Customer-Side Make-Ready Option Rebate

User Guide for External Users

Prepared for:

SCE Customers, and Charge Ready Trade Professionals

Prepared by:

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Southern California Edison
Energy for What's Ahead℠

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Overview

This user guide covers various features and functions of the Charge Ready Application Portal for the Customer-Side Make-Ready Rebate Option.

This document is intended for users who will submit requests for Customer-Side Make-Ready Rebate Option incentives. These roles are:

- Customers
- Charge Ready Trade Professionals

What is Customer-Side Make-Ready Rebate Option?

The Charging Infrastructure & Rebate – Customer-Side Make-Ready Rebate Option is a program 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 Customer –Side Make-Ready Option.

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 Customer-Side Make-Ready Rebate Option 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 Customer-Side Make-Ready Rebate Option 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.
4. SCE completes the Site Assessment.
5. SCE completes the Site Selection.
6. SCE completes the Agreement Preparation.
7. **Customer completes the Agreement Acceptance.**
8. SCE completes the Funds Reservation.
9. **Customer uploads Proof of Procurement in the Agreement Acceptance form.**
10. SCE reviews Proof of Procurement in the Funds Reservation form.
11. **Customer completes the Site Plan Submission.**
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.**
18. SCE completes the Incentive Site Review.
19. SCE completes the Incentive QA Review.
20. SCE approves or rejects the payment for a project.

Program Forms

The Customer-Side Make-Ready Rebate Option consists of five forms and six tasks, and 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

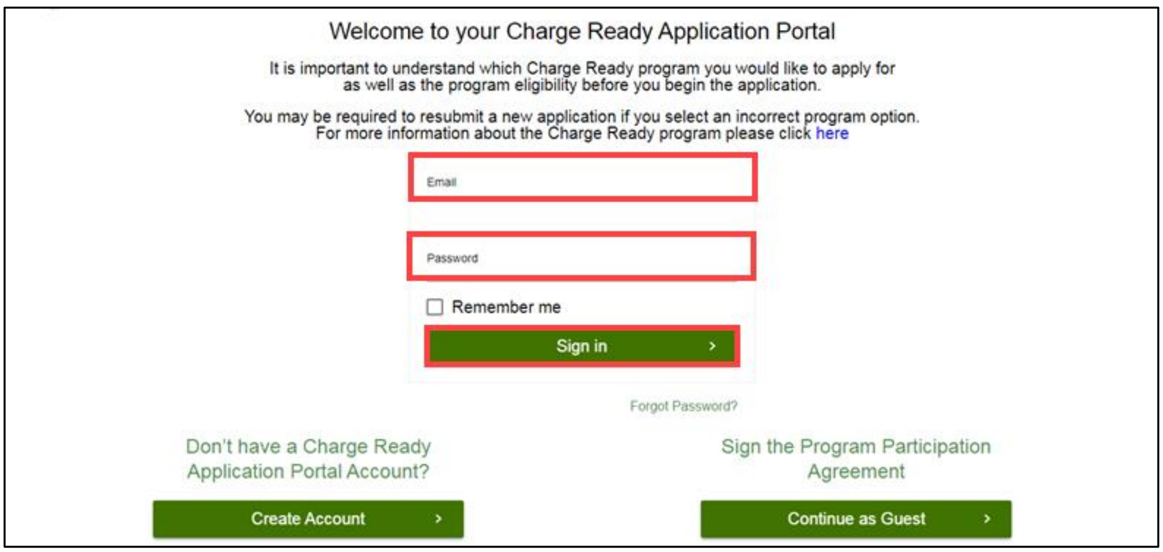
Accessing the Charge Ready Application Portal

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**.



The **Applications** page displays.

Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals

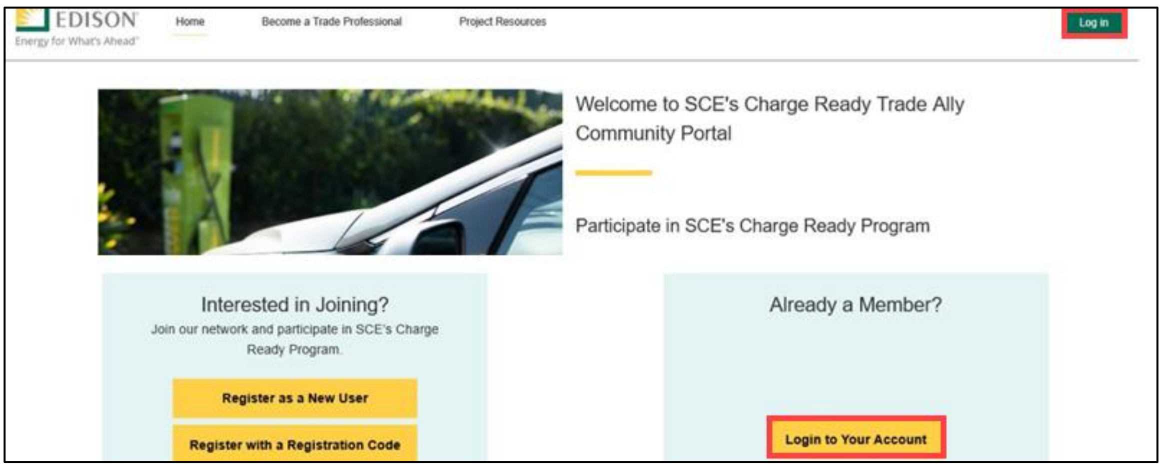
If you are a Charge Ready Trade Professional, you must have access to the Charge Ready Trade Ally Community (TAC) Portal. You and your company must also be approved by SCE to apply for rebates on behalf of the customer(s).

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

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

   The **TAC landing page** displays.

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

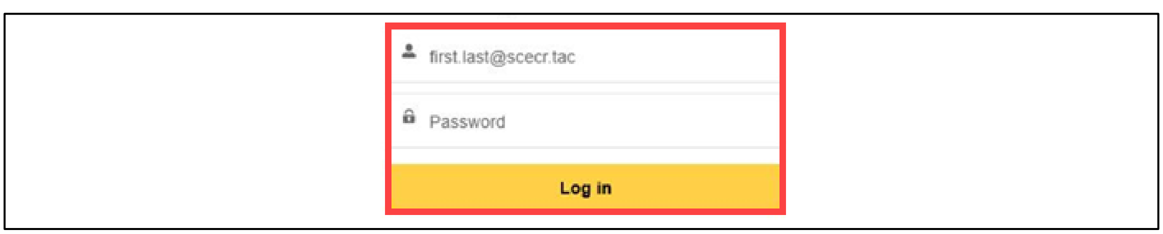


   The **Login** page displays.

3. Enter your **Email**.

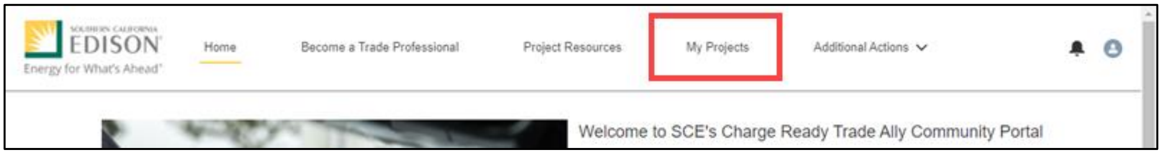
4. Enter your **Password**.

5. Click **Log In**.



   The **TAC Home Page** displays.

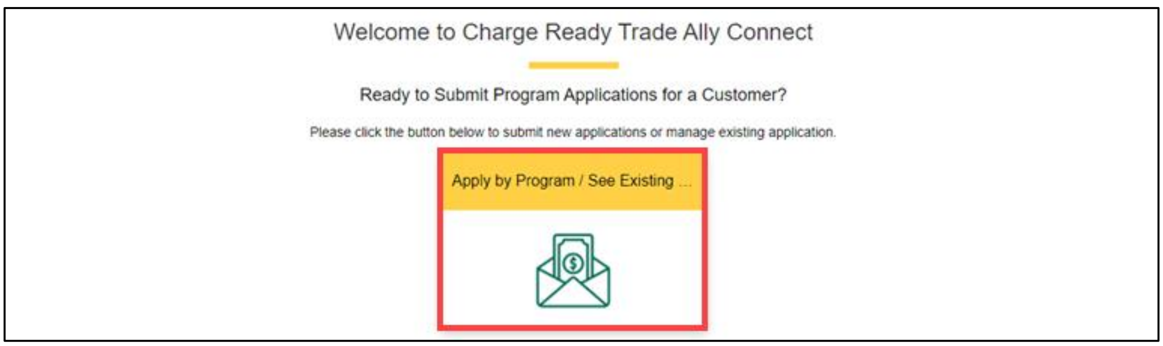
6. Select **My Projects**.



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

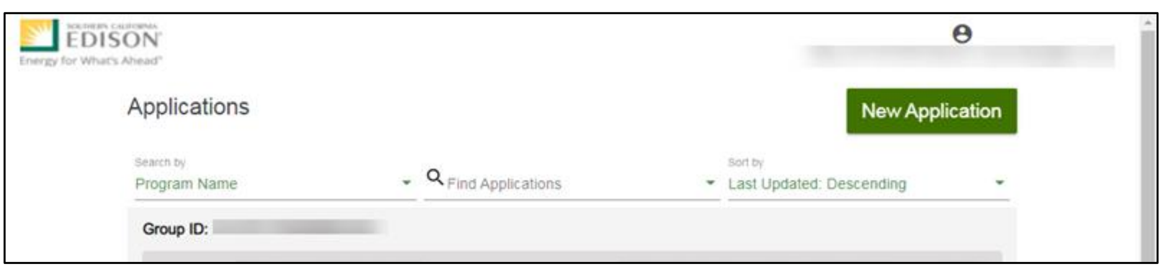
The **My Projects** page displays.

7. Click **Apply by Program**.



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

The **Applications** page displays.



Project Submission

The Project Submission form is submitted by the **Customer** or **Charge Ready Tarde 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

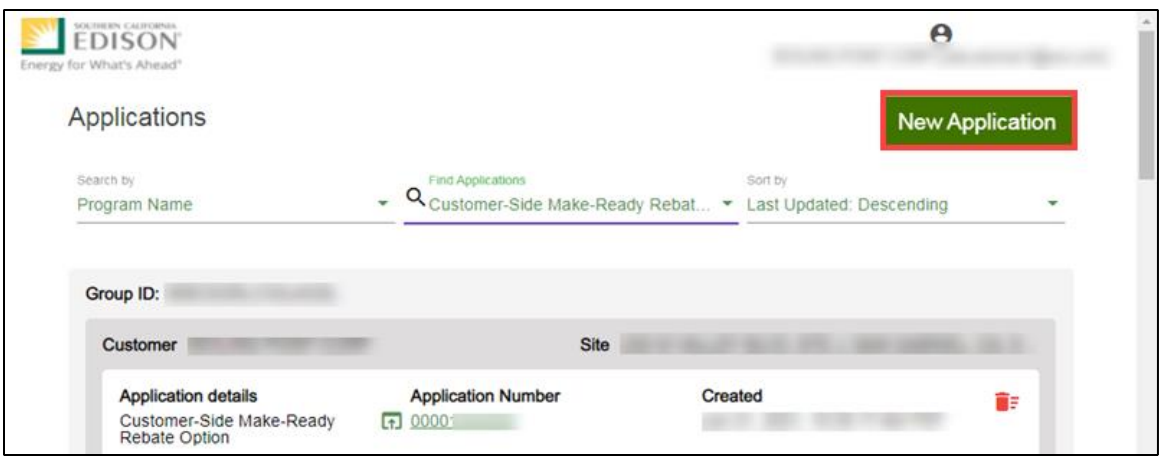
Once a Project Submission is complete, SCE determines the eligibility for program participation.

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**.



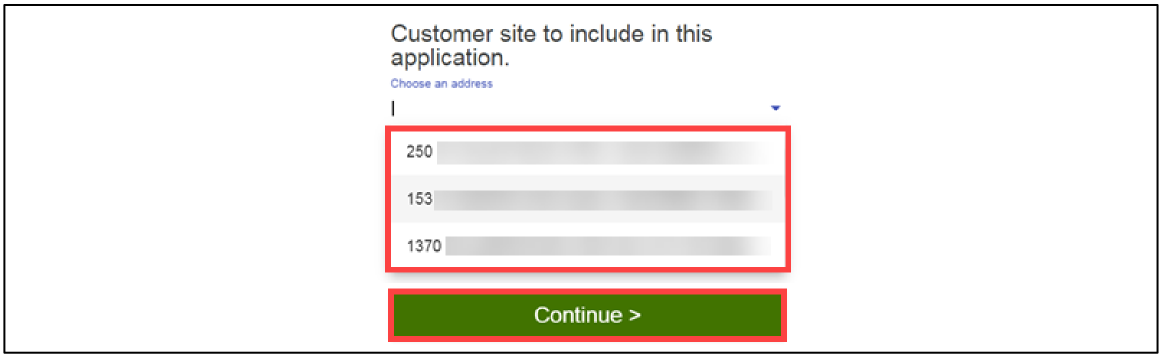
A **Customer site to include in this application** page displays.

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

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

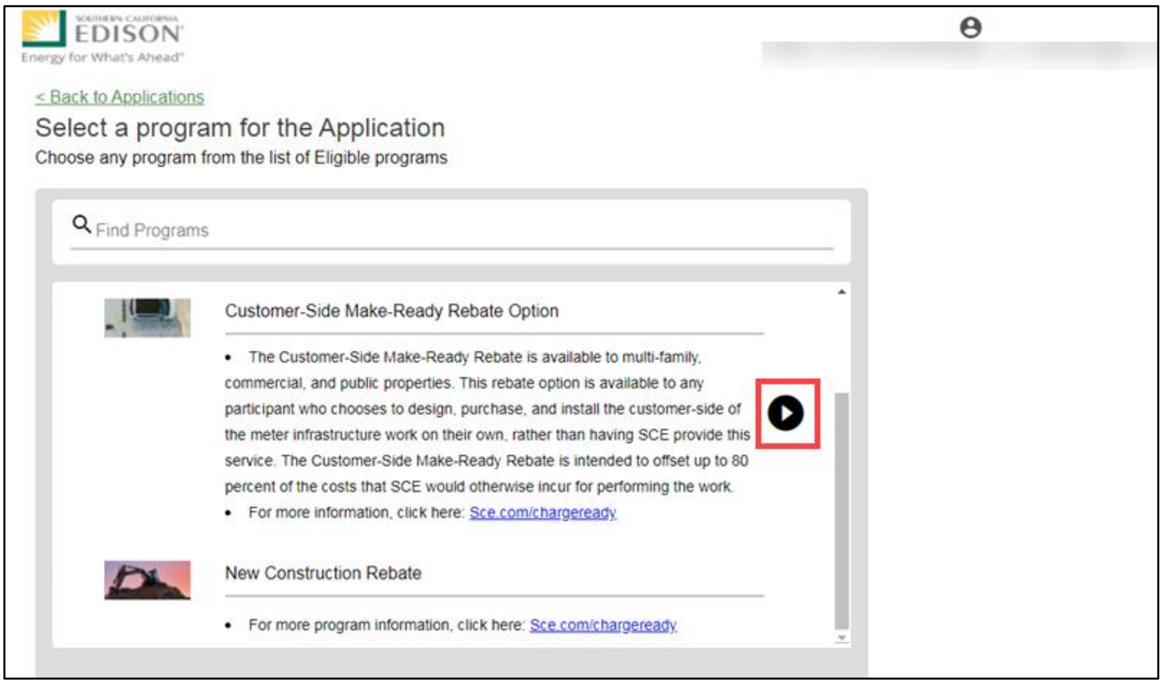
3. Select an address.

4. Click **Continue**.



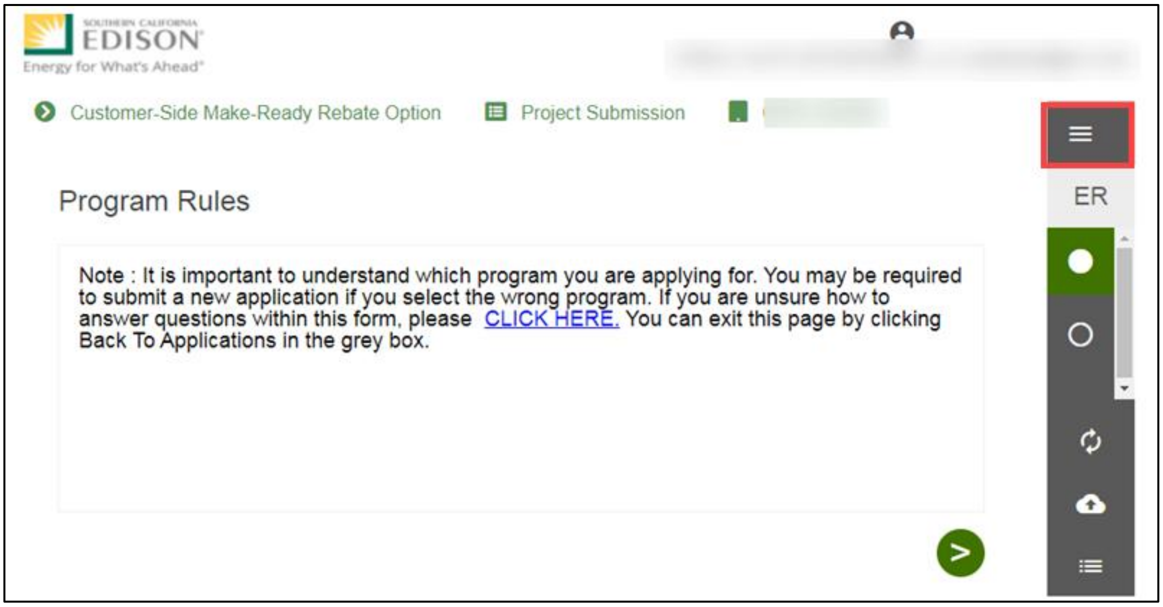
The **Select a program for the Application** page displays.

5. Select the right arrow to select **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.



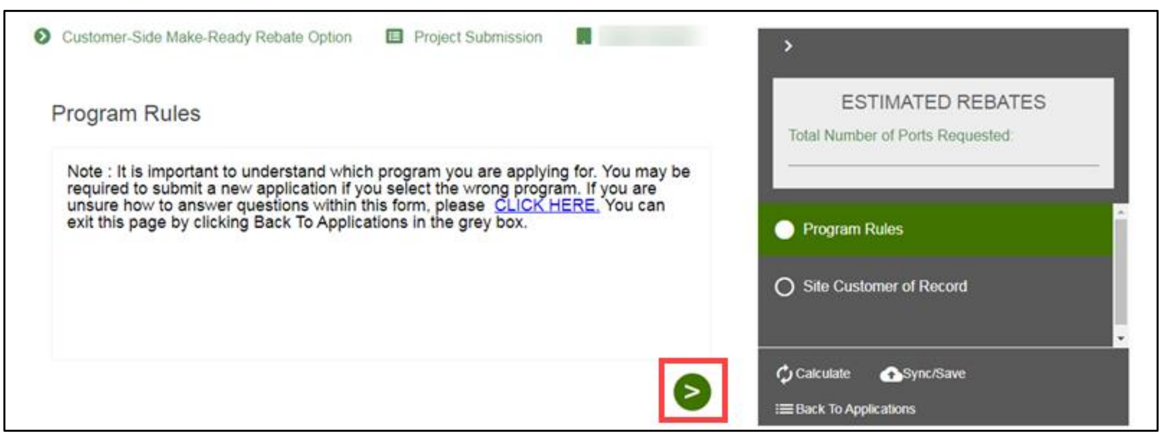
Once the Program Rules page displays, you will complete all the required fields.

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.

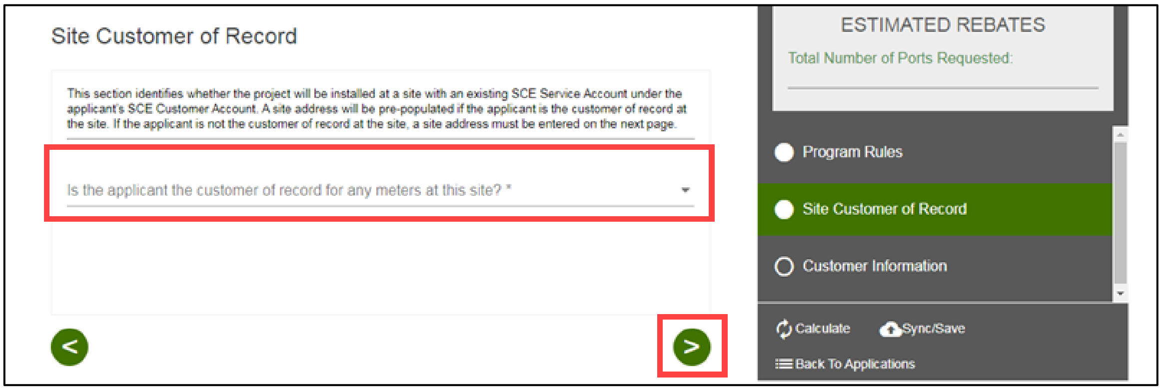


The **Site Customer of Record** page displays.

Site Customer of Record

8. Select Yes or No.

9. Click the **Next** arrow.

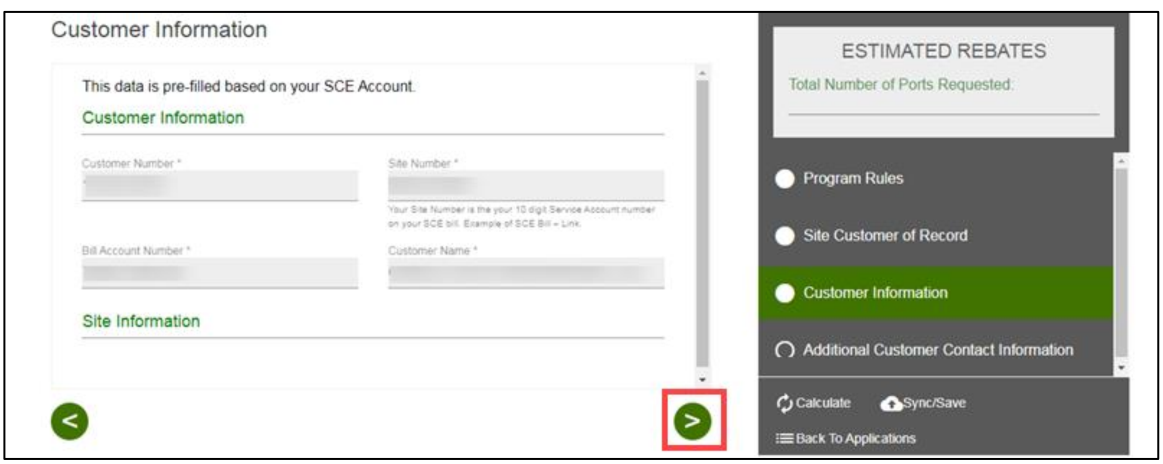


The **Additional Customer Contact Information** page displays.

Customer Information

10. Verify the required information.

11. Click the **Next** arrow.



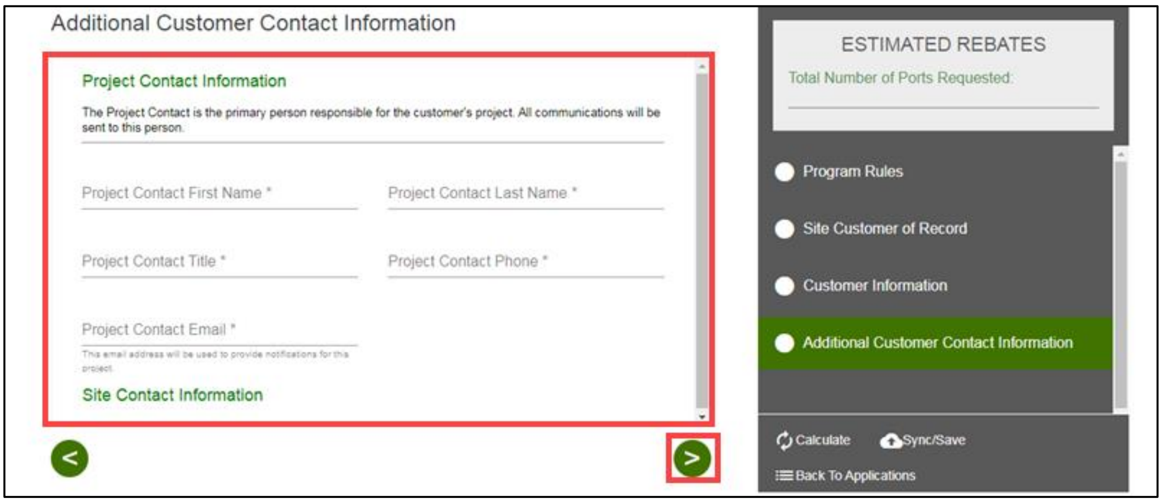
The **Additional Customer Contact Information** page displays.

