

# Charging Infrastructure and Rebate or Turn-Key Installations

## User Guide for External Users

Prepared for:

### SCE Customers, and Charge Ready Trade Professionals



Prepared by:

**EL&D Systems Training**  
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## Overview

This user guide covers various features and functions of the Charge Ready Application Portal for the Charging Infrastructure and Rebate & Turn-Key Installation programs.

This document is intended for users who will submit requests for the Charging Infrastructure and Rebate or Turn-Key Installation incentives. These roles are:

- ◆ Customers
- ◆ Charge Ready Trade Professionals

## What is Charging Infrastructure and Rebate & Turn-Key Installation?

The Charging Infrastructure and Rebate & Turn-Key Installation are programs under the larger Charge Ready (CR) program. It is used to assist customers by providing technical assistance and reducing costs for installation of the Electric Vehicle (EV) charging infrastructure and equipment.

This user guide is to support the training of the Charge Ready Application Portal tool that supports the Charging Infrastructure and Rebate & Turn-Key Installation program.

*For more information about Site and Participant Eligibility, refer to the Charging Infrastructure & Rebate program guidelines.*

## Key Terms

The table below lists key terms used in Charging Infrastructure and Rebate & Turn-Key Installation and their description.

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

## Program Workflow

When completing a Charging Infrastructure and Rebate or Turn-Key Installation 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 Account Management Support form.
4. SCE completes the Site Assessment.
5. SCE completes the Site Selection.
6. **Customer completes Conceptual Design Review.**
7. SCE completes the Agreement Preparation.
8. **Customer completes the Agreement Acceptance.**
9. SCE completes the Funds Reservation.
10. **Customer uploads Proof of Procurement in the Agreement Acceptance form.**
11. SCE reviews Proof of Procurement in the Funds Reservation form.
12. SCE completes the Project Design.
13. **Customer completes the Design Acceptance.**
14. SCE reviews Design Acceptance in the Project Design form.
15. SCE completes the Project Requirements.
16. SCE completes the Construction.
17. **Customer completes the Pending Installation and Incentive Request. – This is only for Charging Infrastructure and Rebate projects.**
18. SCE completes the Incentive Site Review. – **This is only for Charging Infrastructure and Rebate projects.**
19. SCE completes the Incentive QA Review.
20. SCE approves or rejects the payment for a project.



## Program Forms

The Charging Infrastructure and Rebate program consists of five forms and six tasks.

The Turn-Key Installation program consists of four forms and five tasks.

Each form has multiple sections. Depending on the user role and the phase of the process, form sections and fields may be:

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

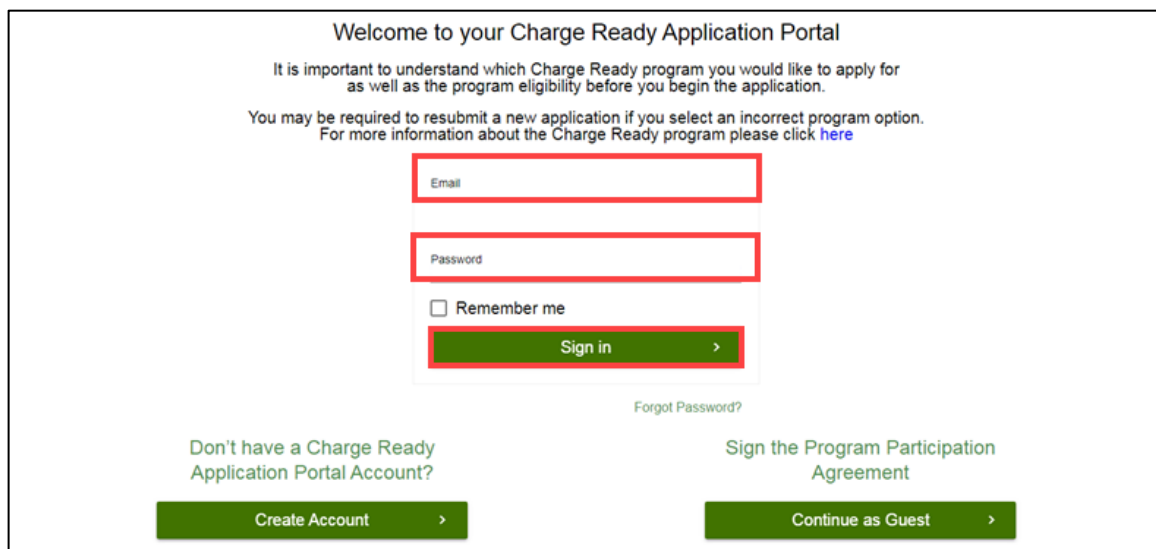
# Accessing the Charge Ready Application Portal

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

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

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?](#)

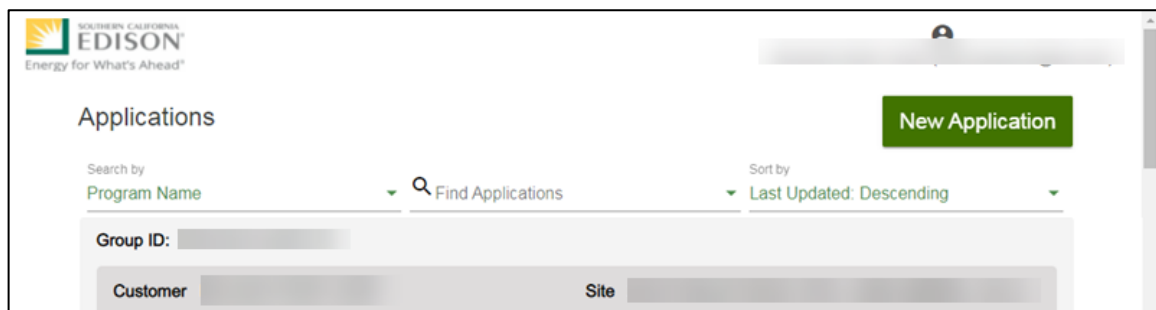
Don't have a Charge Ready Application Portal Account?

Sign the Program Participation Agreement

Create Account >

Continue as Guest >

The **Applications** page displays.



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Applications

New Application

Search by Program Name Find Applications

Sort by Last Updated: Descending

Group ID: [input field]

Customer [input field] Site [input field]

## Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals

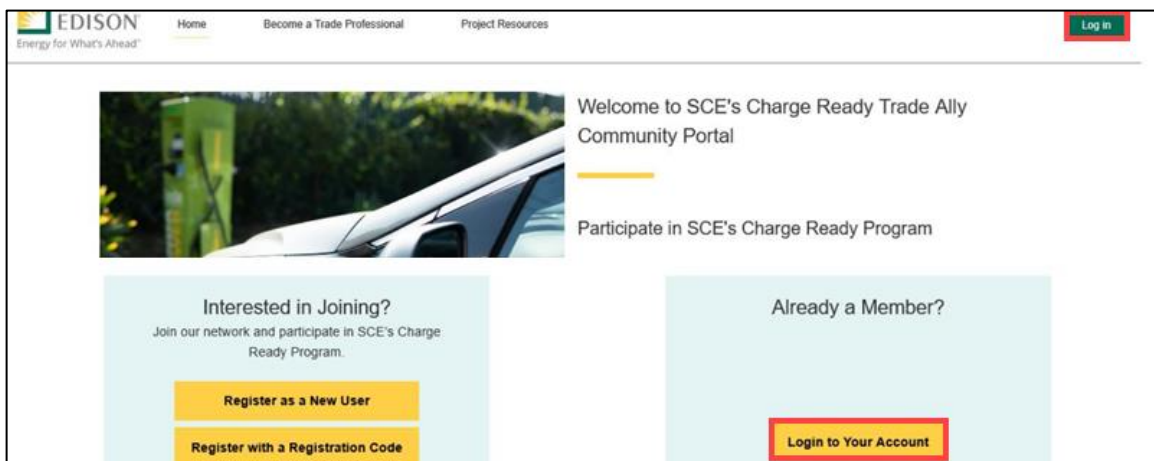
If you are a Charge Ready Trade Professional, you must have access to the Charge Ready Trade Ally Community (TAC) Portal. You and your company must also be approved by SCE to apply for rebates on behalf of the customer(s).

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>

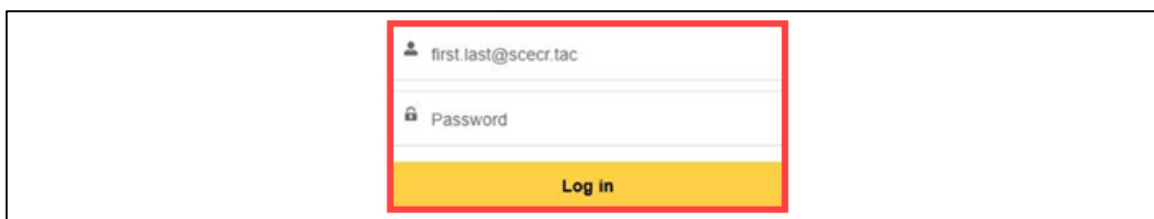
The **TAC landing page displays**.

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



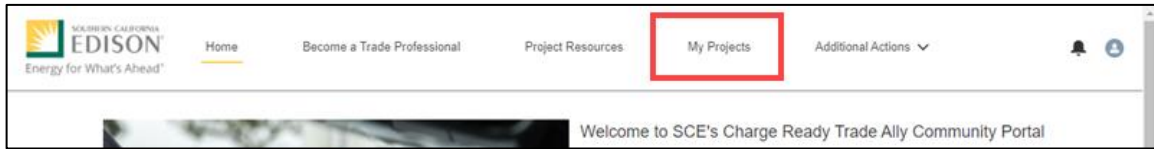
The **Login** page displays.

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



The **TAC Home Page** displays.

## 6. Select **My Projects**.

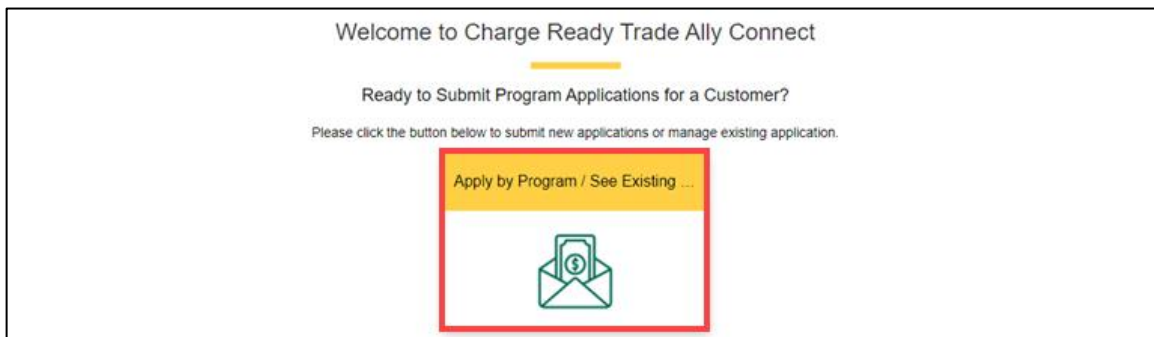


Note: If the My Projects tab is not on the screen, your company profile is not yet approved as a Charge Ready Trade Professional.

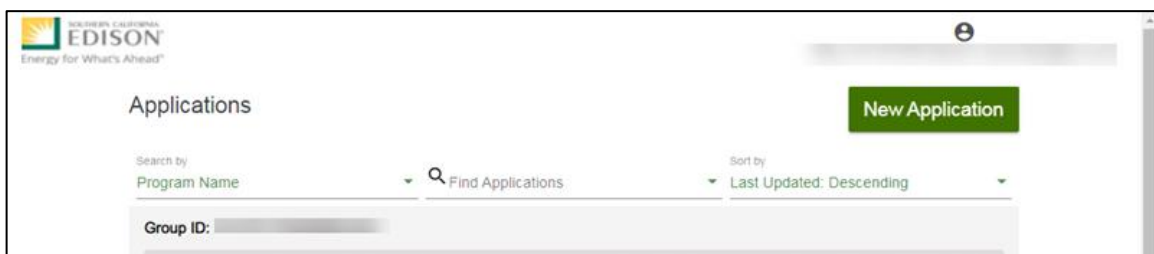


The **My Projects** page displays.

## 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, applicants request to reserve funding for a rebate.

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

- ◆ Specifies the site or project location

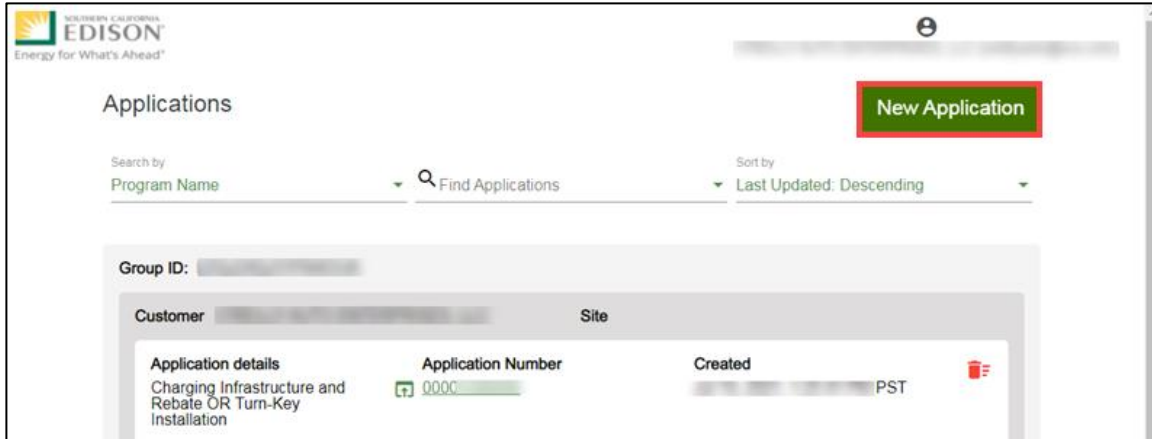
Once a Project Submission is complete, SCE determines the eligibility for program participation.

*For a full list of eligible participants, or for more information about the program, refer to the Charge Ready Program Guidelines.*

## Completing the Project Submission Form

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

1. Click **New Application**.

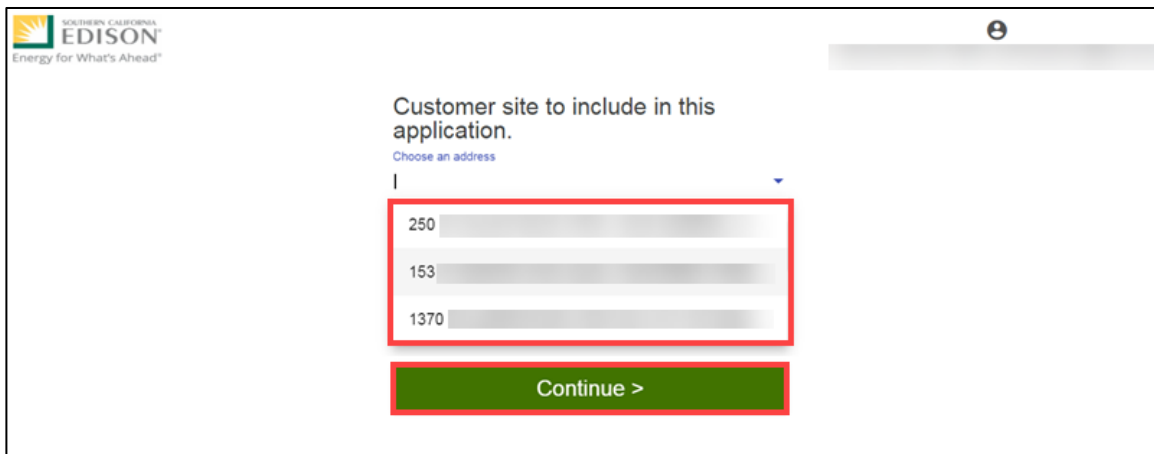


A **Customer site to include in this application** page displays.

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

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

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



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Customer site to include in this application.

Choose an address

250

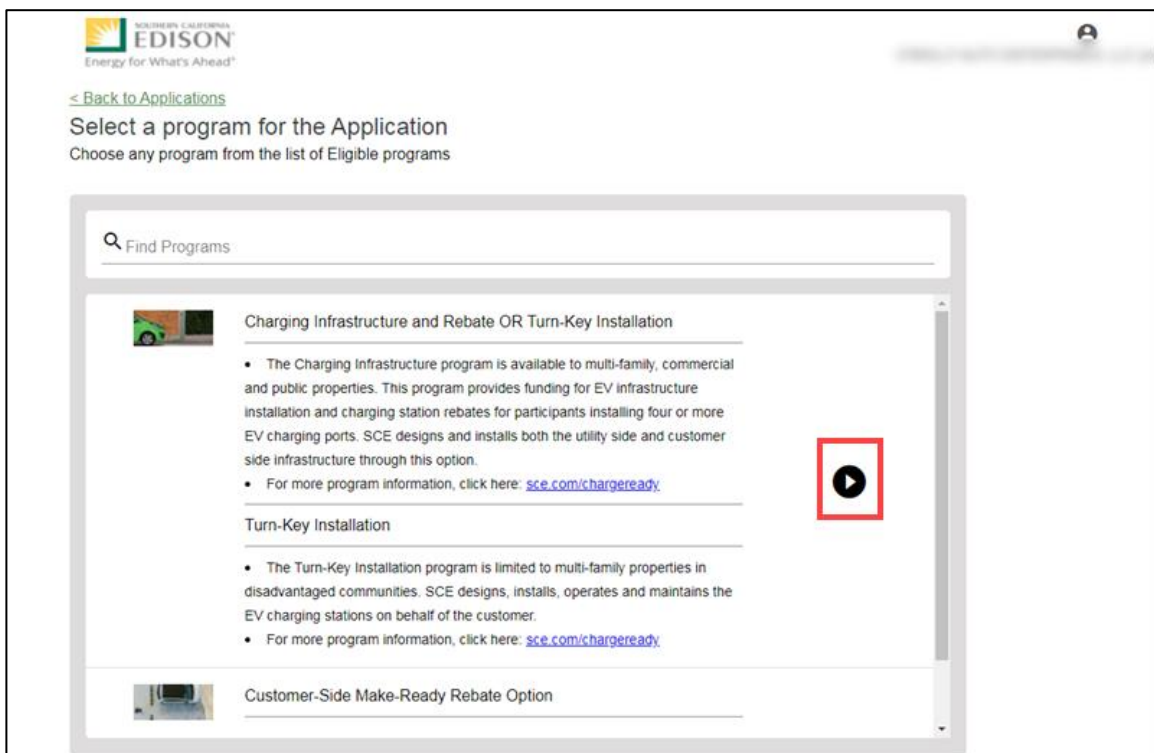
153

1370

Continue >

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

5. Select the  right arrow to select **Charging Infrastructure and Rebate or Turn-Key Installation**.




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[< 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](https://sce.com/chargeready)

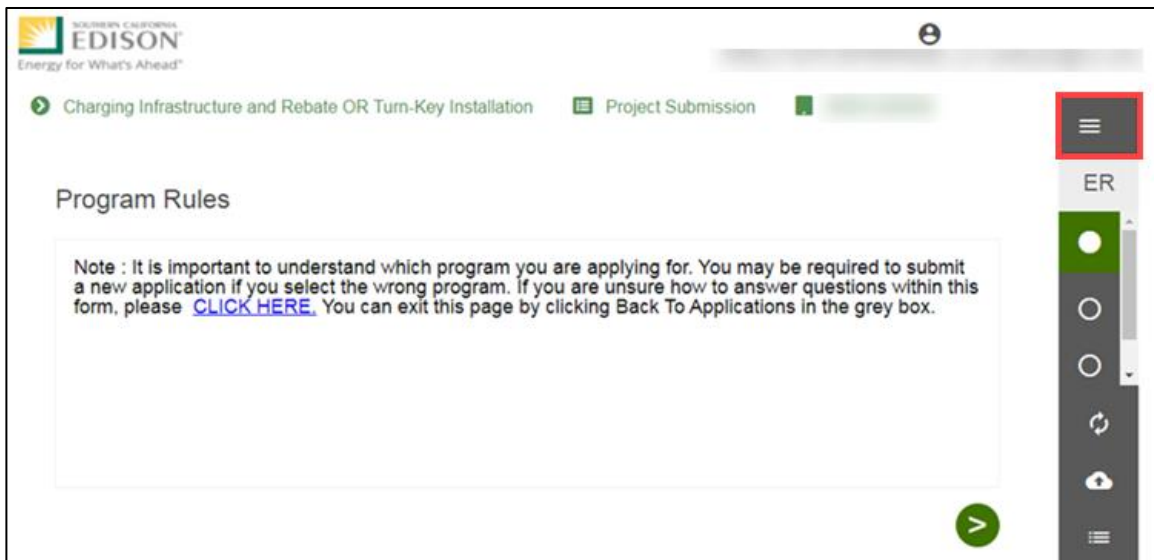
Turn-Key Installation

- 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](https://sce.com/chargeready)

 **Customer-Side Make-Ready Rebate Option**

The **Program Rules** page displays.


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

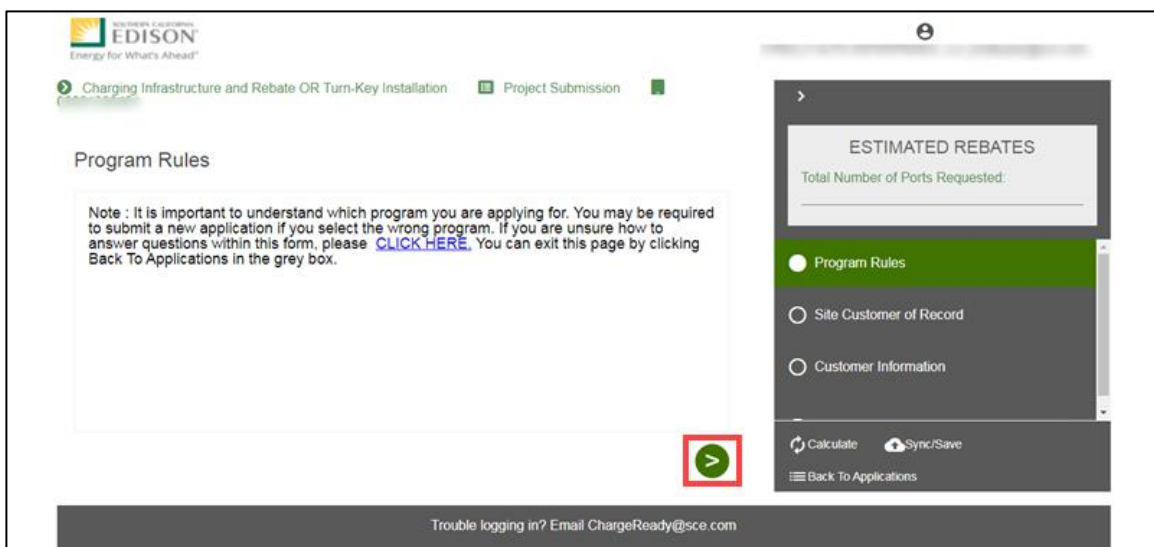


Once the Program Rules page displays, you will complete all the required fields.

