

Customer-Side Make-Ready Option Rebate

User Guide for External Users

Prepared for:

SCE Customers, and Charge Ready Trade Professionals



Prepared by:

EL&D Systems Training
Enterprise Learning & Development (EL&D)

Revision Date: 01/20/2022

This page intentionally left blank.

Table of Contents

Overview.....	1
What is Customer-Side Make-Ready Rebate Option?.....	1
Key Terms.....	1
Program Workflow	2
Program Forms.....	2
Accessing the Charge Ready Application Portal	4
Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals	5
Project Submission	7
Completing the Project Submission Form.....	7
Program Rules	9
Site Customer of Record	10
Customer Information.....	10
Additional Customer Contact Information	11
Additional Customer Information.....	12
Account Management Support	13
Project Information.....	13
File Uploads.....	14
Form Sent!.....	16
Applications in Draft Status	17
Saving an Application in Draft Status.....	17
Editing an Application in Draft Status	18
Duplicating an Application	19
Discarding a Draft Application	20
Agreement Acceptance	21
Completing the Agreement Acceptance Form.....	21
Project Information.....	22
Agreement.....	23
Approved Charging Station Summary	26
Trade Professional Information (if applicable)	27
Additional Customer Contact Information.....	28
Form Sent!.....	28
Agreement Acceptance/Proof of Procurement	30

Completing the Agreement Acceptance/Proof of Procurement Form.....	30
File Uploads.....	31
Project Information.....	33
Installer Information.....	34
Electric Vehicle Service Provider.....	35
Construction Cost Information.....	35
Approved Charging Station Summary.....	36
Charging Station Equipment.....	36
Procured Project Summary.....	37
Additional Customer Contact Information.....	38
Form Sent!.....	38
Site Plan.....	40
Completing the Site Plan Form.....	40
Customer Information.....	41
Additional Customer Contact Information.....	42
File Uploads.....	42
Form Sent!.....	43
Design Acceptance.....	44
Completing the Design Acceptance Form.....	44
File Uploads.....	45
Comments.....	46
Preliminary Design.....	46
Customer Information.....	47
Additional Customer Contact Information.....	47
Project Information.....	48
Form Sent!.....	49
Pending Installation and Incentive Request.....	50
Completing the Pending Installation and Incentive Request Form.....	50
Customer Information.....	51
Additional Customer Contact Information.....	52
Project Information.....	52
Electric Vehicle Service Provider.....	53
Charger Installation.....	54
Construction Cost Information.....	54

Charging Station Equipment 55

Completed Project Summary Totals 56

Approved Charging Station Summary 57

Payment Details 57

Payee Information..... 59

Comments..... 59

File Uploads..... 60

Form Sent!..... 61

This page intentionally left blank.

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

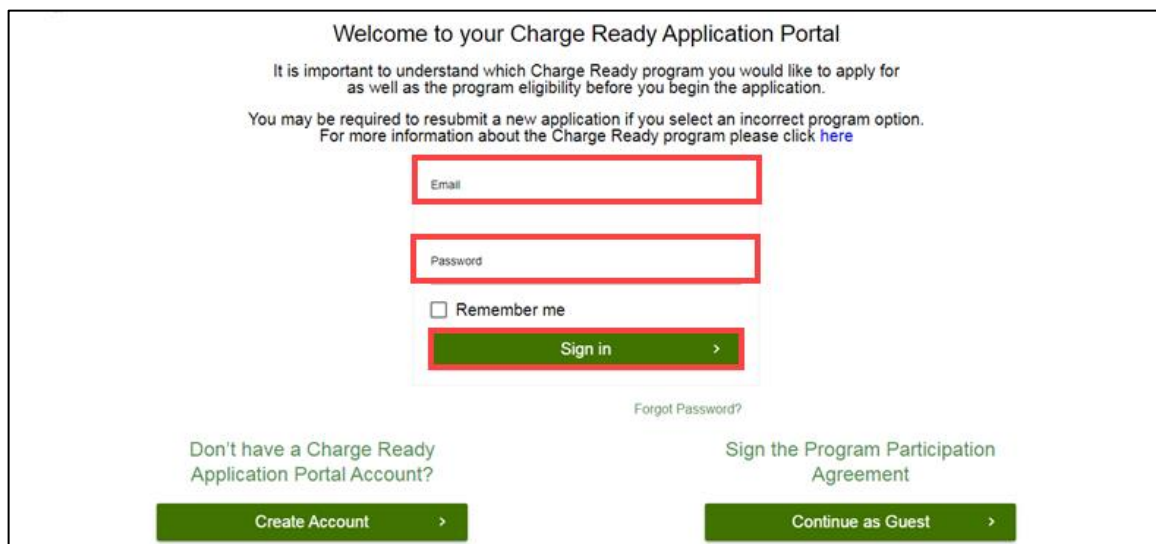
Accessing the Charge Ready Application Portal

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**.



Welcome to your Charge Ready Application Portal

It is important to understand which Charge Ready program you would like to apply for as well as the program eligibility before you begin the application.

You may be required to resubmit a new application if you select an incorrect program option. For more information about the Charge Ready program please click [here](#)

Email

Password

Remember me

Sign in >

Forgot Password?

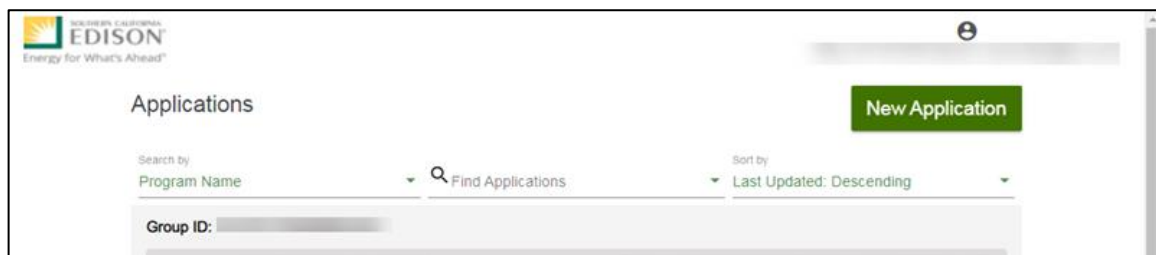
Don't have a Charge Ready Application Portal Account?

Create Account >

Sign the Program Participation Agreement

Continue as Guest >

The **Applications** page displays.



