**
  - **Limited Liability** Corporation

- These selections open a set of W9 Fields:
  - **Individual/ Sole**
  - **Proprietor**
  - **Partnership**
  - **Single Member LLC**
  - **Trust/ Estate**
- This selection opens a Tax Exemption Code and Selections field: **Tax Exempt**

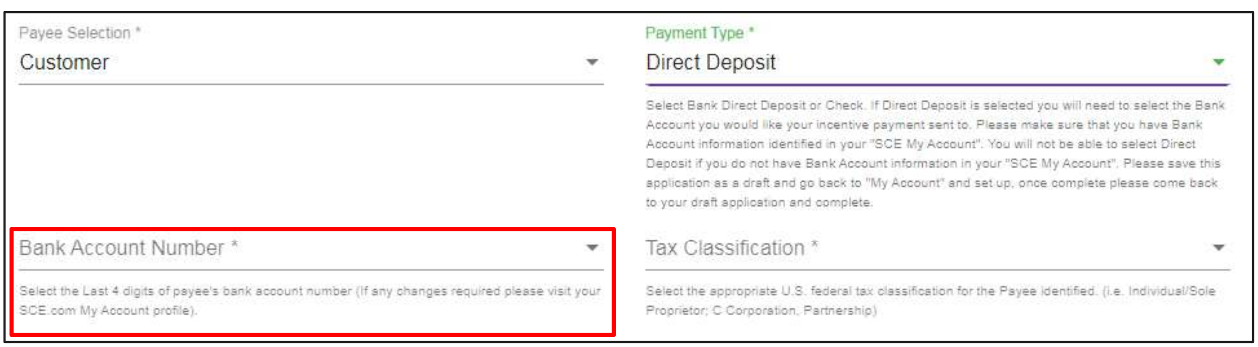
Scenario 1: Payee is Customer and Payment Type is Check

Note: This scenario does not address tax classification selections. These are covered separately from payment type.
In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

Note: **Country Code** must be two digits. Enter "US" for United States or "CA" for Canada.



Payment Type Scenario 2: Payee is Customer and Payment Type is Direct Deposit

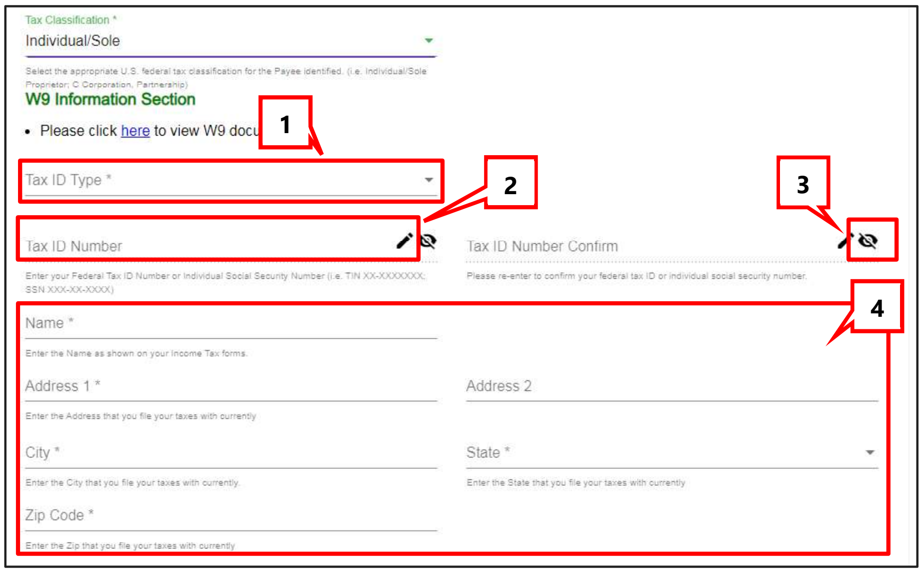


An additional **Bank Account Number** field displays.