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


## Program Rules

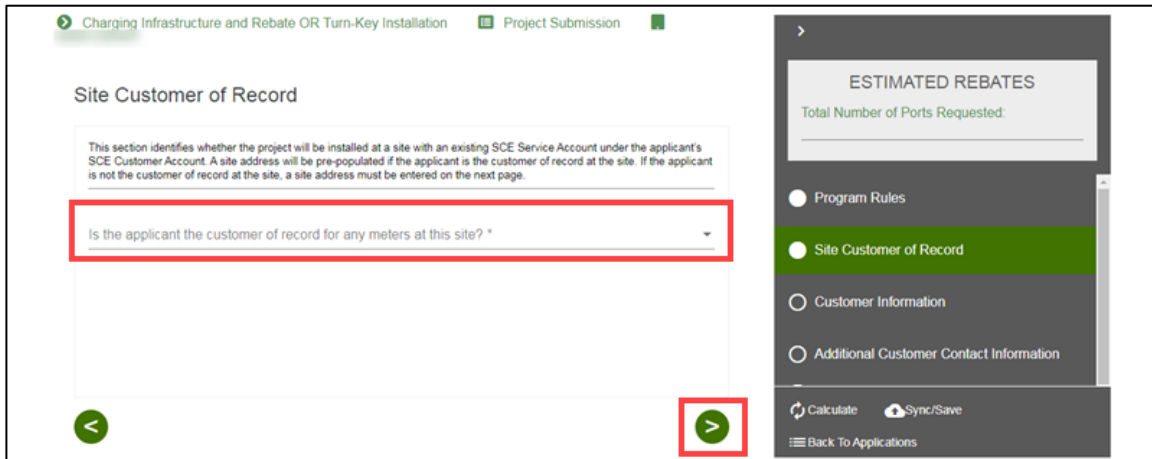
6. Review the **Program Rules**.
7. Click the  **Next** arrow.



The **Site Customer of Record** page displays.


## Site Customer of Record

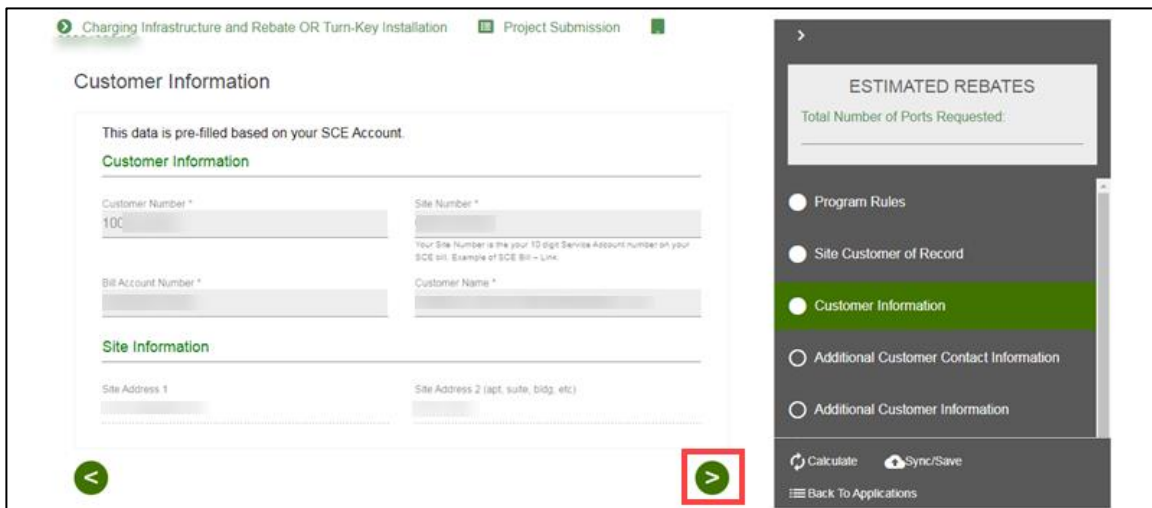
8. Select Yes or No..
9. Click the  **Next** arrow.



The **Customer Information** page displays.

## Customer Information

10. Verify the required information.
11. Click the  **Next** arrow.





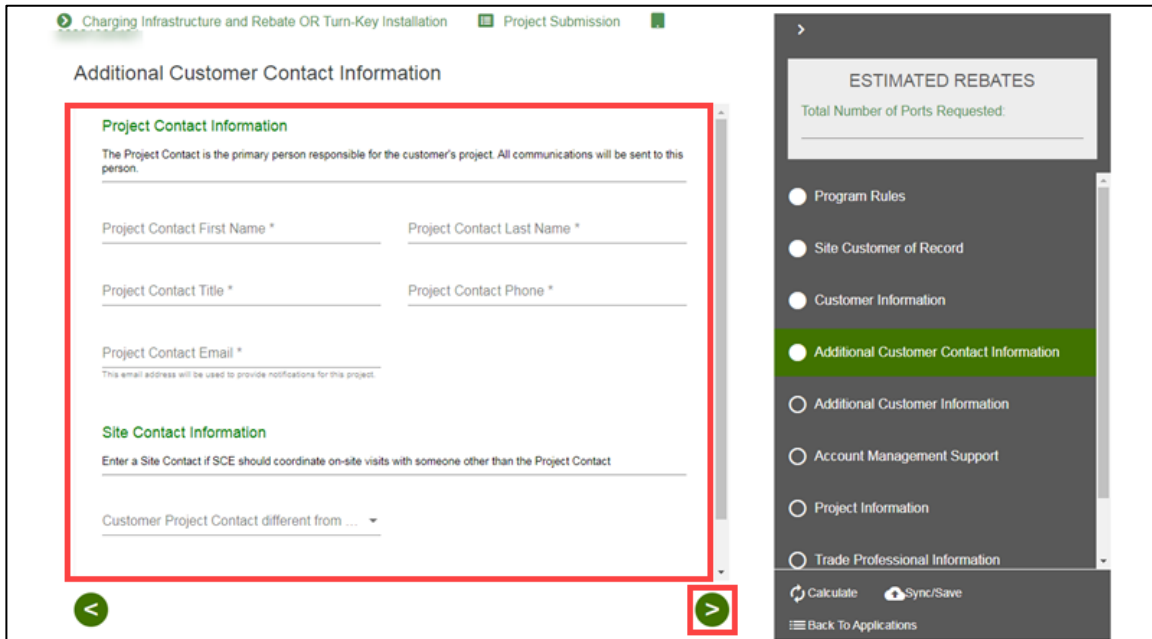
The **Additional Customer Contact Information** page displays.

## Additional Customer Contact Information

12. Enter the **Project Contact Information**.

13. Enter the **Site Contact Information**.

14. Click the  **Next** arrow.



The **Additional Customer Information** page displays.

### ***Customer Project Contact different from Site Contact***

If the customer project contact is different, follow the steps below:

15. Select **Yes**.

16. Enter the contact information.

**Additional Customer Contact Information**

Project Contact Email \*  
This email address will be used to provide notifications for this project.

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

Customer Project Contact different from Site Con...  
 Yes

Site Contact First Name \*      Site Contact Last Name \*  
 Site Contact Title \*      Site Contact Phone \*  
 Site Contact Email \*      Property Ownership \*

**ESTIMATED REBATES**  
 Total Number of Ports Requested:  
 Site Customer of Record  
 Customer Information  
 **Additional Customer Contact Information**  
 Additional Customer Information  
 Account Management Support  
 Project Information  
 Trade Professional Information  
 File Uploads

***Property Ownership is Lease***

If the Property Ownership is Lease, follow the steps below:

- 17. Select **Lease**.
- 18. Enter the **Property Owner** information.

**Additional Customer Contact Information**

Property Ownership \*  
 Lease

**Property Owner Contact Information**  
 If the customer does not own the project property enter contact information for the property owner.

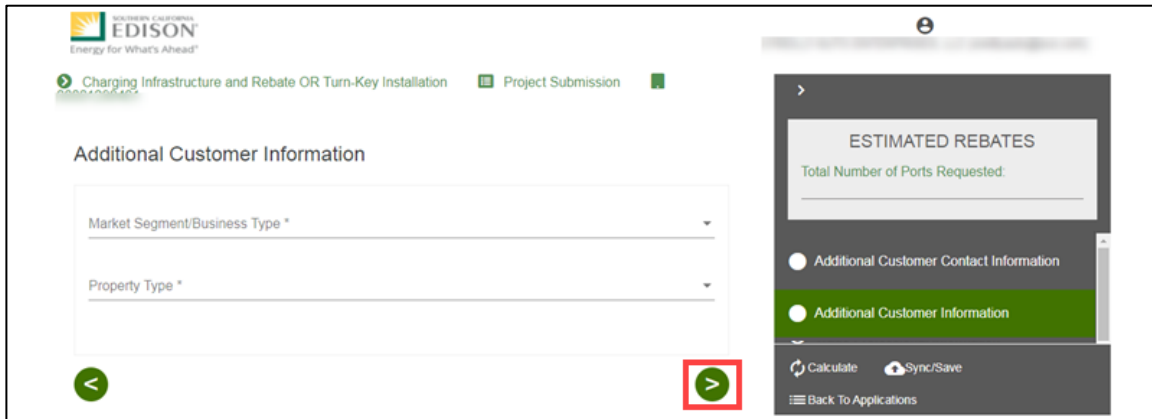
Property Owner First Name \*      Property Owner Last Name \*  
 Property Owner Company Name      Property Owner Title \*  
 Property Owner Email \*      Property Owner Phone \*  
 Property Owner Mailing Address \*      Property Owner Mailing City \*  
 Property Owner Mailing State \*      Property Owner Mailing Zip Code \*

**ESTIMATED REBATES**  
 Total Number of Ports Requested:  
 Site Customer of Record  
 Customer Information  
 **Additional Customer Contact Information**  
 Additional Customer Information  
 Account Management Support  
 Project Information  
 Trade Professional Information  
 File Uploads

## Additional Customer Information

19. Enter the required information.

20. Click the  **Next** arrow.



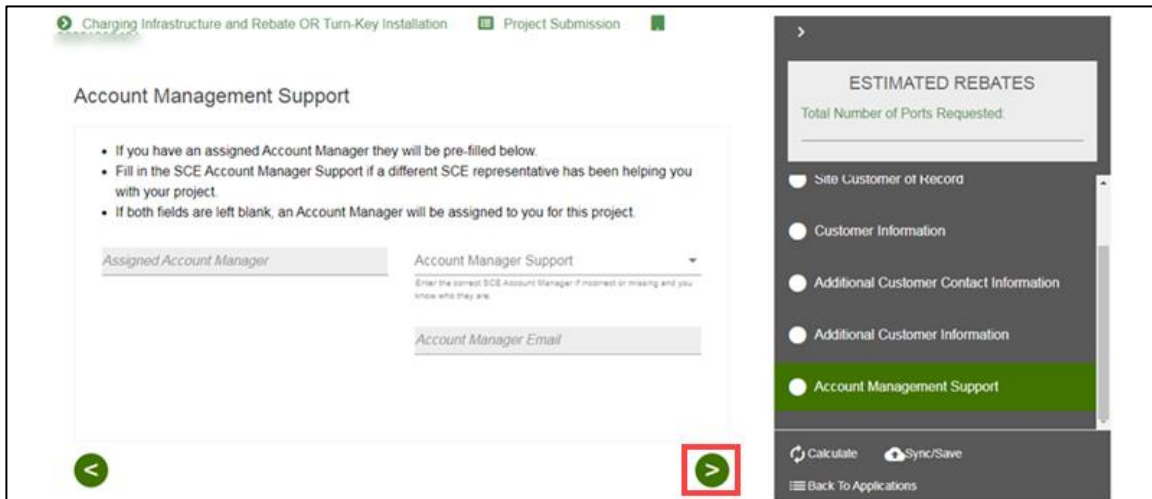
The **Account Management Support** page displays.

## Account Management Support

21. Select an **Account Manager Support**.

22. Click the  **Next** arrow.

6



The **Project Information** page displays.

## Project Information

23. Enter the required information.

24. Scroll down.

**Note: To select the Turn-Key Installation program, select the Turn-Key Option.**

The screenshot shows the 'Project Information' page. The 'How did you hear about the Charge Ready program?' dropdown menu is open, and the 'Turn-Key Installation' option is highlighted with a red box. Below this option, there is a note: 'NOTE: Electric vehicle charging equipment for this project will be owned, operated and maintained by the applicant for the entire commitment period.' The right sidebar shows 'ESTIMATED REBATES' and a list of sections: Program Rules, Site Customer of Record, Customer Information, Additional Customer Contact Information, and Additional Customer Information. At the bottom of the sidebar are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

25. Enter the required information.

26. Click the  **Next** arrow.

The screenshot shows the 'Project Information' page with the 'Enter the Charging Information' section expanded. The 'Total Number of Ports Requested \*' field is highlighted with a red box. The right sidebar is the same as in the previous screenshot. At the bottom of the sidebar are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'. The 'Next' arrow button at the bottom right of the main form area is highlighted with a red box.

The **File Uploads** page displays.

### **Trade Professional Information**

If a Charge Ready Trade Professional is required, the Trade Professional Information page displays.

27. Select the **Trade Professional Lookup**.

The **Trade Professional Lookup** page displays.

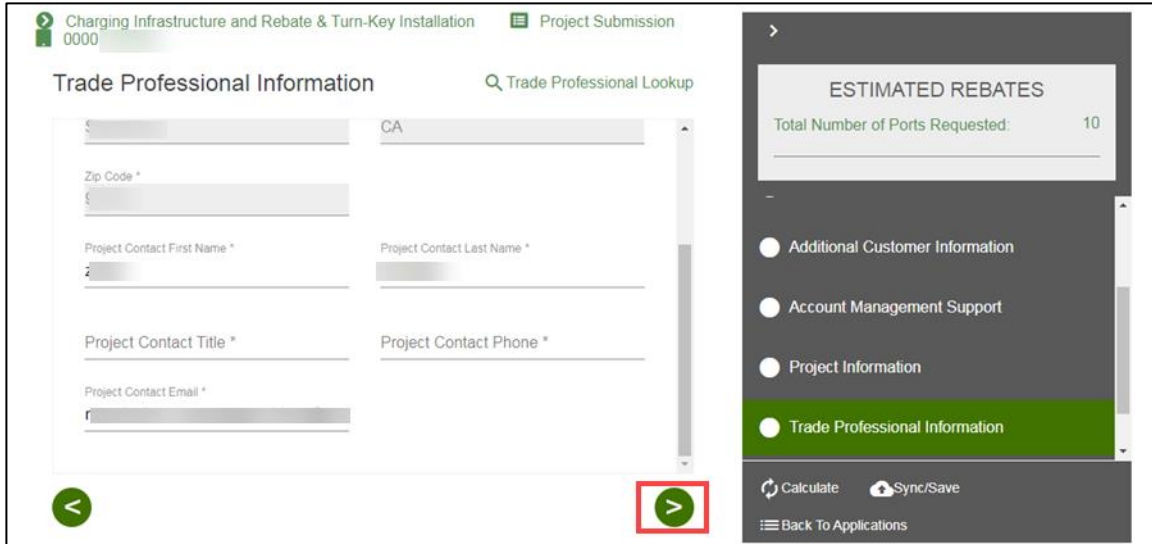
28. Select or search for a Trade Professional.

The Trade Professional Information page displays.


29. Verify the populated fields.

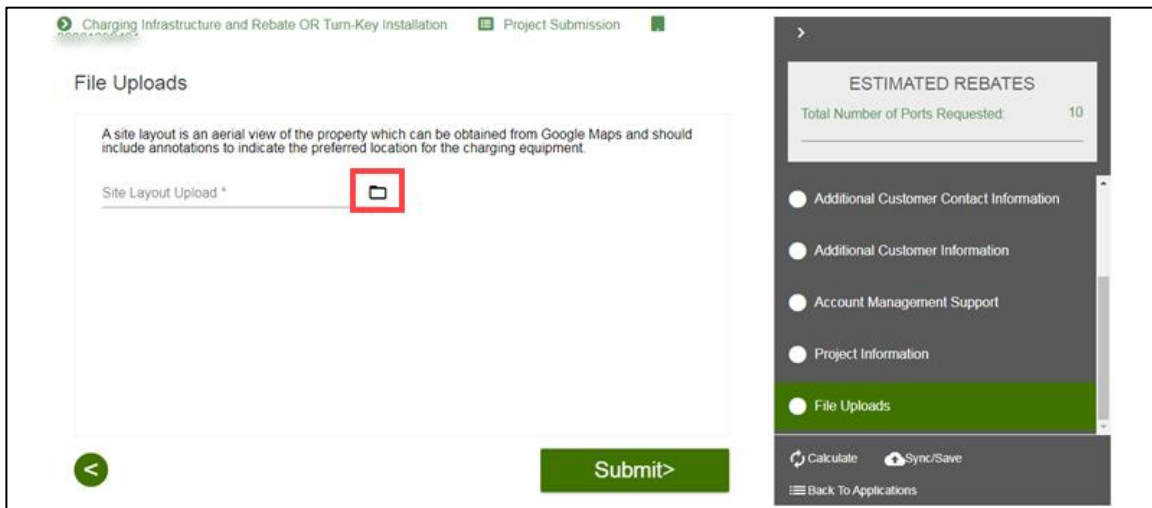
30. Enter the required fields.

31. Click the  **Next** arrow.



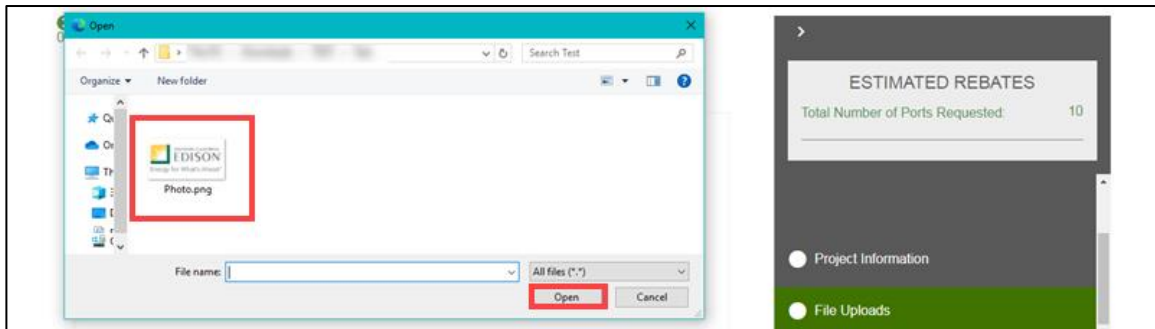
## File Uploads

32. Select the  **folder** icon.

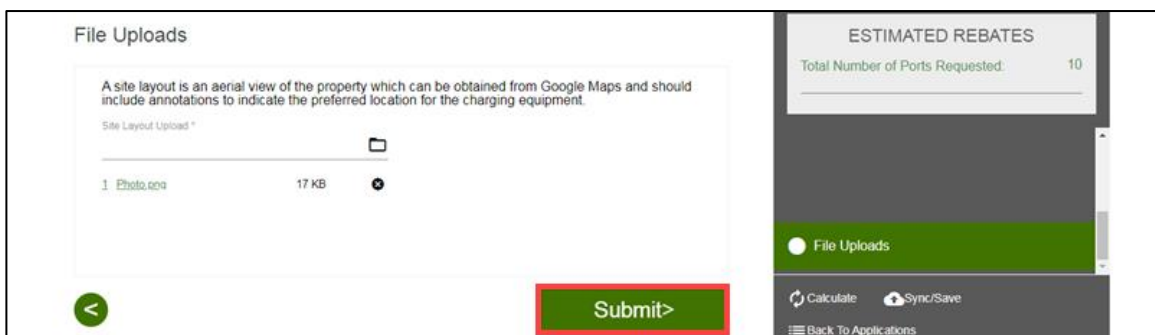


The **Open** window displays.

33. Select the applicable file.

34. Select **Open**.

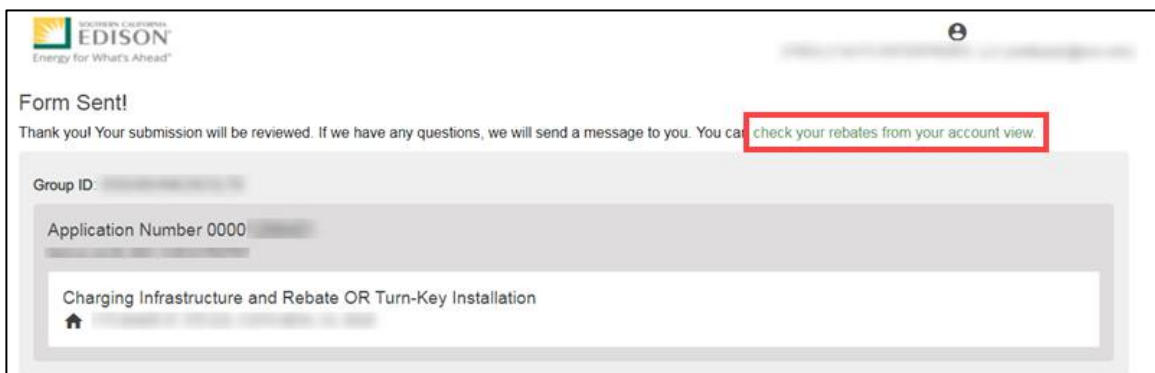
The **File Uploads** page displays.