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**.

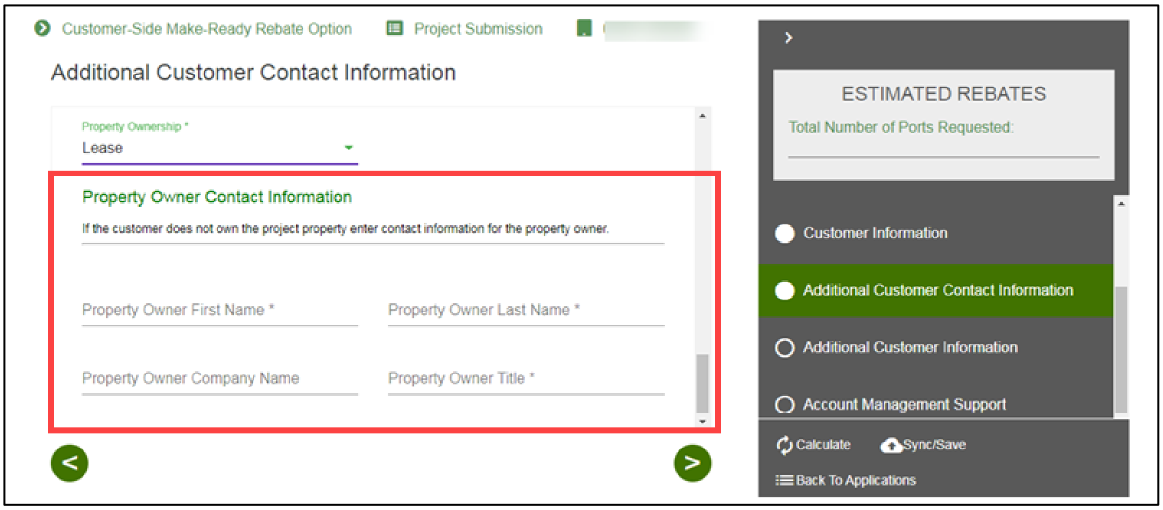
16. Enter the contact information.

Property Ownership is Lease

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

17. Select **Lease**.

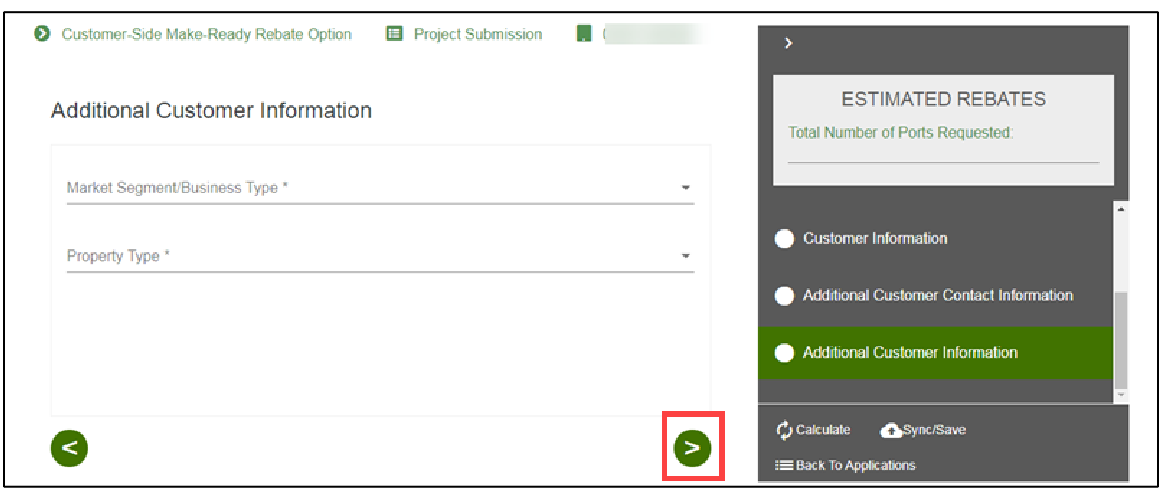
18. Enter the **Property Owner** information.



Additional Customer Information

19. Enter the required information.

20. Click the **Next** arrow.

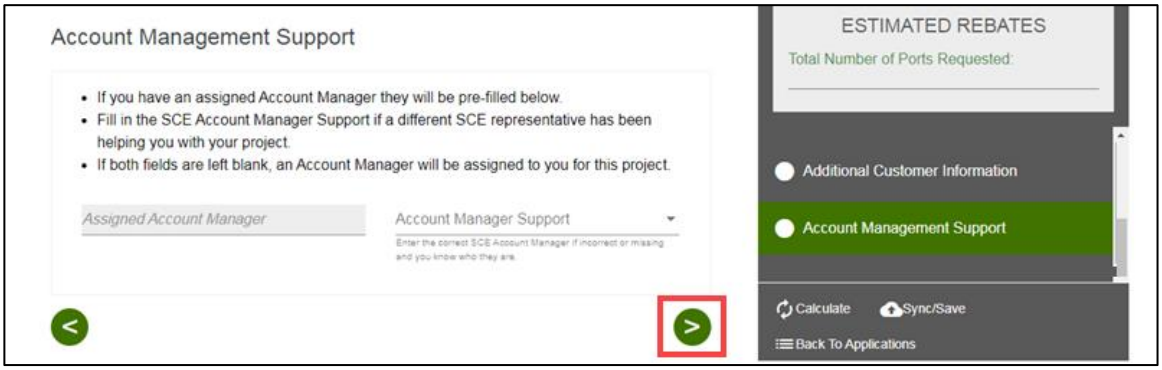


The **Account Management Support** page displays.

Account Management Support

21. Select an **Account Manager Support**, if applicable.

22. Click the **Next** arrow.

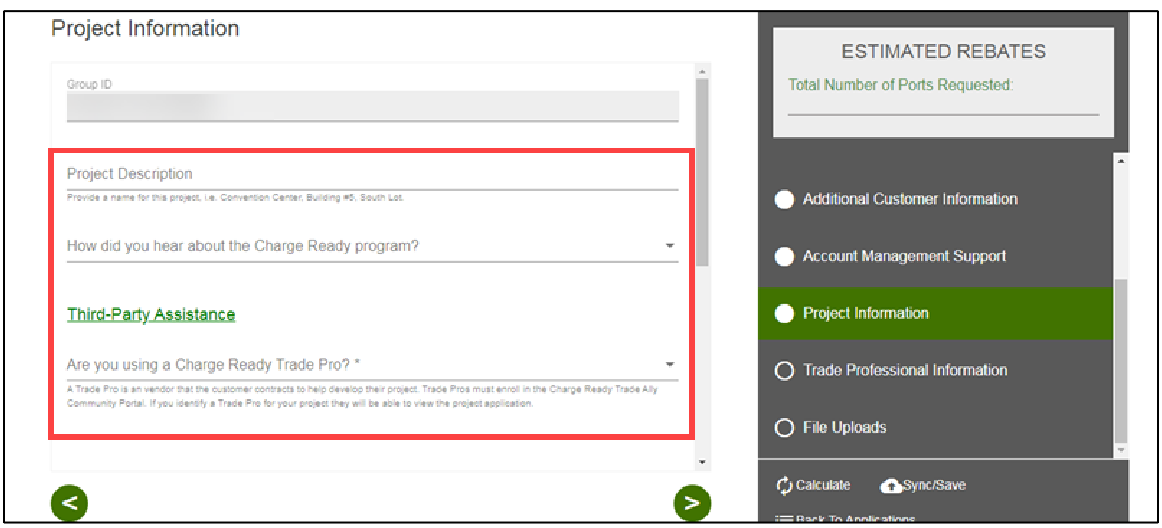


The **Project Information** page displays.

Project Information

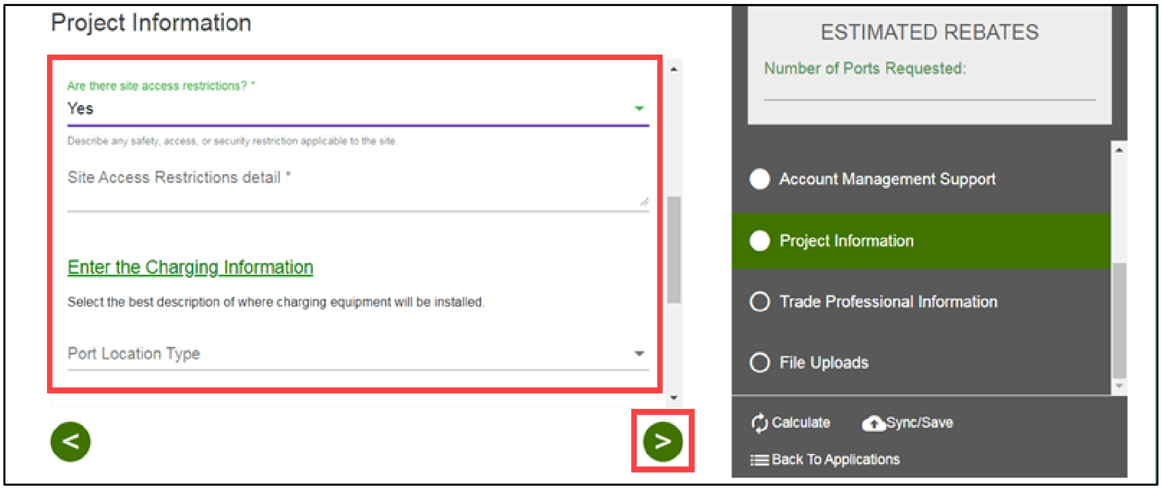
23. Enter the required information.

24. Scroll down.



25. Enter the required information.

26. Click the **Next** arrow.



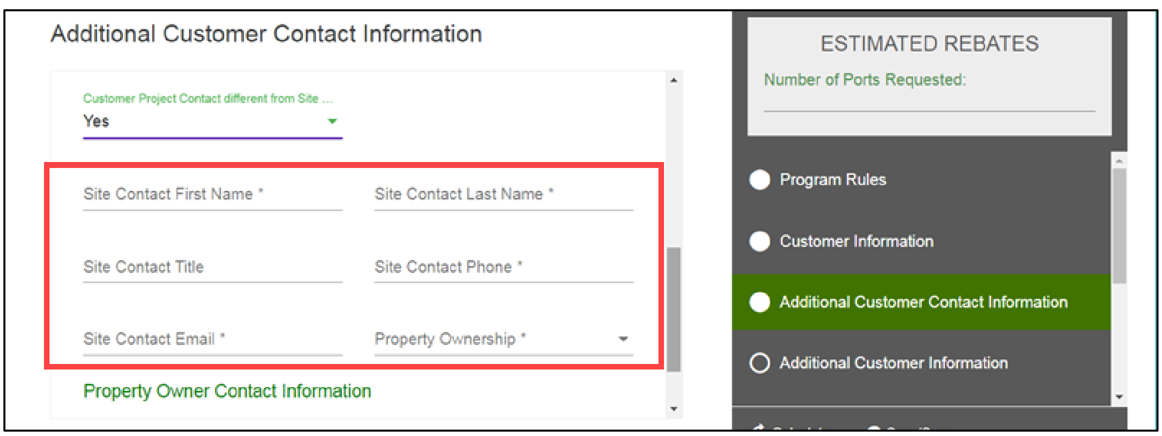
The **File Uploads** page displays.

Trade Professional Information

If a Charge Ready Trade Pro is required for the project, follow the steps below:

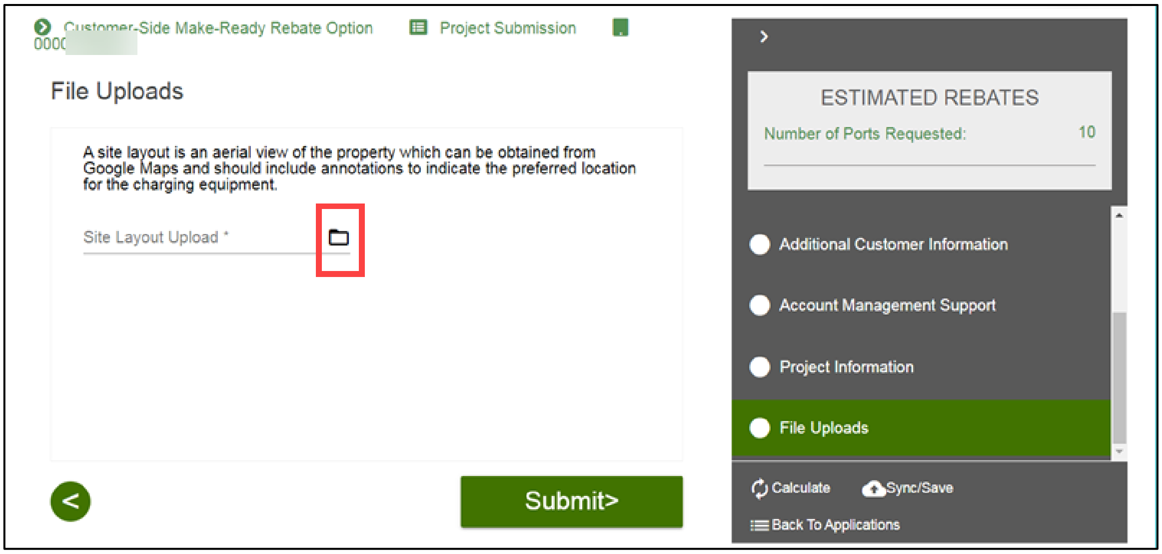
27. Select **Yes**.

28. Enter the contact information.



File Uploads

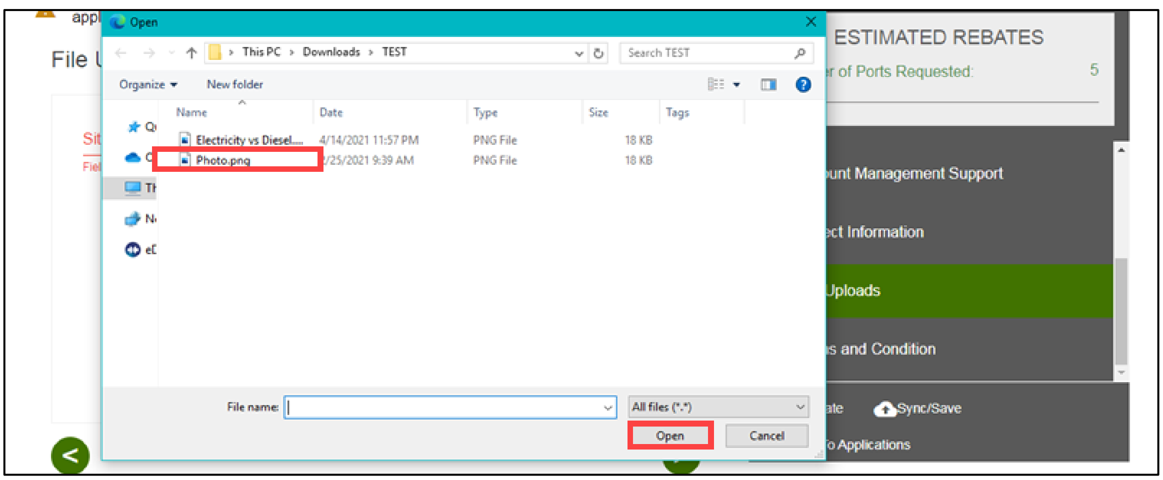
29. Select the **folder** icon.



The **Open** window displays.

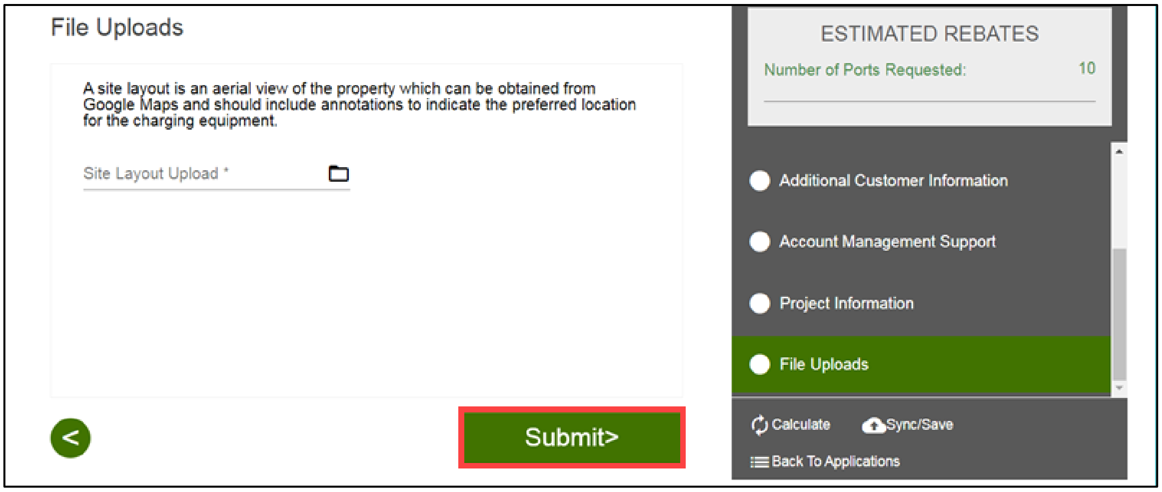
30. Select the applicable file.

31. Select **Open**.



The **File Uploads** page displays.

32. Select **Submit**.

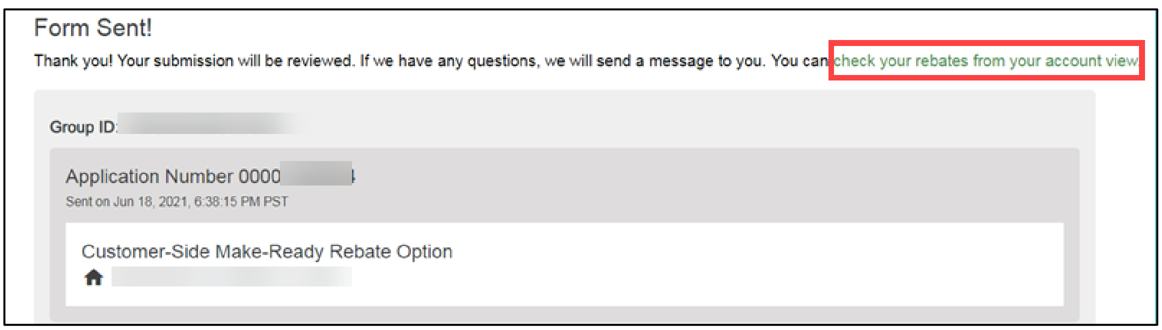


The **Form Sent** page displays.

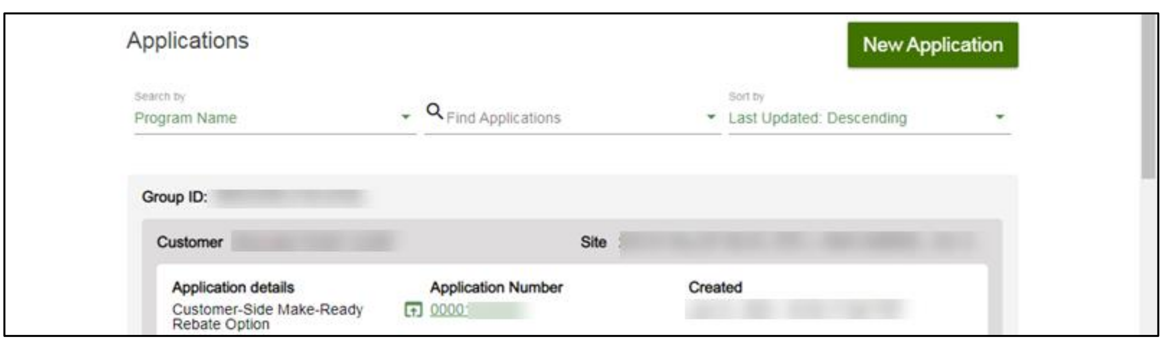
Form Sent!

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

33. 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

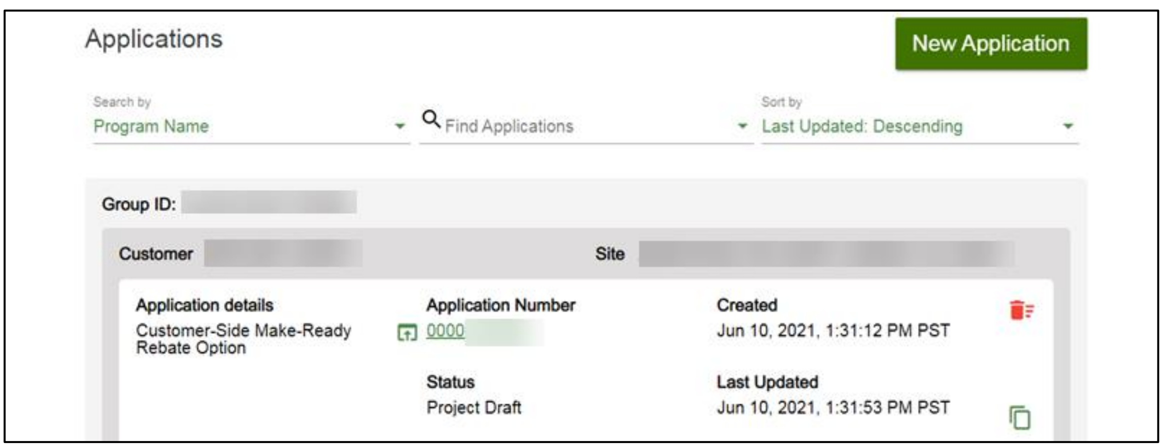
You can save an application and complete it at a later time.

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**.

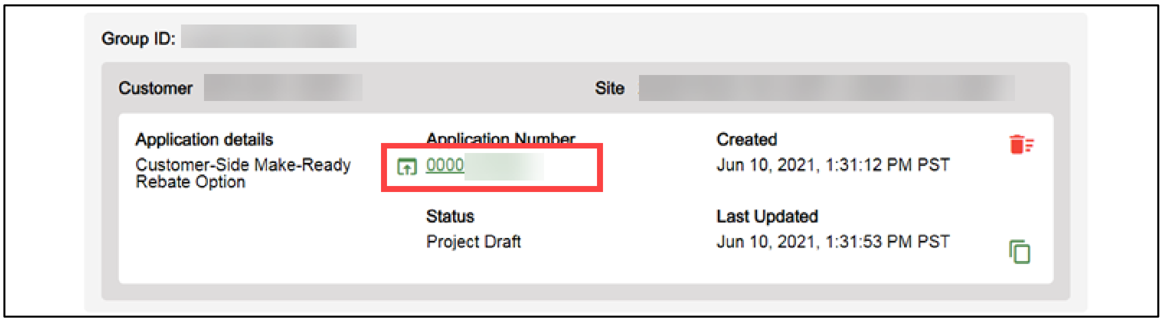
The **Applications** page displays.