EDISON
Energy for What's Ahead™

Applications

New Application

Search by
Program Name

Find Applications

Sort by
Last Updated: Descending

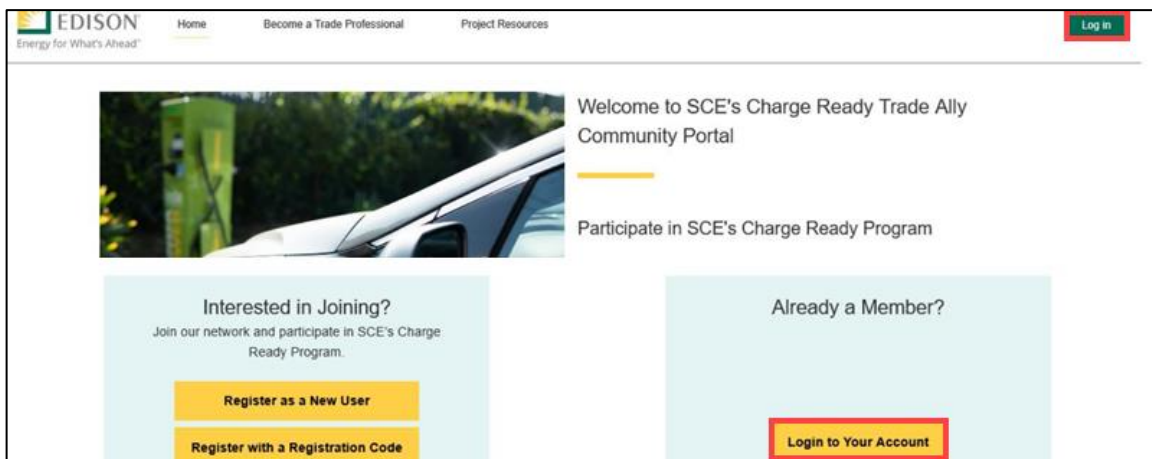
Group ID:

Accessing the Charge Ready Application Portal for Charge Ready Trade Professionals

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

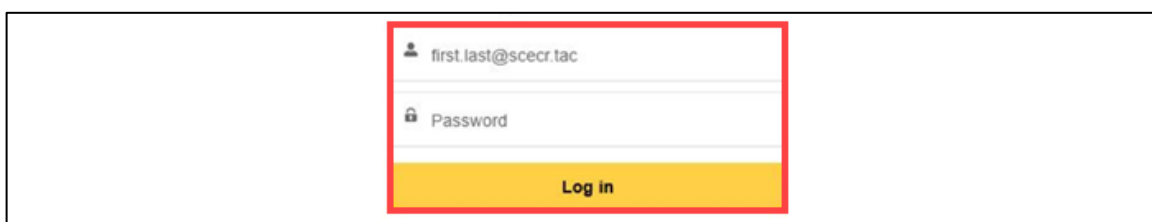
To access the portal as a Charge Ready Trade Professional, follow the steps below:

1. Navigate to the **Trade Ally Community Portal**: <https://sce-chargeready.force.com/s>
The **TAC landing page** displays.
2. Select **Login** or **Login to Your Account**.



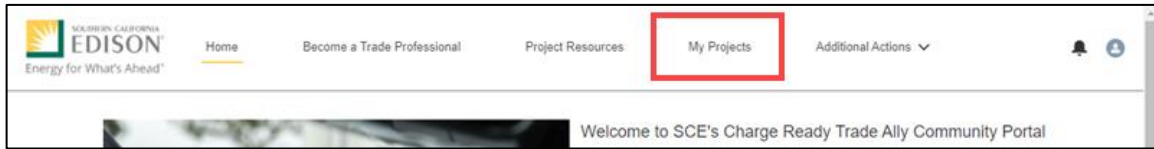
The **Login** page displays.

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



The **TAC Home Page** displays.

6. Select **My Projects**.

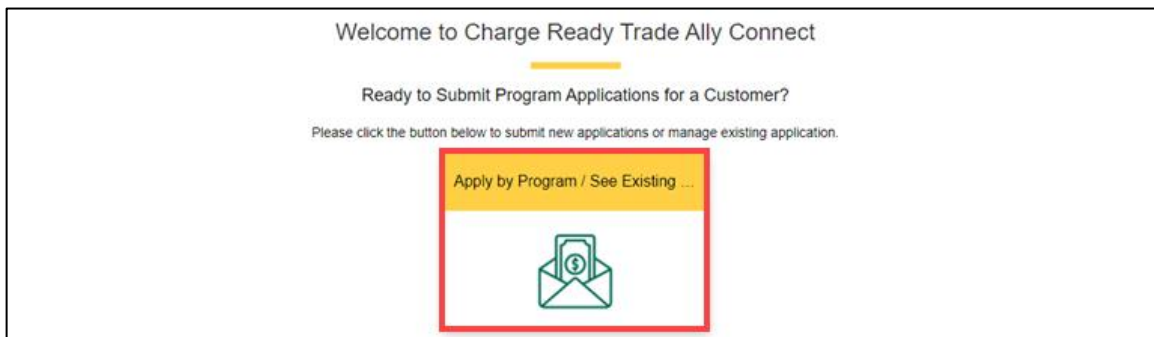


Note: If the My Projects tab is not on the screen, your company profile is not yet approved as a Charge Ready Trade Professional.



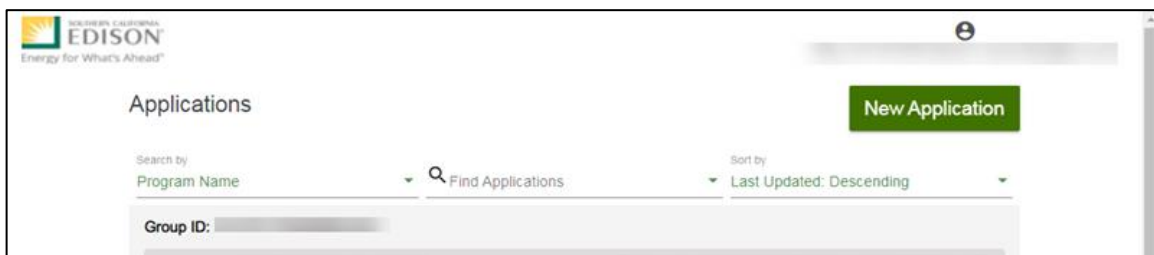
The **My Projects** page displays.

7. Click **Apply by Program**.



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

The **Applications** page displays.



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

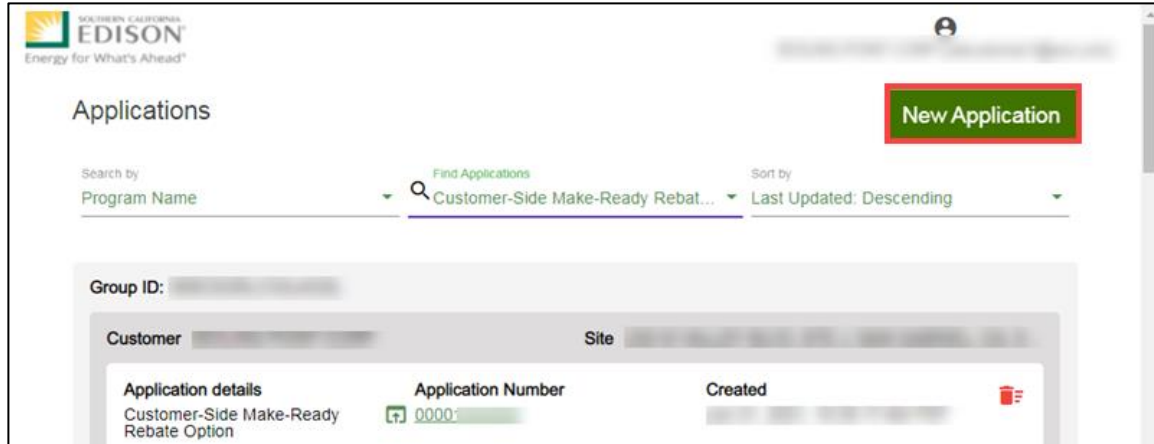
Once a Project Submission is complete, SCE determines the eligibility for program participation.