- The dropdown displays the last four digits of the bank account(s) the customer has added to MyAccount on SCE.com

- If there are no bank accounts available, a pop up will note that no bank accounts are available for this customer. Notify the customer that they need to add the account to My Account on SCE.com, after which it will display in iEnergy
- In this case, the Payee Information section will display two auto-populated fields: **Company Name** and **Company Number**. (Not shown)

Scenario 3: Payee is Customer and Tax Classification opens W9 fields

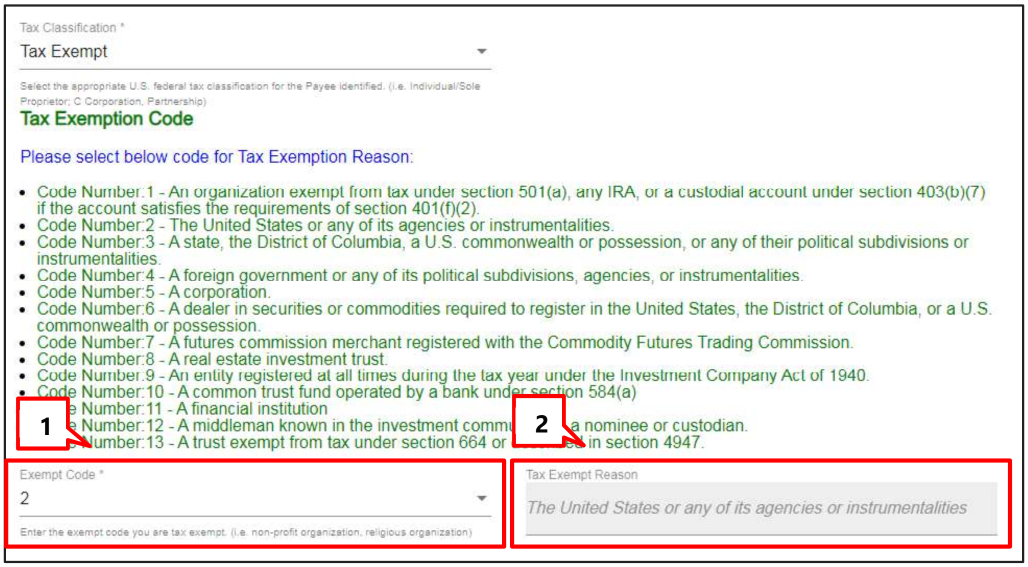


1. Use the **Tax ID Type** dropdown to select EIN or SSN.

   Enter the Tax ID and Tax ID confirmation.
2. Click the **pencil icon** in the **Tax ID Number** and **Tax ID Number Confirm** fields enter the value. The value is not shown on the form.
3. Click the **eye icon** to view the **Tax ID Number** values.
4. Enter the tax contact information.

Scenario 4: Payee is Customer and Tax Classification is Tax Exempt

An additional Tax Exemption Code subsection displays.



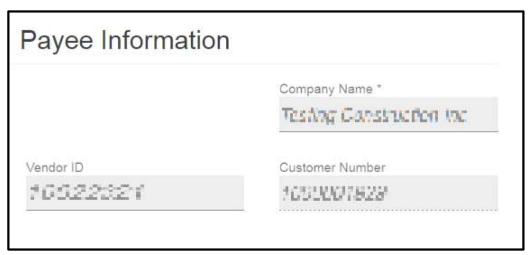
1. The customer or Trade Pro selects a reason code. (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **Tax Exempt Reason** field.

Scenario 5: Payee is Trade Pro

When **Payee Selection** is the **Trade Pro**, no additional information is required. Click the forward arrow to continue.

The Payee Information section displays.

The Payee Information section is auto-populated with the selected Trade Pro **Company Name Vendor ID**.



Scenario 6: Payee is Other

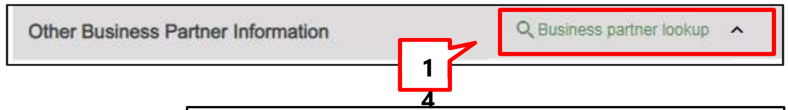
When **Payee Selection** is **Other,** the **Other Business Partner Information** section displays. To add a business partner:

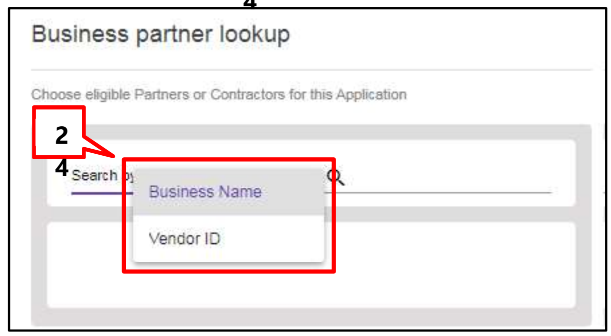
1. Click **Business partner lookup.**

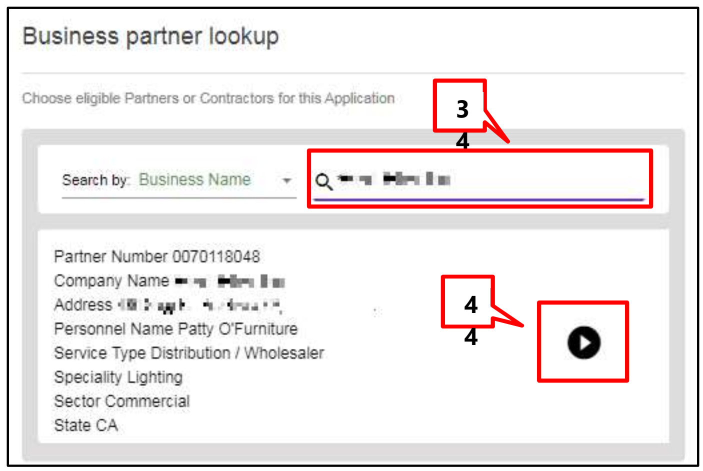
   The Partner lookup screen displays.

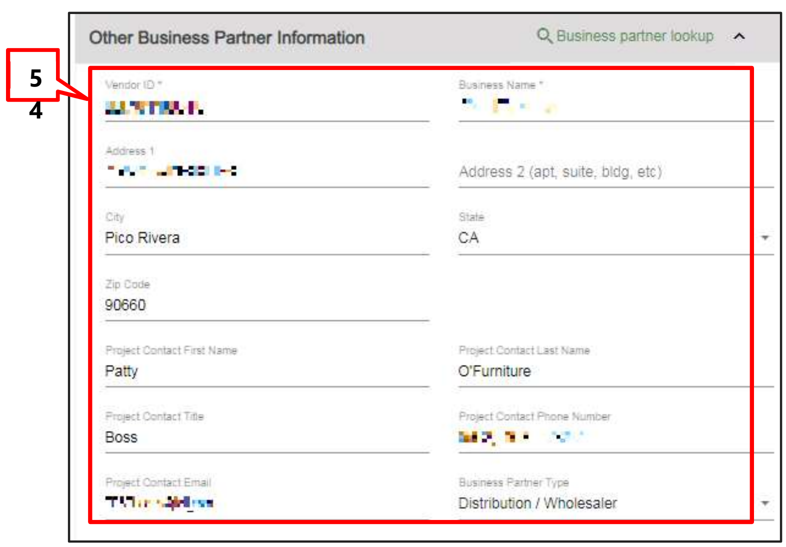
2. Select a search parameter: Business Name or Vendor ID.
3. Type a value in the search field. The results populate automatically.
4. Click the arrow next to the partner you want to add as the payee.
5. The business partner details populate.

   *The **Payee Information** section will auto-populate with the partner's **Company Name** and **Vendor ID** of the selected partner.*





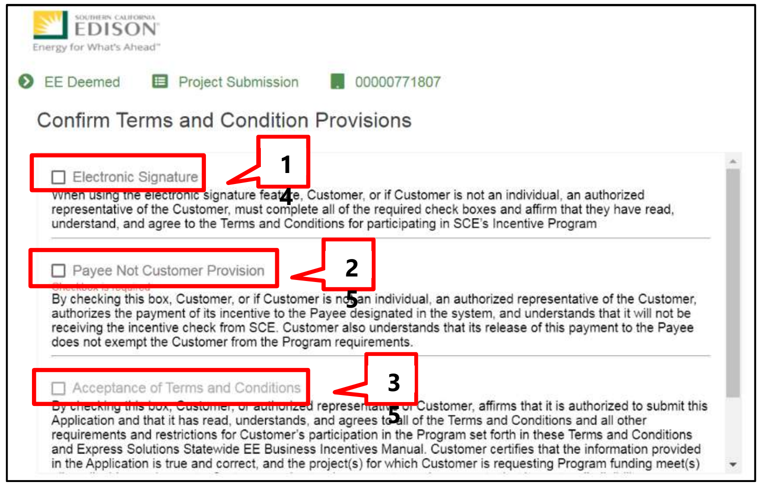




Confirm Terms and Conditions Provisions – Electronic Acceptance

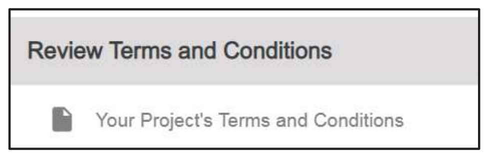
The Confirm Terms and Conditions Provision section displays if the **Terms and Conditions Submission Method** set as **Electronic Acceptance** in the Project Information section.