Editing an Application in Draft Status

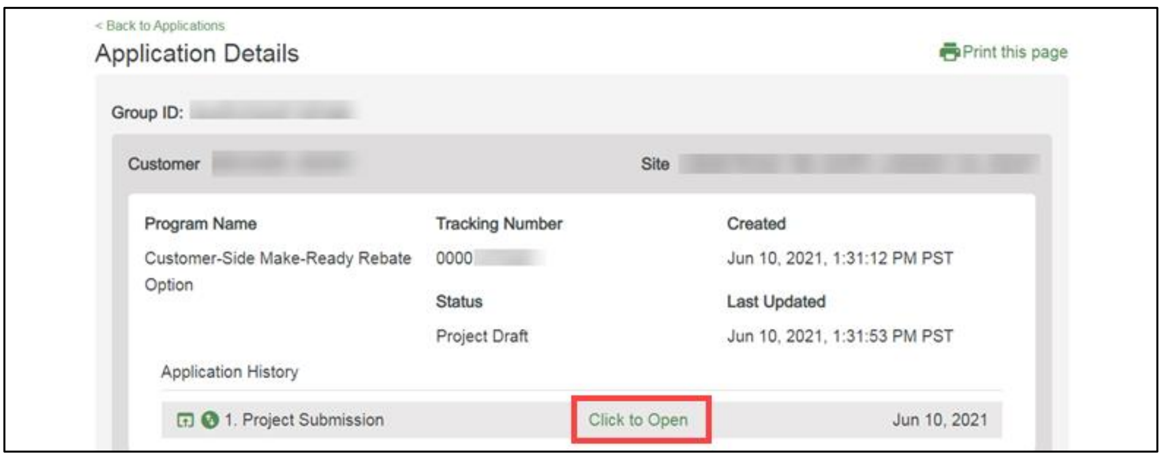
To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.



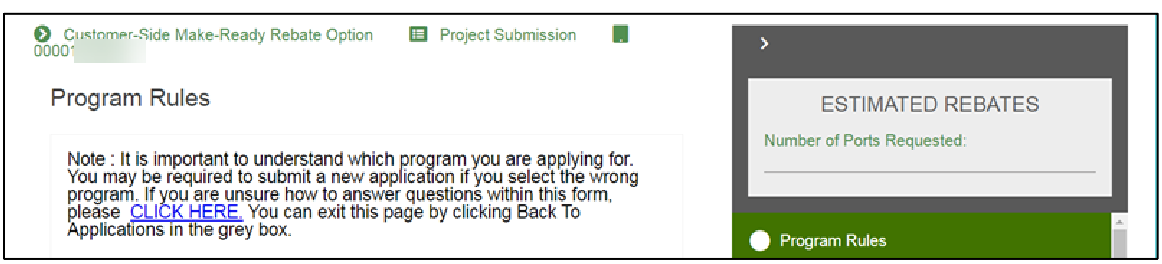
The **Application Details** page displays.

2. Select **Click to Open**.



The **Program Rules** page displays.

3. Complete the application.



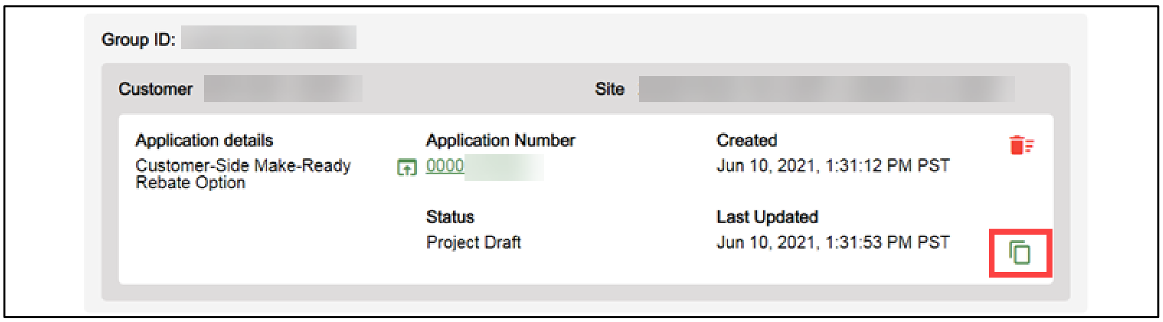
Duplicating an Application

You can duplicate an application in the following statuses:

- Draft
- Submitted
- Withdrawn
- Complete

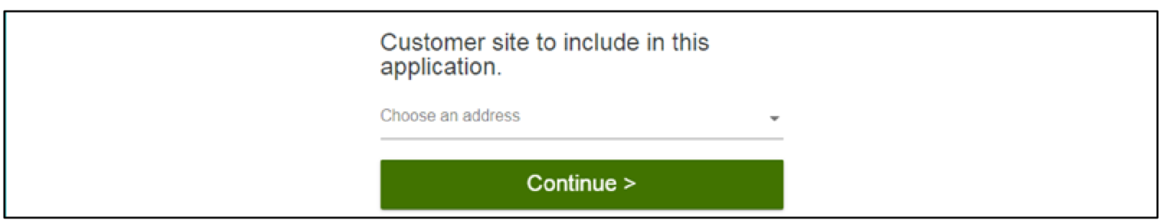
To duplicate an application, follow the steps below:

1. Click the **Duplicate** icon.



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

2. Complete the application.



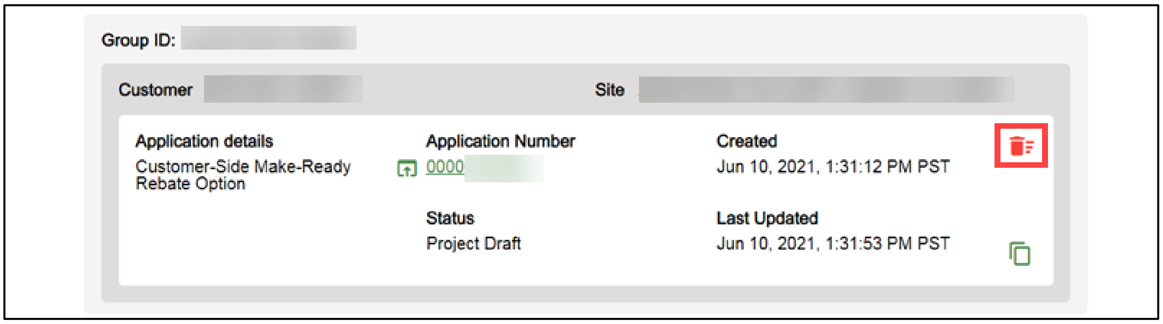
Discarding a Draft Application

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.

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 design and installation of qualifying Electric Vehicle (EV) infrastructure and equipment. This form:

- Specifies the program agreement of the project

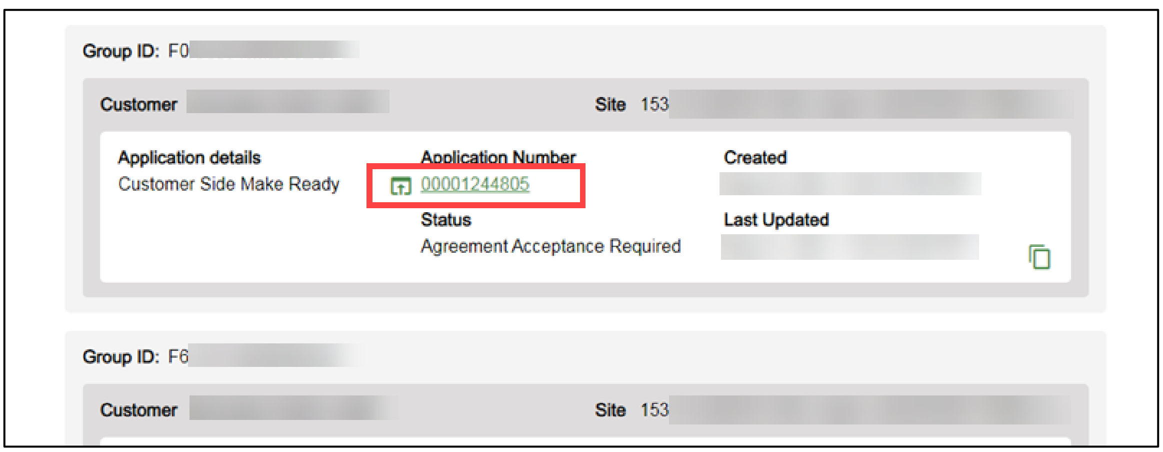
Once an Agreement Acceptance is complete, SCE executes and reserves project funds.

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

Completing the Agreement Acceptance Form

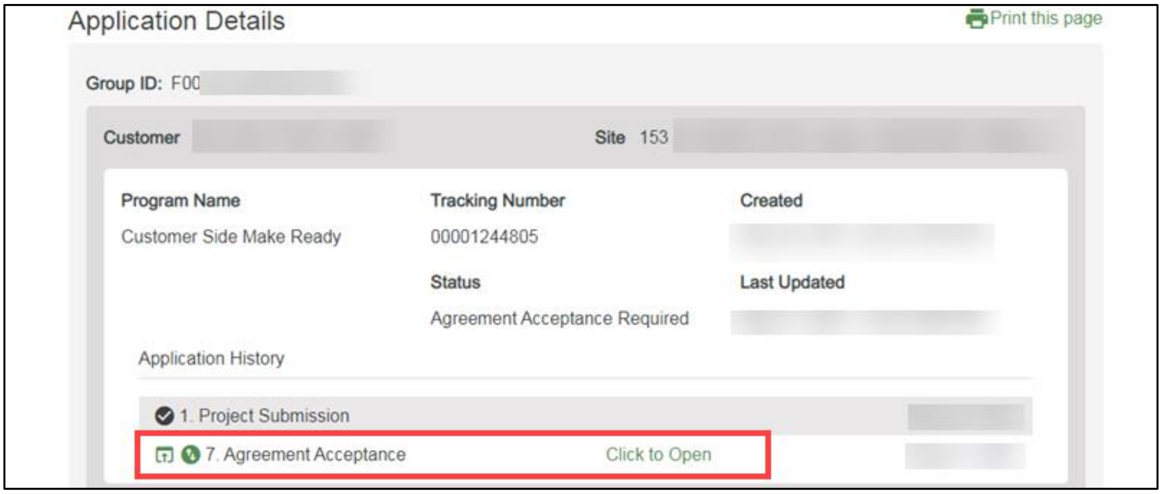
To complete the Agreement Acceptance, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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



The **Project Information** page displays.

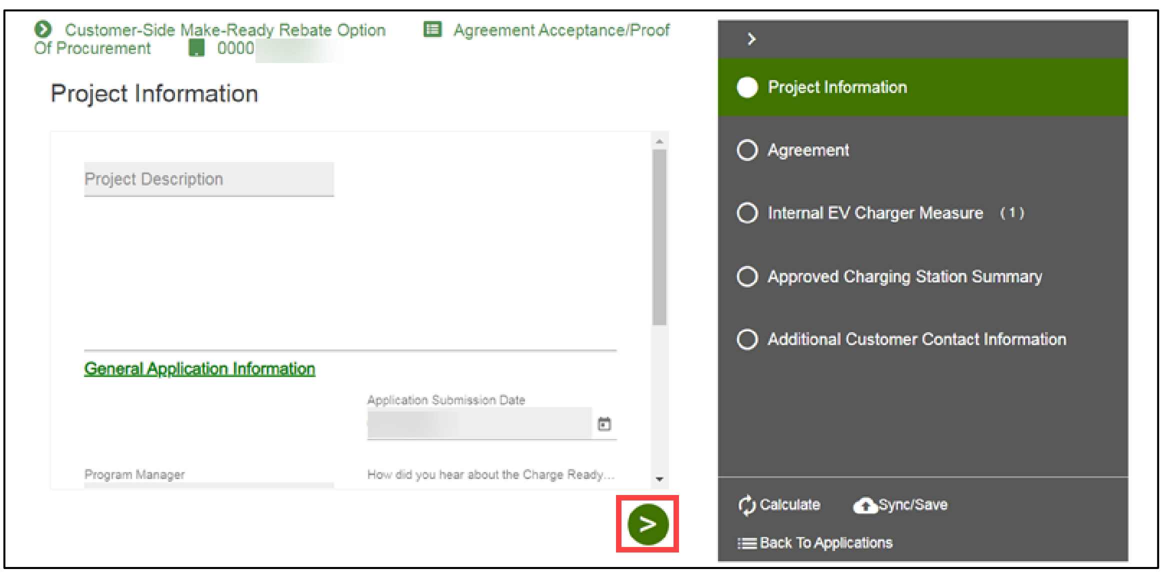
Once the Project Information page displays, you will complete all the required fields.

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

Project Information

3. Verify the **Project Information**.

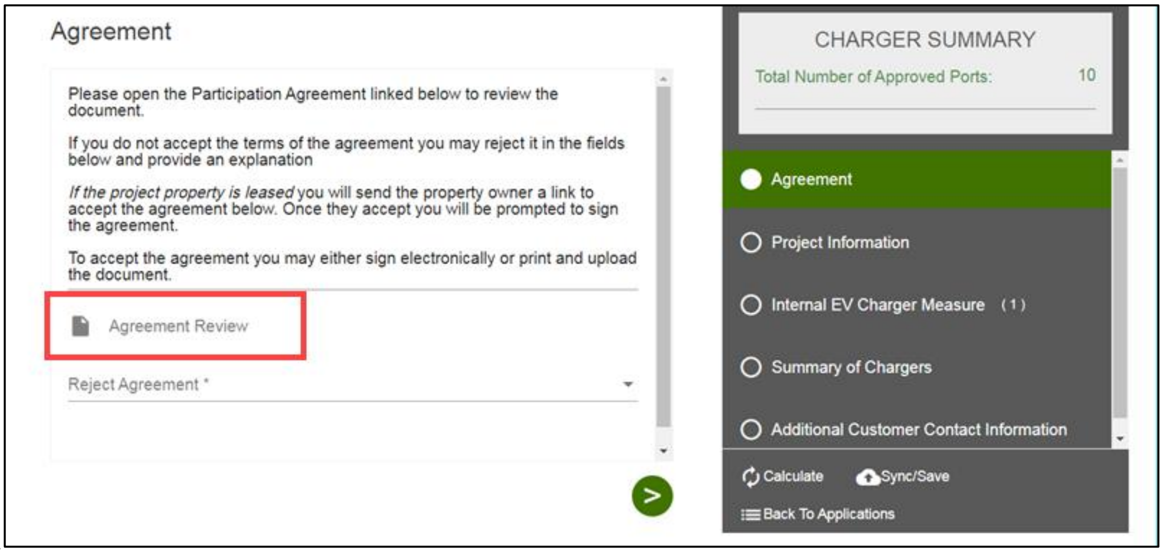
4. Click the  **Next** arrow.



The **Agreement** page displays.

Agreement

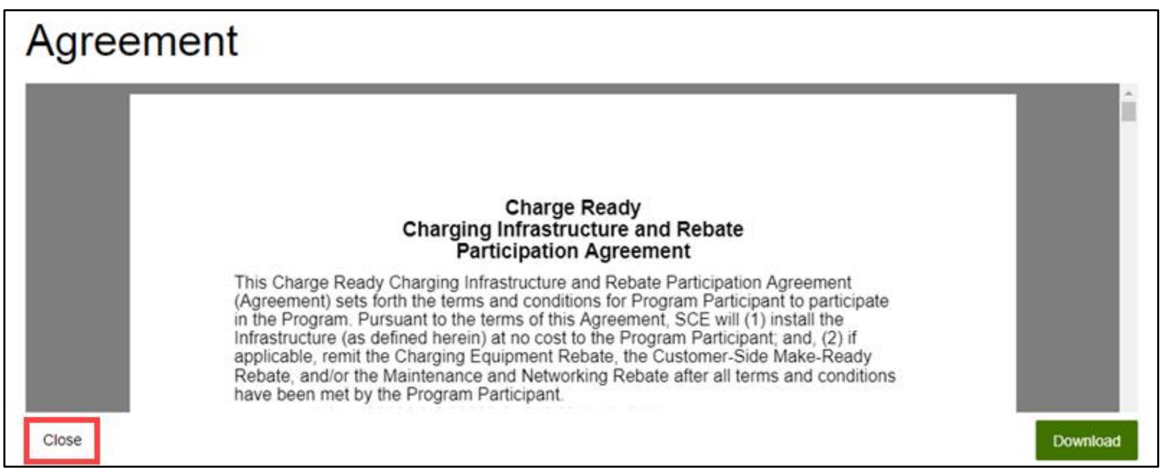
5. Select **Agreement Review**.



An **Agreement** window displays.

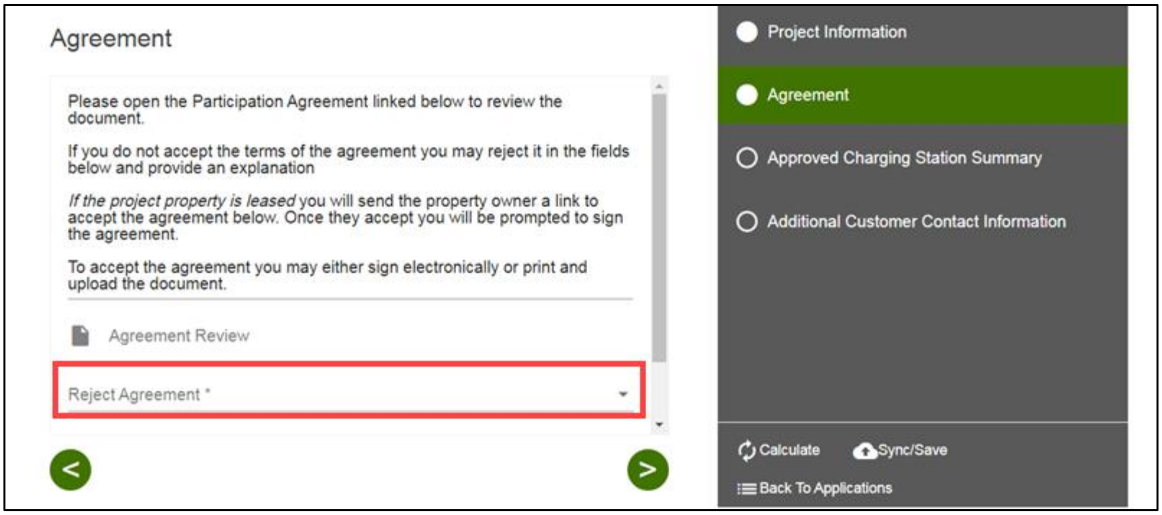
6. Review the agreement.

7. Select **Close**.



The **Agreement** page displays.

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

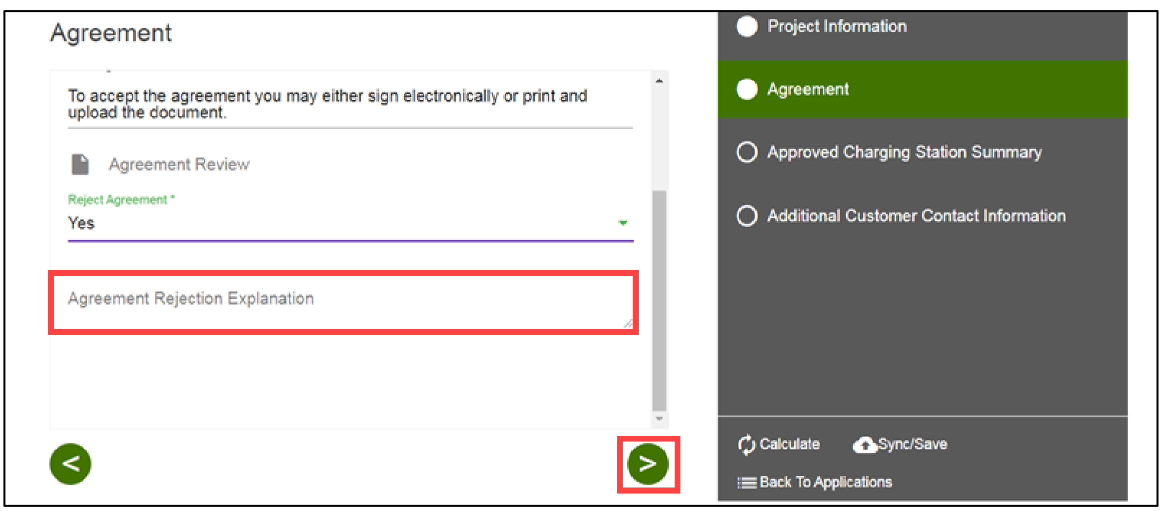


Reject Agreement is Yes

If Reject Agreement is Yes, follow the steps below:

9. Enter an explanation.

10. Click the > **Next** arrow.

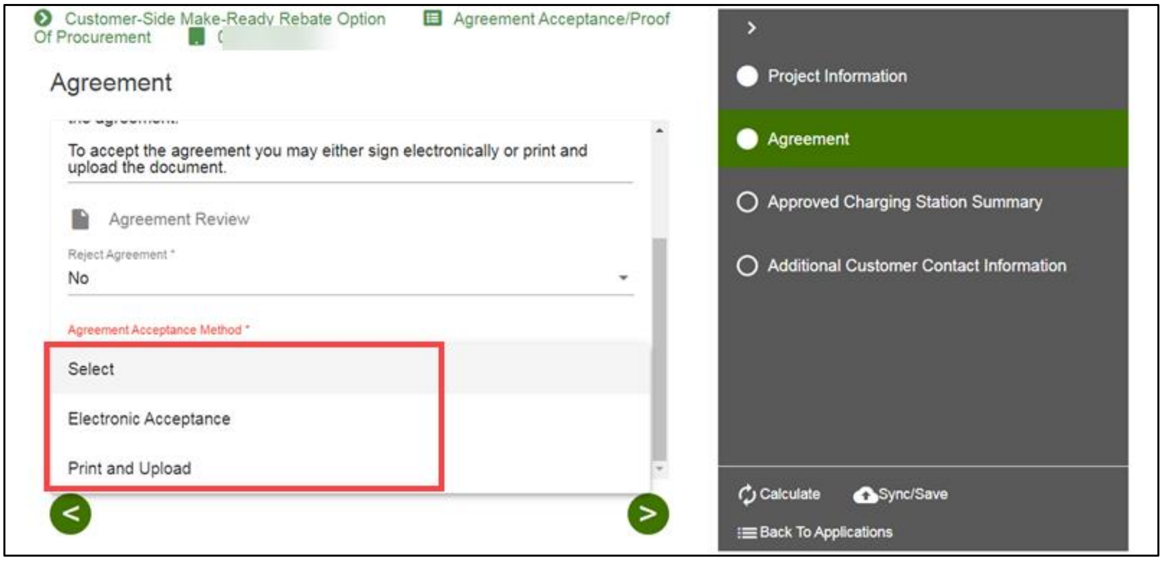


Reject Agreement is No

If Reject Agreement is No, follow the steps below:

11. Select the **Agreement Acceptance Method**.

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



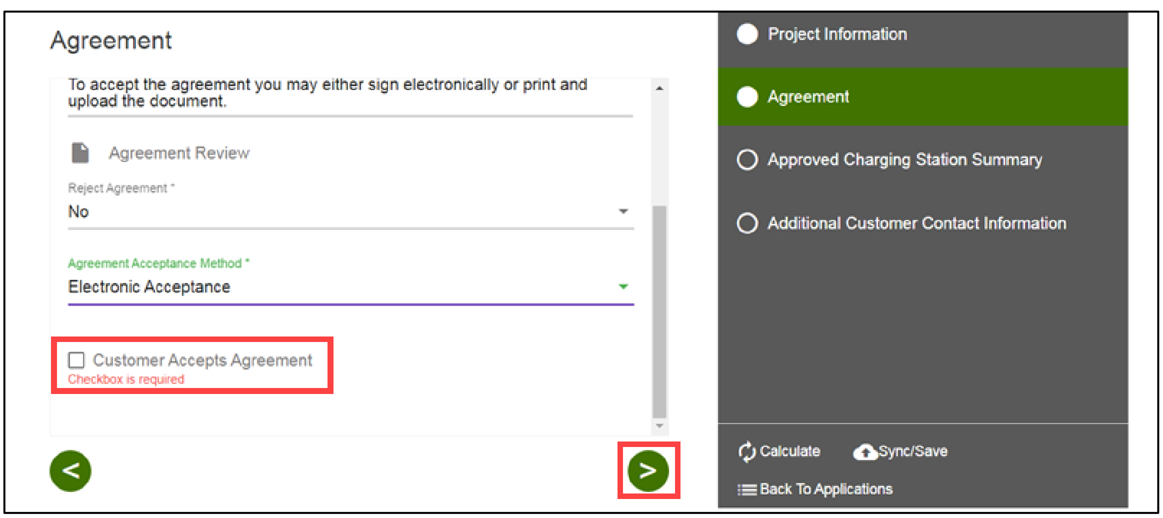
Electronic Acceptance

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:

12. Select the checkboxes under Customer Accepts Agreement.

13. Click the > **Next** arrow.



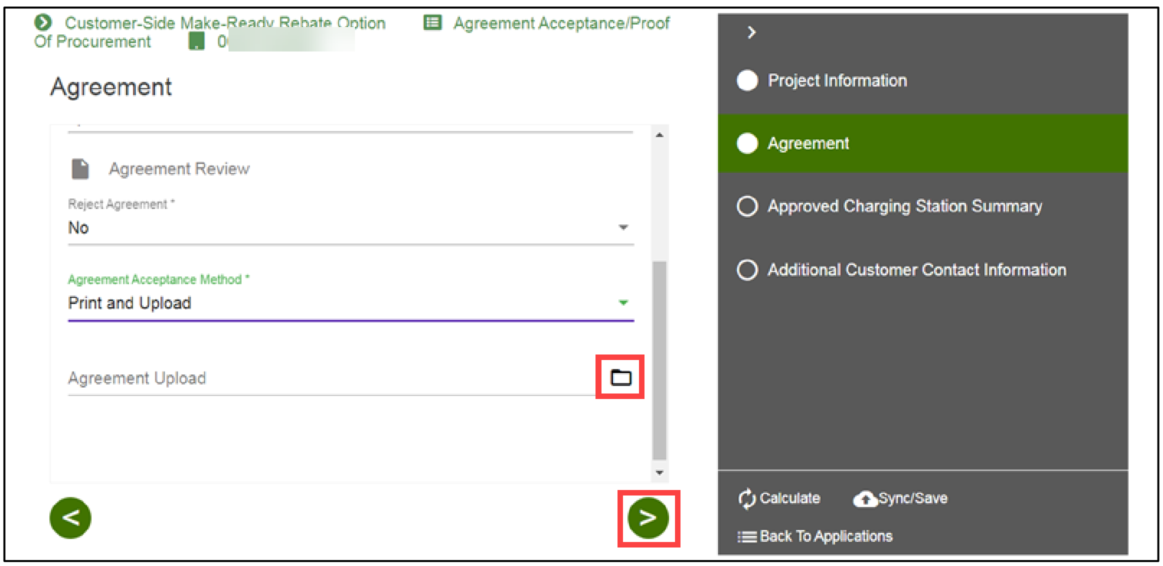
Note: If the Agreement requires a signature from the Property Owner, you will be prompted to send a link for their signature.