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**.

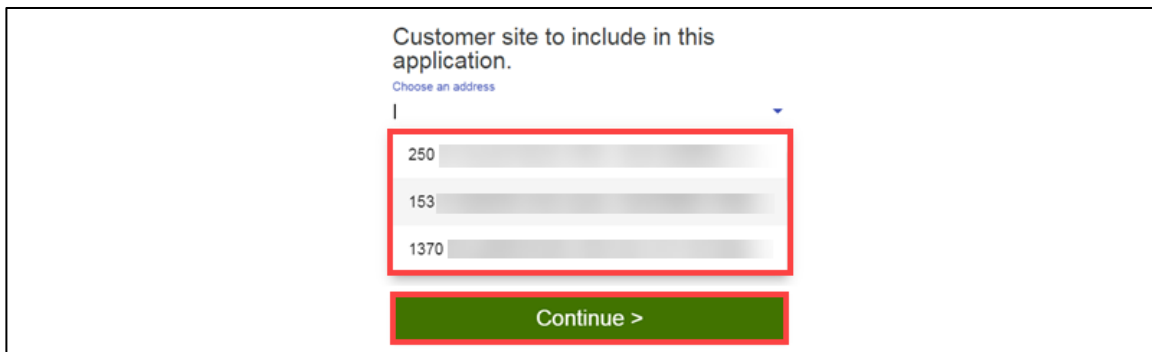


A **Customer site to include in this application** page displays.

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**.



Customer site to include in this application.

Choose an address

|

250

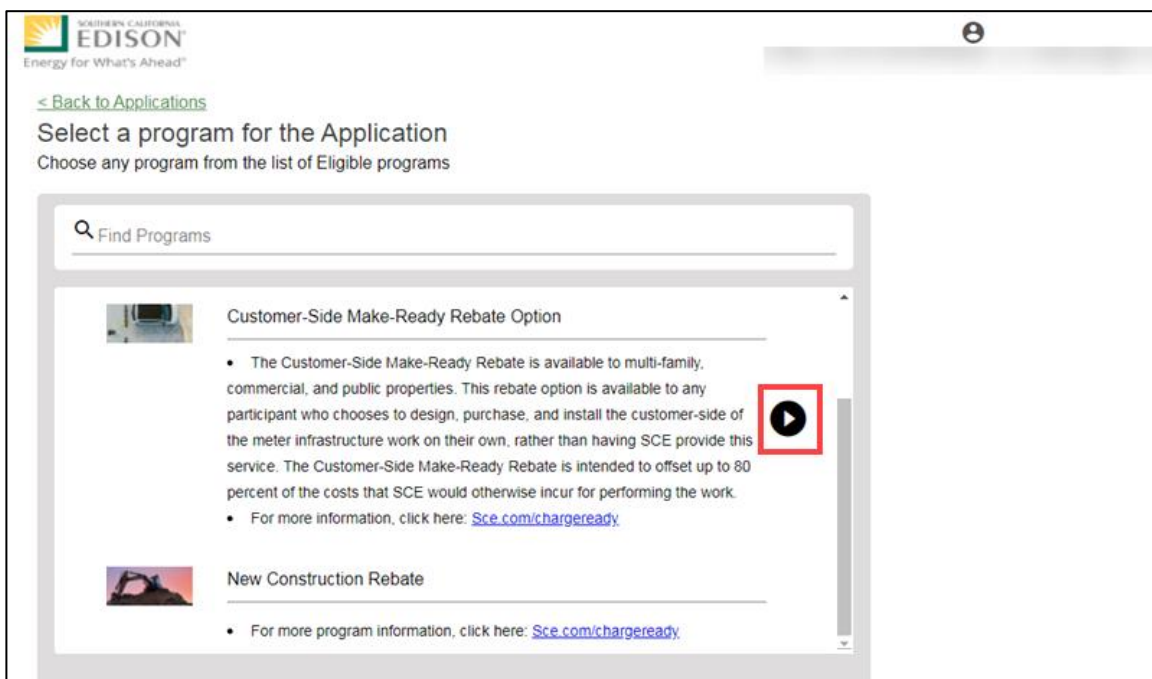
153

1370

Continue >

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

5. Select the  right arrow to select **Customer Side Make-Ready Rebate Option**.



SOUTHERN CALIFORNIA
EDISON
Energy for What's Ahead®

[< Back to Applications](#)

Select a program for the Application

Choose any program from the list of Eligible programs

Find Programs


Customer-Side Make-Ready Rebate Option

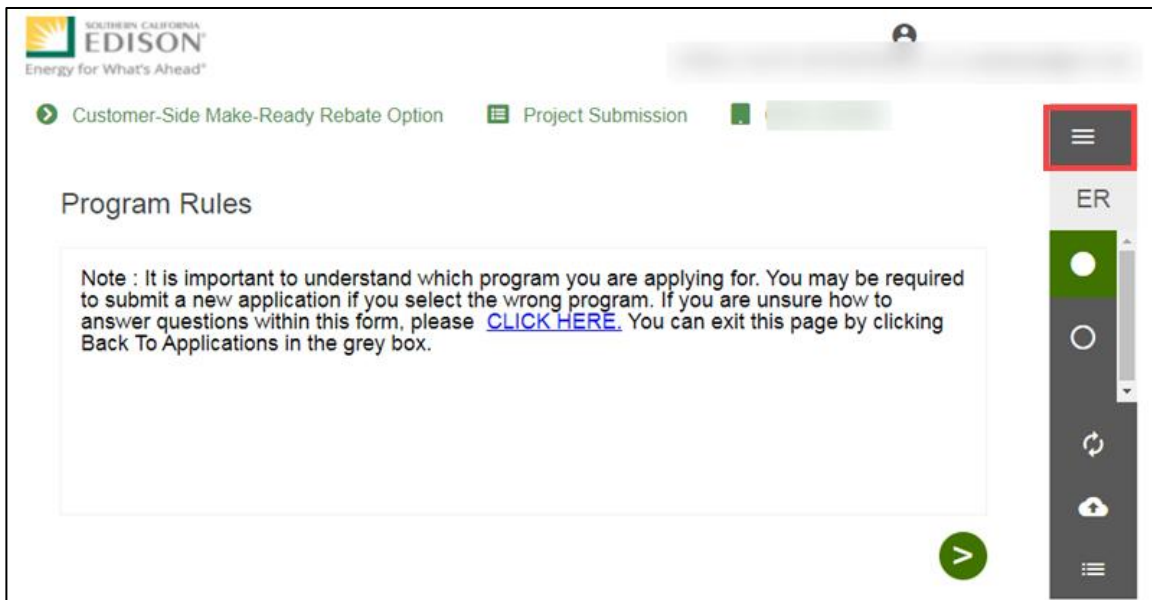
- The Customer-Side Make-Ready Rebate is available to multi-family, commercial, and public properties. This rebate option is available to any participant who chooses to design, purchase, and install the customer-side of the meter infrastructure work on their own, rather than having SCE provide this service. The Customer-Side Make-Ready Rebate is intended to offset up to 80 percent of the costs that SCE would otherwise incur for performing the work.
- For more information, click here: [Sce.com/chargeready](https://sce.com/chargeready).