35. Select **Submit**.

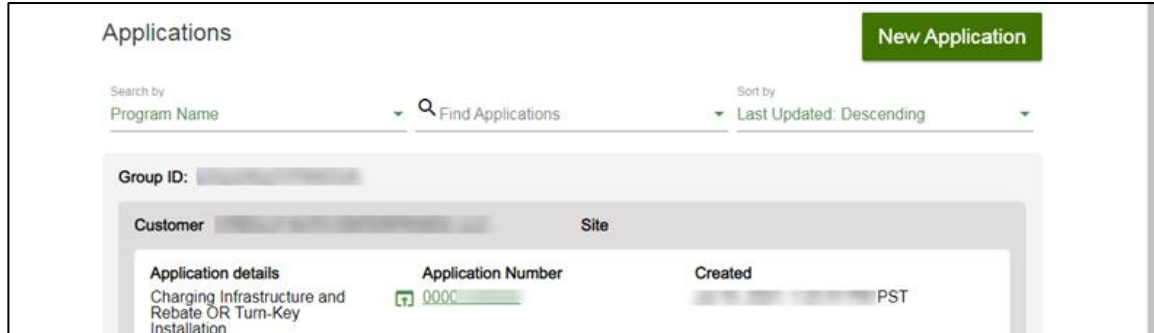
The **Form Sent** page displays.

## Form Sent!

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

36. 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.

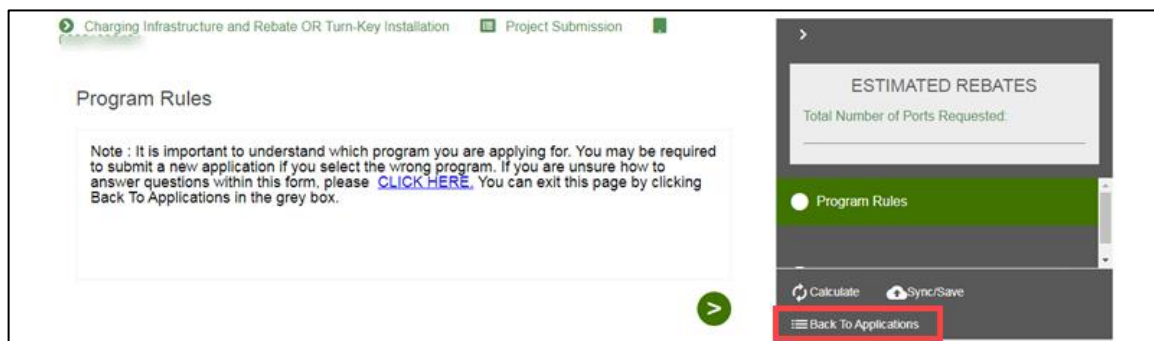
## Applications in Draft Status

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

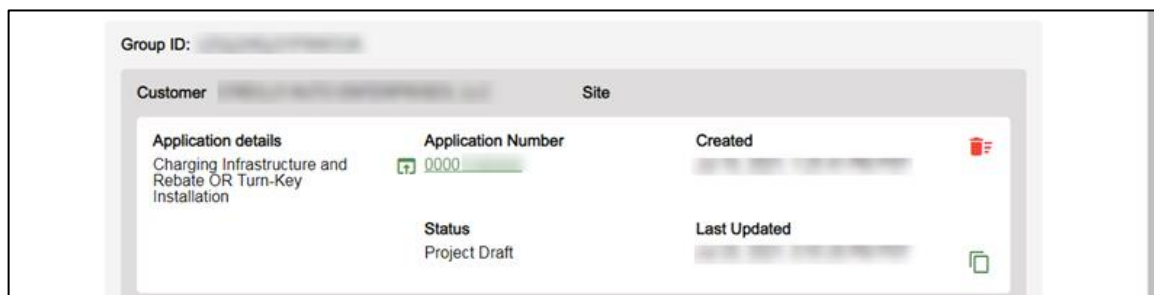
### Saving an Application in Draft Status

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.

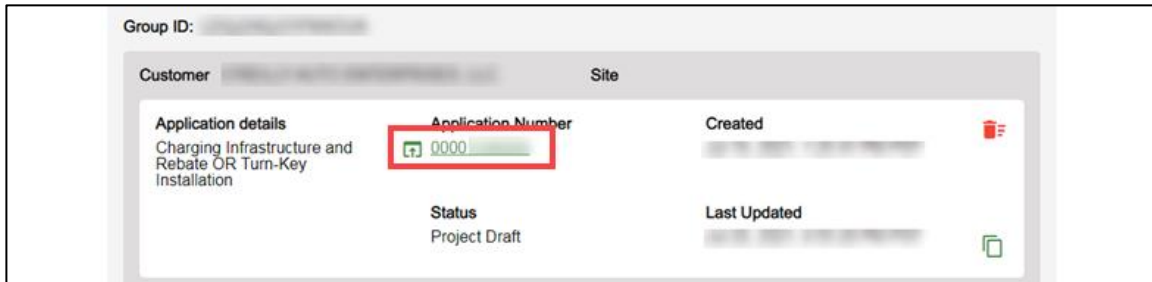




## Editing an Application in Draft Status

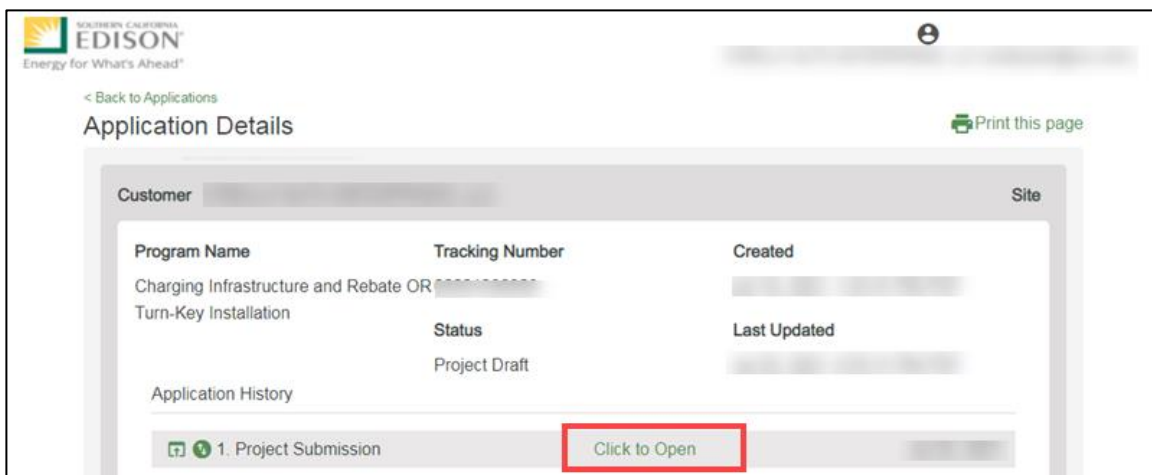
To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.



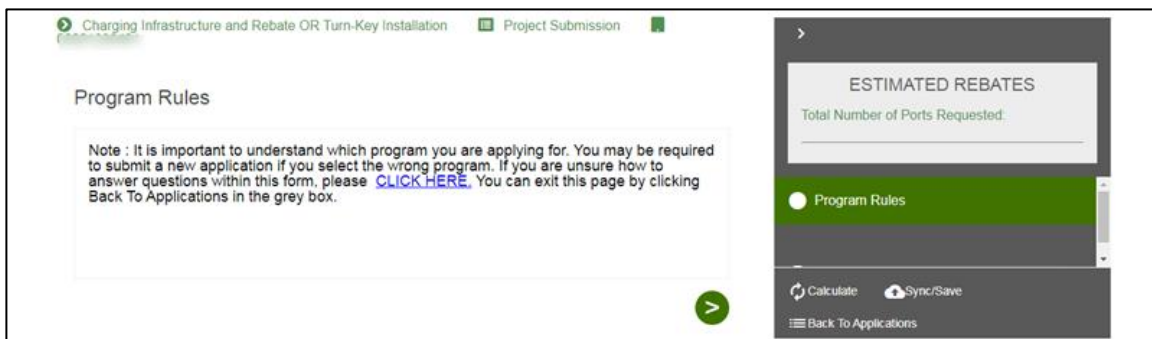
The **Application Details** page displays.

2. Select **Click to Open**.



The **Program Rules** page displays.

3. Complete the application.



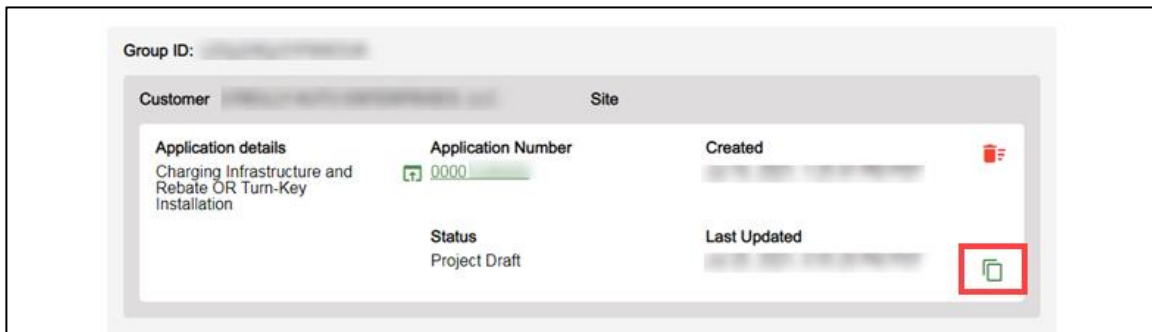
## Duplicating an Application

You can duplicate an application in the following statuses:

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

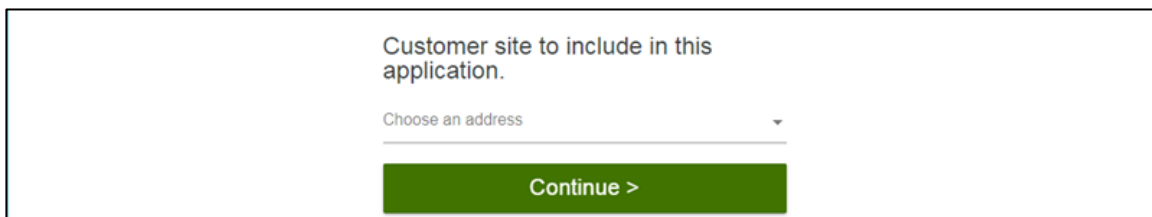
To duplicate an application, follow the steps below:

1. Click the  **Duplicate** icon.



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

2. Complete the application.



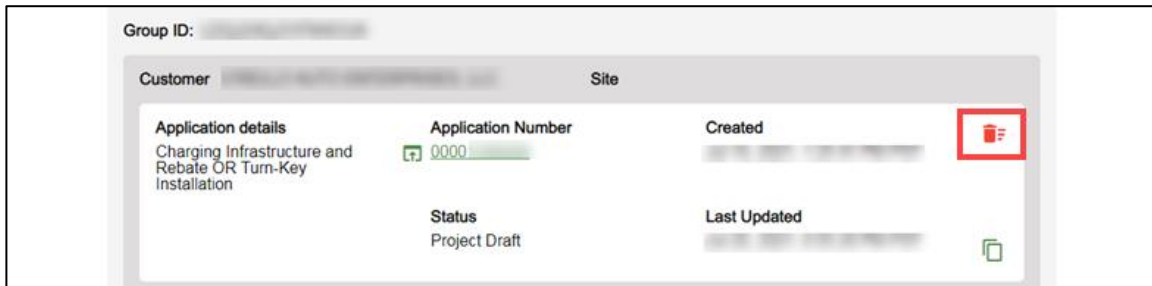
## Discarding a Draft Application

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**.



The application disappears from the Applications page.

# Conceptual Design Review

The Conceptual Design Review form is reviewed by the **Customer** or **Charge Ready Trade Professional** through the Charge Ready Application Portal. By completing this form, participants agree to the design of the project.

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

- ◆ Specifies the site and project design

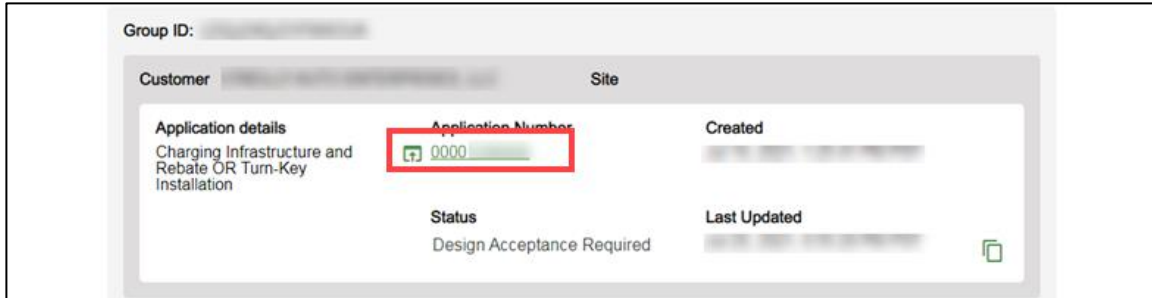
Once a Conceptual Design is complete, SCE begins the agreement preparation.

*For a full list of eligible participants, or for more information about the program, refer to the Charge Ready Program Guidelines.*

## Completing the Conceptual Design Review Form

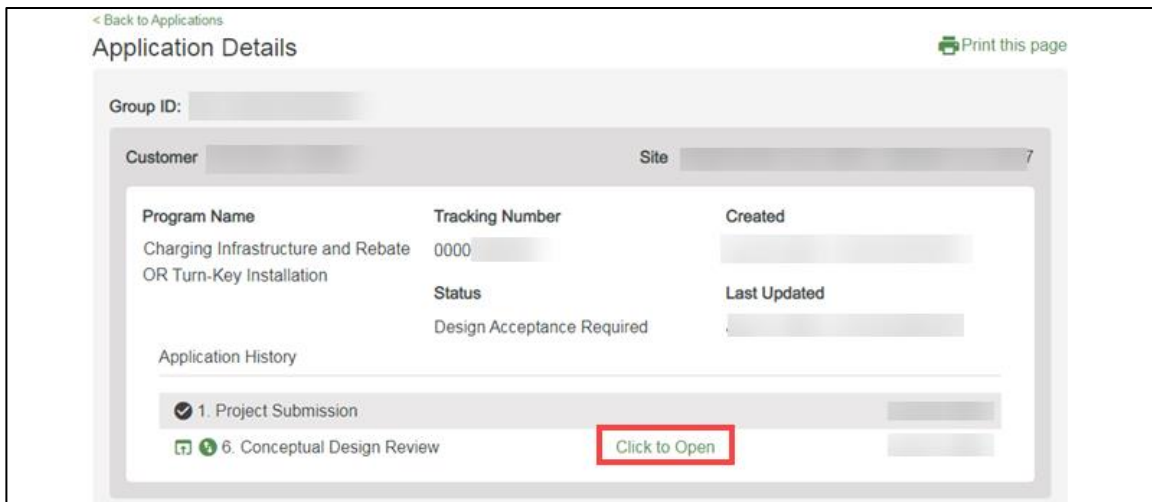
To complete the Conceptual Design Review, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

2. Select **Click to Open** under 6. Conceptual Design Review.



< Back to Applications

Application Details Print this page

Group ID: [Redacted]

Customer [Redacted] Site [Redacted]

Program Name	Tracking Number	Created
Charging Infrastructure and Rebate OR Turn-Key Installation	0000 [Redacted]	[Redacted]
	Status	Last Updated
	Design Acceptance Required	[Redacted]

Application History


- 1. Project Submission [Redacted]
- 6. Conceptual Design Review [Redacted] Click to Open

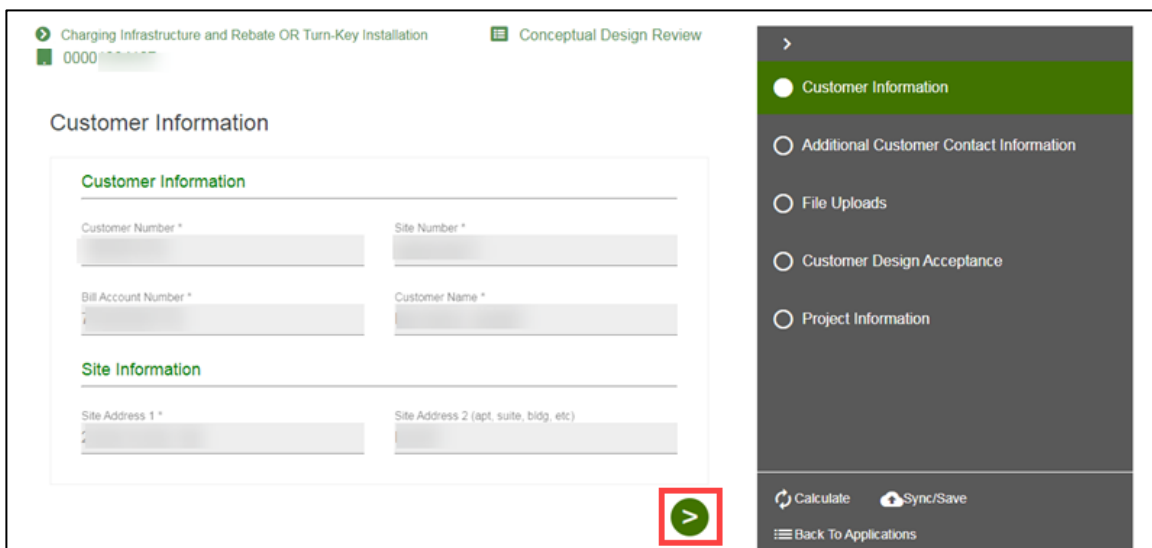
The **Customer Information** page displays.

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

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

## Customer Information

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



Charging Infrastructure and Rebate OR Turn-Key Installation  
0000 [Redacted]

Conceptual Design Review

Customer Information

Customer Information

Customer Number *	Site Number *
[Redacted]	[Redacted]
Bill Account Number *	Customer Name *
[Redacted]	[Redacted]

Site Information


Site Address 1 *	Site Address 2 (apt, suite, bldg, etc)
[Redacted]	[Redacted]

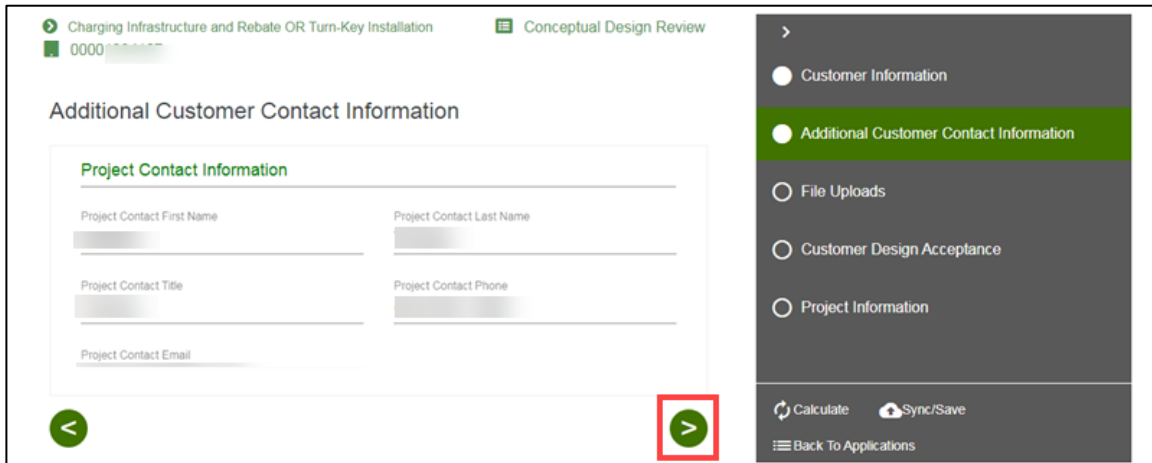
Next arrow button

Calculate Sync/Save Back To Applications

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


## Additional Customer Contact Information

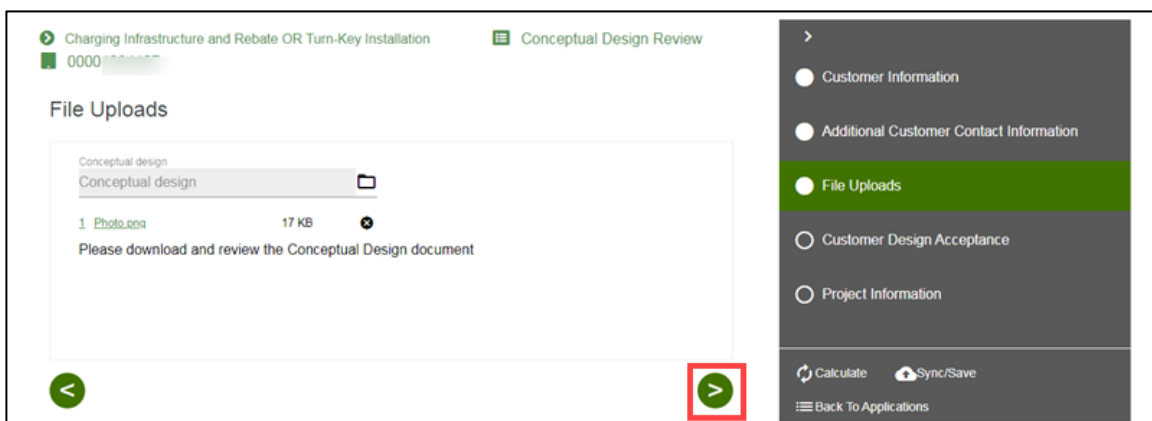
5. Verify the **Additional Customer Contact Information**.
6. Click the  **Next** arrow.



The **File Uploads** page displays.

## File Uploads

7. Review the file.
8. Click the  **Next** arrow.

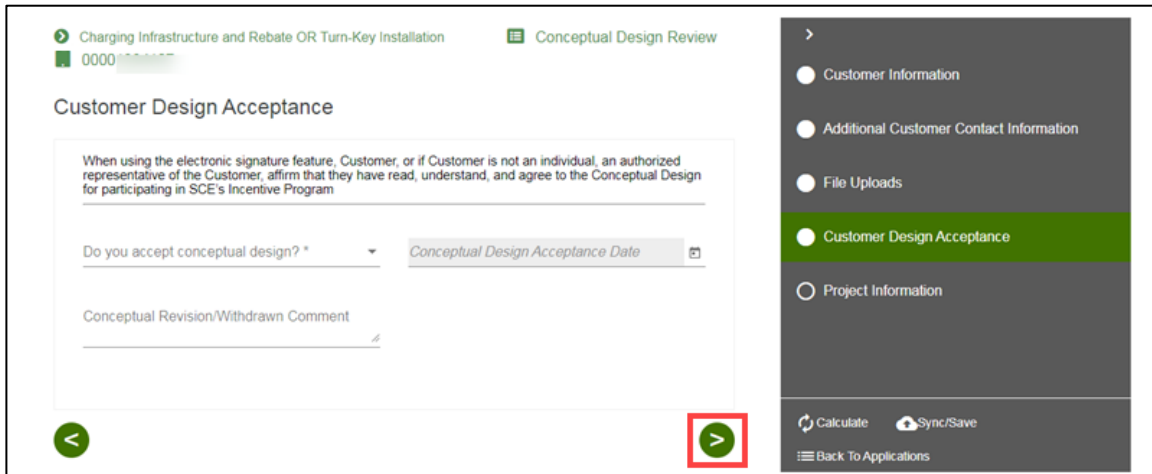


The **Customer Design Acceptance** page displays.