1. Click the **Electronic Signature** checkbox to electronically sign the application.
2. If the payee was set to Trade Pro or Other, the **Payee Not Customer Provision** is required.
3. Check **Acceptance of Terms and Conditions**.



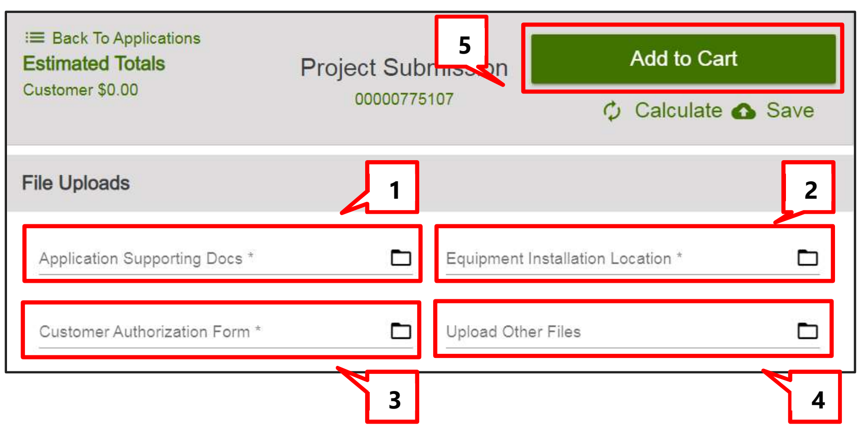
Confirm Terms and Conditions Provisions – Print and Upload

Click on the file icon to open the terms and conditions in a new browser tab.



File Uploads

1. Upload **Application Supporting Docs.**
2. Upload the **Equipment Installation Location** document.
3. If T&Cs submission was Print and Upload, upload **Customer Authorization Form**.
4. Upload other files as needed.



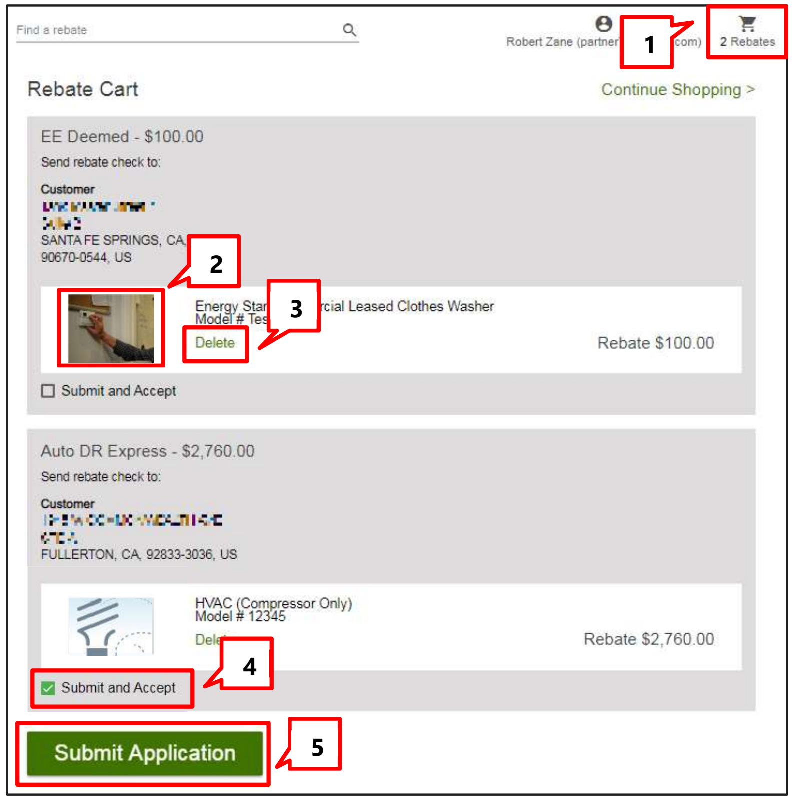
5. Scroll to the top of the page and click **Add to Cart.**

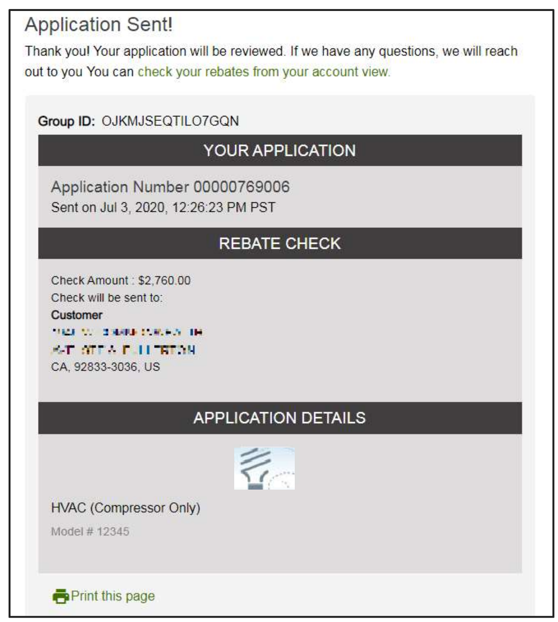
   The Rebate Cart displays.