New Construction Rebate

- For more program information, click here: [Sce.com/chargeready](https://sce.com/chargeready).

The **Program Rules** page displays.


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

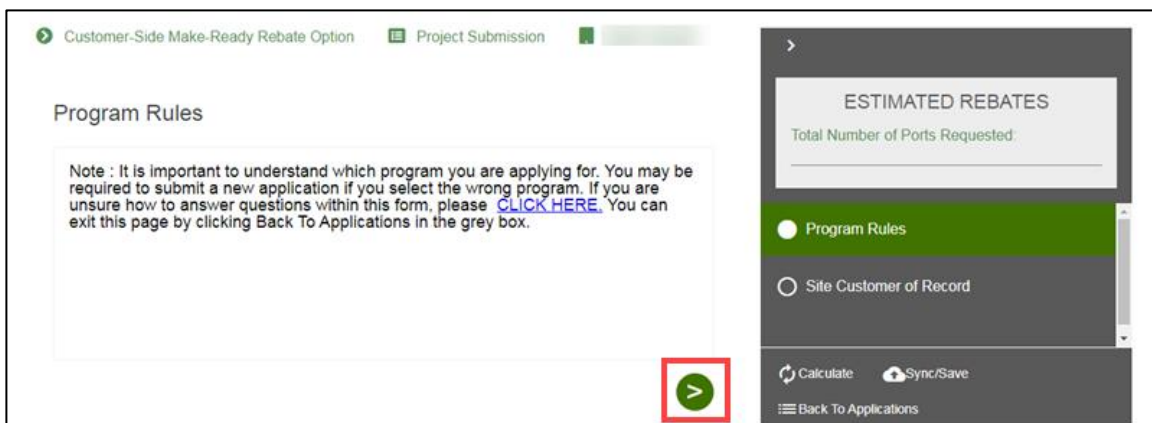


Once the Program Rules page displays, you will complete all the required fields.

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


Program Rules

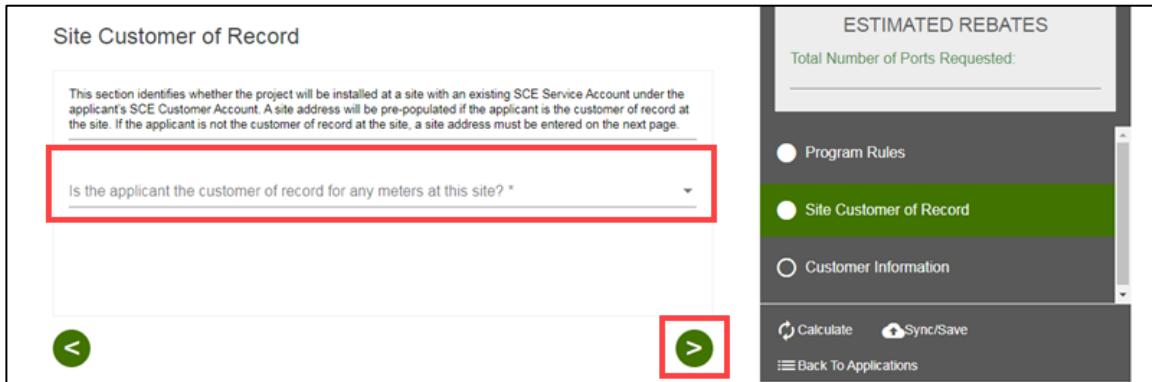
6. Review the **Program Rules**.
7. Click the  **Next** arrow.



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


Site Customer of Record

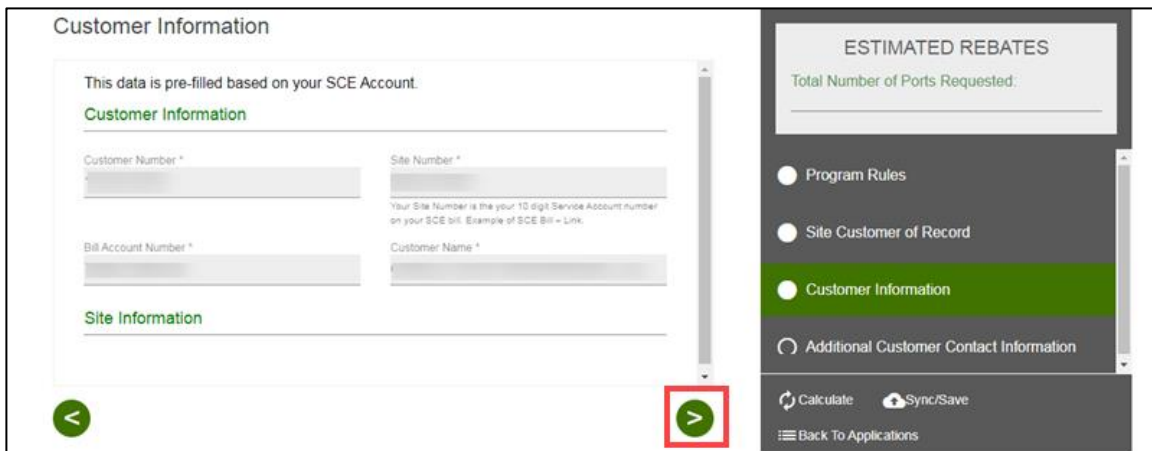
8. Select Yes or No.
9. Click the  **Next** arrow.