Print and Upload

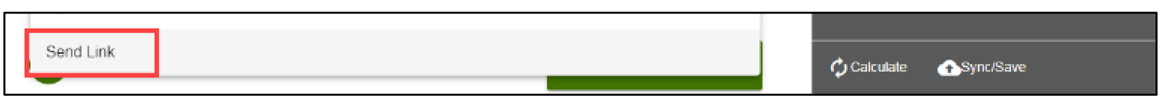
If the Agreement Acceptance Method is Print and Upload, follow the steps below:

14. Upload a file under Agreement Upload.

15. Click the **Next** arrow.



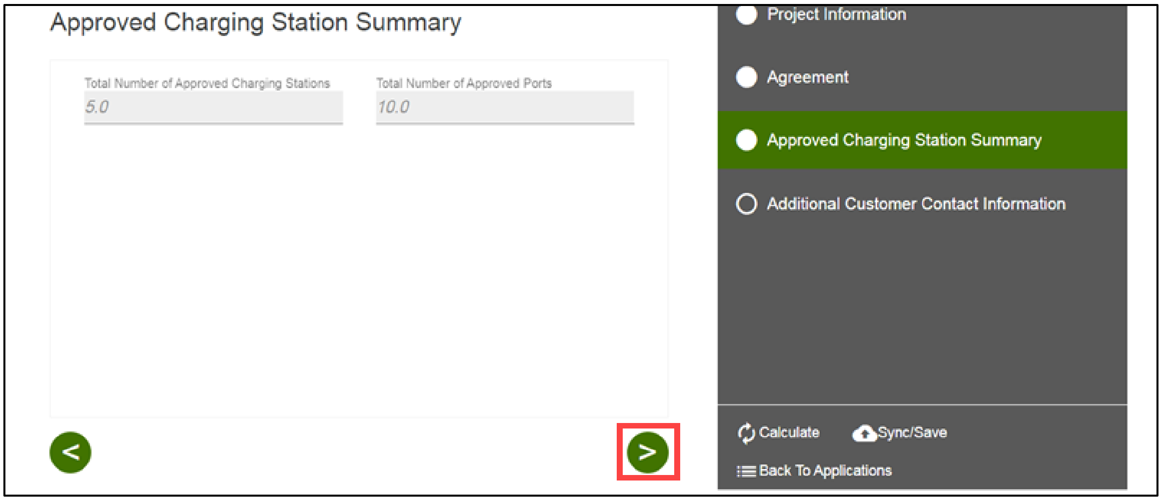
Note: If the Agreement requires a signature from the Property Owner, you will be prompted to send a link for their signature.



Approved Charging Station Summary

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

17. Click the **Next** arrow.



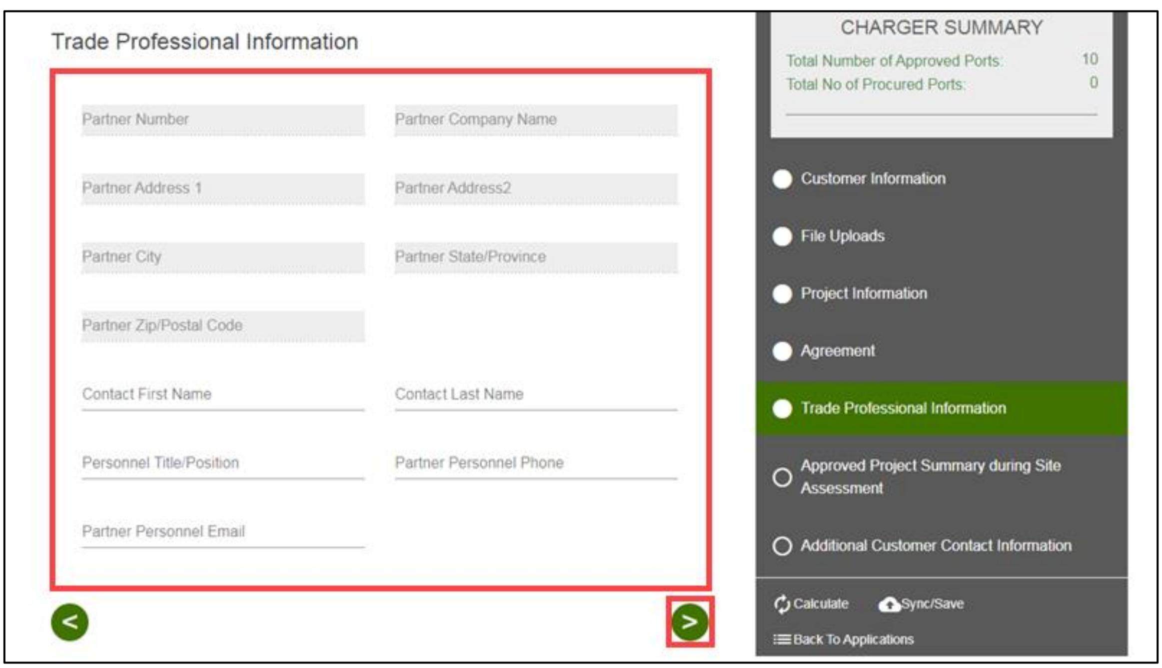
The **Additional Customer Contact Information** page displays.

Trade Professional Information (if applicable)

The Trade Professional Information page displays if the Trade Professional field is Yes.

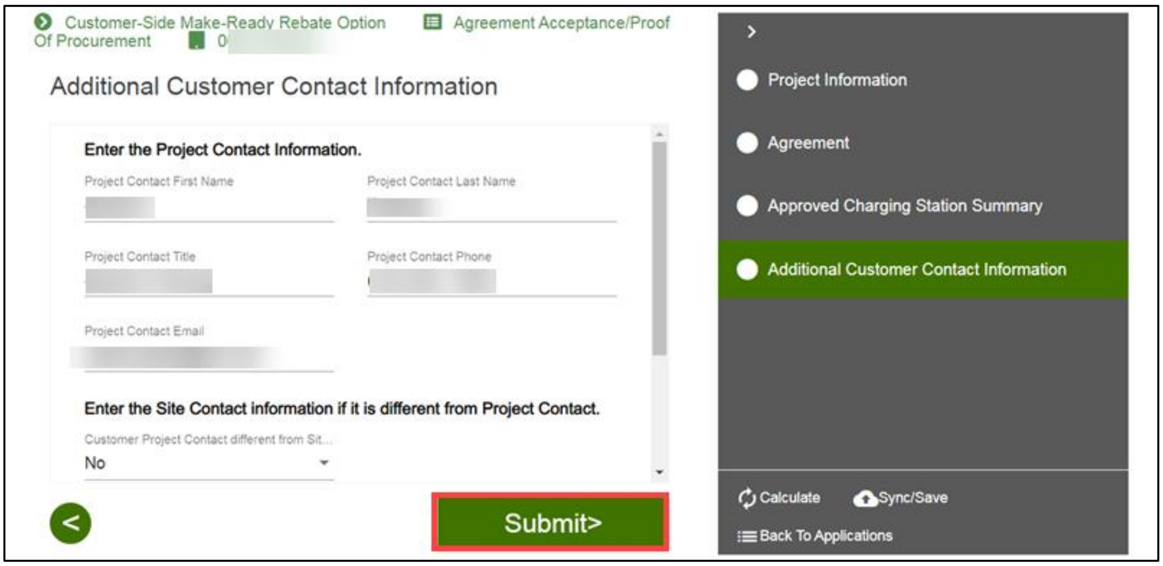
18. Verify the **Trade Professional Information**, if applicable.

19. Click the **Next** arrow.



Additional Customer Contact Information

20. Verify the **Customer Contact Information**.
21. Update as needed.
22. Select **Submit**.

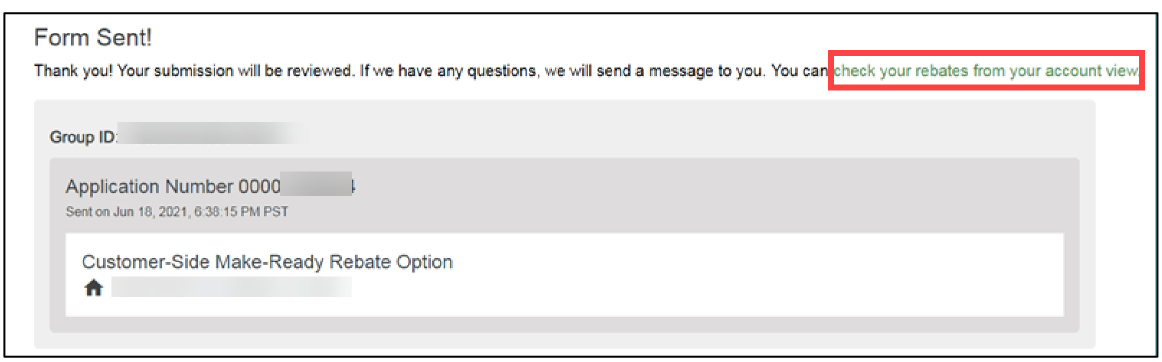


The **Form Sent** page displays.

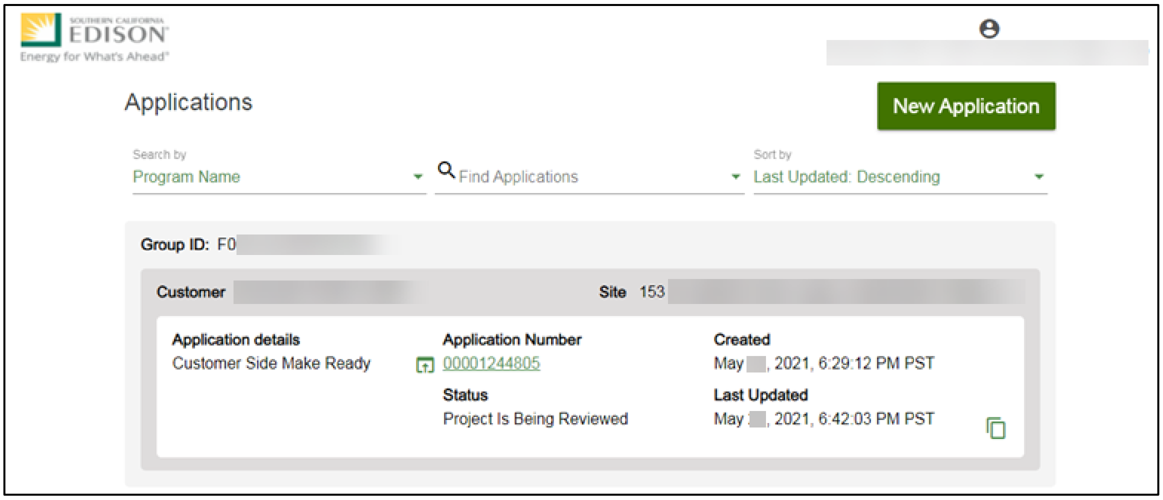
Form Sent!

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

23. Select check your rebates from your account view.



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.

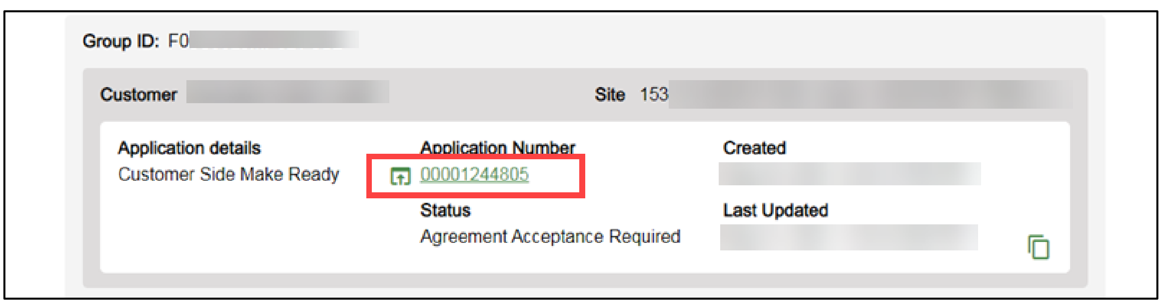
Once an Agreement Acceptance is complete, SCE reviews the Proof of Procurement.

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

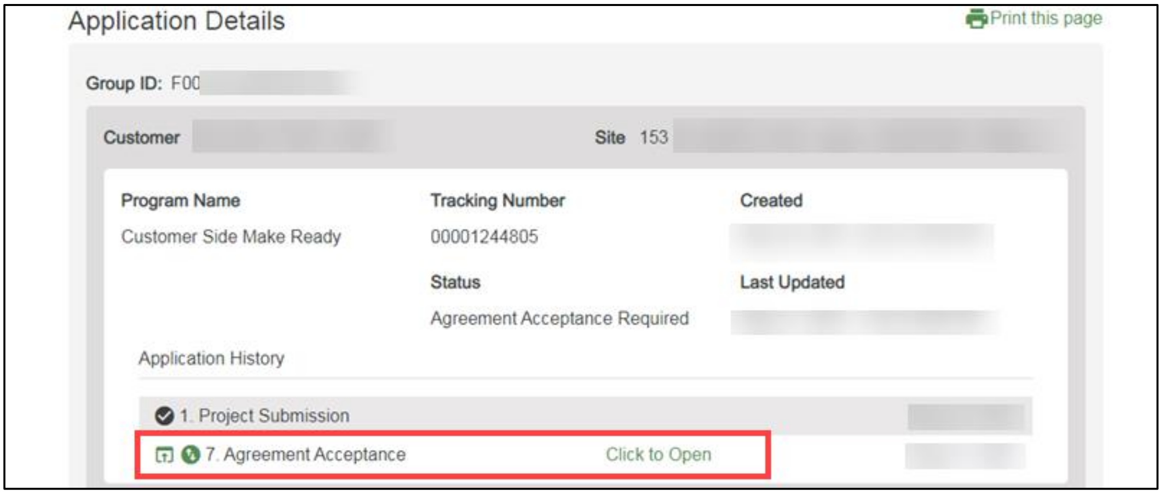
To complete the Agreement Acceptance/Proof of Procurement, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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

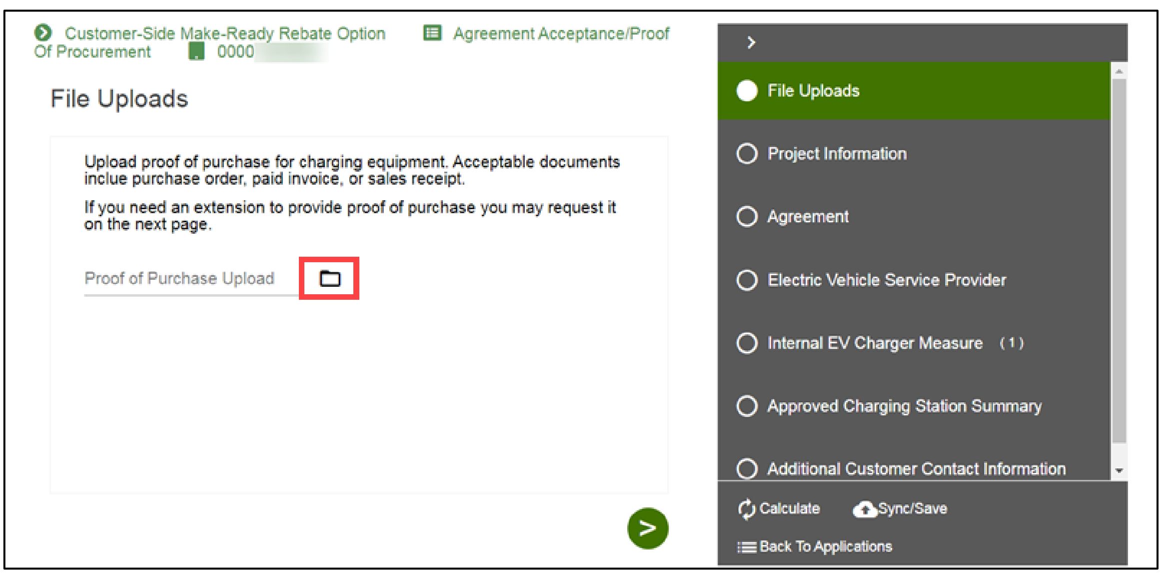


The **File Uploads** page displays.

Once the File Uploads page displays, you will complete all the required fields. The topics below covers how to complete each section of the Agreement Acceptance/Proof of Procurement form.

File Uploads

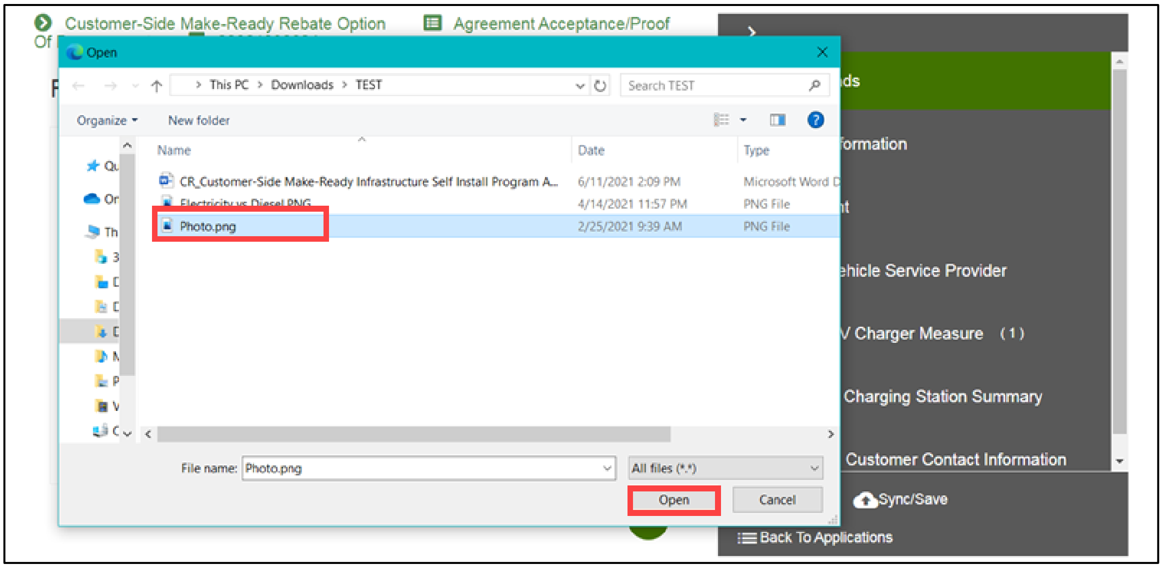
3. Select the **folder** icon.



The **Open** window displays.

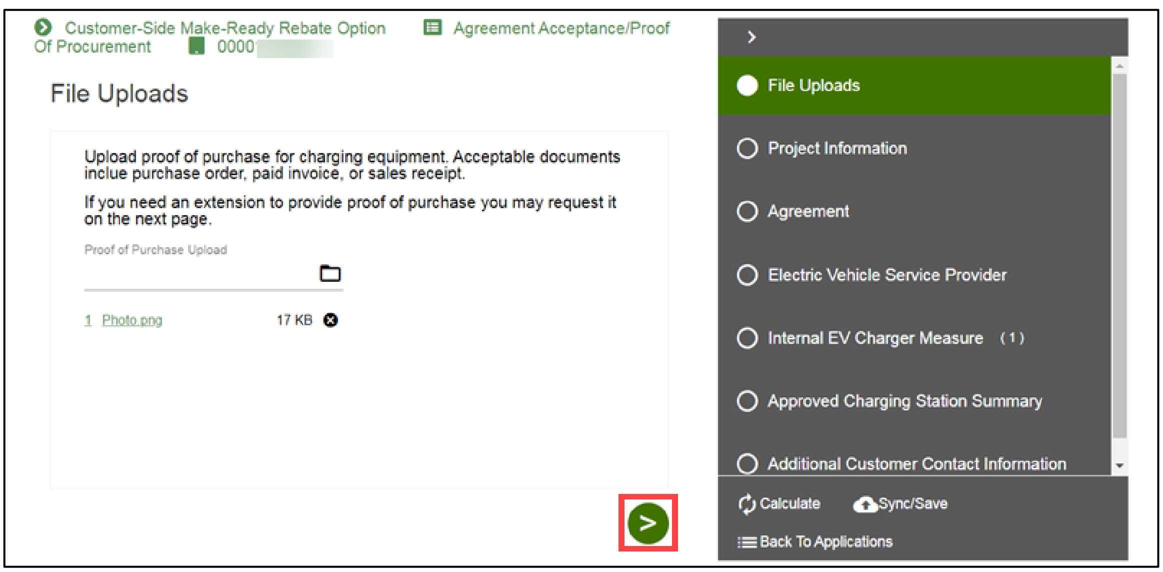
4. Select the file.

5. Select **Open**.



The **File Upload** page displays.

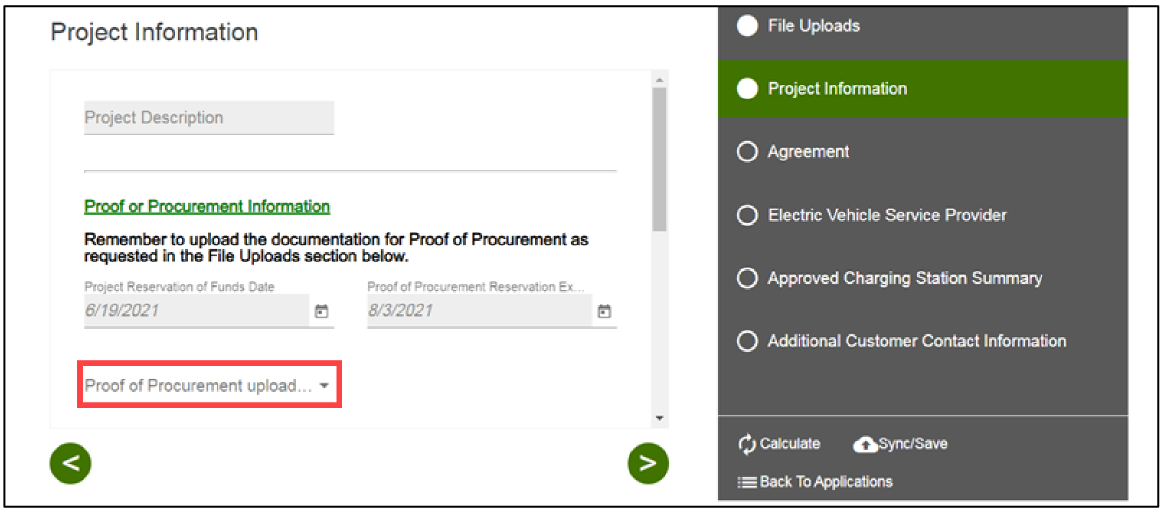
6. Click the **Next** arrow.