## Customer Design Acceptance

9. Complete the required fields.

10. Click the  **Next** arrow.

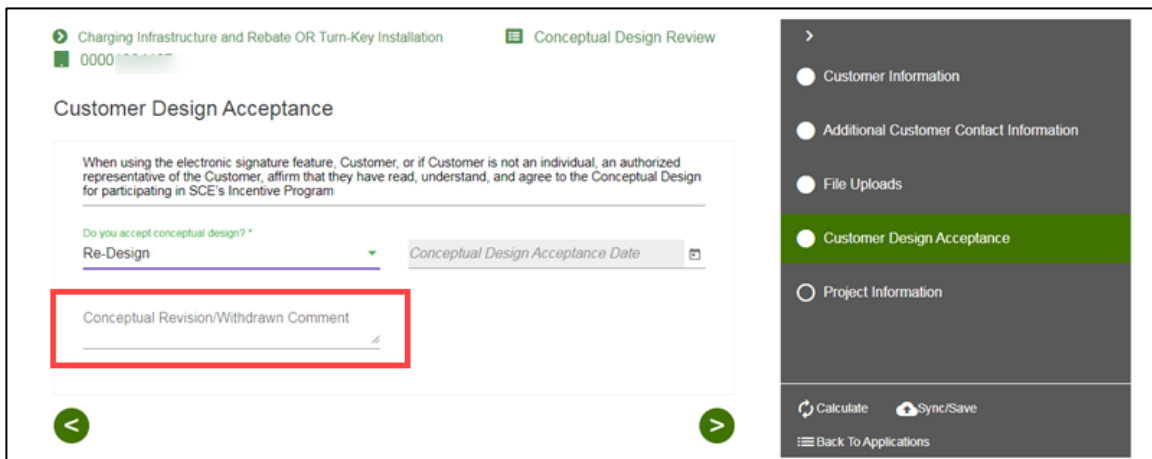


The **Project Information** page displays.

### ***Re-Design or Withdraw***

If the Customer Design Acceptance is Re-Design or Withdraw, follow the steps below:

11. Enter a Conceptual Revision/Withdrawn Comment.



The screenshot shows the 'Customer Design Acceptance' form. At the top, there are two tabs: 'Charging Infrastructure and Rebate OR Turn-Key Installation' and 'Conceptual Design Review'. Below the tabs, there is a section titled 'Customer Design Acceptance' with a text box containing the following text: 'When using the electronic signature feature, Customer, or if Customer is not an individual, an authorized representative of the Customer, affirm that they have read, understand, and agree to the Conceptual Design for participating in SCE's Incentive Program'. Below this text box, there is a dropdown menu labeled 'Request to Withdraw Application' and a text input field for 'Conceptual Design Acceptance Date'. A red box highlights a text input field labeled 'Conceptual Revision/Withdrawn Comment'. On the right side, there is a sidebar menu with options: 'Customer Information', 'Additional Customer Contact Information', 'File Uploads', 'Customer Design Acceptance' (highlighted in green), and 'Project Information'. At the bottom of the sidebar, there are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

## Project Information

12. Verify the **Project Information**.

13. Select **Submit**.

The screenshot shows the 'Project Information' form. At the top, there are two tabs: 'Charging Infrastructure and Rebate OR Turn-Key Installation' and 'Conceptual Design Review'. Below the tabs, there is a section titled 'Project Information' with several input fields: 'Group ID', 'Application Submission Date', 'Project Description', and 'Program Manager' (with the name 'Irfan Parekh' entered). Below these fields, there is a section titled 'Turn-Key Installation' with a text box containing the following text: 'This field indicates participation in the Turn-Key Installation program. The project must be located in a [Disadvantaged Community](#) to be eligible for Turn-Key Installation.' Below this text box, there is a bullet point: '• NOTE: Electric vehicle charging equipment for this project will be owned, operated and maintained by the applicant for the entire commitment period.' Below this bullet point, there is a text input field for 'Eligible for Networking and Maintenance rebate'. Below this text input field, there is a section titled 'Third-Party Assistance' with two text input fields: 'Currently working with a Trade Ally?' (with 'No' entered) and 'Are there site access restrictions?' (with 'No' entered). Below these two text input fields, there is a text input field for 'Total Number of Port Requested' (with '10' entered). At the bottom right of the form, there is a green button labeled 'Submit>'. On the right side, there is a sidebar menu with options: 'Customer Information', 'Additional Customer Contact Information', 'File Uploads', 'Customer Design Acceptance', and 'Project Information' (highlighted in green). At the bottom of the sidebar, there are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

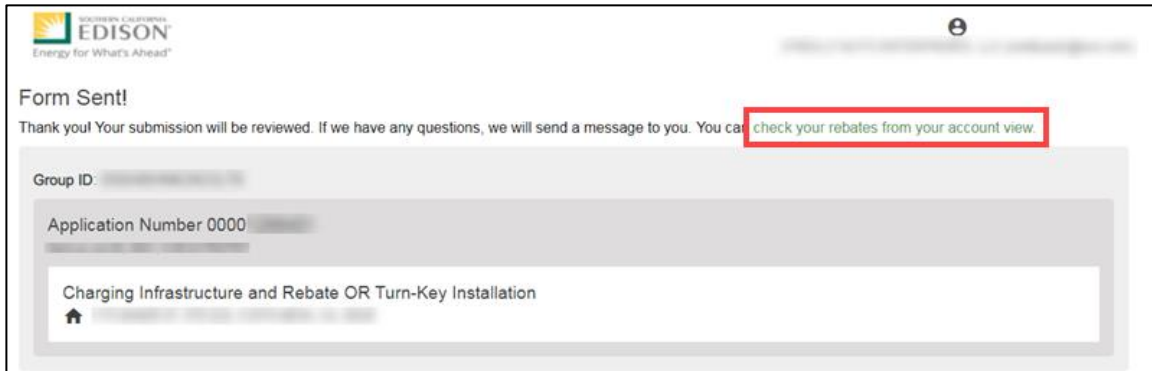
The **Form Sent** page displays.



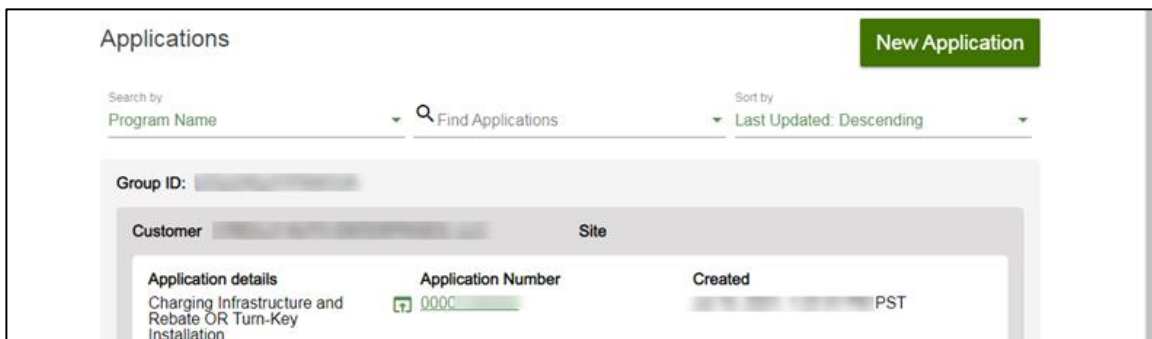
## Form Sent!

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

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



The **Applications** page displays.



Once a Conceptual Design is complete, SCE begins the agreement preparation.

# Agreement Acceptance

The Agreement Acceptance is submitted 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

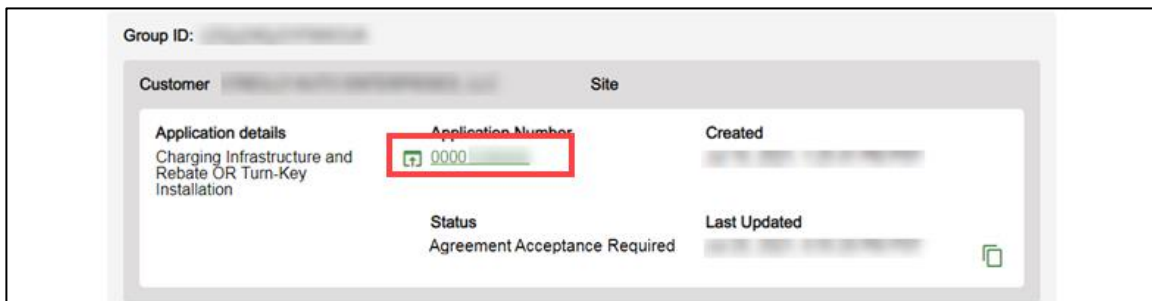
Once an Agreement Acceptance is complete, SCE executes and reserves project funds. After the project funds are reserved, you return to the Agreement Acceptance form to upload the Proof of Procurement.

*For a full list of eligible participants, or for more information about the program, refer to the Charge Ready Program Guidelines.*

## Completing the Agreement Acceptance Form

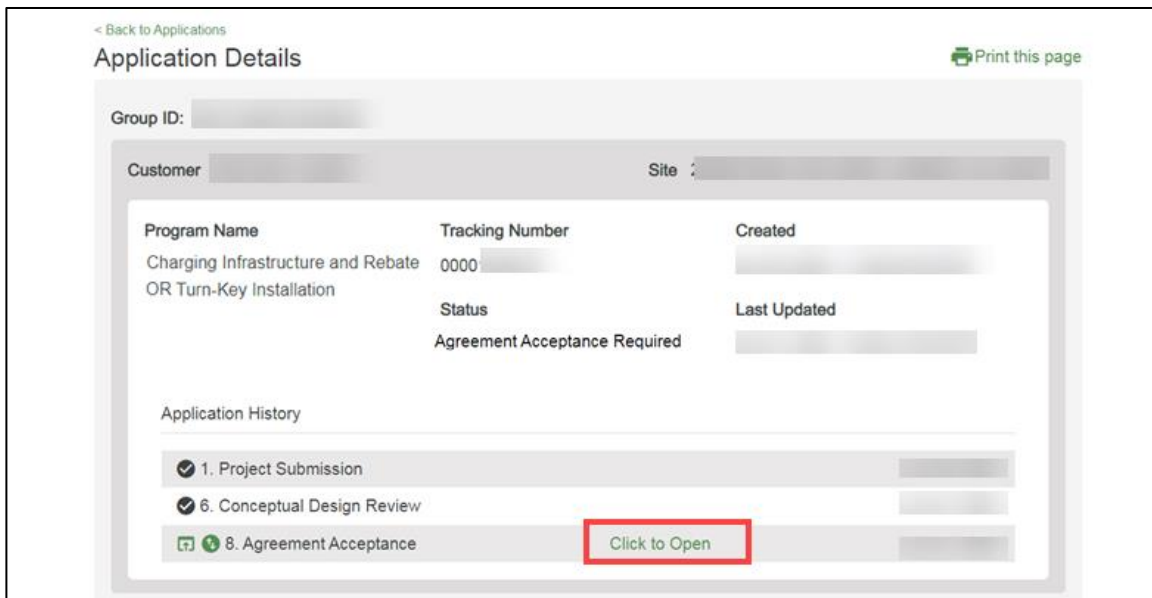
To complete the Agreement Acceptance, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

2. Select **Click to Open** under 8. Agreement Acceptance.



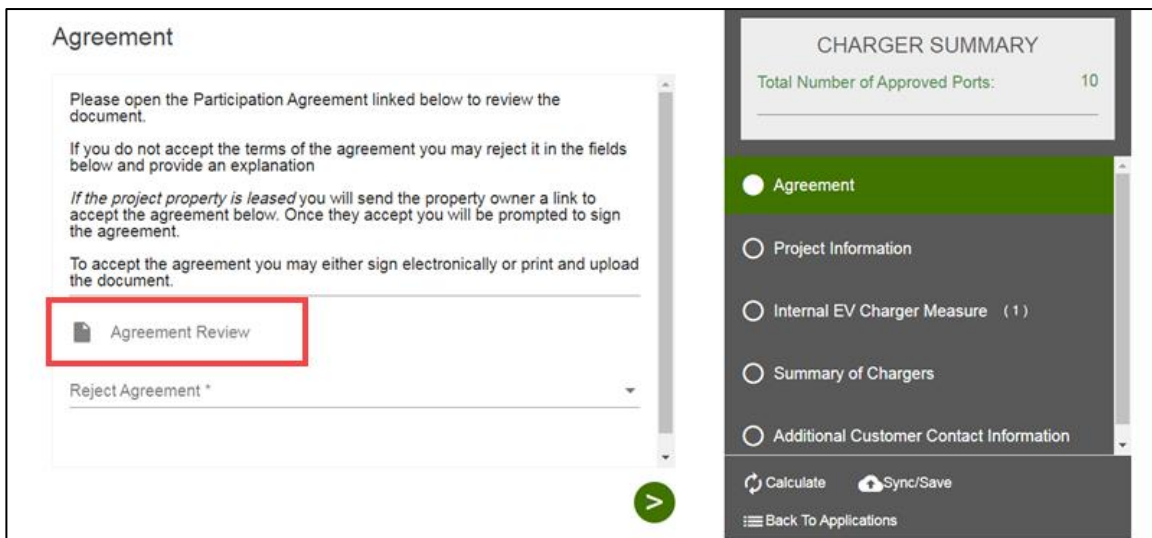
The **Agreement** page displays.

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.

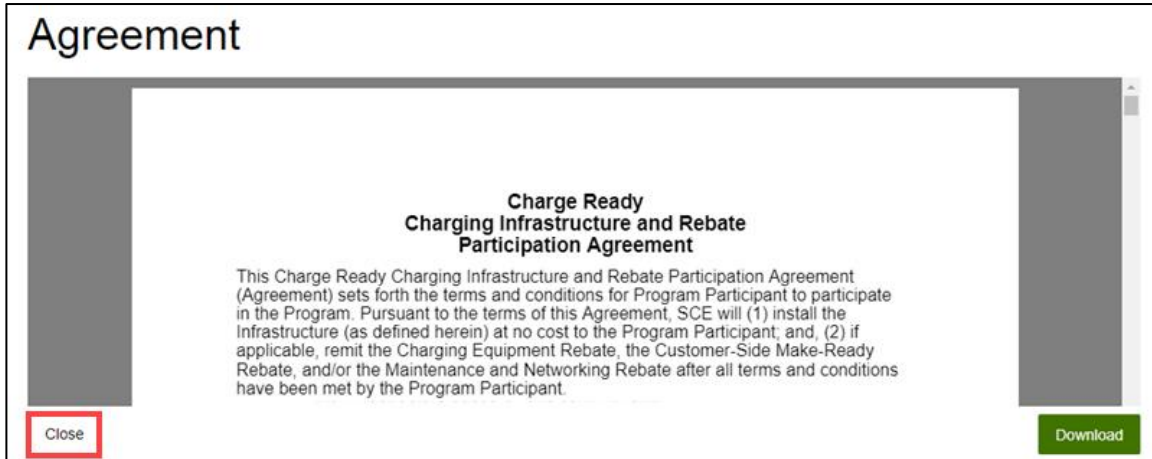
## Agreement

3. Select **Agreement Review**.



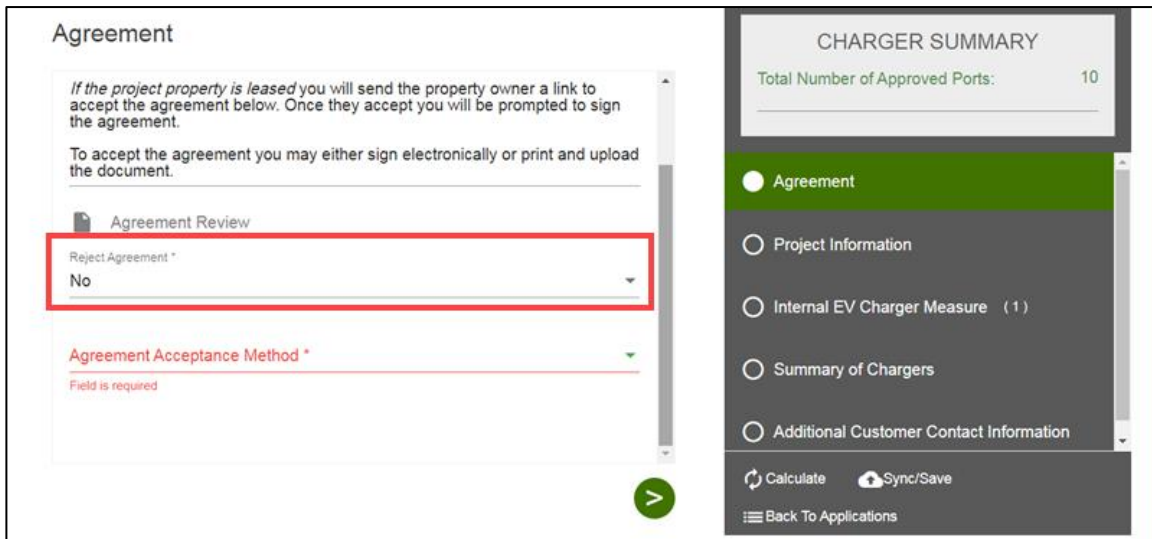
An **Agreement** window displays.

4. Review the agreement.
5. Select **Close**.



The **Agreement** page displays.


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

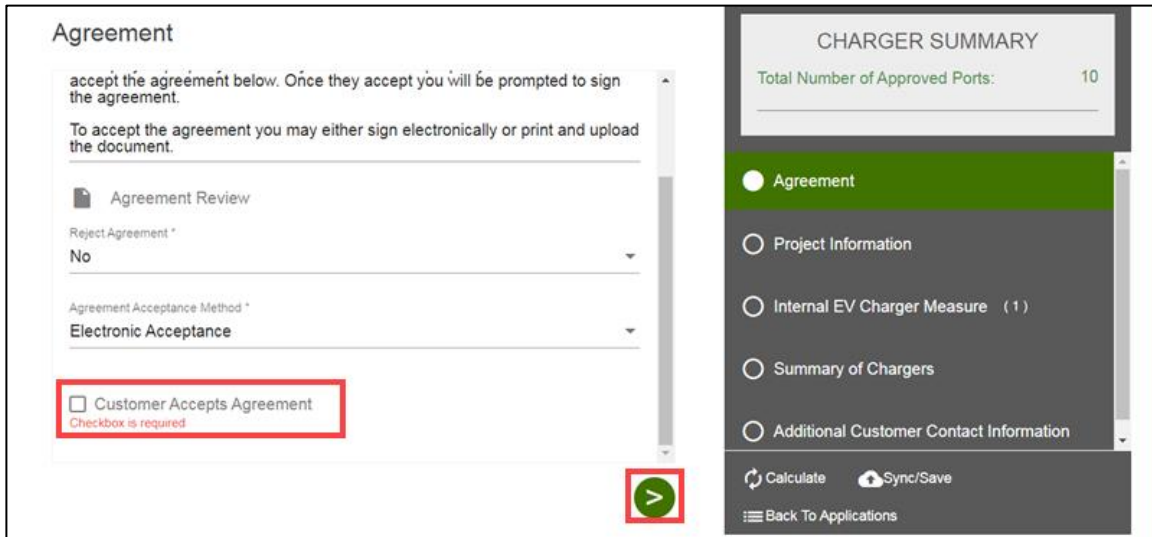


## Electronic Acceptance

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.

7. Select the checkboxes under Customer Accepts Agreement.
8. Click the  **Next** arrow.



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



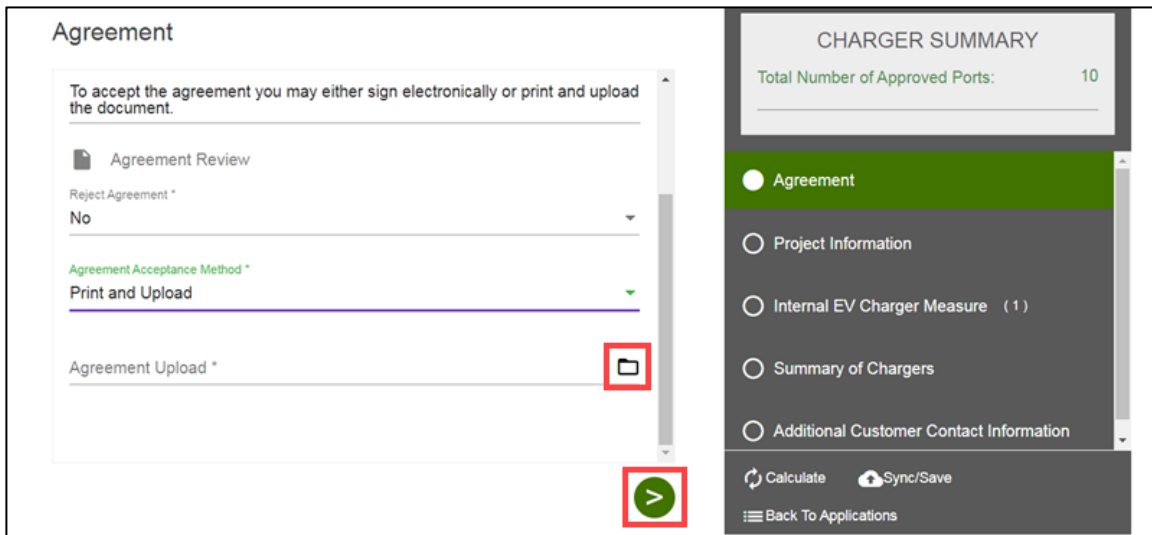
The **Project Information** page displays.

## Print and Upload

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

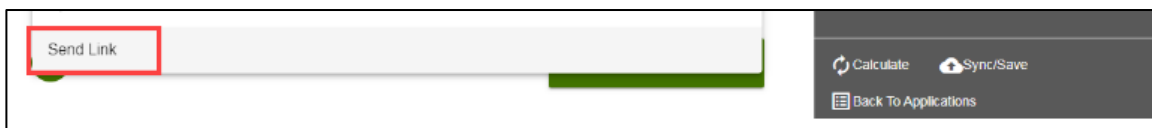
9. Upload a file under Agreement Upload.