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

Customer Information

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



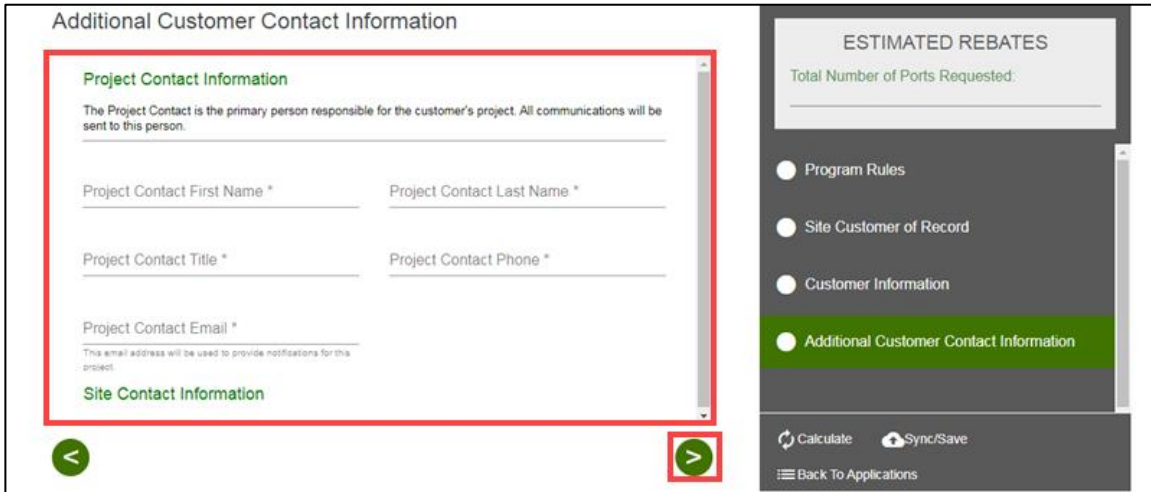
The **Additional Customer Contact Information** page displays.

Additional Customer Contact Information

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

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

14. Click the  **Next** arrow.



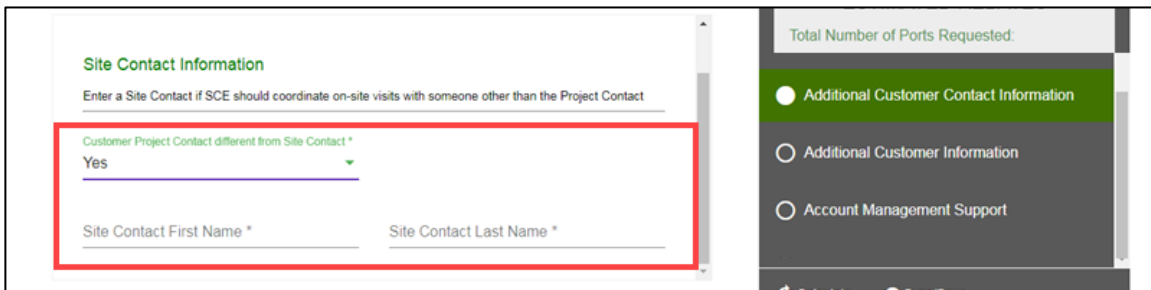
The **Additional Customer Information** page displays.

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.

The screenshot shows a mobile application interface for 'Customer-Side Make-Ready Rebate Option'. The main form is titled 'Additional Customer Contact Information'. At the top, there is a dropdown menu for 'Property Ownership *' with 'Lease' selected. Below this, a section titled 'Property Owner Contact Information' is highlighted with a red border. This section includes a sub-header and a note: 'If the customer does not own the project property enter contact information for the property owner.' Below the note are four input fields: 'Property Owner First Name *', 'Property Owner Last Name *', 'Property Owner Company Name', and 'Property Owner Title *'. To the right of the main form is a sidebar titled 'ESTIMATED REBATES' with a 'Total Number of Ports Requested:' field. Below the sidebar are radio buttons for 'Customer Information', 'Additional Customer Contact Information' (which is selected), 'Additional Customer Information', and 'Account Management Support'. At the bottom of the sidebar are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'. The main form has a back arrow on the left and a next arrow on the right.

Additional Customer Information

19. Enter the required information.
20. Click the  **Next** arrow.

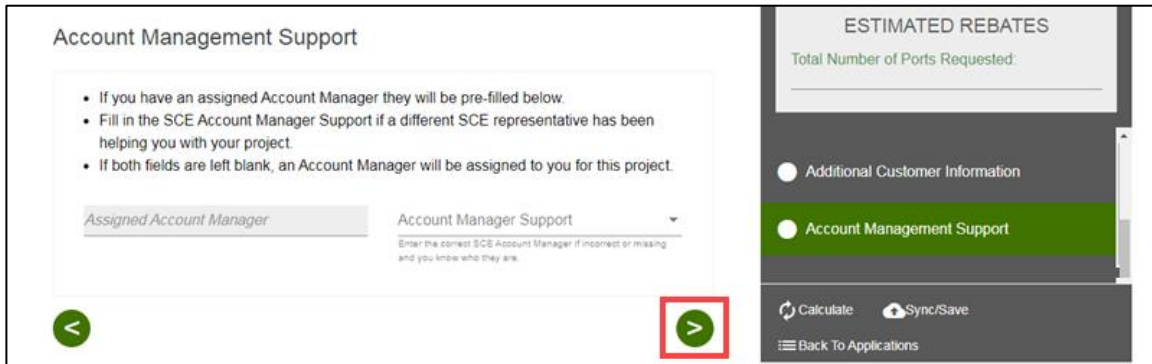
The screenshot shows the same mobile application interface, but the main form is now titled 'Additional Customer Information'. It features two dropdown menus: 'Market Segment/Business Type *' and 'Property Type *'. The 'Next' arrow button at the bottom right of the main form is highlighted with a red border. The sidebar and bottom navigation are identical to the previous screenshot.

The **Account Management Support** page displays.

Account Management Support

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

22. Click the  **Next** arrow.

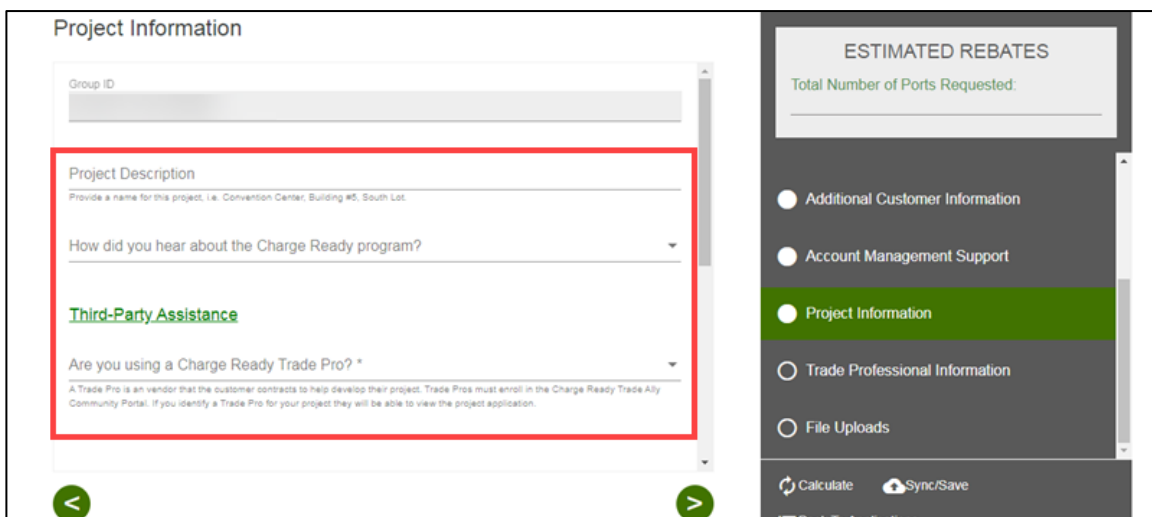


The **Project Information** page displays.