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.

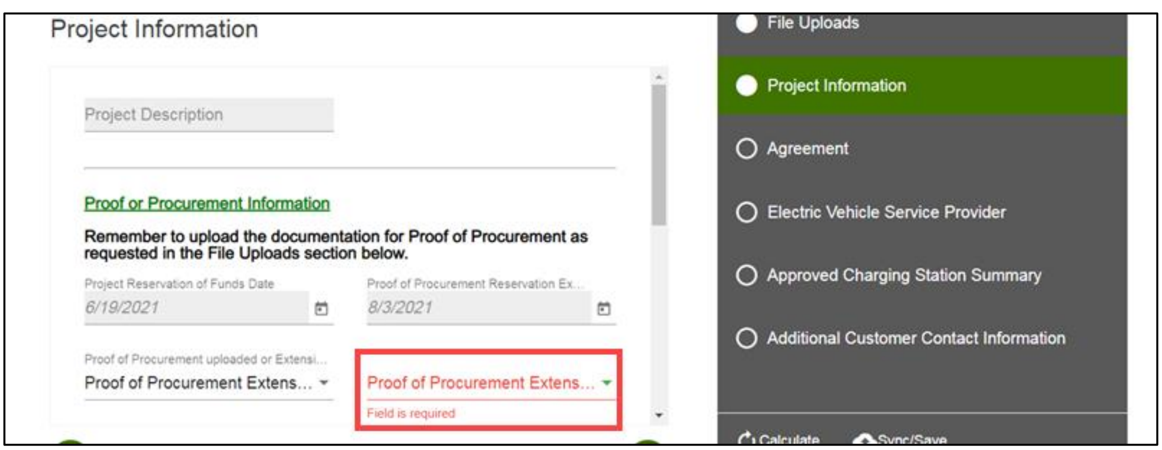


The **Installer Information** page displays.

Proof of Procurement Extension

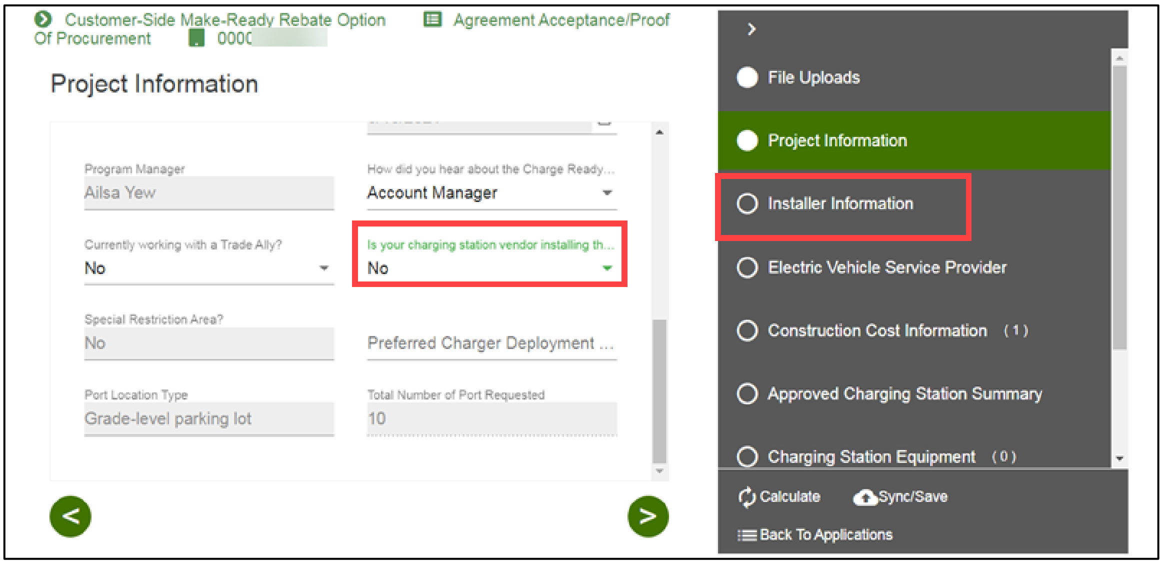
If an extension is required, follow the steps below:

11. Enter an explanation.



Is your charging station vendor installing the equipment?

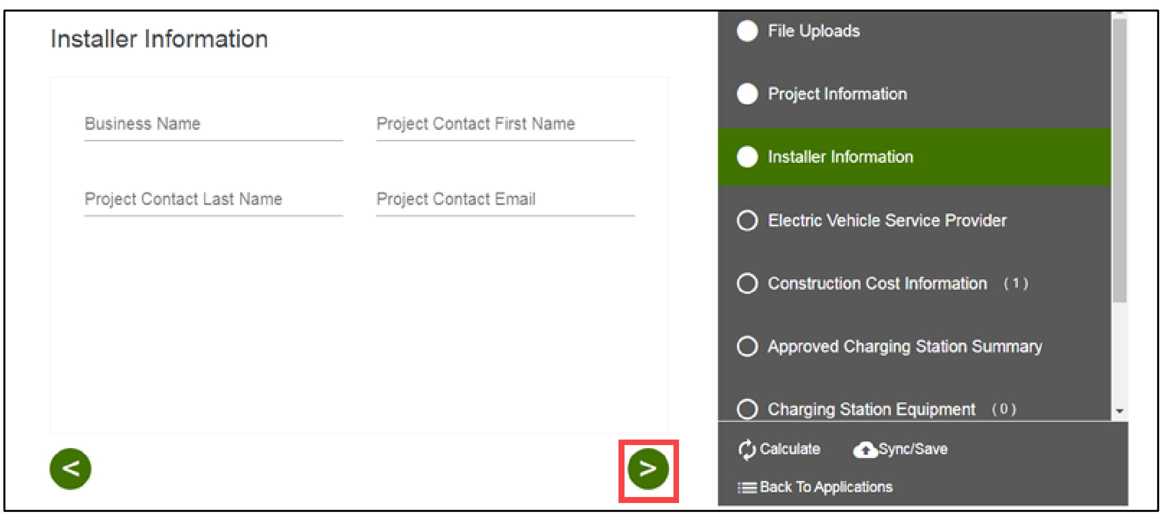
If the charging station vendor is different from the installer, the Installer Information page displays.



Installer Information

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

13. Click the **Next** arrow.

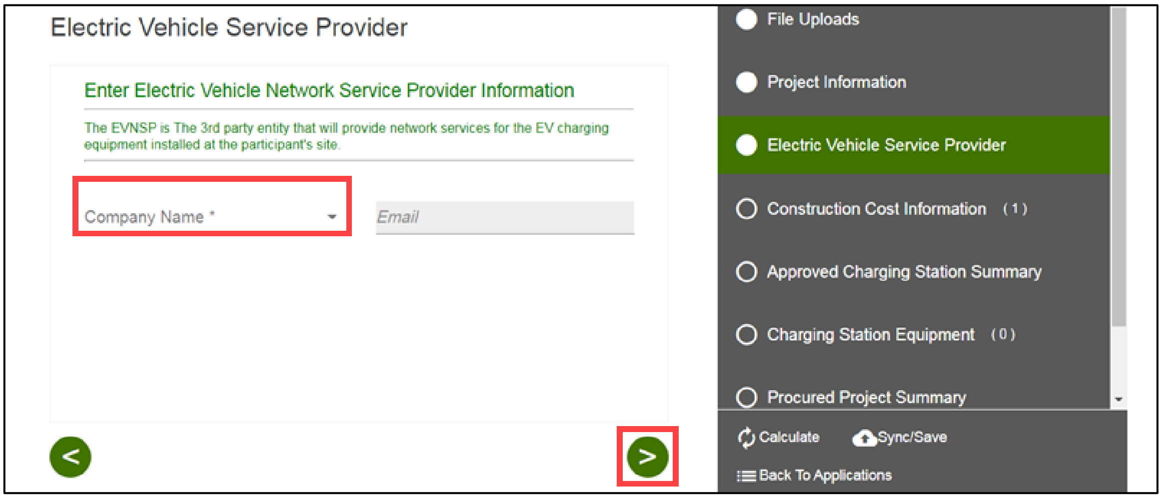


The **Electric Vehicle Service Provider (EVSP)** page displays.

Electric Vehicle Service Provider

14. Enter the **Company Name**.

15. Click the > **Next** arrow.

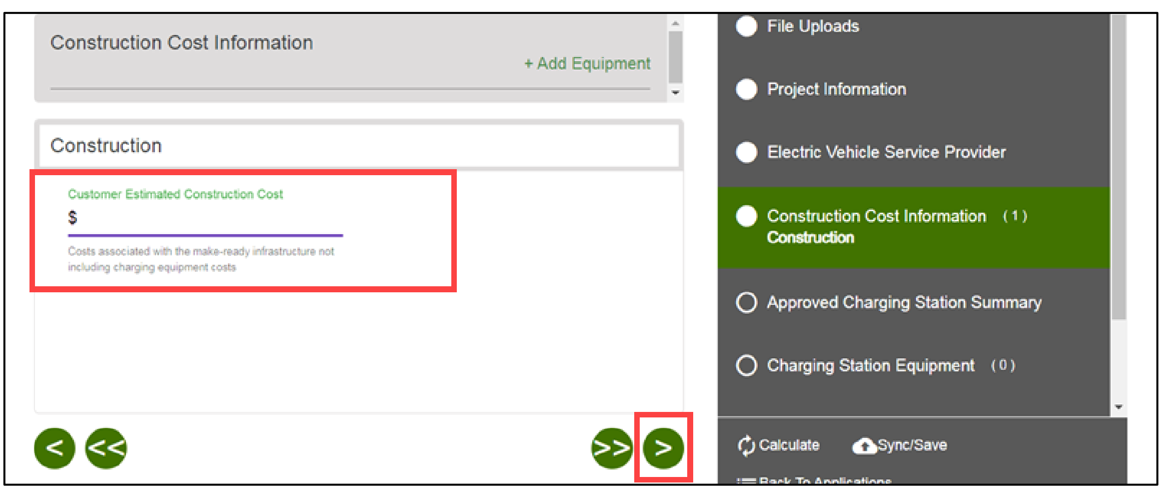


The **Construction Cost Information** page displays.

Construction Cost Information

16. Enter the **Customer Estimated Construction Cost**.

17. Click the > **Next** arrow.

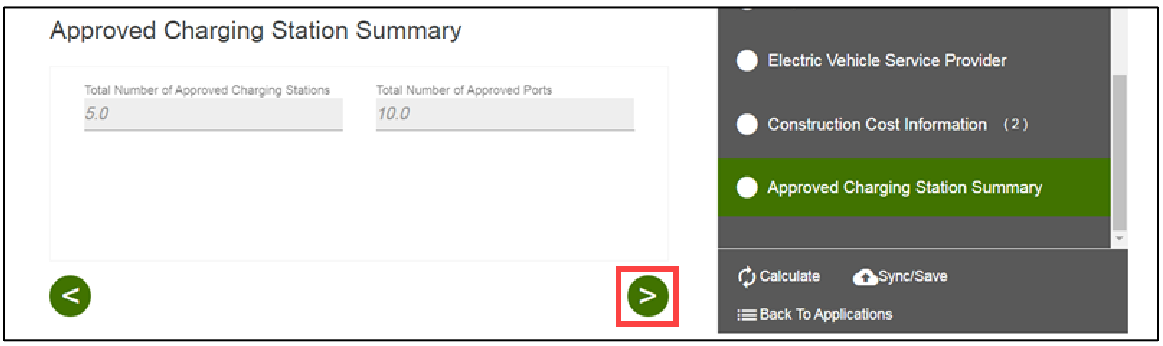


The **Approved Charging Station Summary** page displays.

Approved Charging Station Summary

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

19. Click the **Next** arrow.

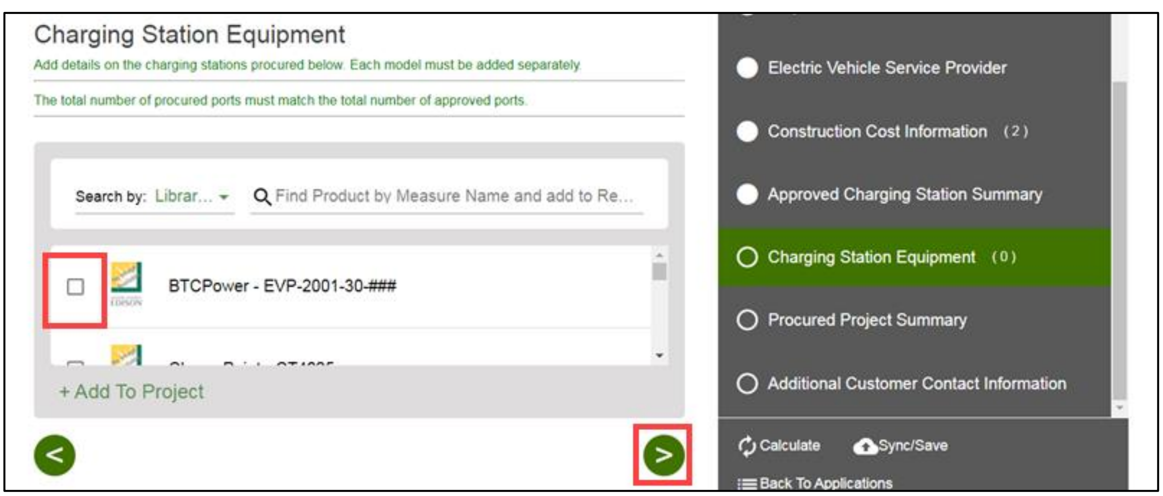


The **Charging Station Equipment** page displays.

Charging Station Equipment

20. Select the checkbox next to the equipment.

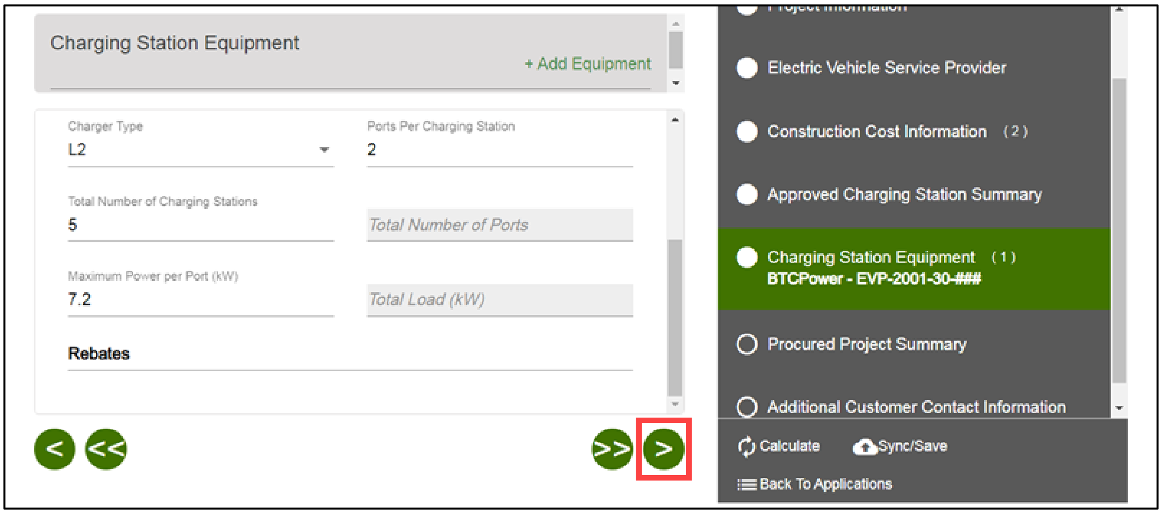
21. Click the **Next** arrow.



Additional fields display.

22. Enter the required information.

23. Click the **Next** arrow.

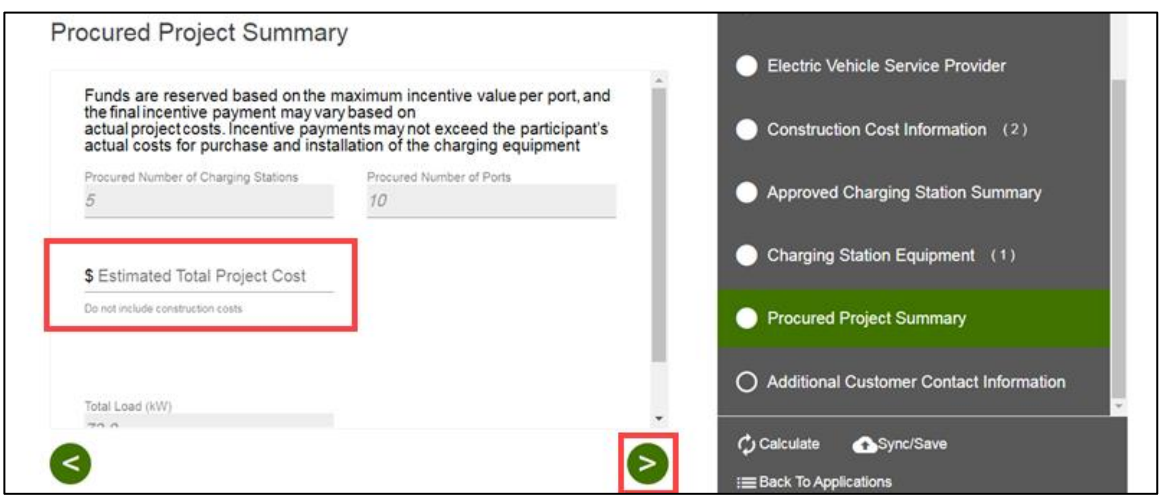


The **Procured Project Summary** page displays.

Procured Project Summary

24. Enter the **Estimated Total Project Cost**.

25. Click the **Next** arrow.



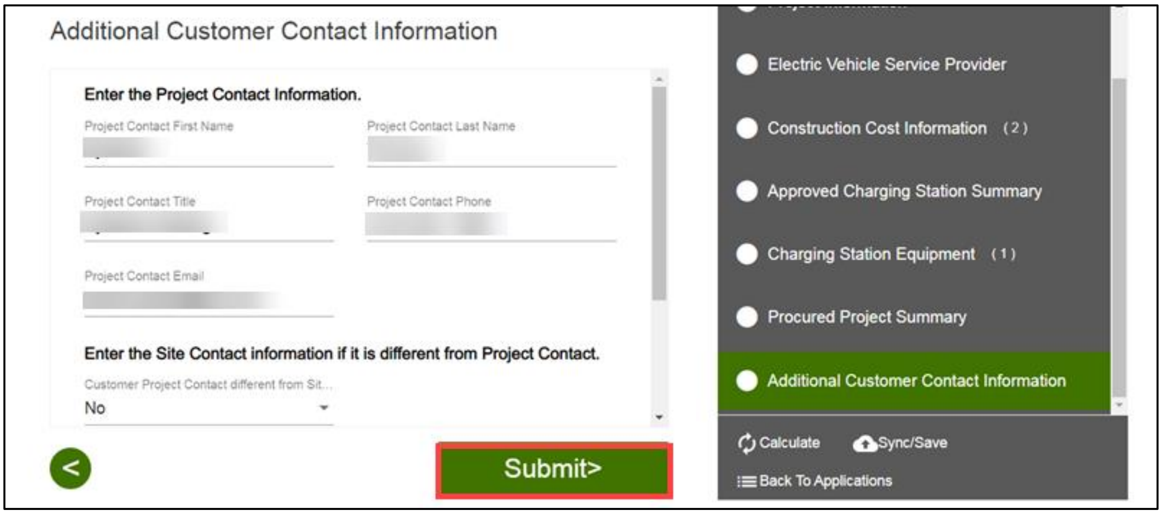
The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

27. Update as needed.

28. Select **Submit**.

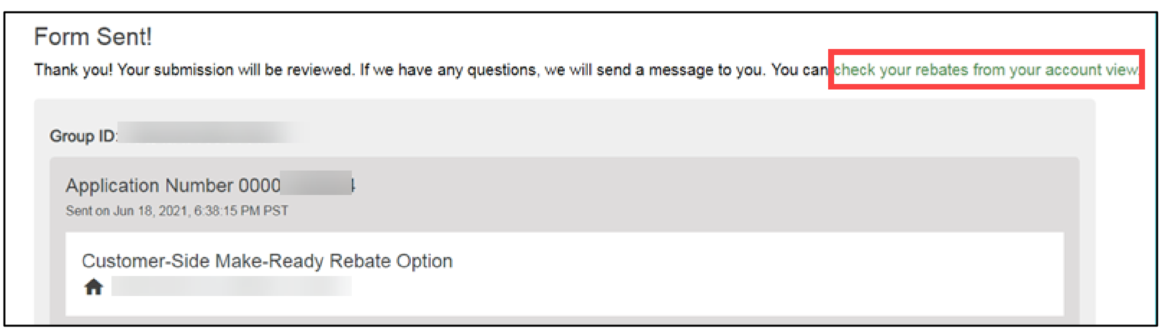


The **Form Sent** page displays.

Form Sent!

Once you submit the Agreement Acceptance/Proof of Procurement, 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.

Site Plan

The Site Plan form is submitted by the Customer through the Charge Ready Application Portal. By completing this form, participants provide the plan of the project site.

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

- Specifies the overall site plan

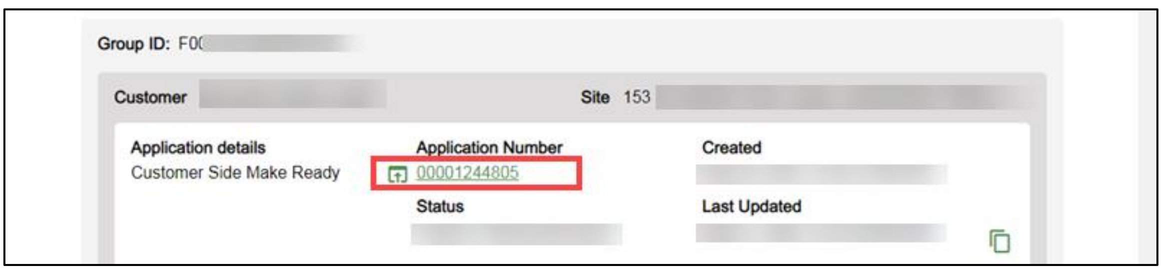
Once a Site Plan is complete, SCE reviews the site plan.

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

Completing the Site Plan Form

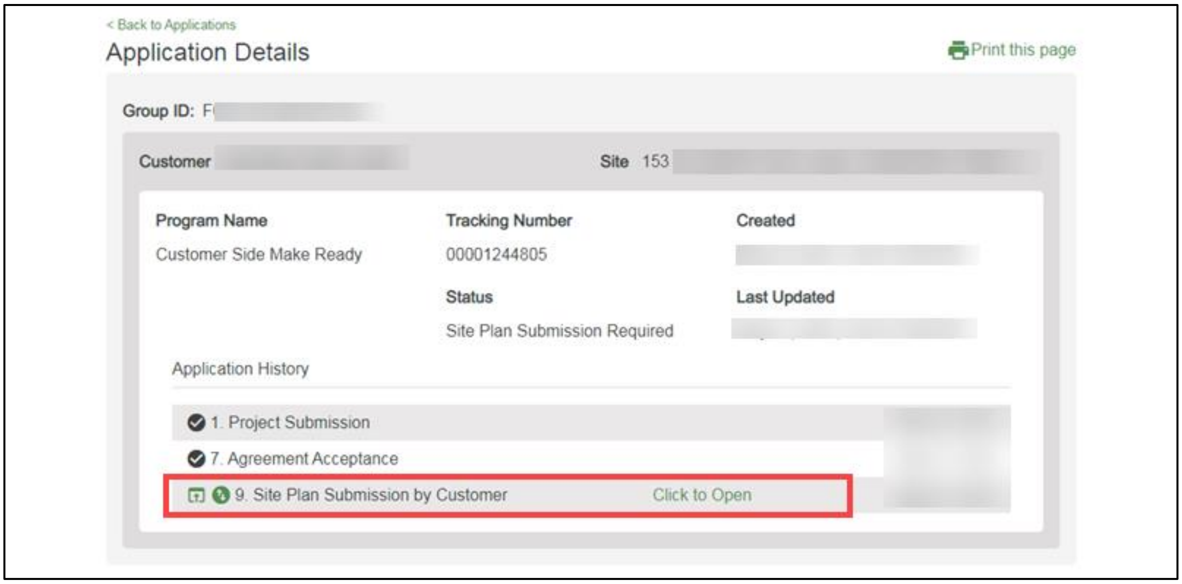
To complete the Site Plan, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

2. Select **Click to Open** under 9. Site Plan Submission by Customer.



The **Customer Information** page displays.