10. Click the  **Next** arrow.



The screenshot shows the 'Agreement' page. On the left, under 'Agreement Review', there is a 'Reject Agreement \*' dropdown set to 'No' and an 'Agreement Acceptance Method \*' dropdown set to 'Print and Upload'. Below this is the 'Agreement Upload \*' field, which is highlighted with a red box. On the right, the 'CHARGER SUMMARY' shows 'Total Number of Approved Ports: 10'. A sidebar on the right contains a list of sections: 'Agreement' (selected), 'Project Information', 'Internal EV Charger Measure (1)', 'Summary of Chargers', and 'Additional Customer Contact Information'. At the bottom of the sidebar are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'. A green 'Next' arrow button is highlighted with a red box at the bottom right of the main content area.

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



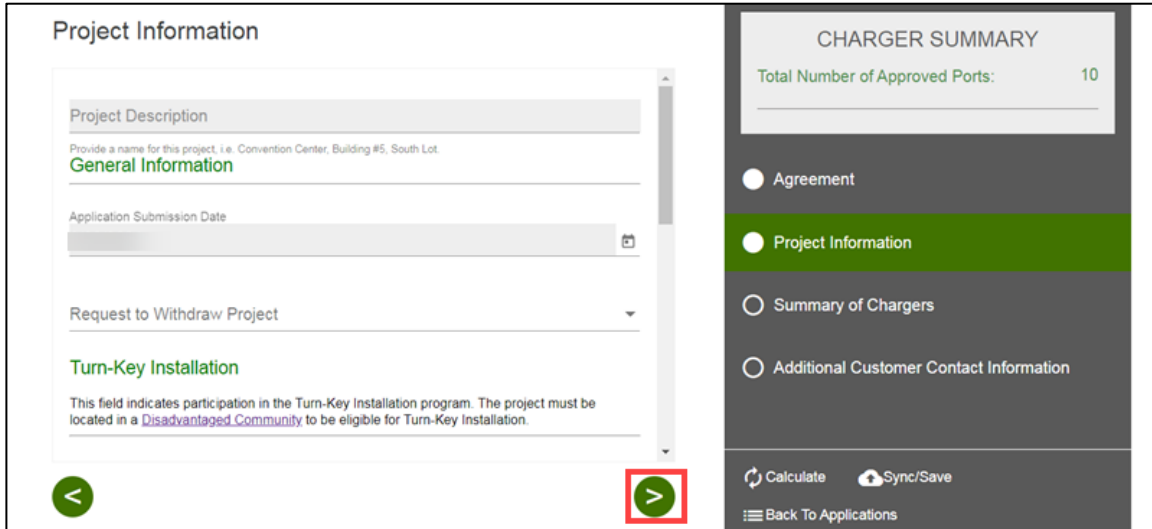
The screenshot shows a close-up of the bottom of the 'Agreement' page. A 'Send Link' button is highlighted with a red box. Below it are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

The **Project Information** page displays.

## Project Information

11. Verify the **Project Information**.

12. Click the  **Next** arrow.

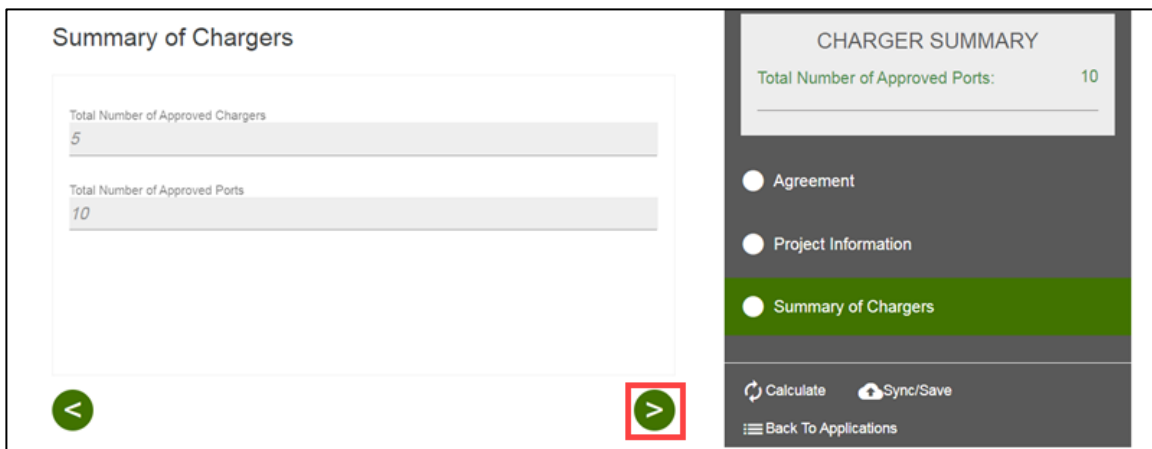


The **Summary of Chargers** page displays.

## Summary of Chargers

13. Verify the **Summary of Chargers**.

14. Click the  **Next** arrow.



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

## Additional Customer Contact Information

15. Verify the **Customer Contact Information**.
16. Update as needed.
17. Select **Submit**.

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

**Submit**

**CHARGER SUMMARY**  
Total Number of Approved Ports: 10

- Agreement
- Project Information
- Summary of Chargers
- Additional Customer Contact Information**

Calculate Sync/Save  
Back To Applications

The **Form Sent** page displays.

## Form Sent!

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

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

**EDISON**  
Energy for What's Ahead™

**Form Sent!**  
Thank you! Your submission will be reviewed. If we have any questions, we will send a message to you. You can **check your rebates from your account view**.

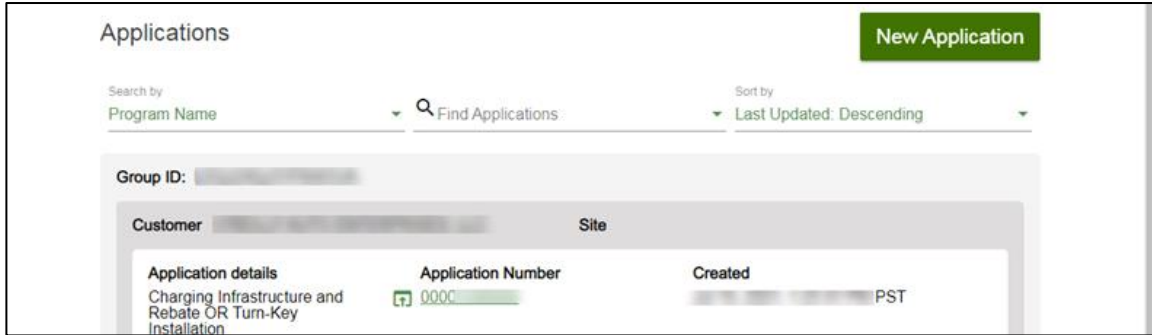
Group ID: [Redacted]

Application Number 0000 [Redacted]

Charging Infrastructure and Rebate OR Turn-Key Installation



The **Applications** page displays.



Once an Agreement Acceptance is complete, SCE executes and reserves project funds. After the project funds are reserved, you return to the Agreement Acceptance form to upload the Proof of Procurement.

# Agreement Acceptance/Proof of Procurement

The Agreement Acceptance/Proof of Procurement is submitted by the **Customer** or **Charge Ready Trade Professional** through the Charge Ready Application Portal. By completing this form, participants enter additional project information.

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

- ◆ Specifies the Proof of Procurement, and the EV Charger Measure Information.

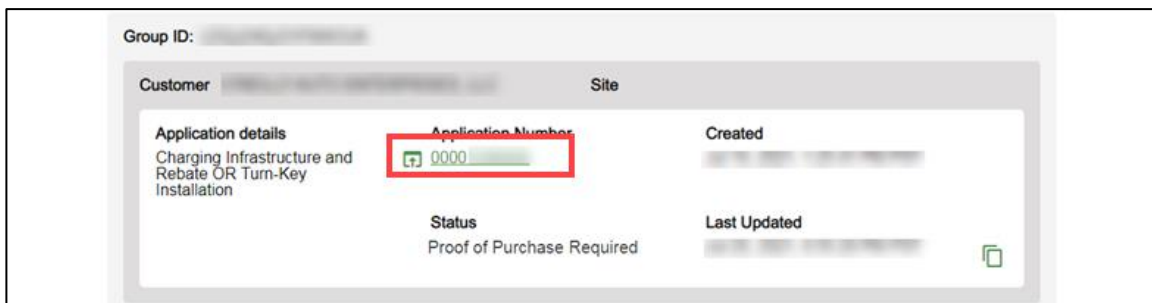
Once an Agreement Acceptance is complete, SCE reviews the Proof of Procurement.

*For a full list of eligible participants, or for more information about the program, refer to the Charge Ready Program Guidelines.*

## Completing the Agreement Acceptance/Proof of Procurement Form

To complete the Agreement Acceptance/Proof of Procurement, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

2. Select **Click to Open** under 8. Agreement Acceptance.

< Back to Applications

### Application Details

Print this page

Group ID: [Redacted]

Customer: [Redacted] Site: [Redacted]

Program Name	Tracking Number	Created
Charging Infrastructure and Rebate OR Turn-Key Installation	0000 [Redacted]	[Redacted]
Status	Last Updated	
Agreement Acceptance Req	[Redacted]	


Application History

- 1. Project Submission [Redacted]
- 6. Conceptual Design Review [Redacted]
- 8. Agreement Acceptance [Redacted] [Click to Open](#)

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 Agreement Acceptance/Proof of Procurement form.

## File Uploads

3. Select the  **folder** icon.

### File Uploads

Upload proof of purchase for charging equipment. Acceptable documents include purchase order, paid invoice, or sales receipt.  
If you need an extension to provide proof of purchase you may request it on the next page.

Proof of Purchase Upload 

[>](#)

#### CHARGER SUMMARY

Total Number of Approved Ports: 10

- File Uploads
- Project Information
- Network Service Provider

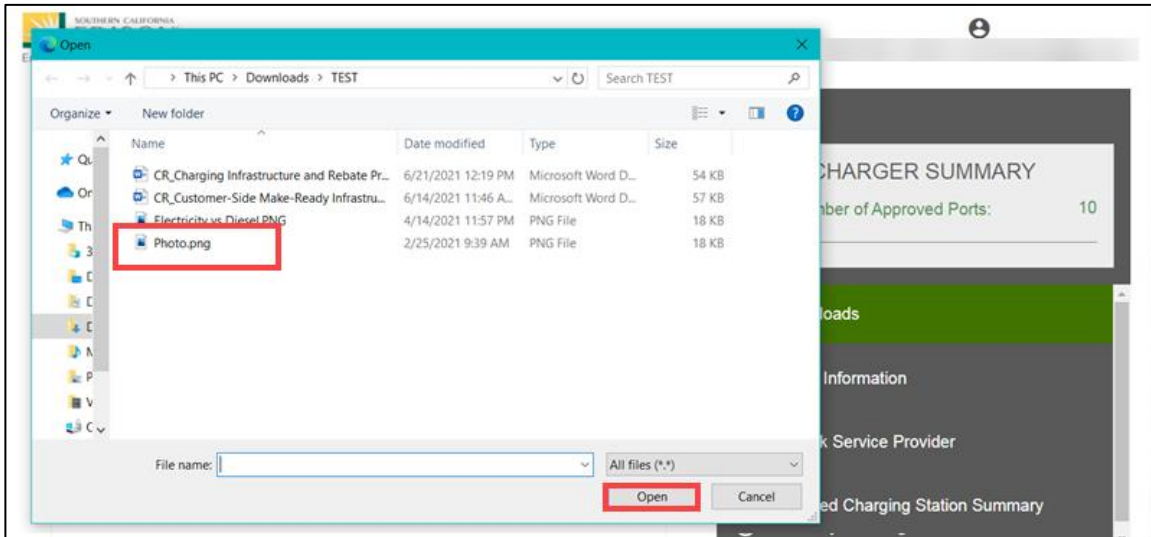
[Calculate](#) [Sync/Save](#)

[Back To Applications](#)

The **Open** window displays.

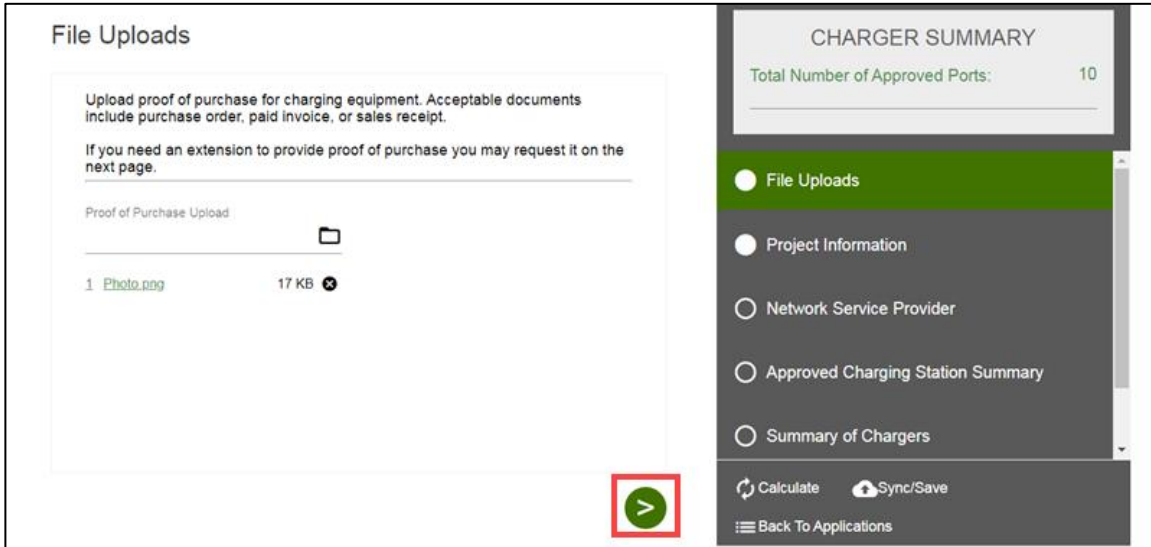
4. Select the file.

5. Select **Open**.




The **File Upload** page displays.

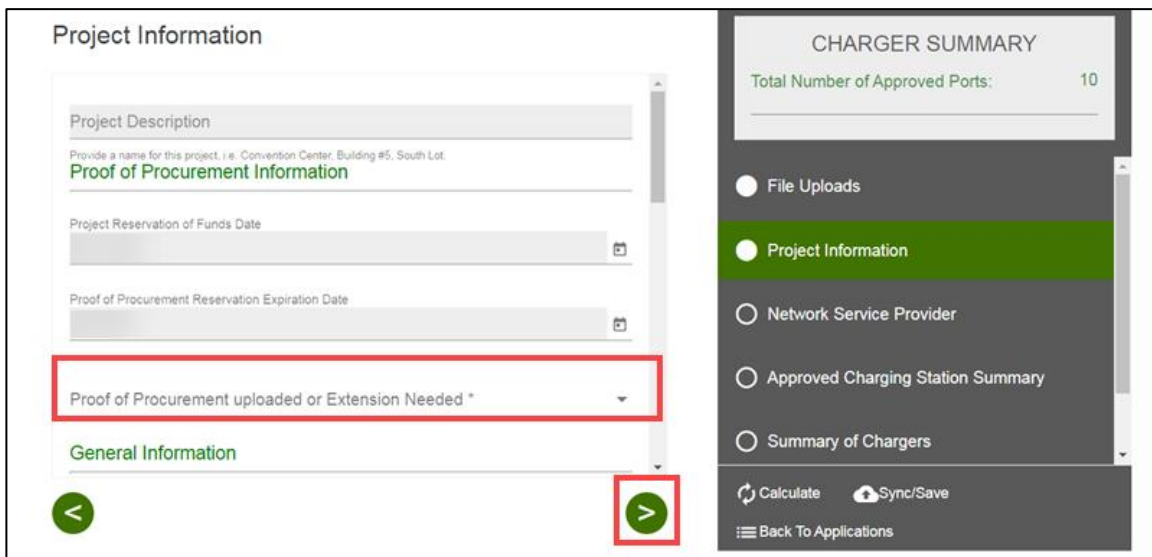
6. Click the  **Next** arrow.



The **Project Information** page displays.

## Project Information

7. Verify the **Project Information**.
8. Select the applicable **Proof of Procurement** option.
9. Complete the required fields.
10. Click the  **Next** arrow.



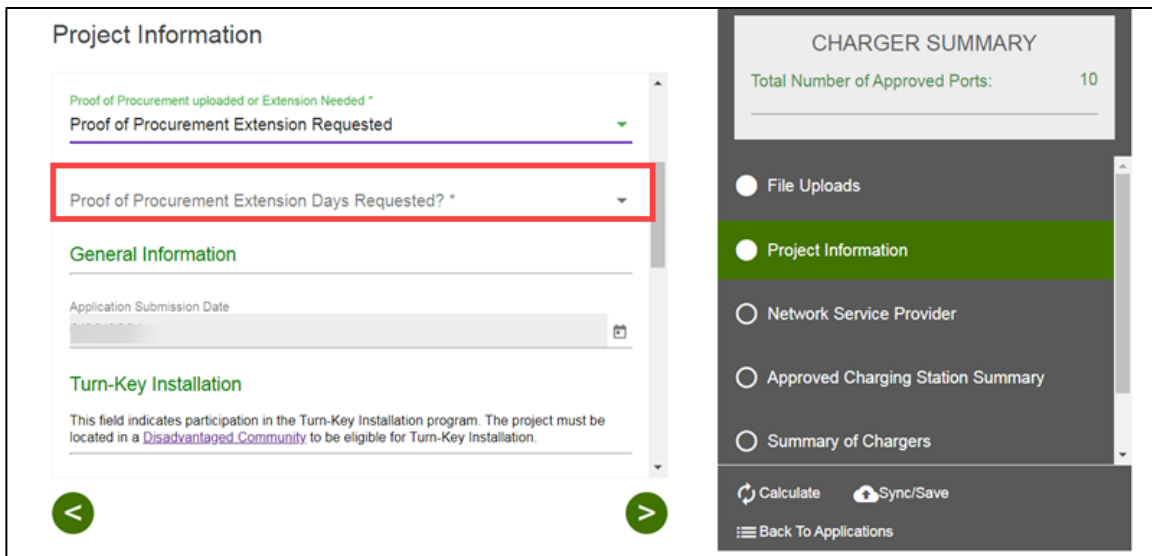
The screenshot shows the 'Project Information' form on the left and the 'CHARGER SUMMARY' sidebar on the right. The form includes fields for 'Project Description', 'Project Reservation of Funds Date', and 'Proof of Procurement Reservation Expiration Date'. A dropdown menu for 'Proof of Procurement uploaded or Extension Needed \*' is highlighted with a red box. A green arrow icon is also highlighted with a red box at the bottom right of the form. The sidebar shows a 'Total Number of Approved Ports: 10' and a list of options: 'File Uploads', 'Project Information' (selected), 'Network Service Provider', 'Approved Charging Station Summary', and 'Summary of Chargers'. At the bottom of the sidebar are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

The **Installer Information** page displays.

### ***Proof of Procurement Extension***

If an extension is required, follow the steps below:

11. Enter an explanation.

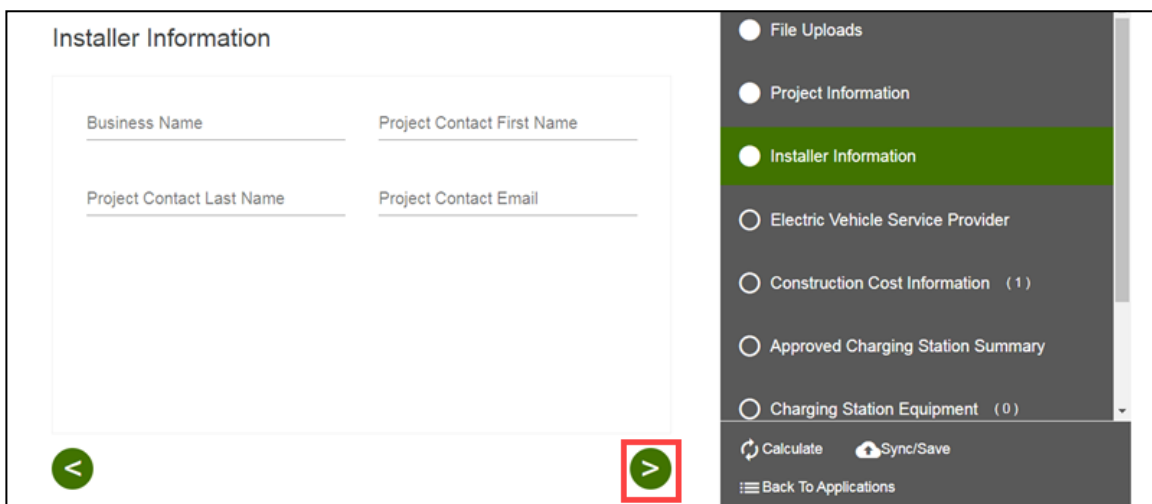


### Installer Information

If the charging station vendor is different from the installer, the Installer Information page displays.

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

13. Click the  **Next** arrow.

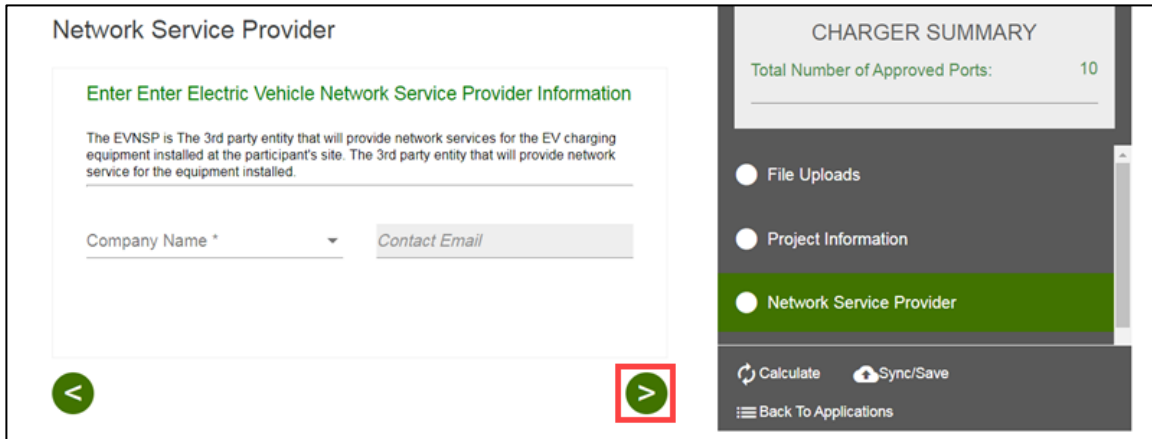


The **Network Service Provider** page displays.