Project Information

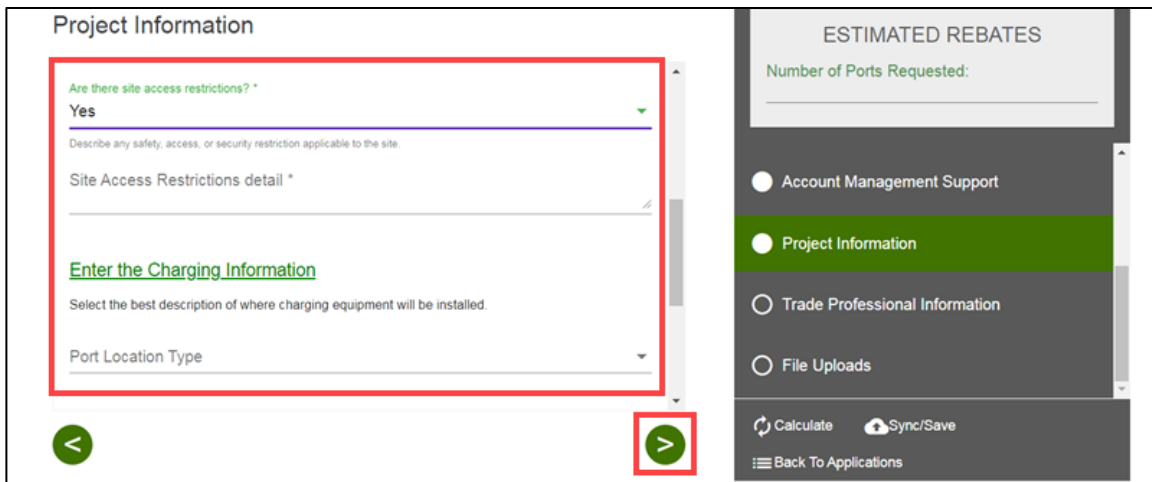
23. Enter the required information.

24. Scroll down.



25. Enter the required information.

26. Click the  **Next** arrow.

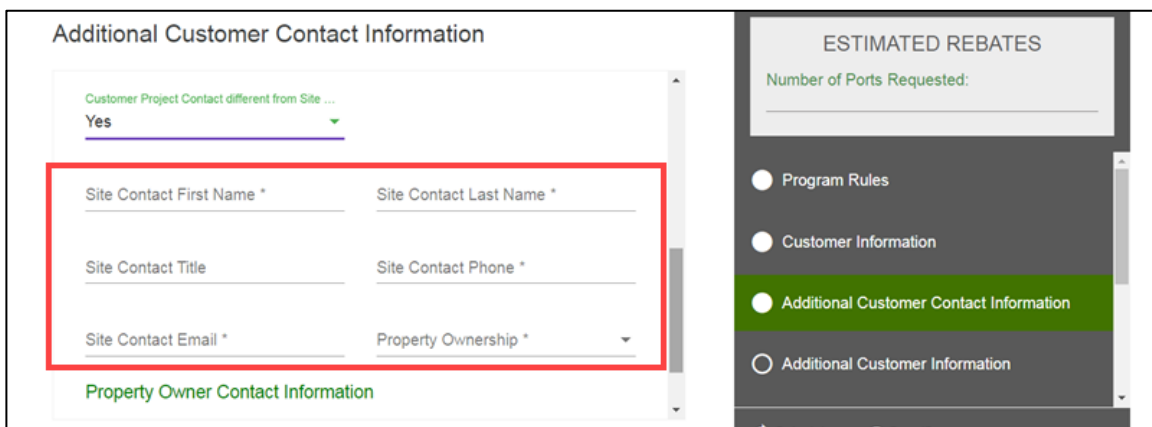


The **File Uploads** page displays.


Trade Professional Information

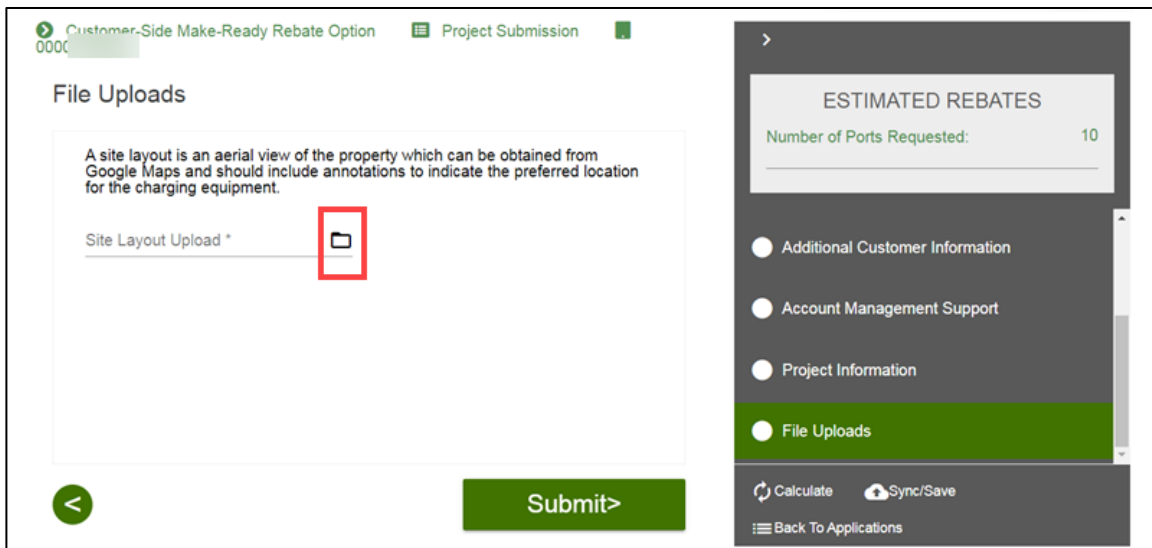
If a Charge Ready Trade Pro is required for the project, follow the steps below:

27. Select **Yes**.
28. Enter the contact information.



File Uploads

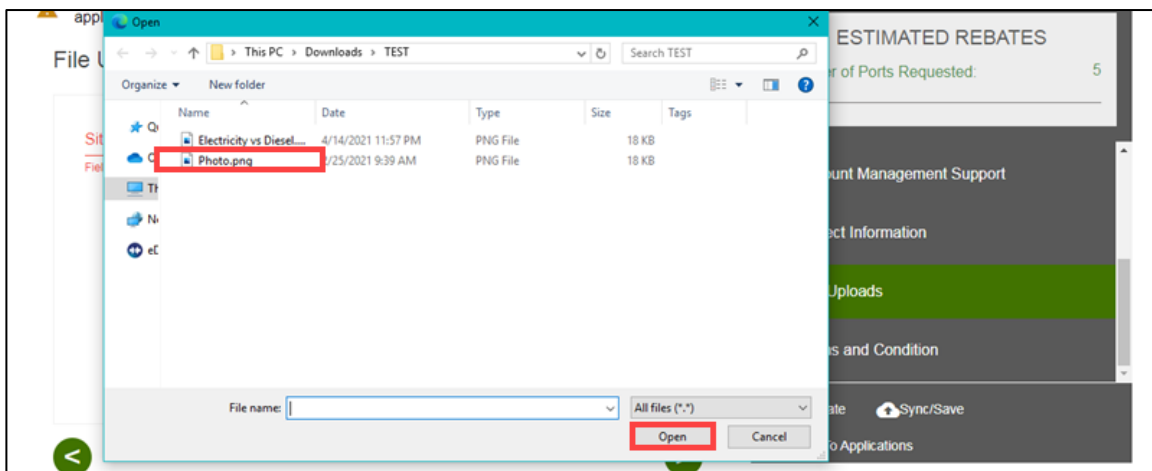
29. Select the  **folder** icon.