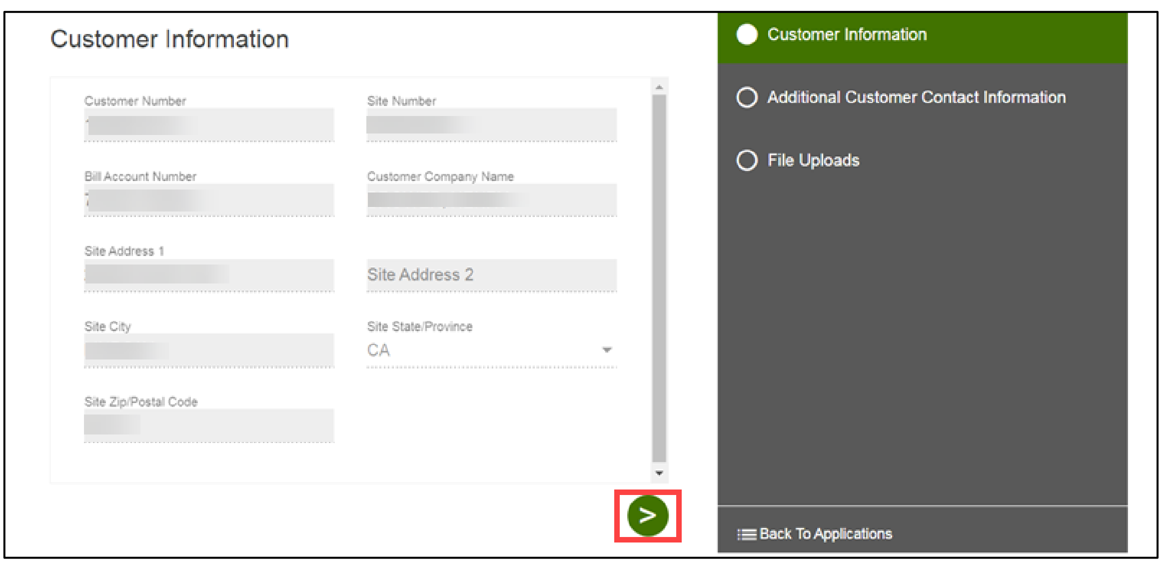
Once the Customer Information page displays, you will complete all the required fields.

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

Customer Information

3. Verify the **Customer Information**.

4. Click the **>** **Next** arrow.

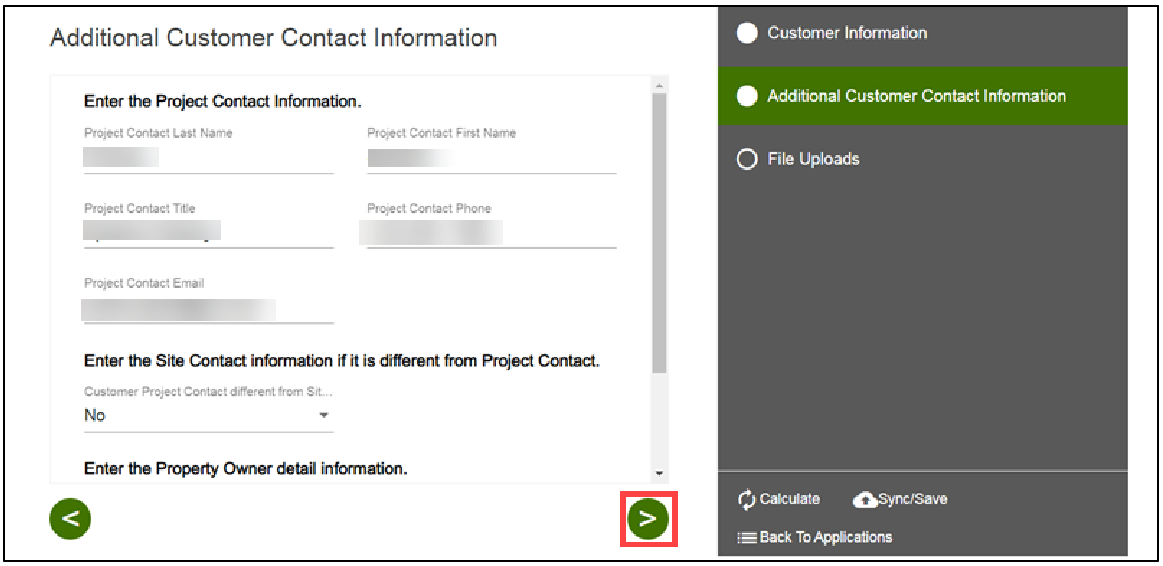


The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

6. Click the **Next** arrow.

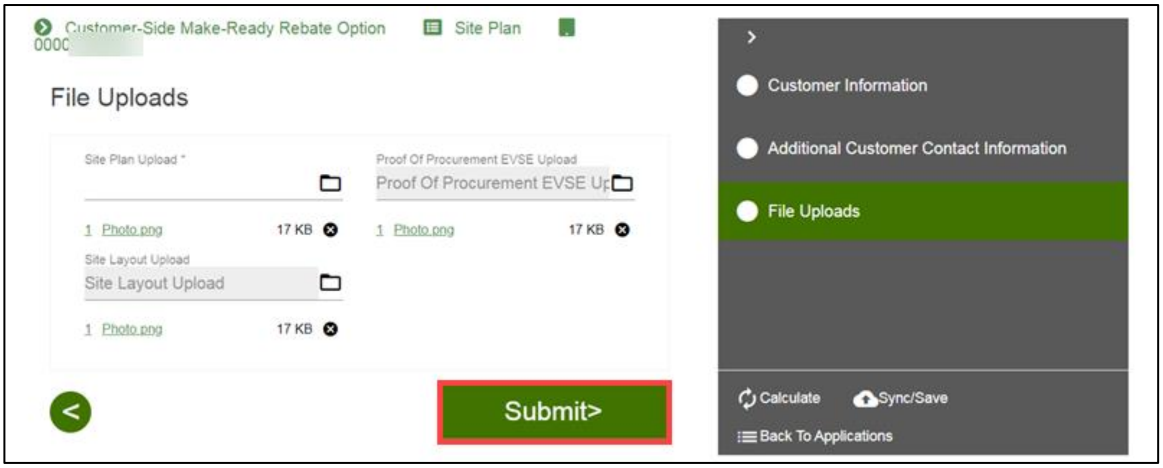


The **File Uploads** page displays.

File Uploads

7. Upload the **Site Plan**.

8. Select **Submit**.

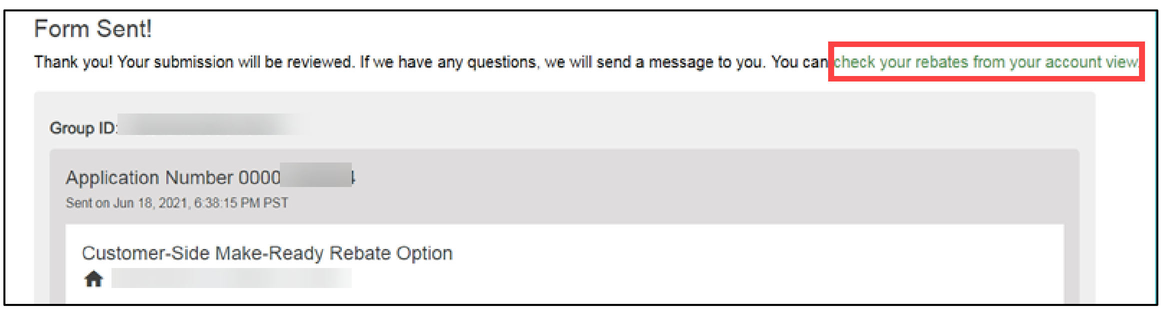


The **Form Sent** page displays.

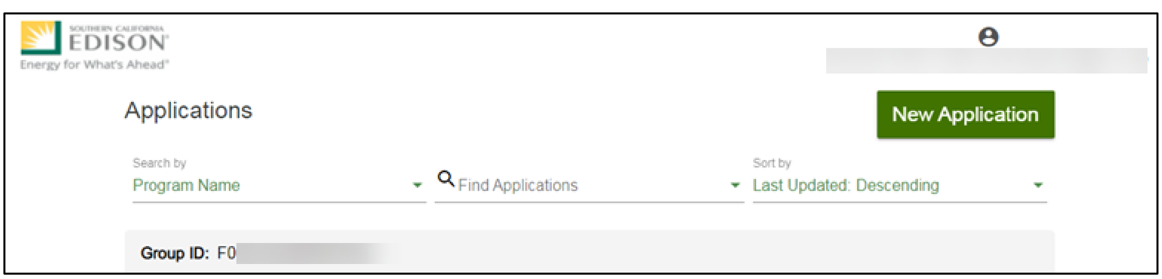
Form Sent!

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

9. Select check your rebates from your account view.



The **Applications** page displays.



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

Design Acceptance

The Design Acceptance form is submitted by the Customer through the Charge Ready Application Portal. By completing this form, participants agree to the design of the project site.

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

- Specifies the design of the site plan

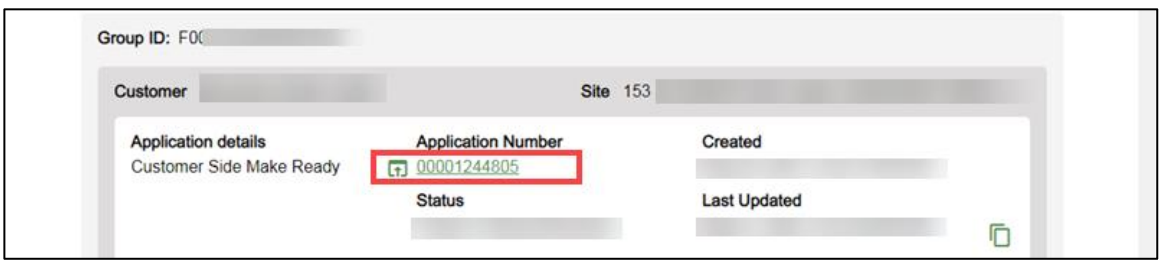
Once a Design Acceptance is complete, SCE begins work on project requirements.

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

Completing the Design Acceptance Form

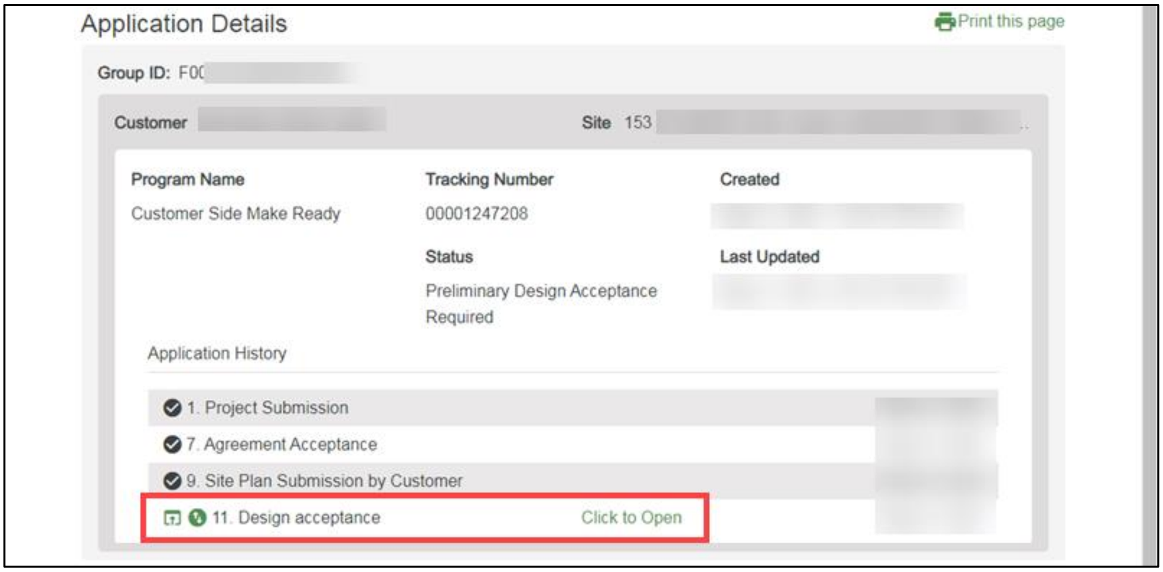
To complete the Design Acceptance, follow the steps below:

1. Select the **Application Number**.



   The **Application Details** page displays.

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



The **File Uploads** page displays.

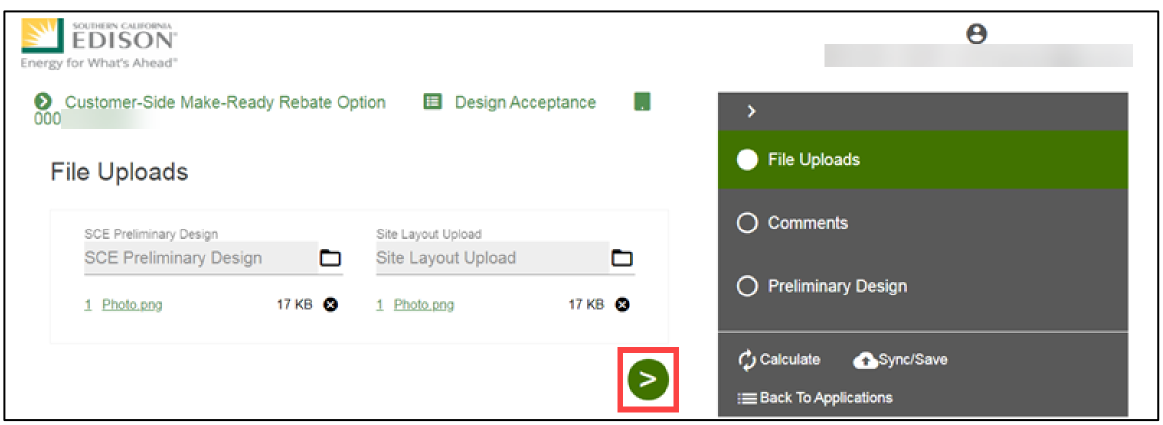
Once the File Uploads page displays, you will complete all the required fields.

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

File Uploads

3. Review the **File Uploads**.

4. Click the > **Next** arrow.

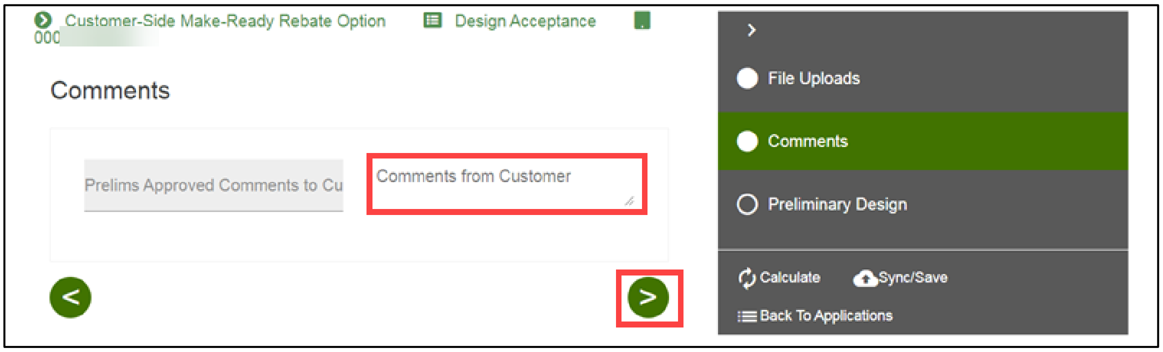


The **Comments** page displays.

Comments

5. Enter **Comments**, if applicable.

6. Click the **Next** arrow.



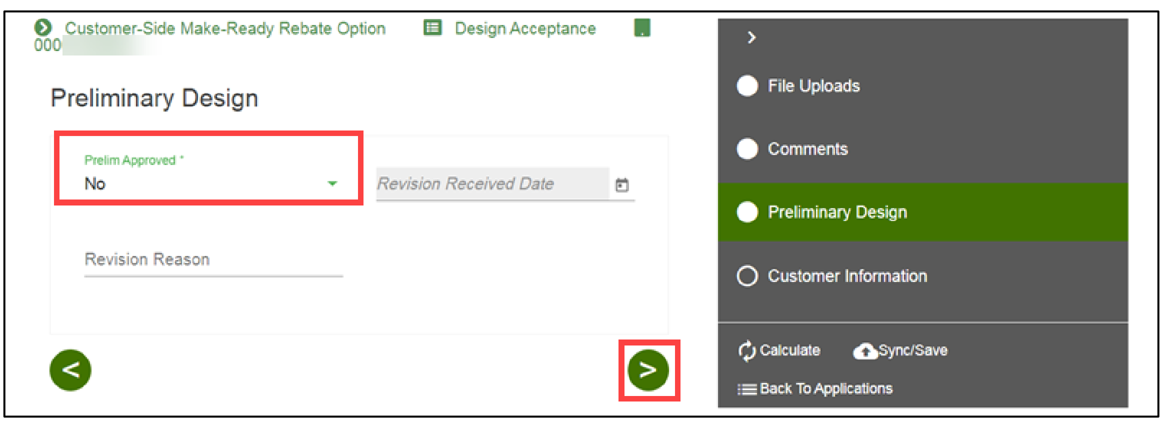
The **Preliminary Design** page displays.

Preliminary Design

7. Select **Yes** or **No** for Prelim Approved.

   Note: If the Prelim Approved is No, enter a reason.

8. Click the **Next** arrow.

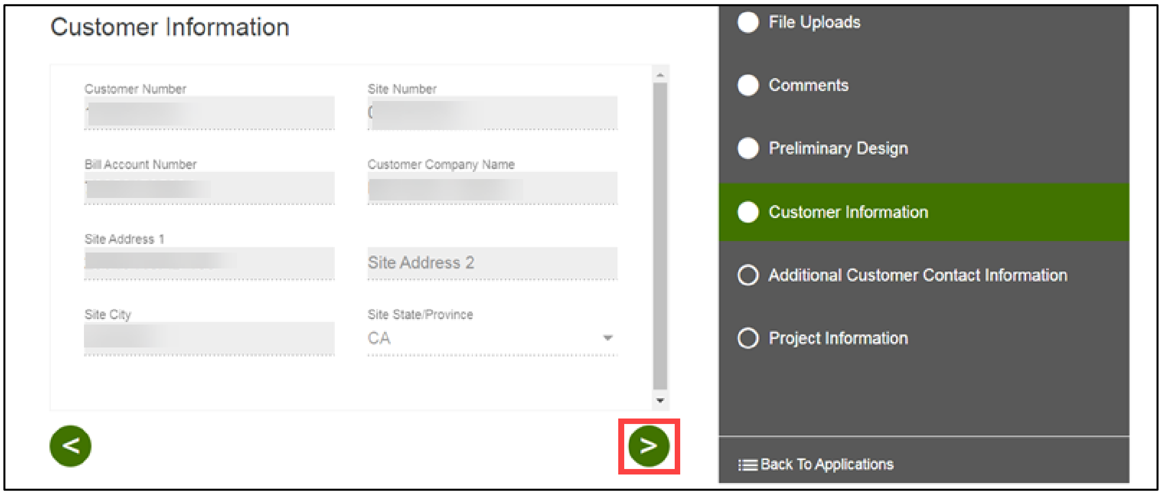


The **Customer Information** page displays.

Customer Information

9. Verify the **Customer Information**.

10. Click the **Next** arrow.

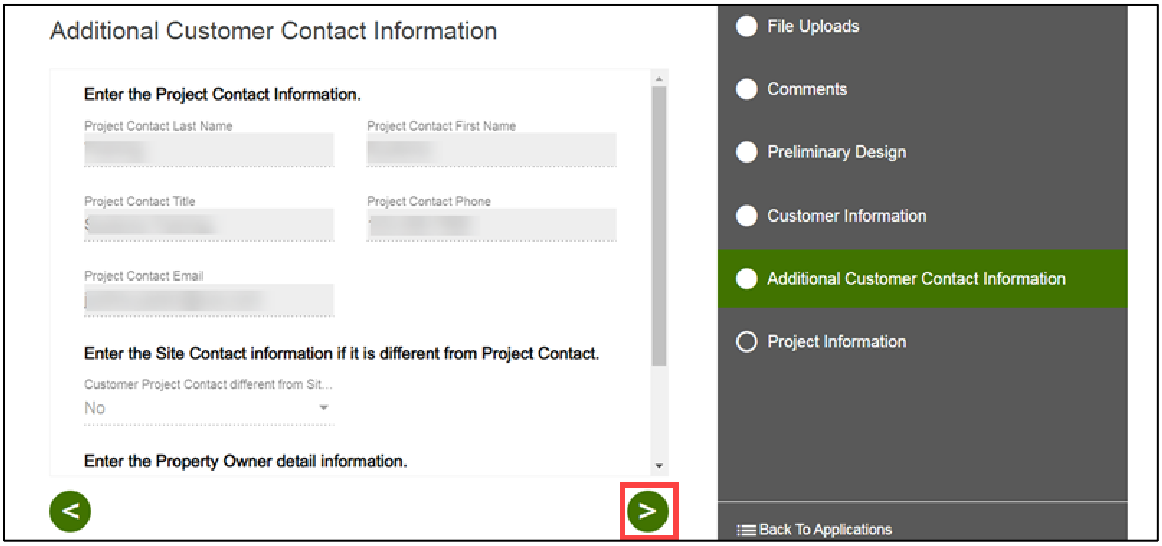


The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

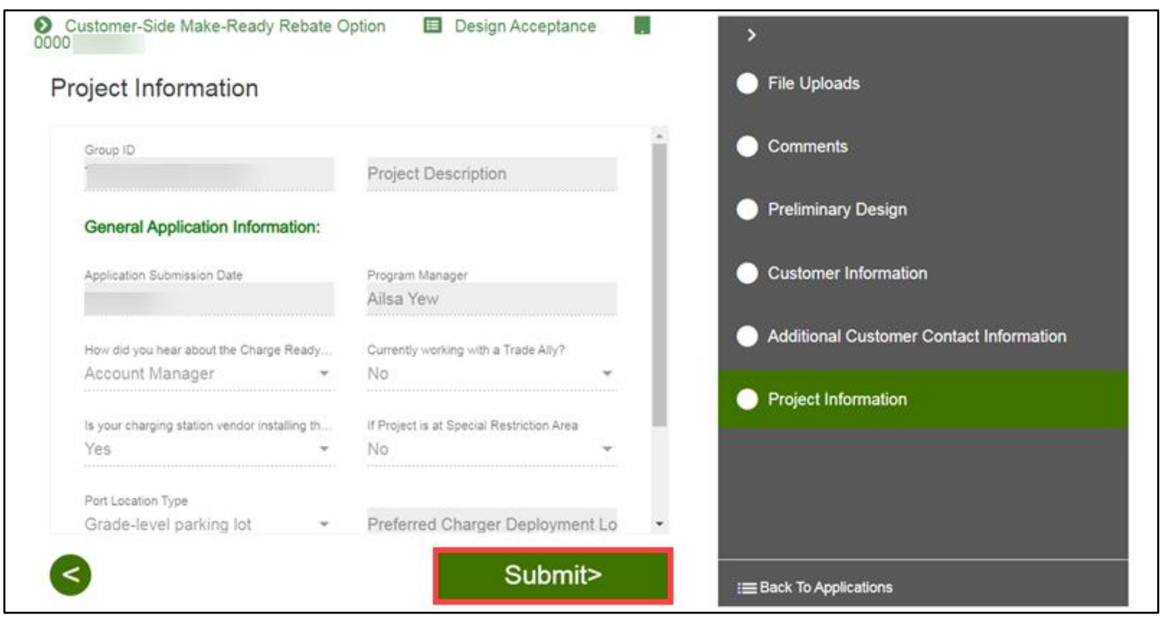
12. Click the **Next** arrow.