## Network Service Provider

14. Enter the **Company Name**.

15. Click the  **Next** arrow.

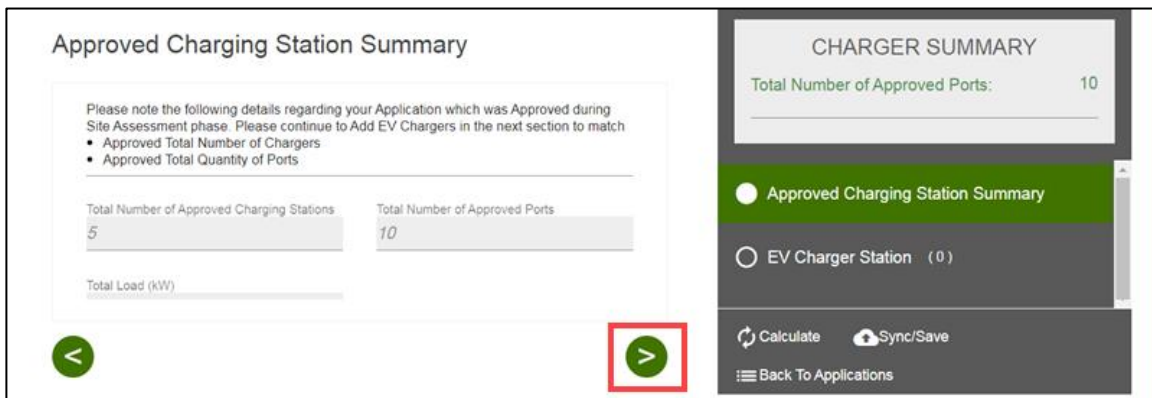


The **Approved Charging Station Summary** page displays.

## Approved Charging Station Summary

16. Verify the **Approved Charging Station Summary**.

17. Click the  **Next** arrow.

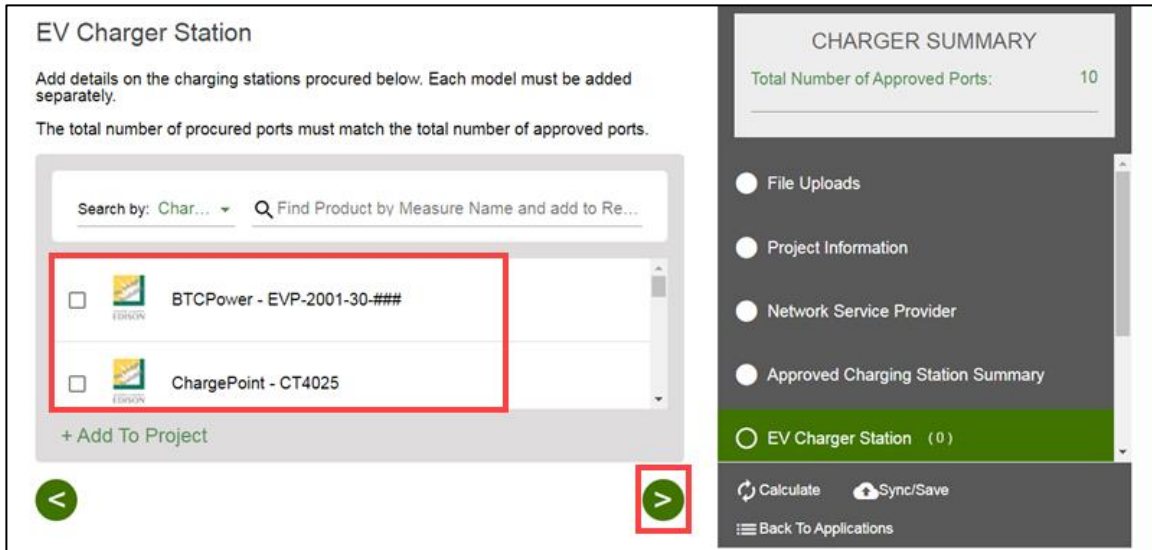


The **EV Charger Station** page displays.

## EV Charger Station

18. Select the checkbox next to the equipment.

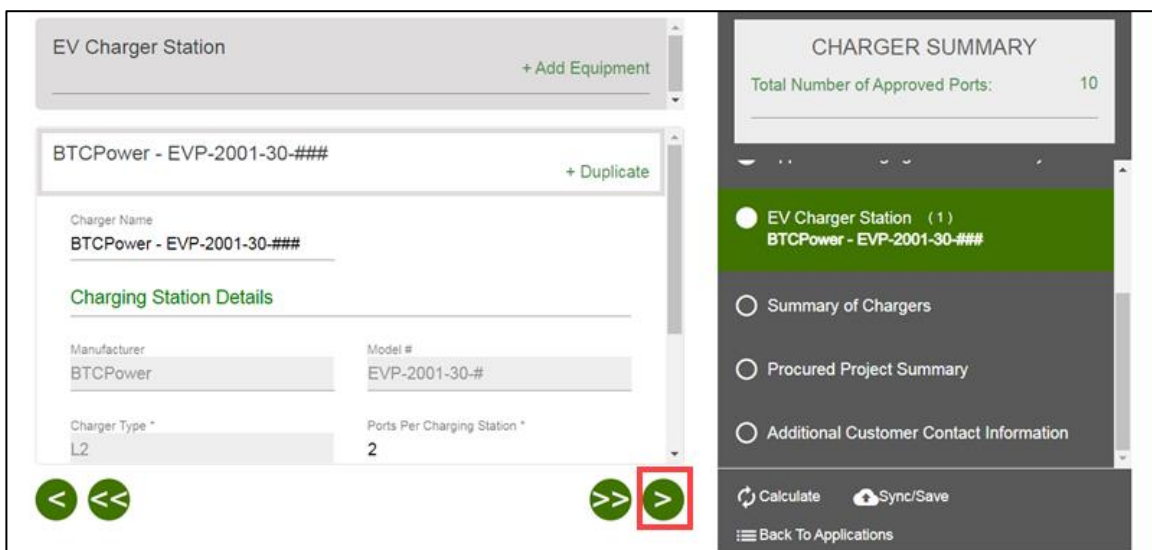
19. Click the  **Next** arrow.



Additional fields display.

20. Enter the required information.

21. Click the  **Next** arrow.



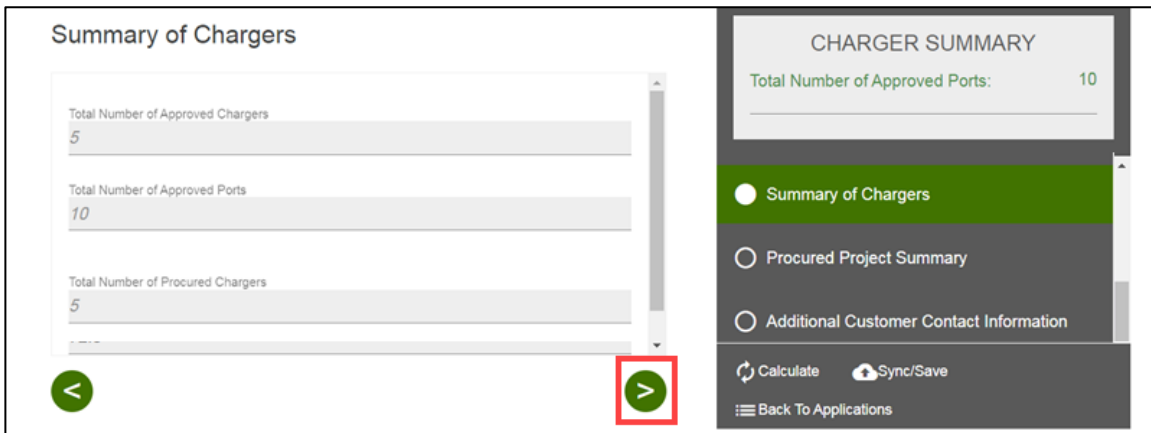


The **Summary of Chargers** page displays.

## Summary of Chargers

22. Verify the information.

23. Click the  **Next** arrow.



Summary of Chargers

Total Number of Approved Chargers  
5

Total Number of Approved Ports  
10

Total Number of Procured Chargers  
5

CHARGER SUMMARY

Total Number of Approved Ports: 10

- Summary of Chargers
- Procured Project Summary
- Additional Customer Contact Information

Calculate Sync/Save

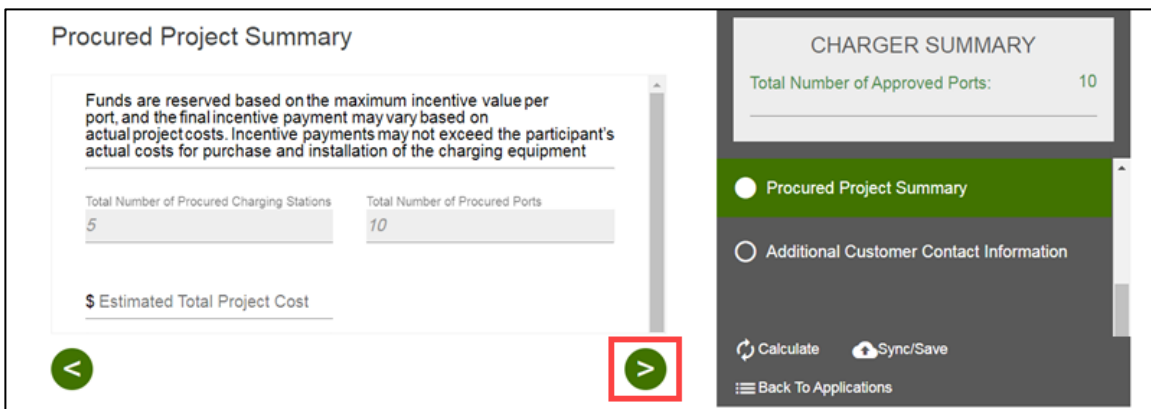
Back To Applications

The **Procured Project Summary** page displays.

## Procured Project Summary

24. Verify the information.

25. Click the  **Next** arrow.



Procured Project Summary

Funds are reserved based on the maximum incentive value per port, and the final incentive payment may vary based on actual project costs. Incentive payments may not exceed the participant's actual costs for purchase and installation of the charging equipment

Total Number of Procured Charging Stations: 5

Total Number of Procured Ports: 10

\$ Estimated Total Project Cost

CHARGER SUMMARY

Total Number of Approved Ports: 10

- Procured Project Summary
- Additional Customer Contact Information

Calculate Sync/Save

Back To Applications

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

## Additional Customer Contact Information

26. Verify the **Customer Contact Information**.

27. Update as needed.

28. Select **Submit**.

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

Submit

**CHARGER SUMMARY**

Total Number of Approved Ports: 10

- Approved Charging Station Summary
- EV Charger Station (1)
- Summary of Chargers
- Procured Project Summary
- Additional Customer Contact Information

Calculate Sync/Save

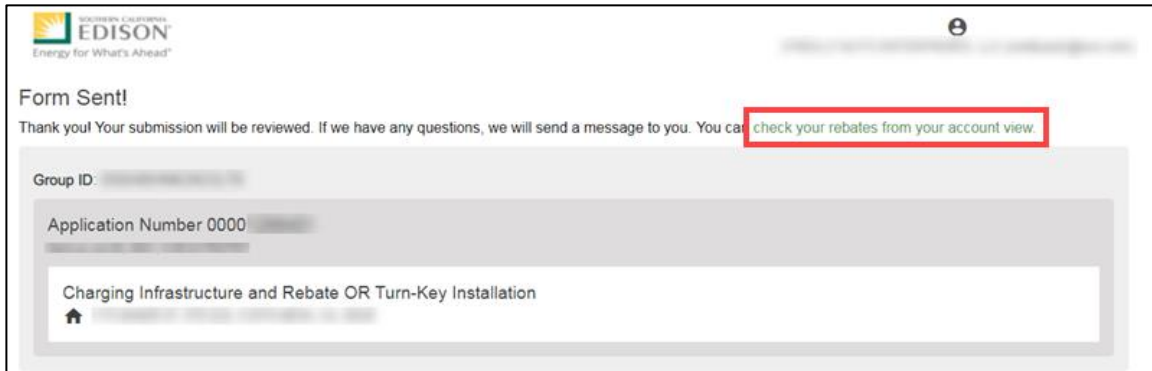
Back To Applications

The **Form Sent** page displays.

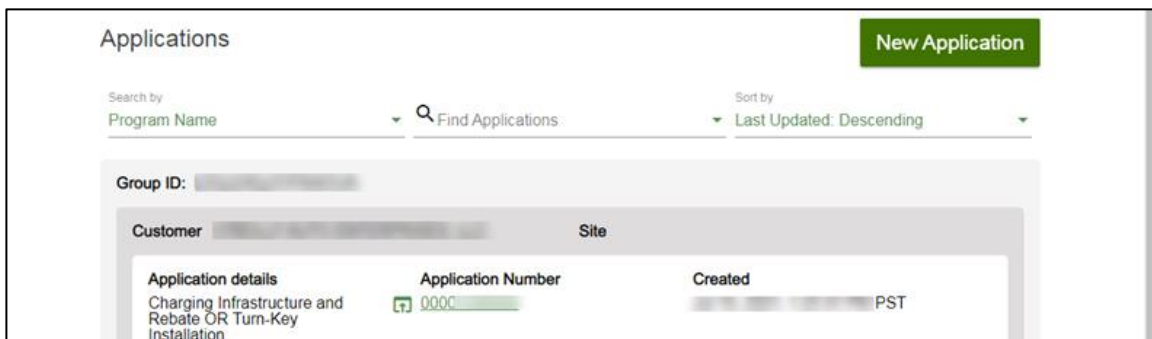
## Form Sent!

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

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



The **Applications** page displays.



Once an Agreement Acceptance/Proof of Procurement is complete, SCE reviews the Proof of Procurement.

## 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

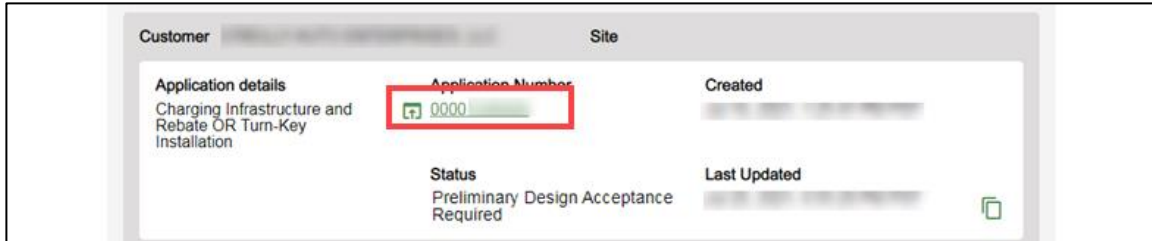
Once a Design Acceptance is complete, SCE reviews the design of the site plan.

*For a full list of eligible participants, or for more information about the program, refer to the Charge Ready Program Guidelines.*

## Completing the Design Acceptance Form

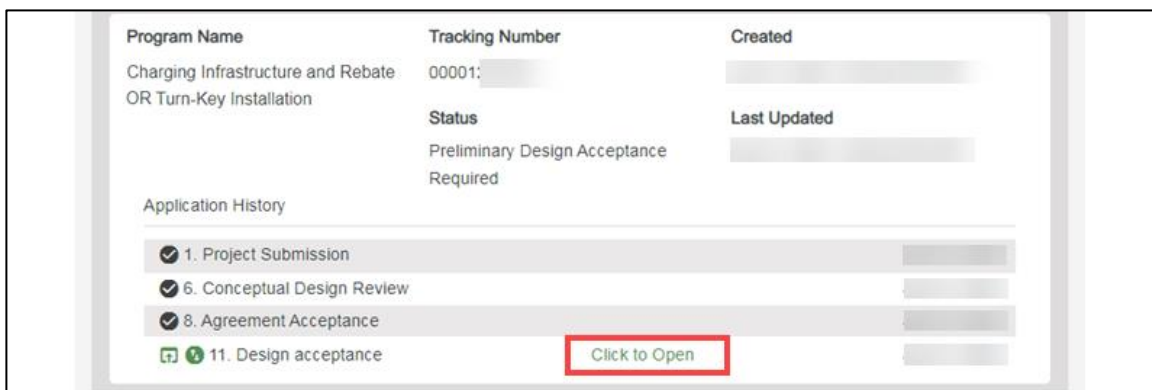
To complete the Design Acceptance, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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




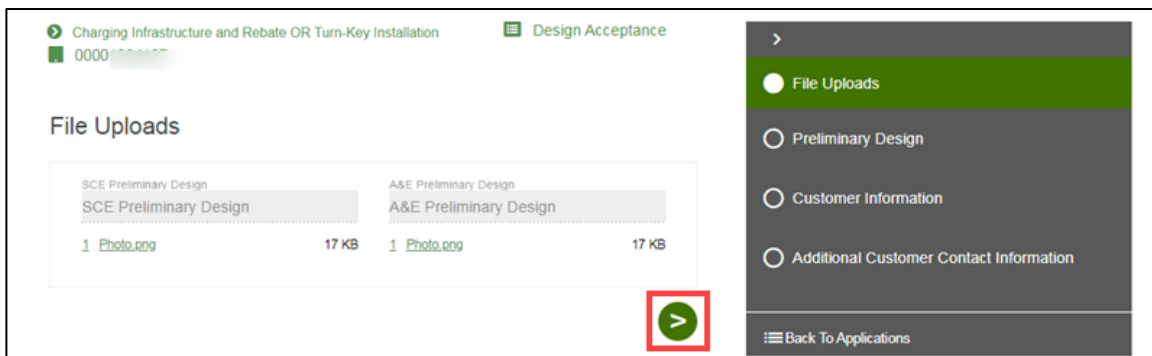
The **File Uploads** page displays.

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.

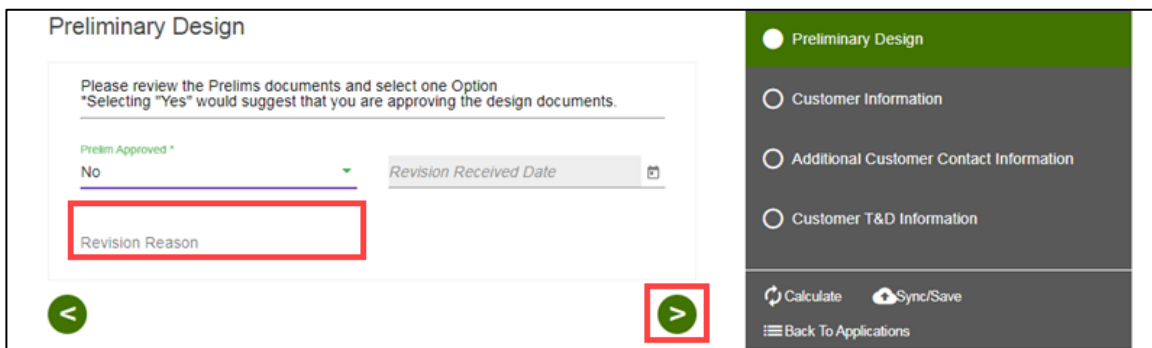


The screenshot shows the 'File Uploads' section of the 'Design Acceptance' form. The page title is 'Charging Infrastructure and Rebate OR Turn-Key Installation' with a sub-header 'Design Acceptance'. The main content area is titled 'File Uploads' and contains two columns of upload information. The left column is for 'SCE Preliminary Design' and the right column is for 'A&E Preliminary Design'. Each column shows a file named 'Photo.png' with a size of 17 KB. A green 'Next' arrow icon is highlighted with a red box at the bottom right of the main content area. On the right side, there is a navigation menu with radio buttons for 'File Uploads' (selected), 'Preliminary Design', 'Customer Information', and 'Additional Customer Contact Information'. At the bottom of the menu is a 'Back To Applications' link.

The **Preliminary Design** page displays.

## Preliminary Design


5. Select **Yes** or **No** for Prelim Approved.
6. Enter **Revision Reason** for No.
7. Click the  **Next** arrow.

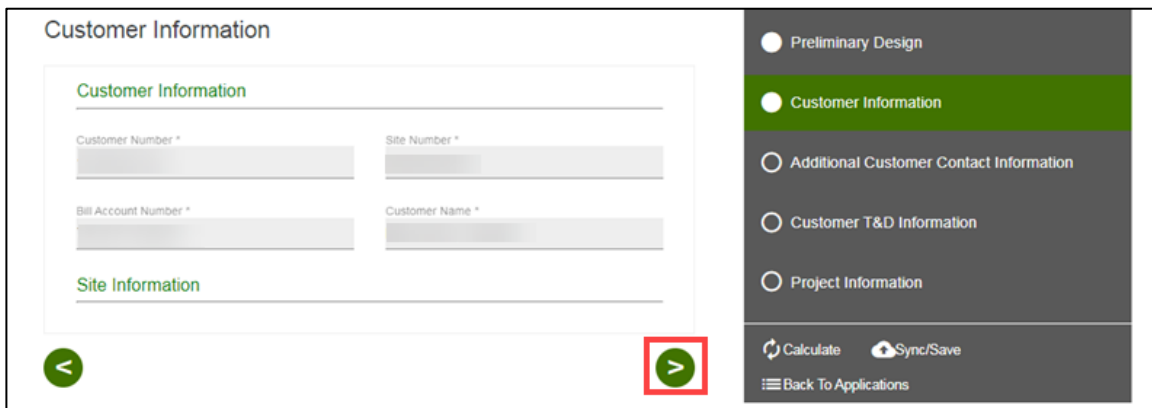


The screenshot shows the 'Preliminary Design' section of the 'Design Acceptance' form. The page title is 'Preliminary Design'. The main content area contains a text box with the instruction: 'Please review the Prelims documents and select one Option \*Selecting "Yes" would suggest that you are approving the design documents.' Below this is a 'Prelim Approved \*' dropdown menu with 'No' selected. To the right of the dropdown is a 'Revision Received Date' field with a calendar icon. A red box highlights the 'Revision Reason' text input field. At the bottom left, there is a green 'Previous' arrow icon, and at the bottom right, there is a green 'Next' arrow icon highlighted with a red box. On the right side, there is a navigation menu with radio buttons for 'Preliminary Design' (selected), 'Customer Information', 'Additional Customer Contact Information', and 'Customer T&D Information'. At the bottom of the menu are 'Calculate' and 'Sync/Save' icons, and a 'Back To Applications' link.