The **Open** window displays.

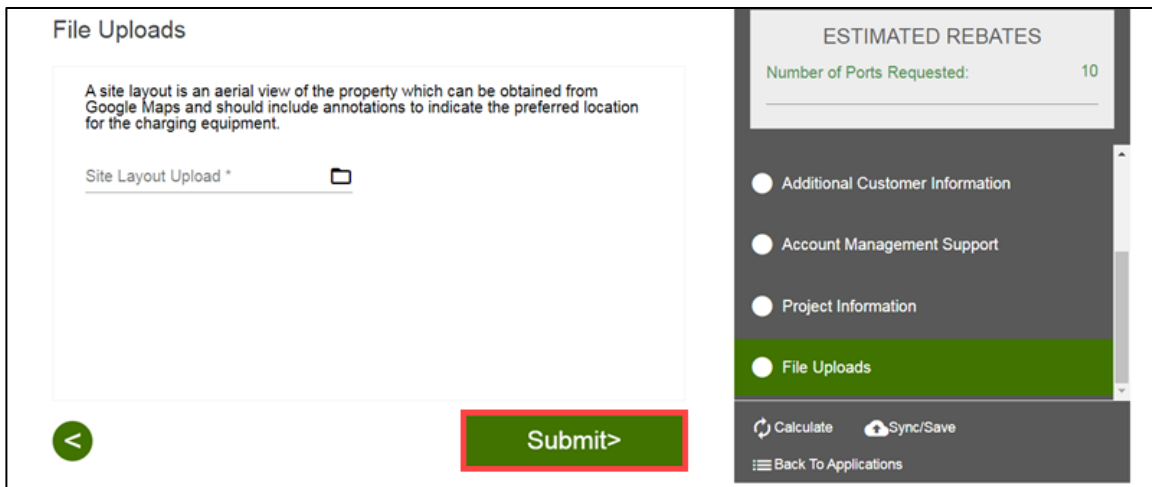
30. Select the applicable file.

31. Select **Open**.



The **File Uploads** page displays.

32. Select **Submit**.

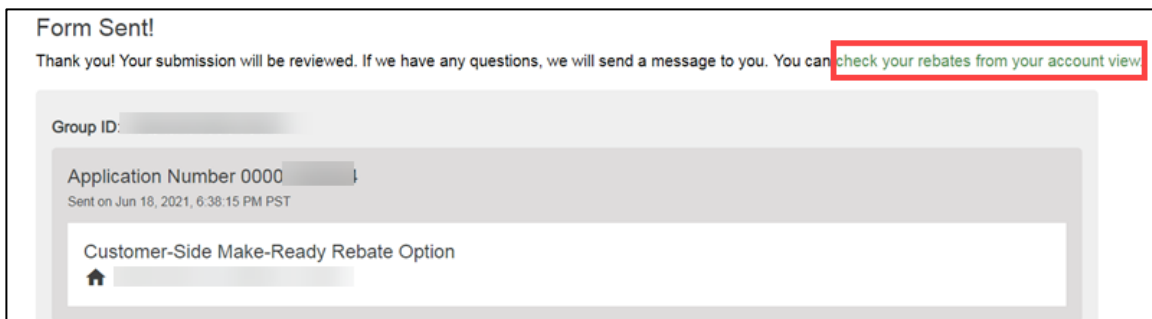


The **Form Sent** page displays.

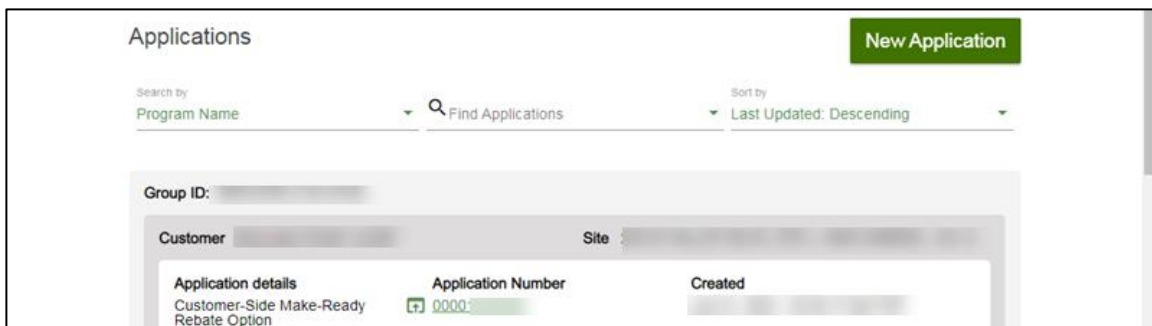
Form Sent!

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.