The **Project Information** page displays.

Project Information

13. Verify the **Project Information**.
14. Select **Submit**.

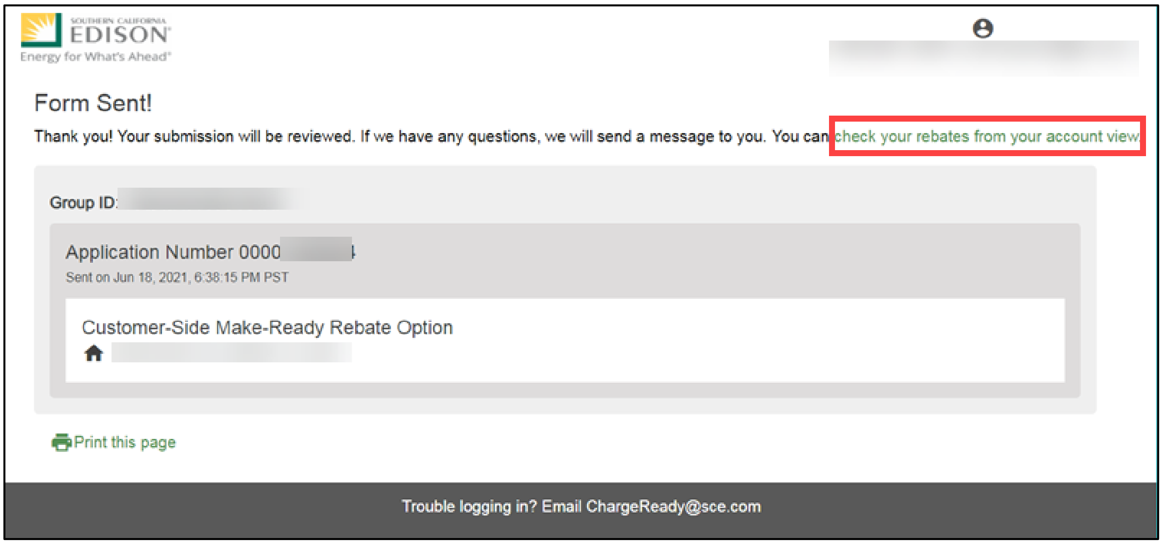


The **Form Sent** page displays.

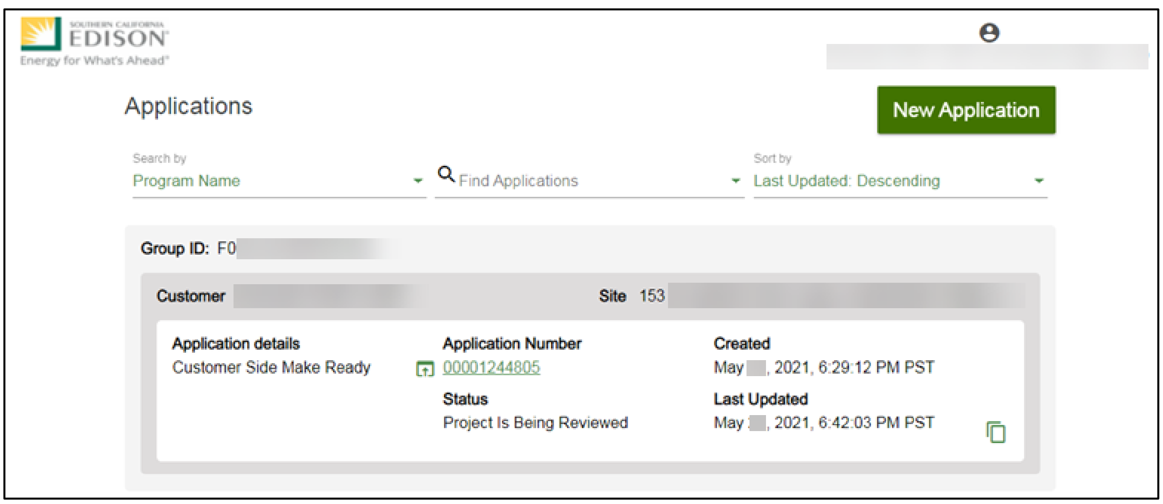
Form Sent!

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

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

Eligible participants submit 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

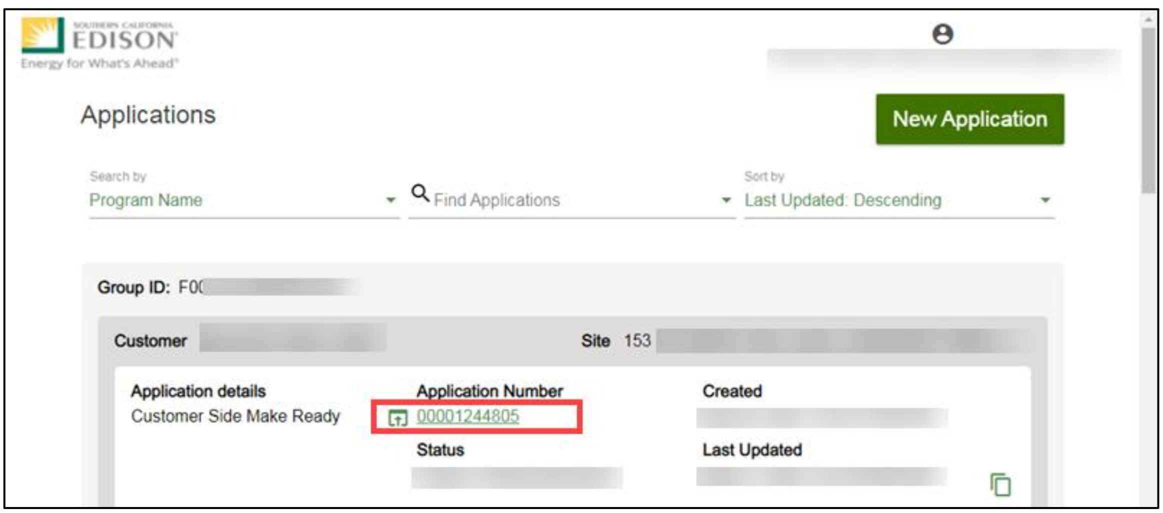
Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

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

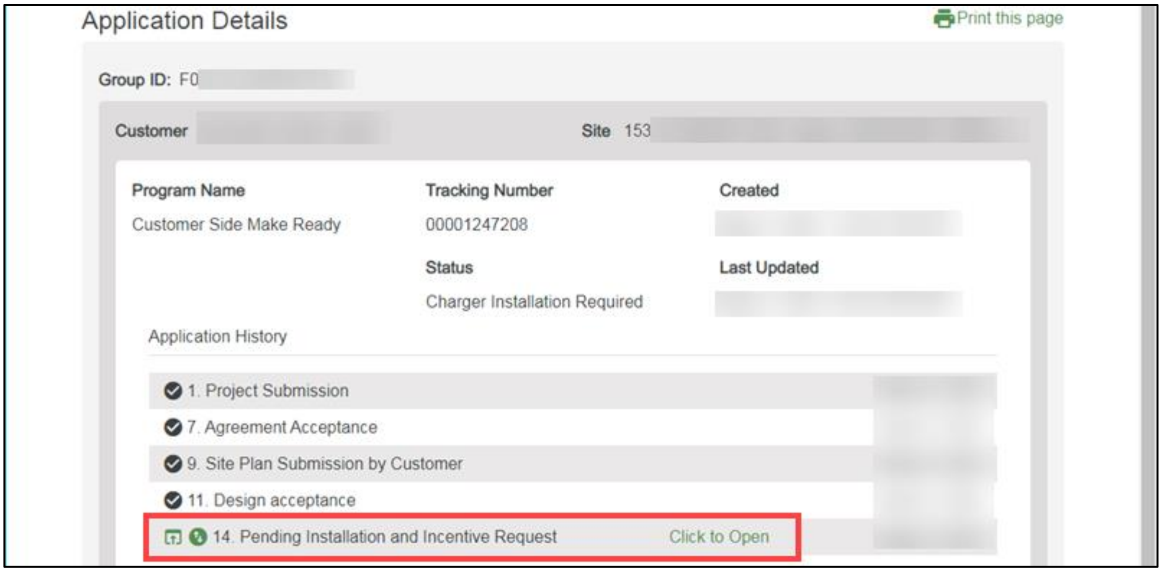
To complete the Pending Installation and Incentive Request form, follow the steps below.

1. Select the **Application Number**.



The **Application Details** page displays.

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

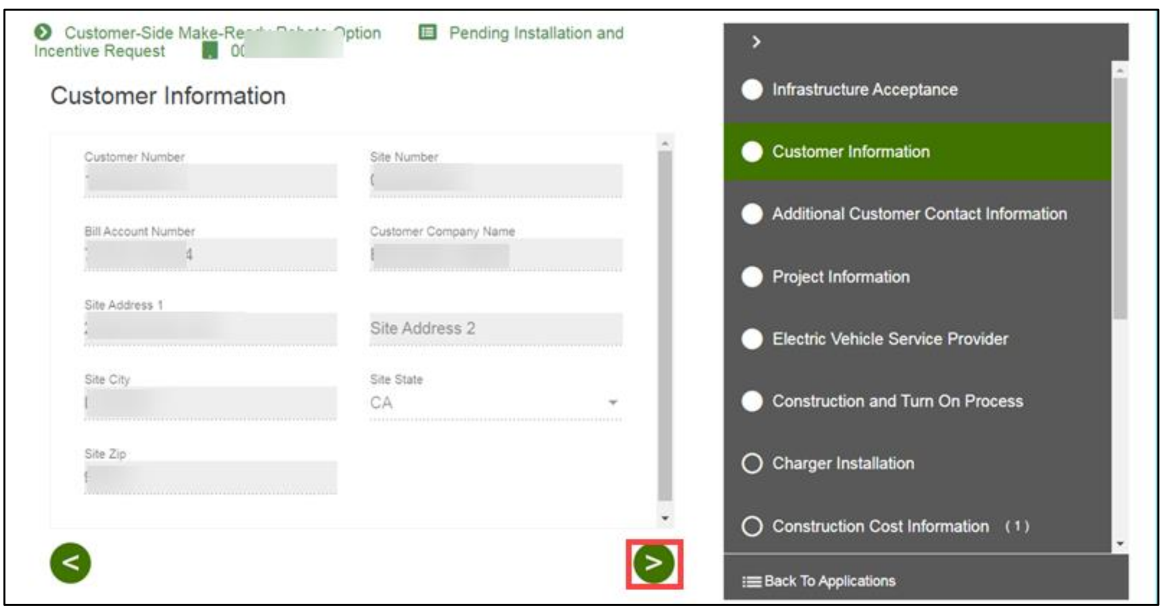


The **Customer Information** page displays.

Customer Information

3. Verify the **Customer Information**.

4. Click the **Next** arrow.

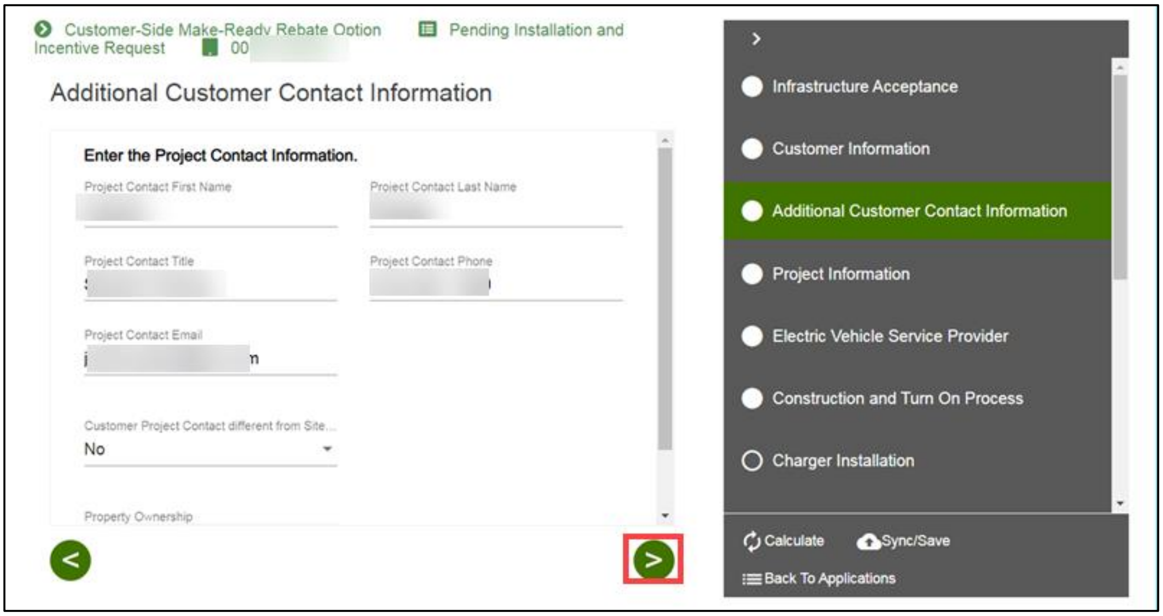


The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

6. Click the **Next** arrow.

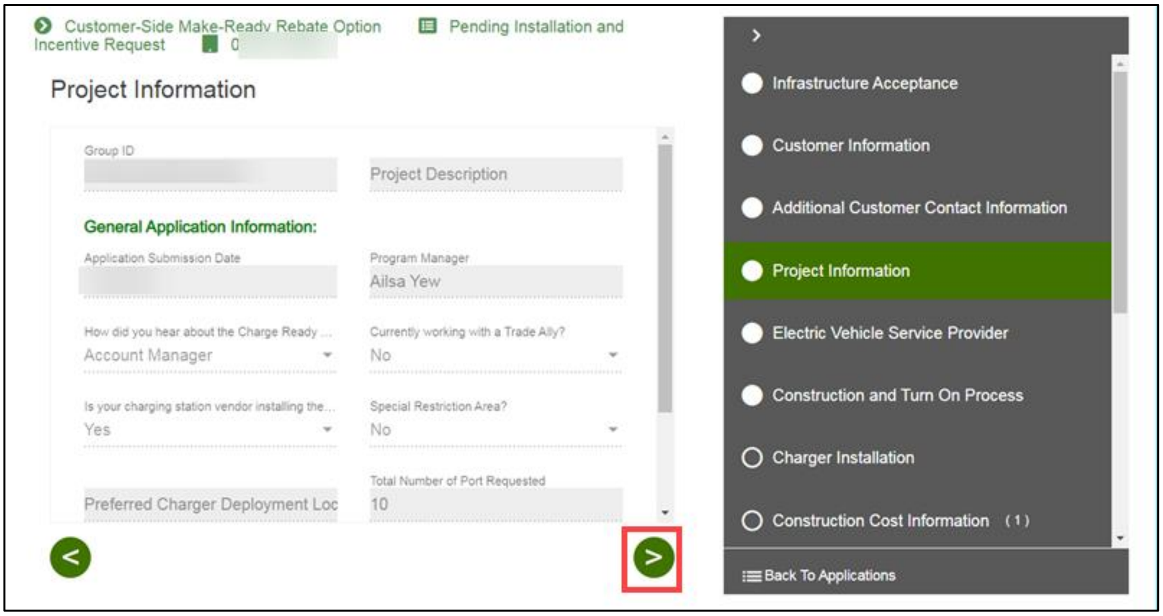


The **Project Information** page displays.

Project Information

7. Verify the **Project Information**.

8. Click the **Next** arrow.

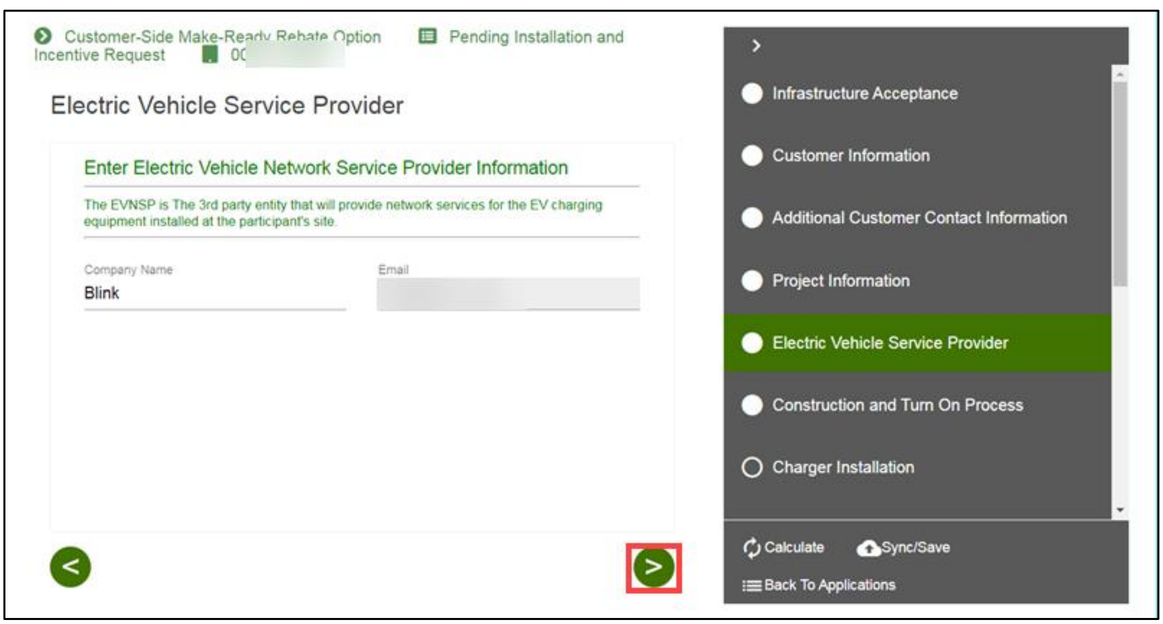


The **Electric Vehicle Service Provider** page displays.

Electric Vehicle Service Provider

9. Verify the **Electric Vehicle Service Provider Information**.

10. Click the **Next** arrow.

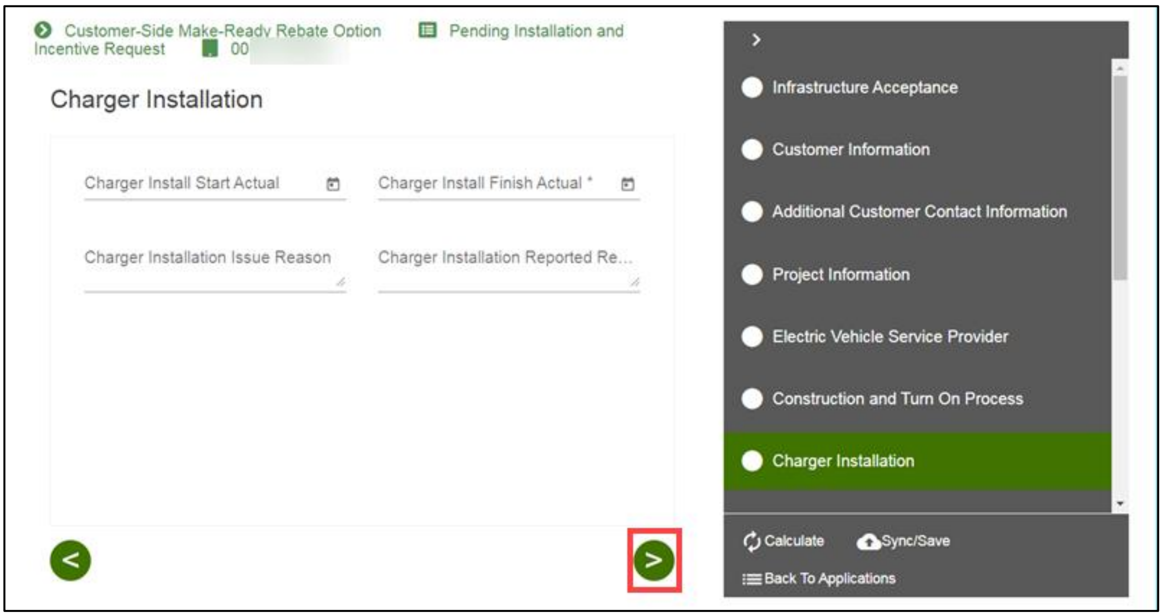


The **Charger Installation** page displays.

Charger Installation

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

12. Click the **Next** arrow.

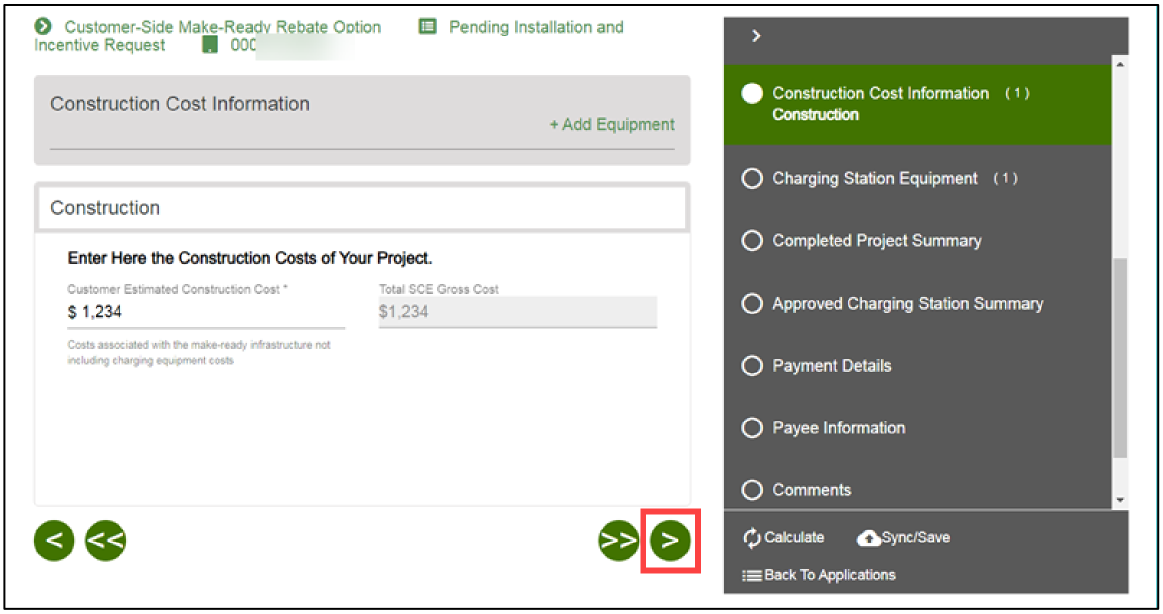


The **Construction Cost Information** page displays.

Construction Cost Information

13. Enter and verify the required information.

14. Click the **Next** arrow.

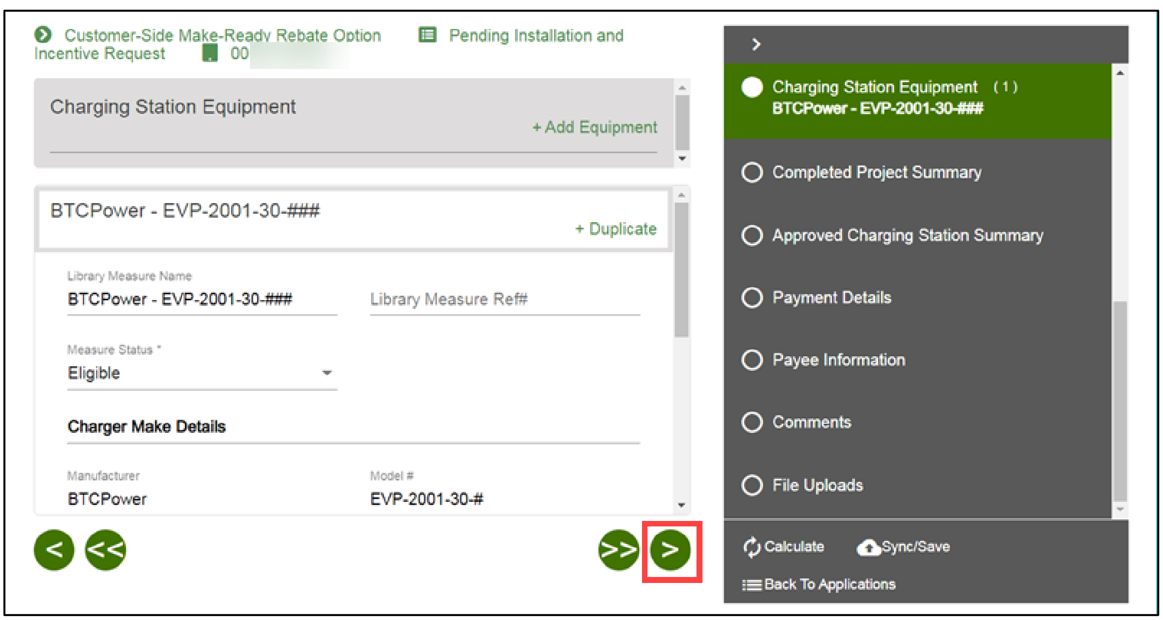


The **Charging Station Equipment** page displays.