Submit and Manage Applications

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
2. To edit an application before it is submitted, click the image.
3. To delete an application, click **Delete**.
4. Click the Submit and Accept checkbox for any application you are ready to submit.
5. Click **Submit Application**.

   A printable confirmation screen displays.





Revisions Required

If the application submission is incomplete or missing needed information for processing, the application will be sent back to the applicant to address the issues.

Hello [redacted]

Thank you for submitting Project 00000782708 located at [redacted] CA, 90670. After carefully reviewing your application, we identified that revisions are needed for the following reason(s): [redacted]

Please log on to SCE.com/My Account and update your project information. If you have any questions, please contact us at (626) 635-6015 Monday through Friday, from 8:00 a.m. to 5:00 p.m., or send an e-mail to BusinessIncentives@sce.com. Please have your Application Number available for reference when you call and include it in any e-mail correspondence.

Thank you for doing your part to save energy and the environment.

In this case, an email notification informs the application submitter that revisions are required and the application must be updated or withdrawn.

Project Withdrawal

If the customer wishes to withdraw the project instead of making the revisions, then the application submitter requests withdrawal from the **Project Submission** form by updating the **Withdrawal Requested** field to **Yes** and completing the form.

This ends the project. The applicant and the customer each receive a notification that the project has ended.

Hello [redacted]

Thanks you for your interest in participating in SCE's Energy Efficiency Programs. We received your request to withdraw Project 00000782708 located at [redacted] SPRINGS,CA,90670 that was submitted on 07/10/2020. Your request will be processed within 48 hours.

If this request was submitted by mistake or if you have any questions, please contact us at (626) 635-6015 Monday through Friday, from 8:00 a.m. to 5:00 p.m., or send an e-mail to BusinessIncentives@sce.com. Please have your Application Number available for reference when you call and include it in any e-mail correspondence.

Thank you for doing your part to save energy and the environment.

Check Payment Status

For Deemed and Auto DR applications, payment status is only available after installation.

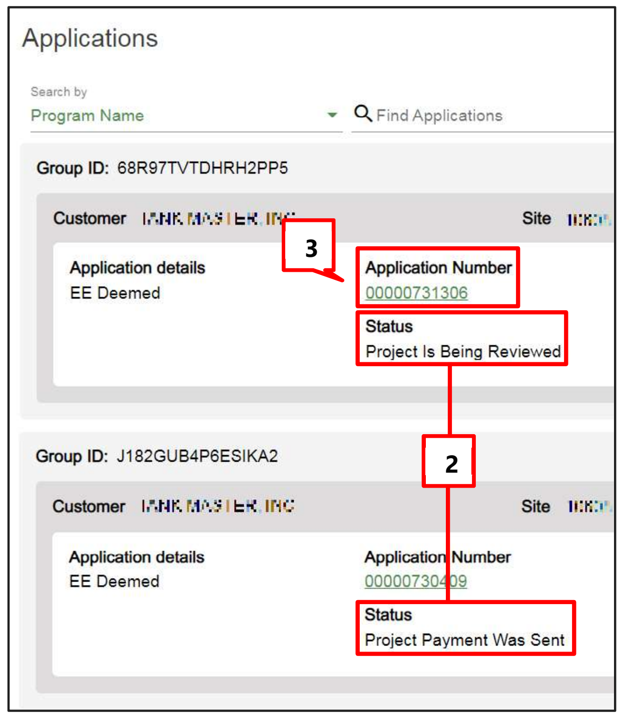
After submitting an application, you can check the payment status of your payment in the Rebate Center.

1. At the top right of the screen, click on your username, then select **Applications**.

   The Applications page displays.

2. On the Applications page, you can see the status of each application. The statuses shown below are **Project is being Reviewed** and **Project Payment Was Sent**.

3. You can click on an **Application Number** to access the project details.



This concludes the section on checking payment status.