The **Customer Information** page displays.


## Customer Information

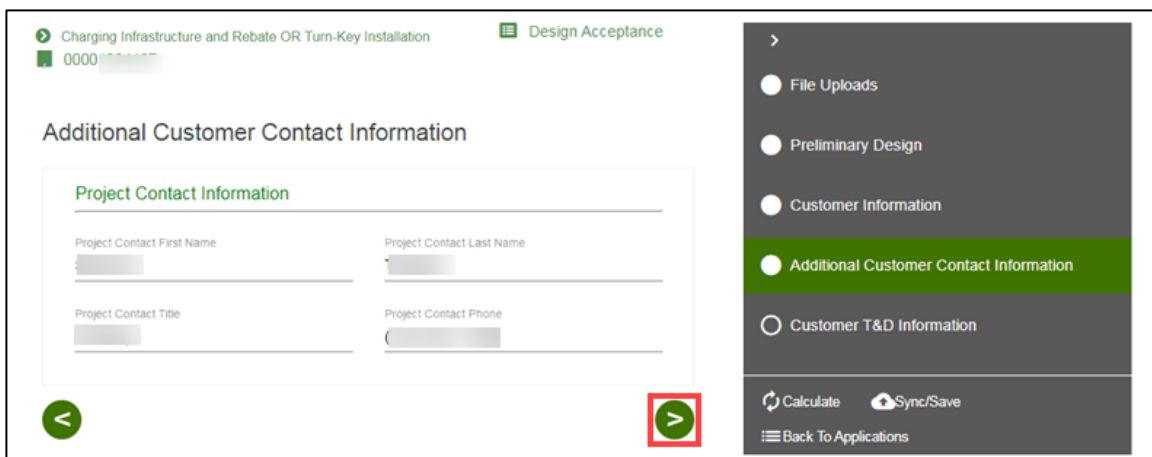
8. Verify the **Customer Information**.
9. Click the  **Next** arrow.



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

## Additional Customer Contact Information

10. Verify the **Additional Customer Contact Information**.
11. Click the  **Next** arrow.

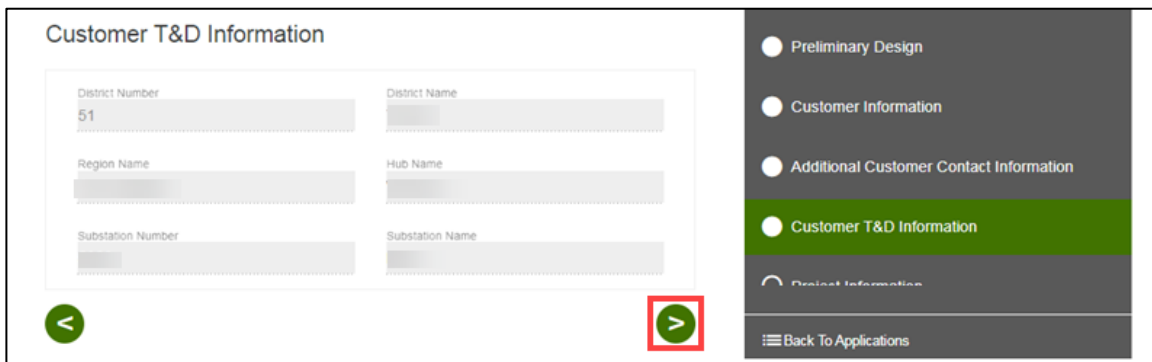


The **Customer T&D Information Section** page displays.

## Customer T&D Information

12. Verify the **Customer T&D Information**.

13. Click the  **Next** arrow.



Customer T&D Information

District Number: 51

District Name: \_\_\_\_\_

Region Name: \_\_\_\_\_

Hub Name: \_\_\_\_\_

Substation Number: \_\_\_\_\_

Substation Name: \_\_\_\_\_

Progress Indicator:

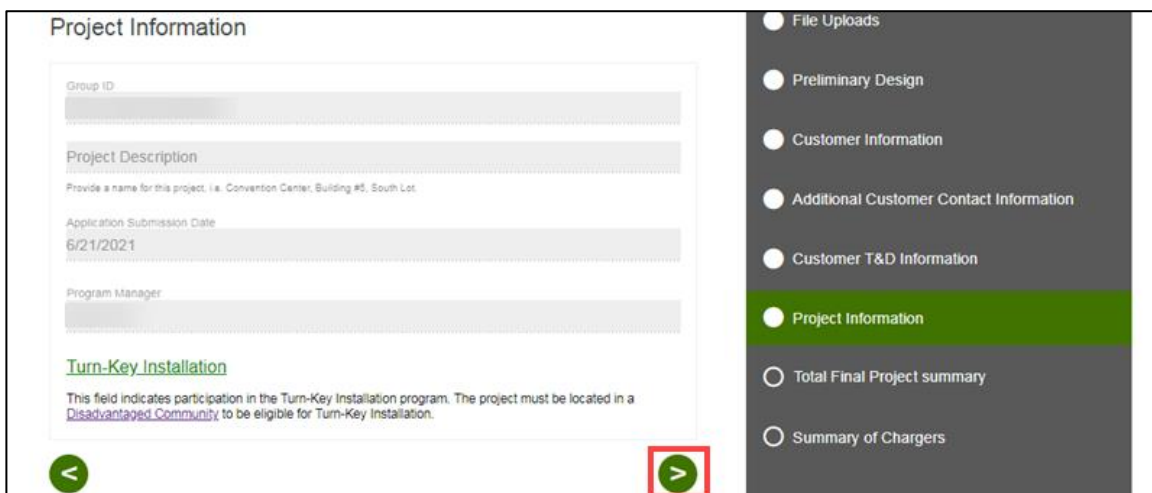
- Preliminary Design
- Customer Information
- Additional Customer Contact Information
- Customer T&D Information**
- Project Information
- Back To Applications

The **Project Information** page displays.

## Project Information

14. Verify the **Project Information**.

15. Click the  **Next** arrow.



Project Information

Group ID: \_\_\_\_\_

Project Description: \_\_\_\_\_  
Provide a name for this project. i.e. Convention Center, Building #5, South Lot

Application Submission Date: 6/21/2021

Program Manager: \_\_\_\_\_

[Turn-Key installation](#)

This field indicates participation in the Turn-Key Installation program. The project must be located in a [Disadvantaged Community](#) to be eligible for Turn-Key Installation.

Progress Indicator:

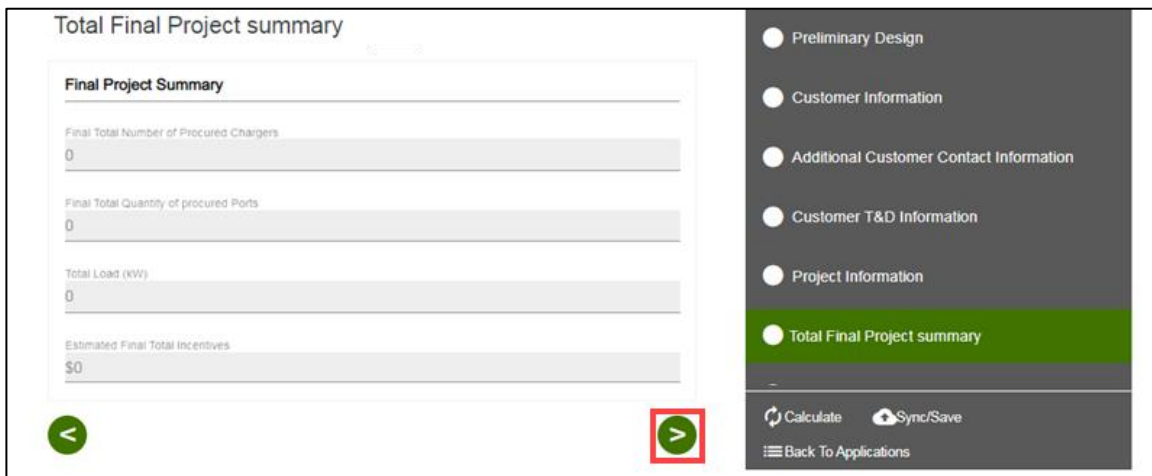
- File Uploads
- Preliminary Design
- Customer Information
- Additional Customer Contact Information
- Customer T&D Information
- Project Information**
- Total Final Project summary
- Summary of Chargers

The **Total Final Project Summary** page displays.

## Total Final Project Summary

16. Verify the **Total Final Project Summary**.

17. Click the  **Next** arrow.



The **Summary of Chargers** page displays.

## Summary of Chargers

18. Verify the **Summary of Chargers**.

19. Select **Submit**.



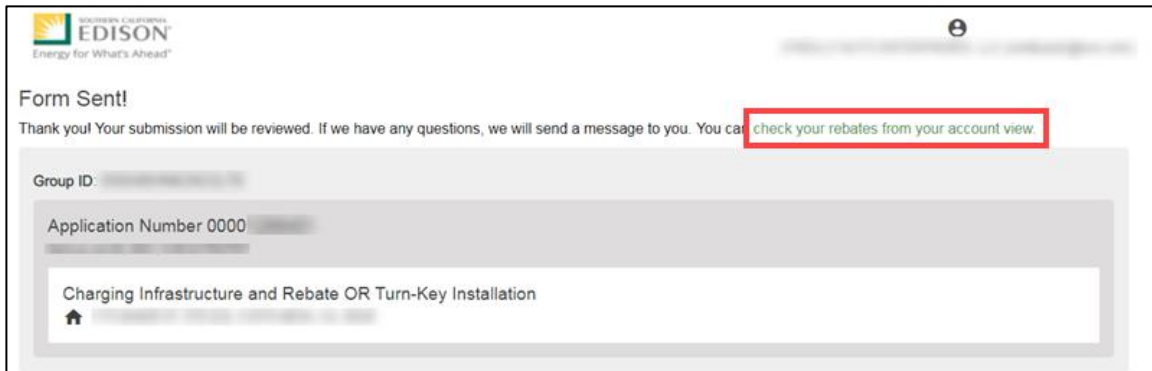


The **Form Sent** page displays.

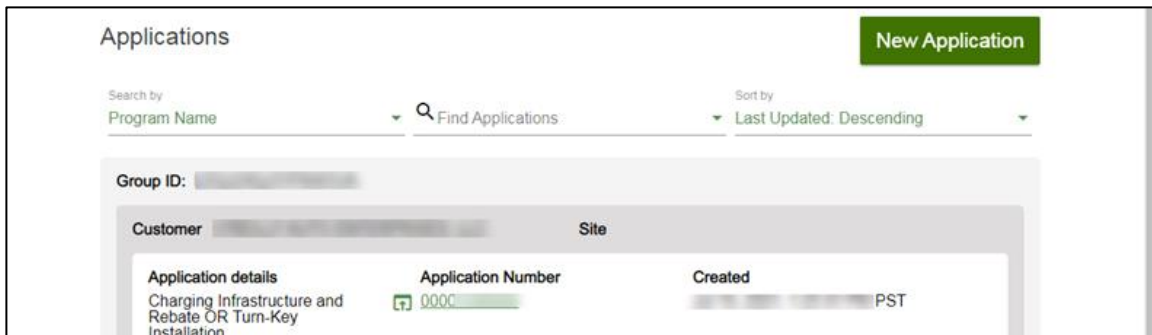
## Form Sent!

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

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



The **Applications** page displays.



Once a Design Acceptance is complete, SCE reviews the design of the site plan and begins work on project requirements.

# Pending Installation and Incentive Request

**The Pending Installation and Incentive Request form is only applicable to Charging Infrastructure and Rebate projects.**

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

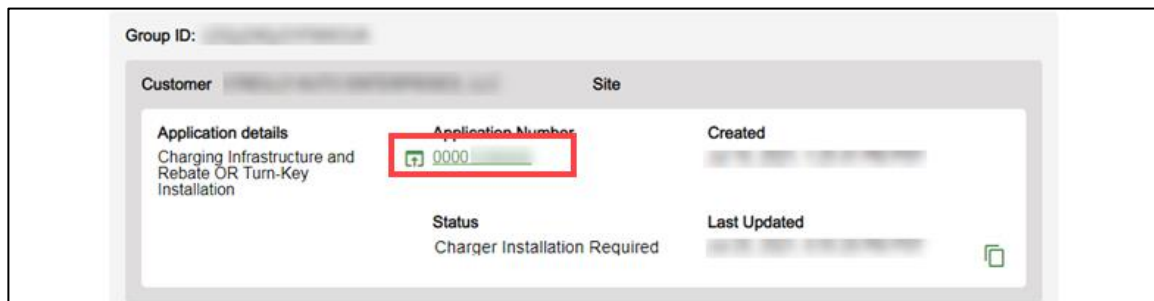
Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

*For a full list of eligible participants, or for more information about the program, refer to the Charge Ready Program Guidelines.*

## Completing the Pending Installation and Incentive Request Form

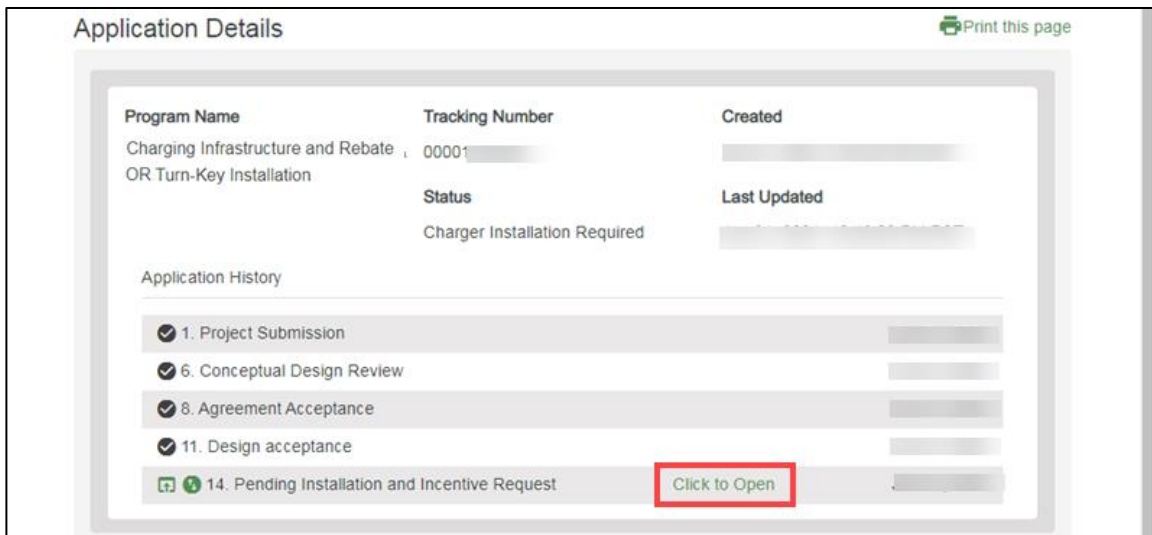
To complete the Pending Installation and Incentive Request form, follow the steps below.

1. Select the **Application Number**.




The **Application Details** page displays.

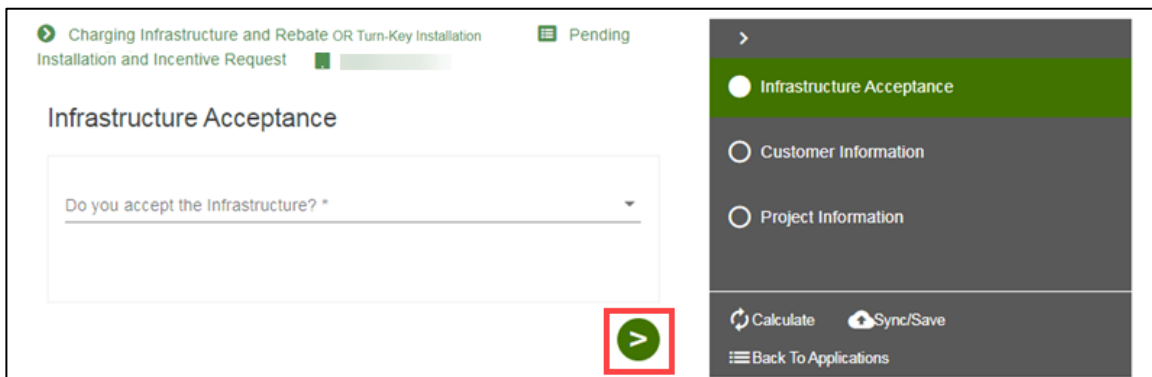
2. Select **Click to Open** under 14. Pending Installation and Incentive Request.



The **Infrastructure Acceptance** page displays.

## Infrastructure Acceptance

3. Select Yes or No for **Do you accept the infrastructure as built?**
4. Click the  **Next** arrow.



The **Customer Information** page displays.

### **Infrastructure Acceptance is No**

If the Infrastructure Acceptance is No, follow the steps below:

5. Enter the customer comments.

Charging Infrastructure and Rebate OR Turn-Key Installation Installation and Incentive Request Pending

### Infrastructure Acceptance

Do you accept the infrastructure? \*

No

Customer Comments for No accepting Infrastructure \*

Calculate Sync/Save Back To Applications

## Customer Information

6. Verify the **Customer Information**.

7. Click the  **Next** arrow.

Charging Infrastructure and Rebate OR Turn-Key Installation Installation and Incentive Request Pending

### Customer Information

Customer Information

Customer Number \* Site Number \*

Bill Account Number \* Customer Name \*

Site Information

Site Address 1 \* Site Address 2 (apt, suite, bldg, etc)

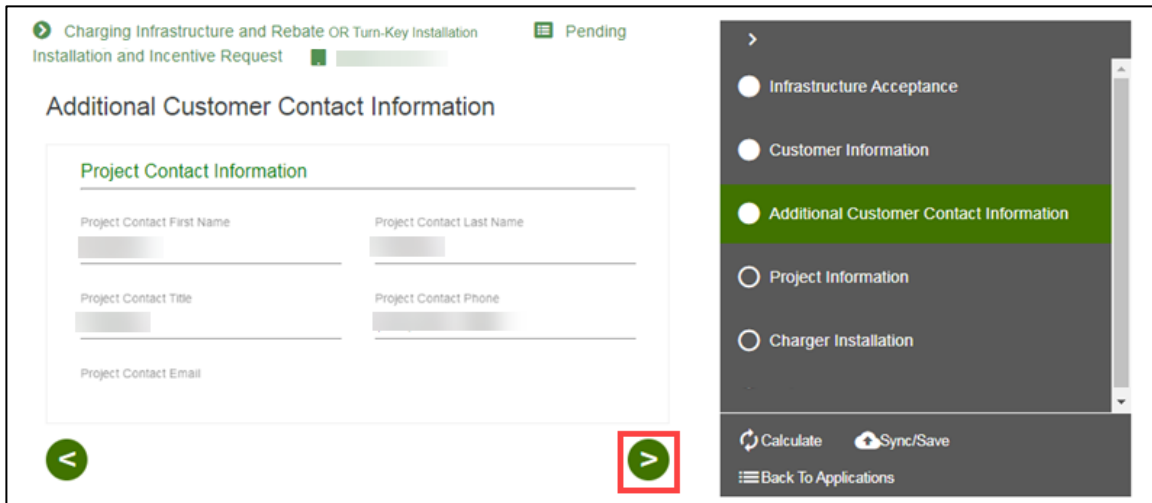
Calculate Sync/Save Back To Applications

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

## Additional Customer Contact Information

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

9. Click the  **Next** arrow.

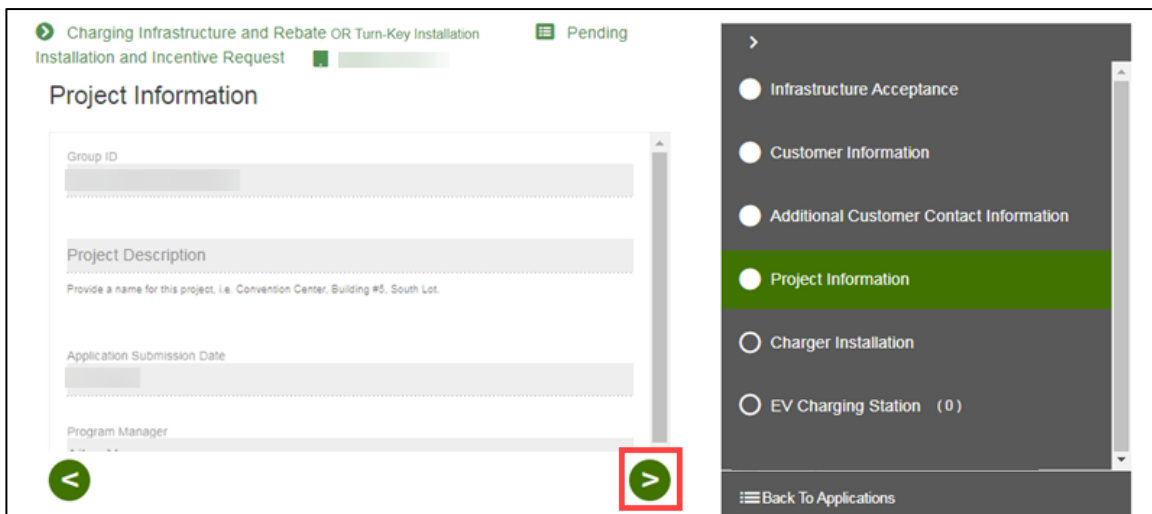


The **Project Information** page displays.

## Project Information

10. Verify the **Project Information**.

11. Click the  **Next** arrow.

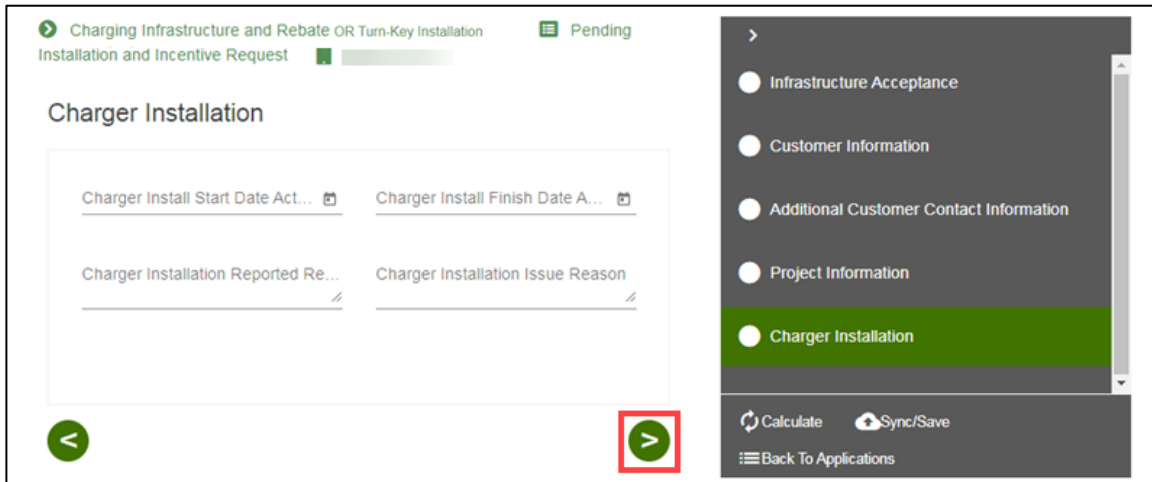


The **Charger Installation** page displays.