Charging Station Equipment

15. Verify the **Charging Station Equipment** information.

16. Click the  **Next** arrow.

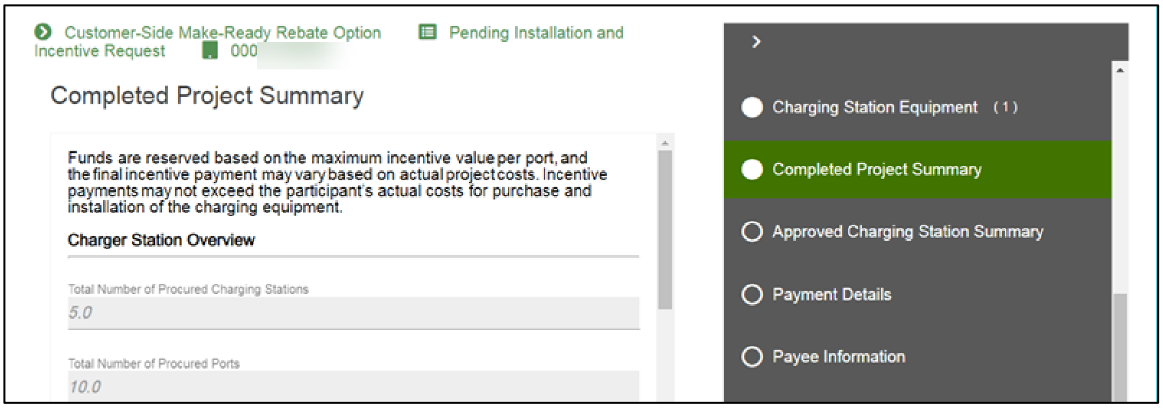


The **Completed Project Summary** page displays.

Completed Project Summary Totals

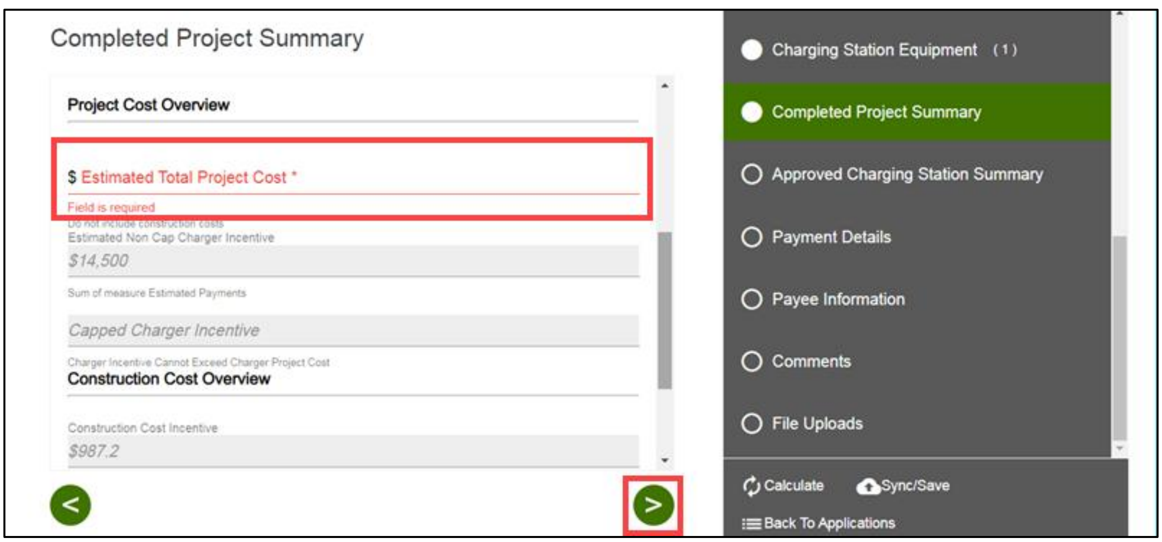
17. Verify the **Completed Project Summary**.

18. Scroll down.



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

20. Click the **Next** arrow.

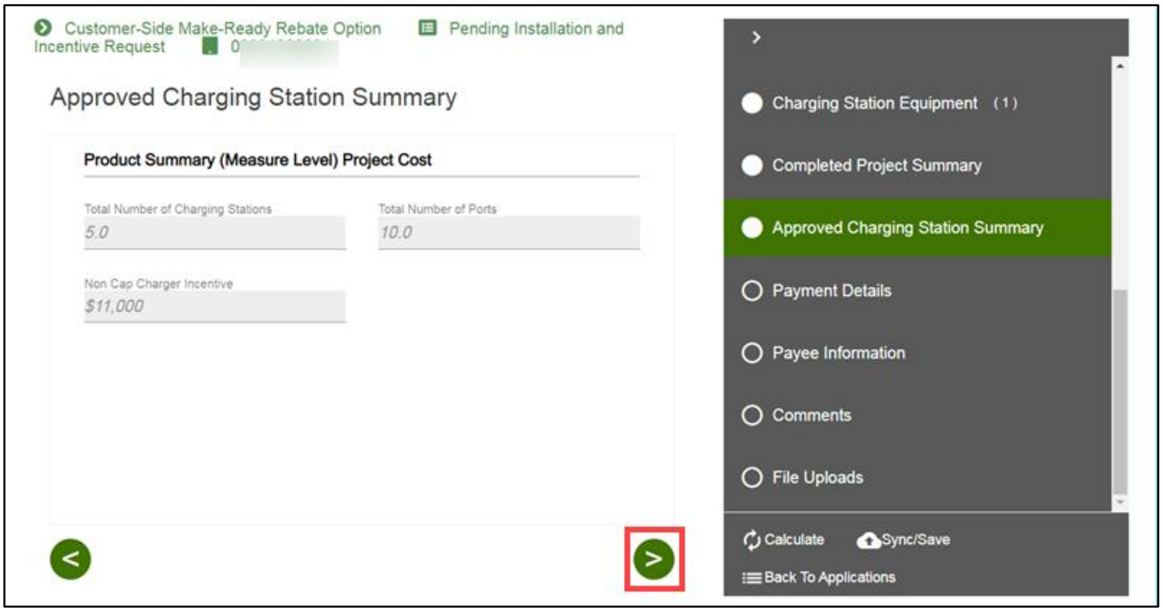


The **Approved Charging Station Summary** page displays.

Approved Charging Station Summary

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

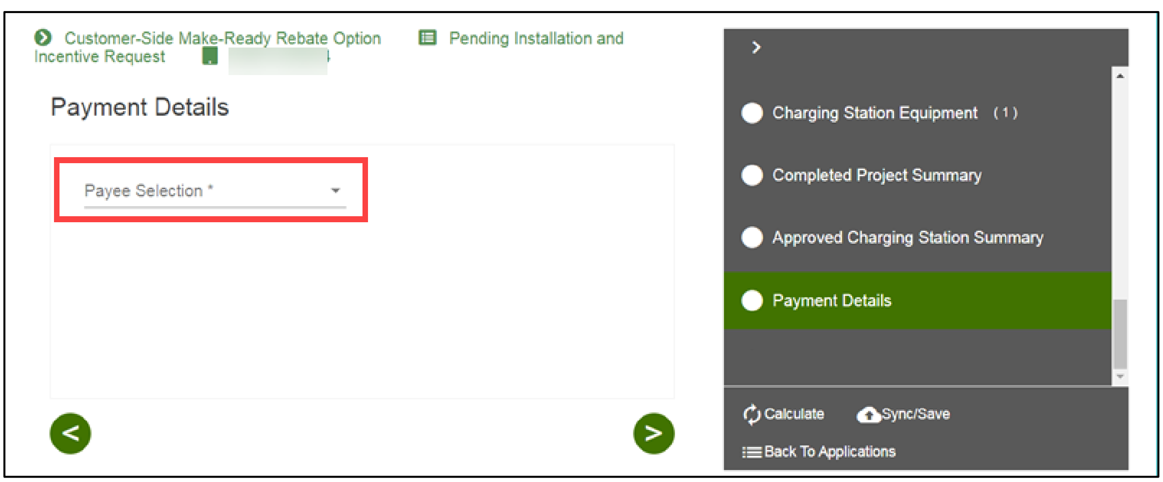
22. Click the > **Next** arrow.



The **Payment Details** page displays.

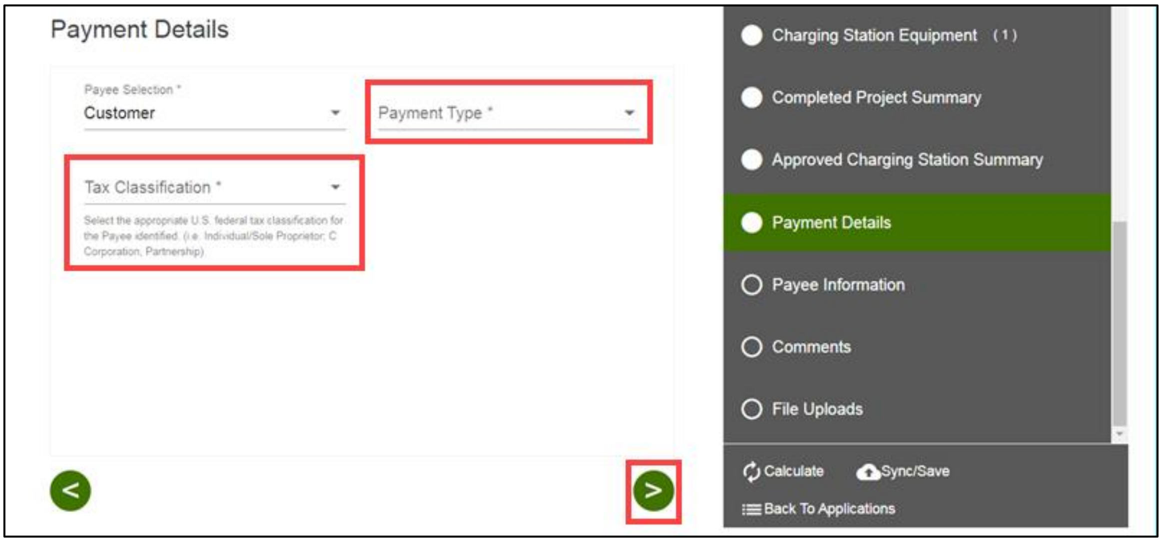
Payment Details

23. Select a **Payee Selection**.



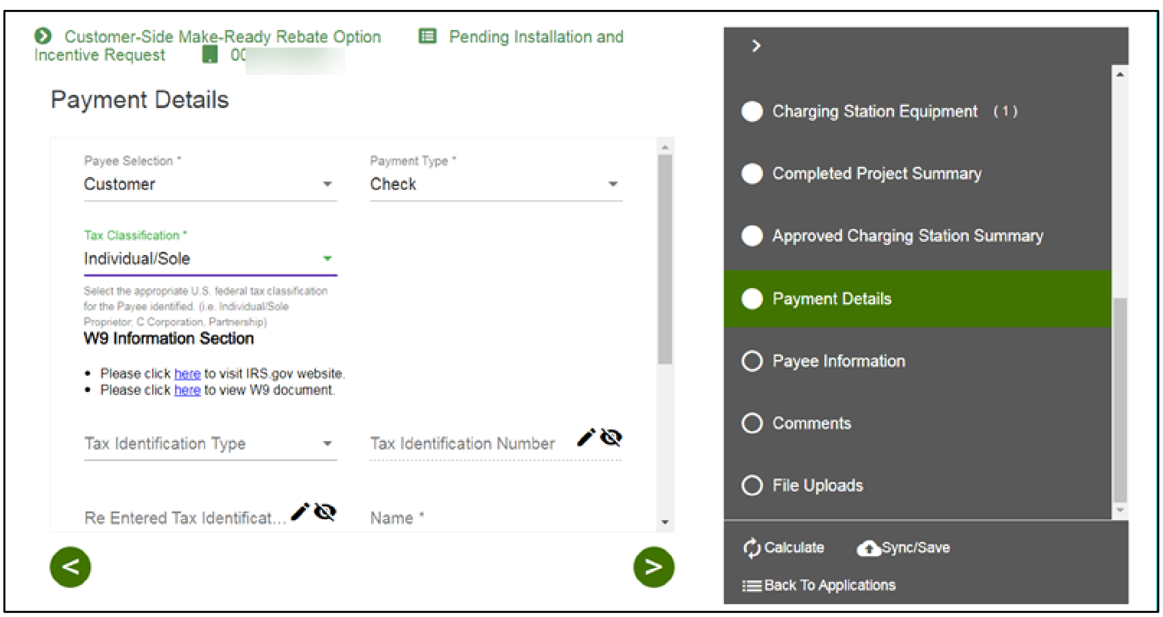
Additional fields display.

24. Select the **Payment Type**.
25. Select the **Tax Classification**.
26. Click the **>** **Next** arrow.



The **Payee Information** page displays.

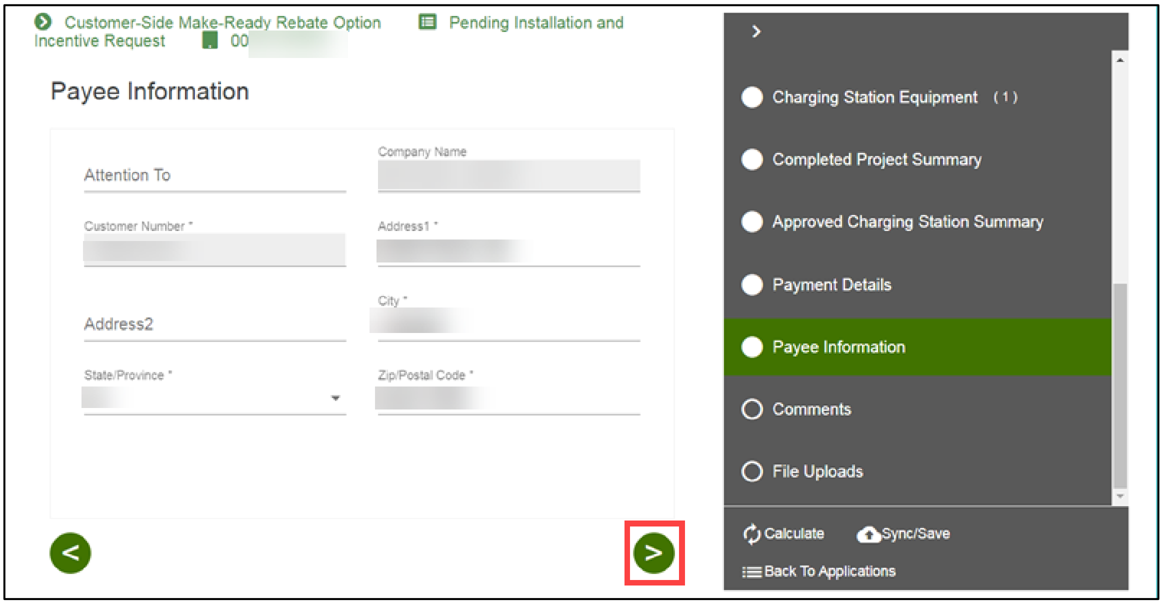
Note: Certain Tax Classifications require more information.



Payee Information

27. Enter and verify the required information.

28. Click the **Next** arrow.

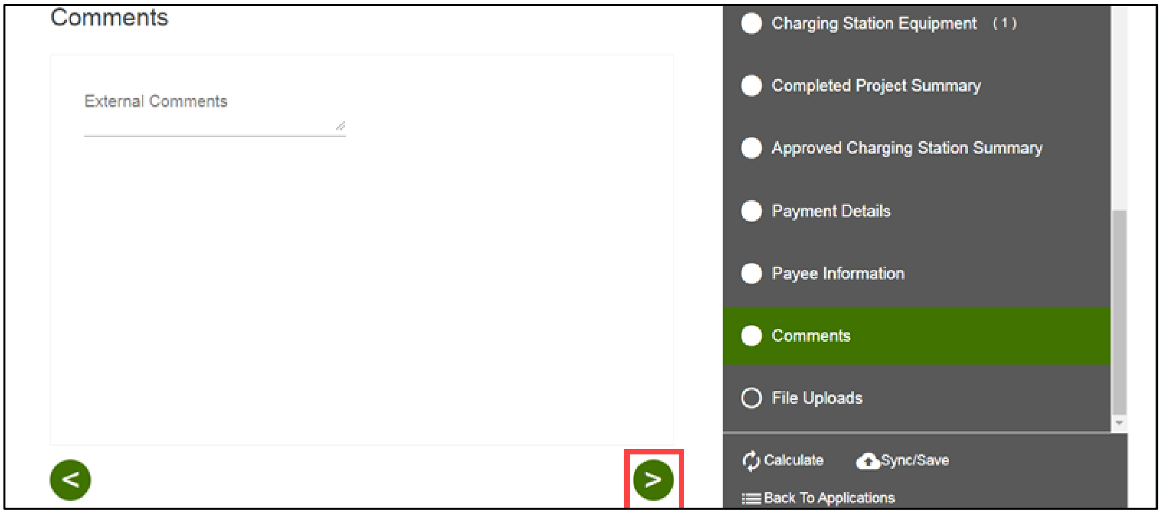


The **Comments** page displays.

Comments

29. Review the comments.

30. Click the **Next** arrow.

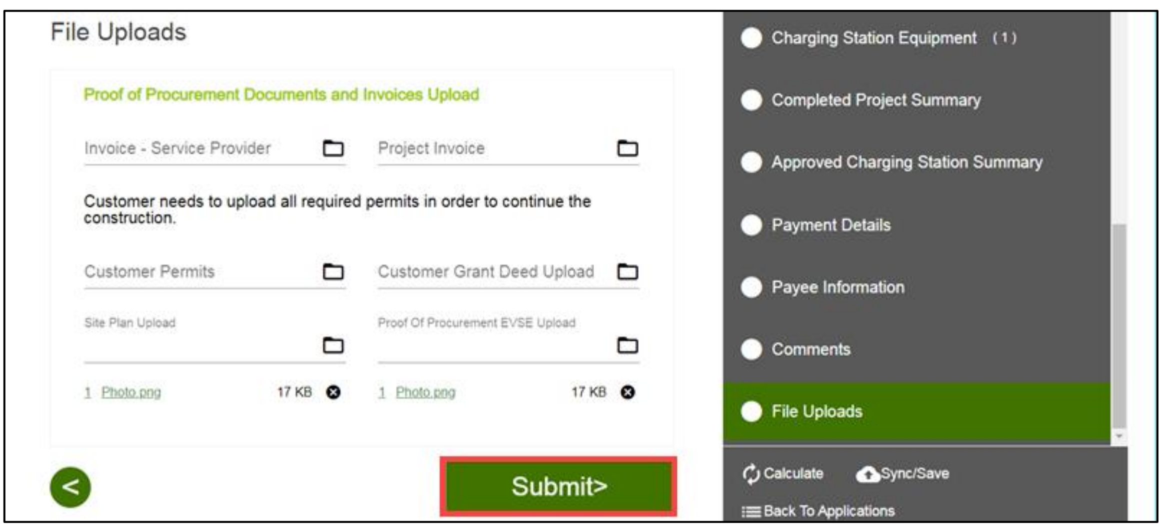


The **File Uploads** page displays.

File Uploads

31. Upload and verify the applicable files.

32. Select **Submit**.

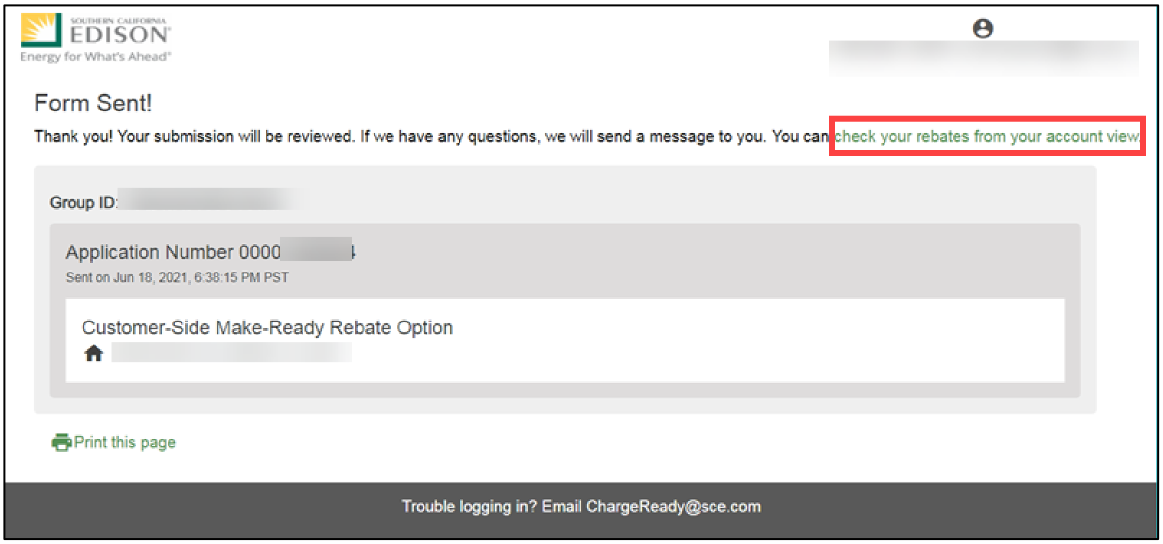


The **Form Sent** page displays.

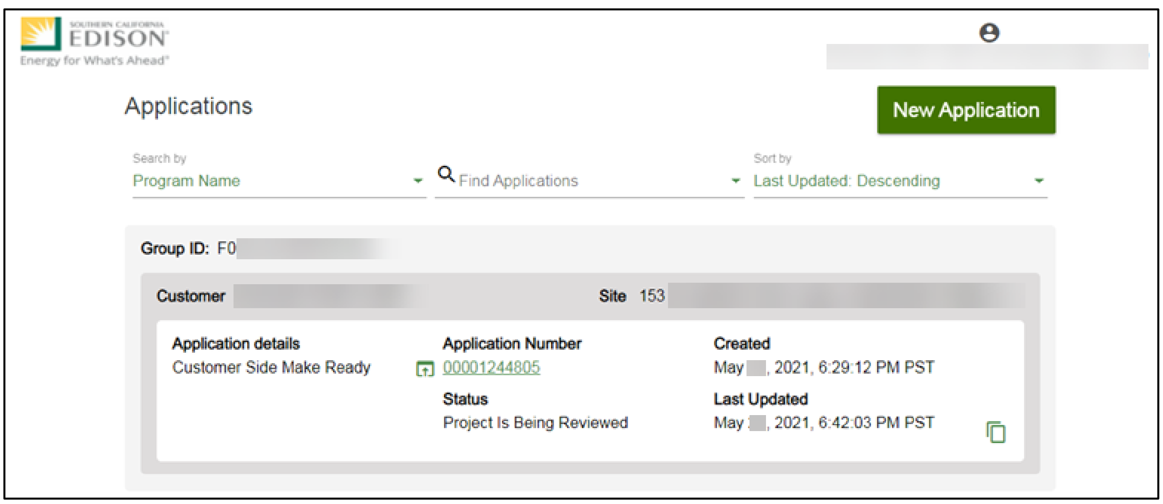
Form Sent!

Once you submit the Pending Installation and Incentive Request, the Form Sent! page displays, and a submission email is sent to you.

33. 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.