## Charger Installation

12. Enter and verify the **Charger Installation** information.

13. Click the  **Next** arrow.

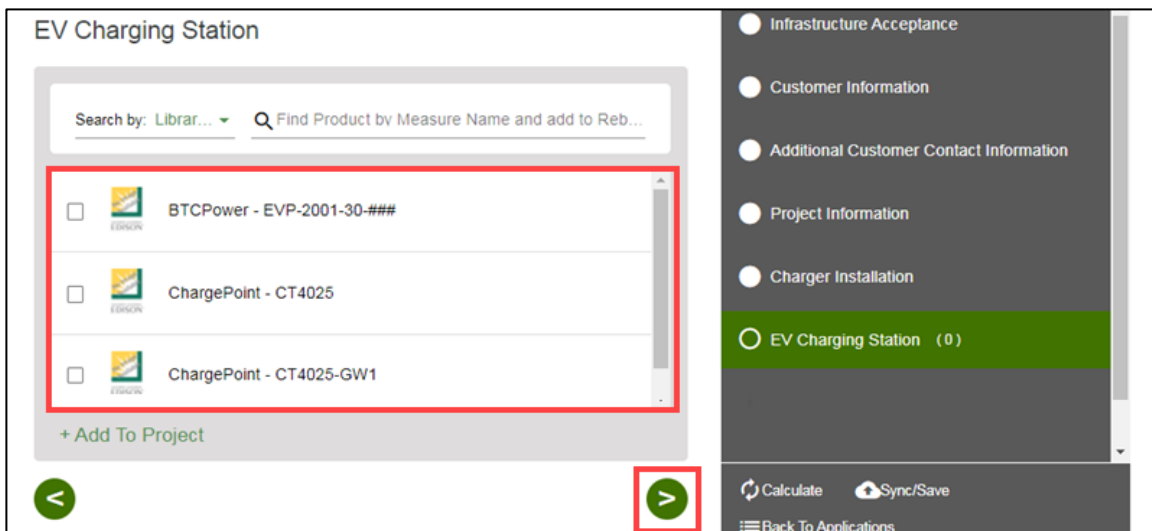


The **EV Charging Station** page displays.

## EV Charger Station

14. Enter and verify the required information.

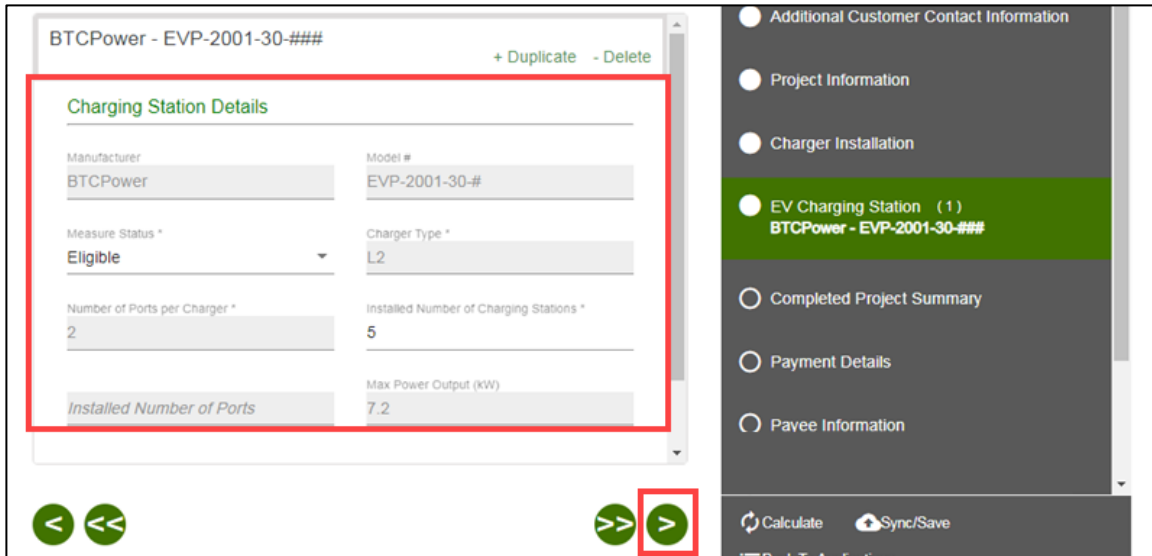
15. Click the  **Next** arrow.



The **Charging Station Details** page displays.

16. Enter and verify the required information.

17. Click the  **Next** arrow.

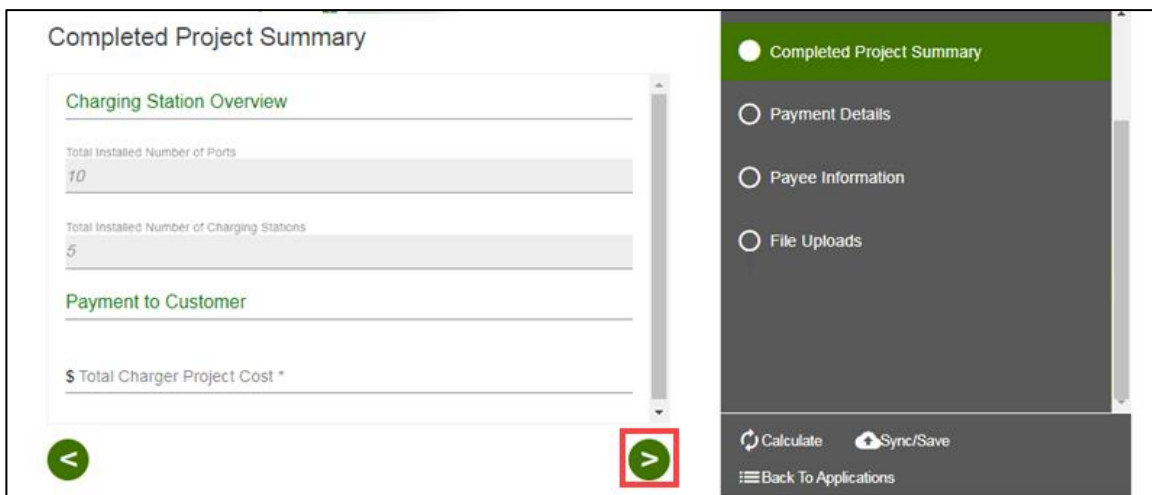


## Completed Project Summary

18. Verify the **Completed Project Summary**.

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

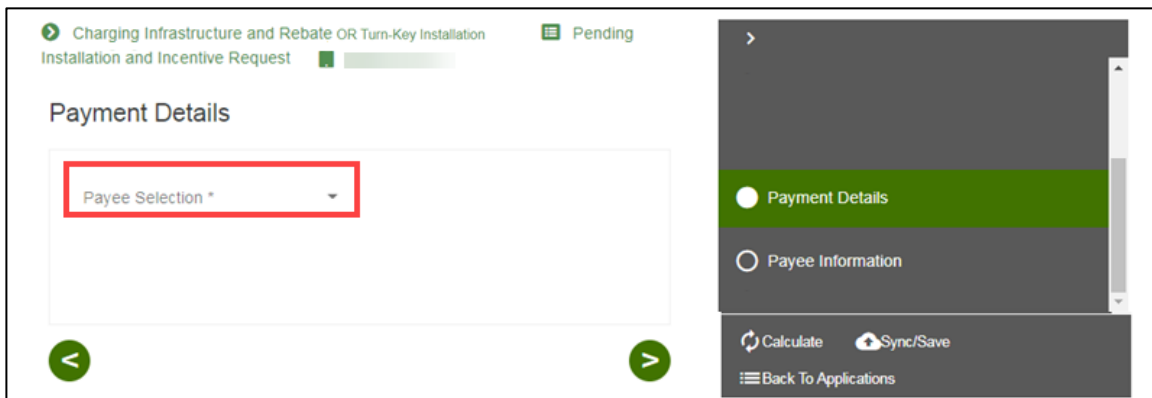
20. Click the  **Next** arrow.



The **Payment Details** page displays.

## Payment Details

21. Select a **Payee Selection**.



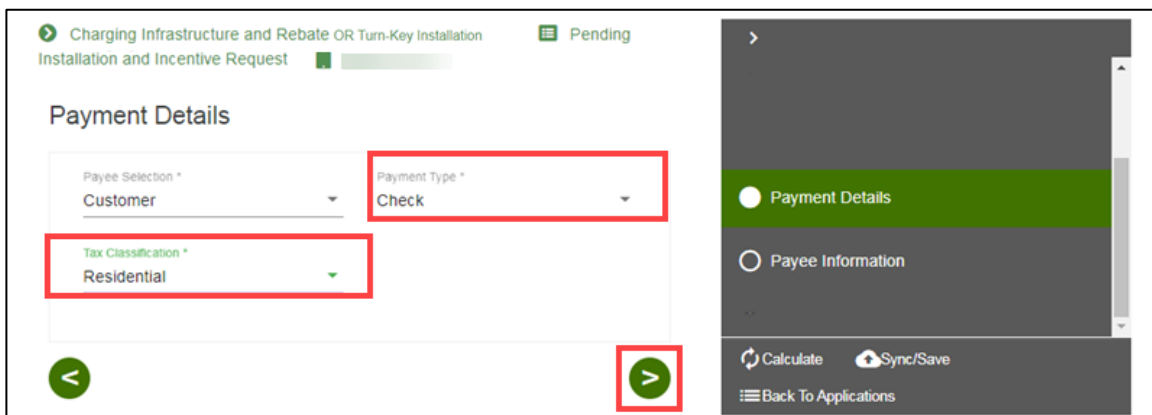
The screenshot shows the 'Payment Details' screen in a mobile application. At the top, there is a header with a green arrow icon, the text 'Charging Infrastructure and Rebate OR Turn-Key Installation', and a 'Pending' status indicator. Below the header, the title 'Payment Details' is displayed. A dropdown menu labeled 'Payee Selection \*' is highlighted with a red box. To the right, a sidebar menu shows 'Payment Details' selected with a green circle, and 'Payee Information' with an unselected circle. At the bottom, there are navigation buttons: a green left arrow, a green right arrow, 'Calculate', 'Sync/Save', and 'Back To Applications'.

Additional fields display.

22. Select the **Payment Type**.

23. Select the **Tax Classification**.

24. Click the  **Next** arrow.

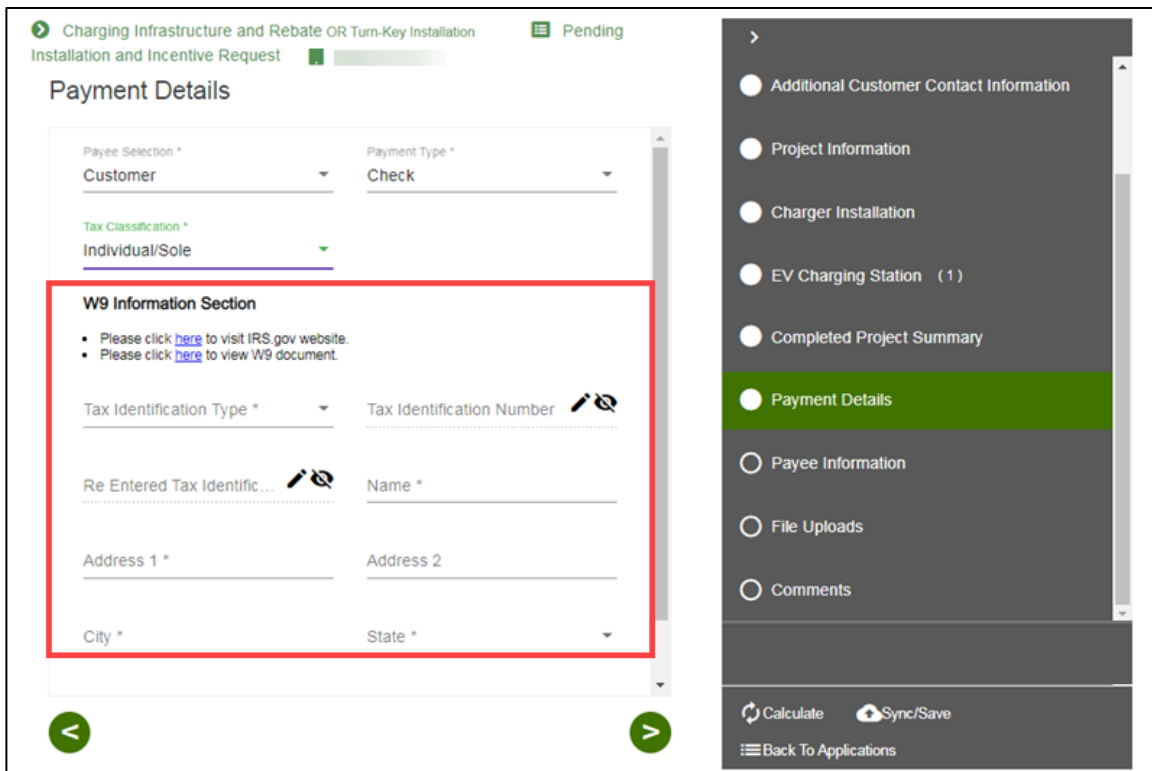


The screenshot shows the 'Payment Details' screen with three fields highlighted by red boxes: 'Payee Selection \*' (set to 'Customer'), 'Payment Type \*' (set to 'Check'), and 'Tax Classification \*' (set to 'Residential'). The 'Next' arrow button at the bottom right is also highlighted with a red box. The sidebar menu and bottom navigation buttons remain the same as in the previous screenshot.

The **Payee Information** page displays.

Note: Certain Tax Classifications require more information.

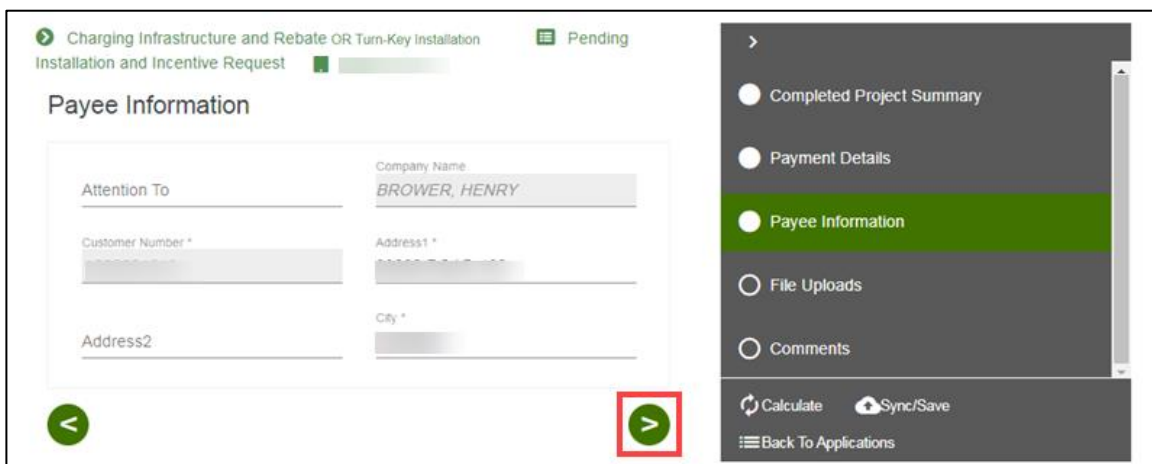




## Payee Information

25. Enter and verify the required information.

26. Click the  **Next** arrow.

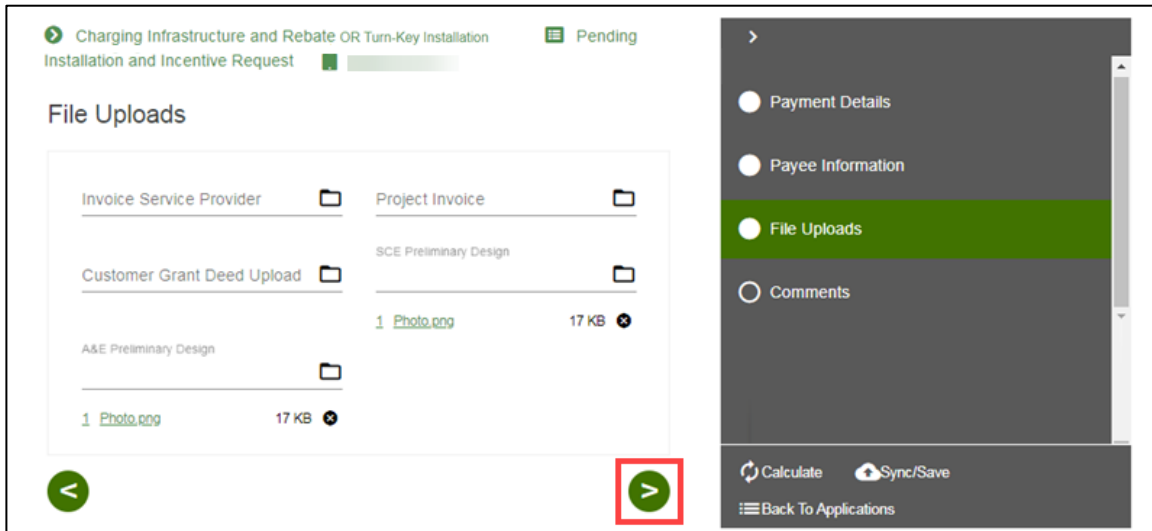


The **File Uploads** page displays.

## File Uploads

27. Upload and verify the applicable files.

28. Click the  **Next** arrow.

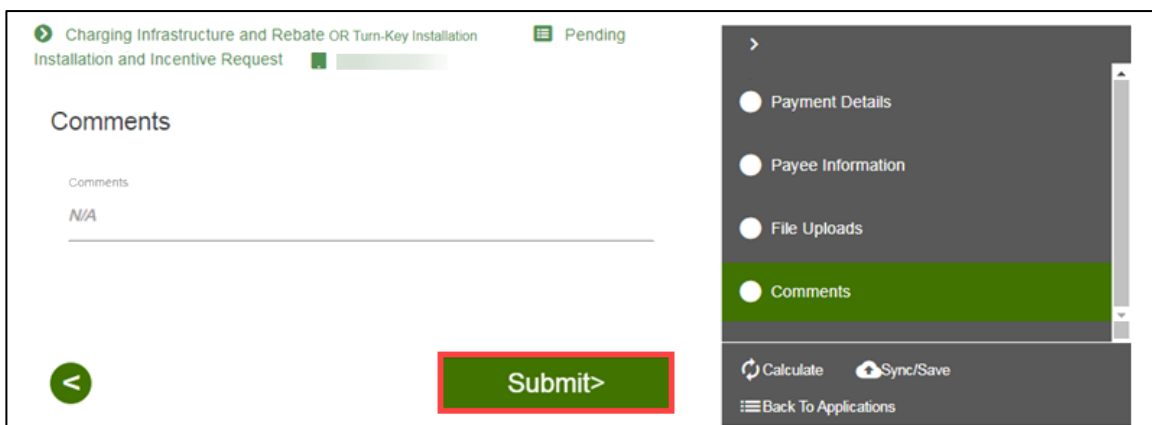


The **Comments** page displays.

## Comments

29. Review the comments, if applicable.

30. Select **Submit**.

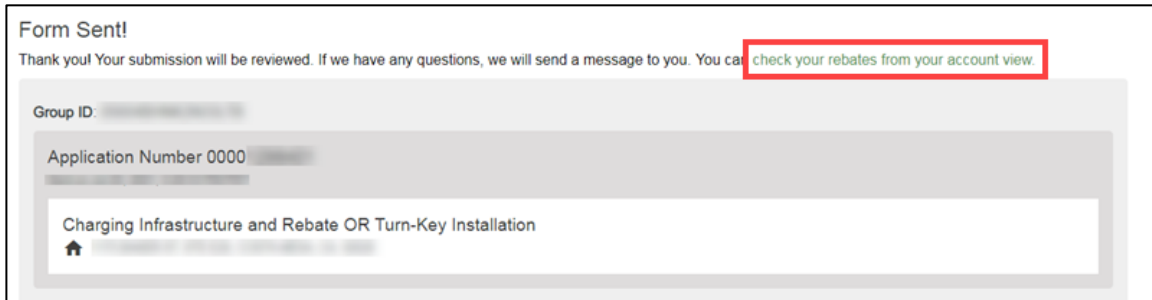


The **Form Sent** page displays.

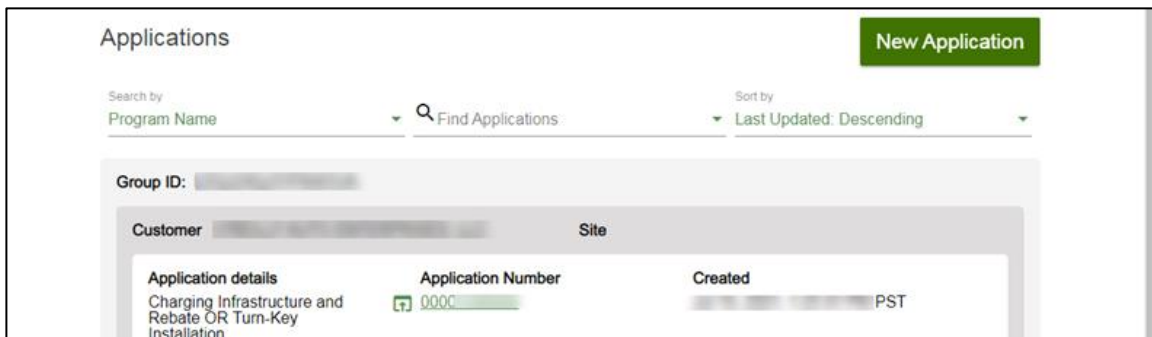
## Form Sent!

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

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



The **Applications** page displays.



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