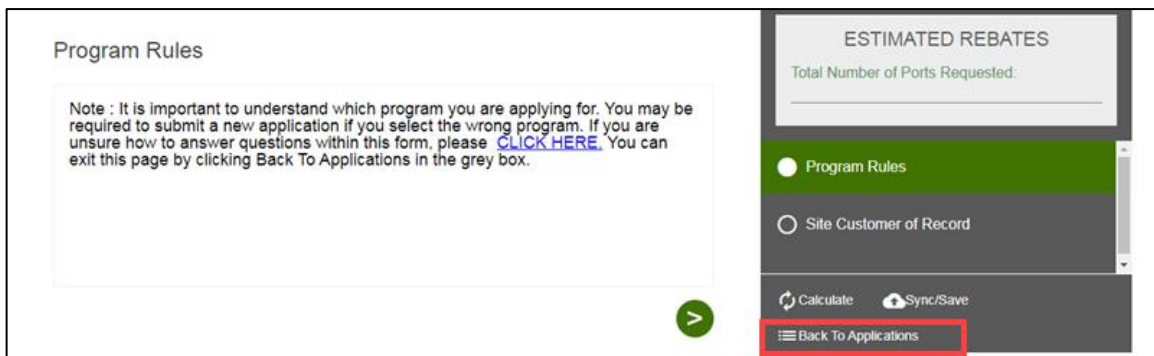
Applications in Draft Status

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

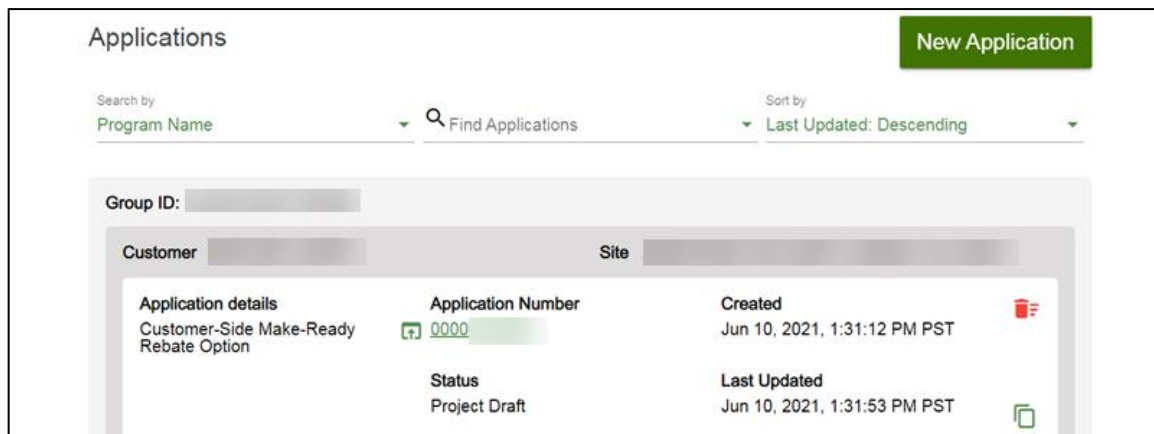
Saving an Application in Draft Status

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

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



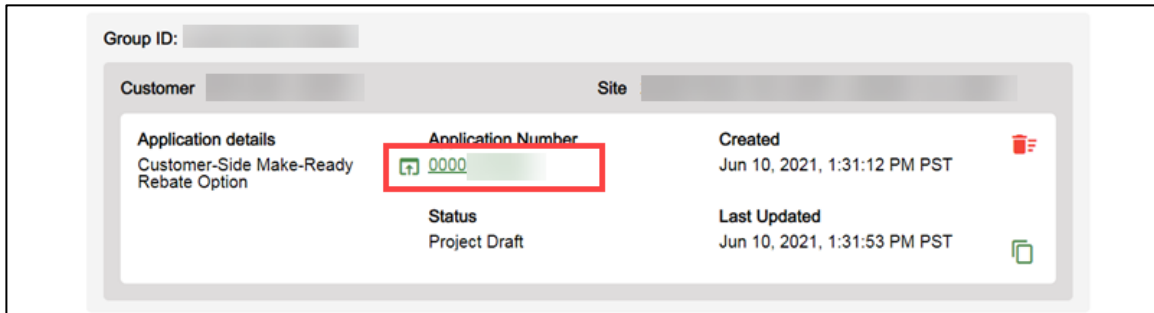
The **Applications** page displays.



Editing an Application in Draft Status

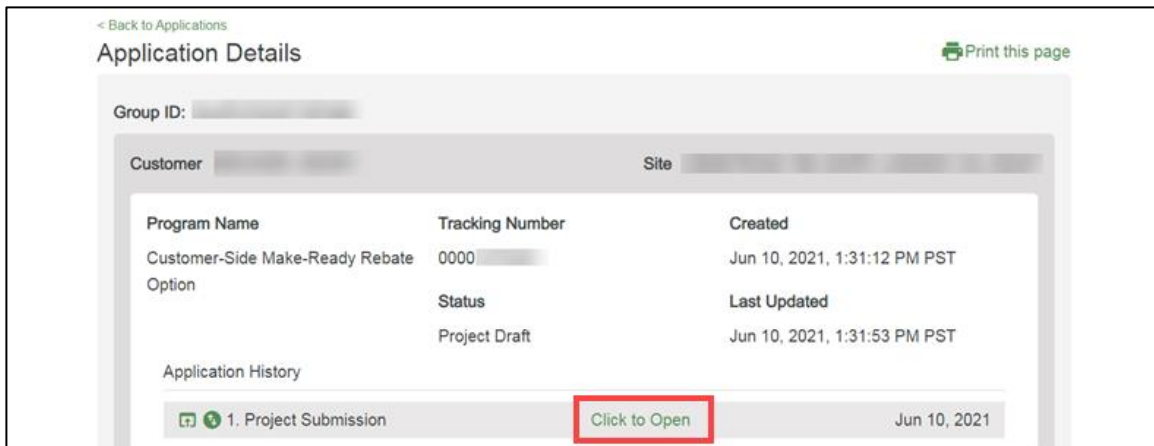
To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.



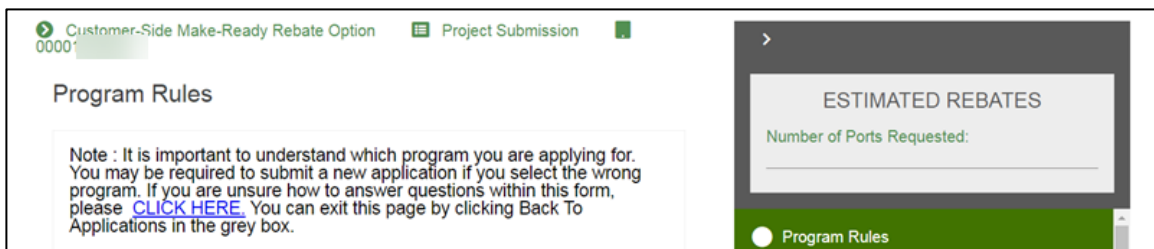
The **Application Details** page displays.

2. Select **Click to Open**.



The **Program Rules** page displays.

3. Complete the application.



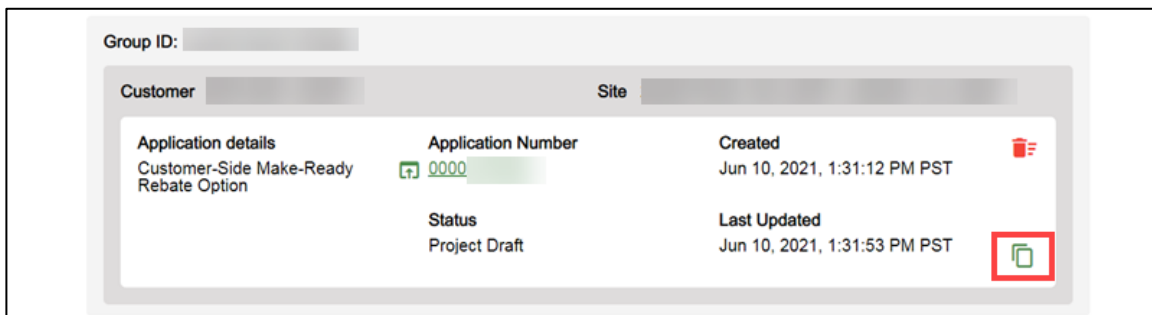
Duplicating an Application

You can duplicate an application in the following statuses:

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

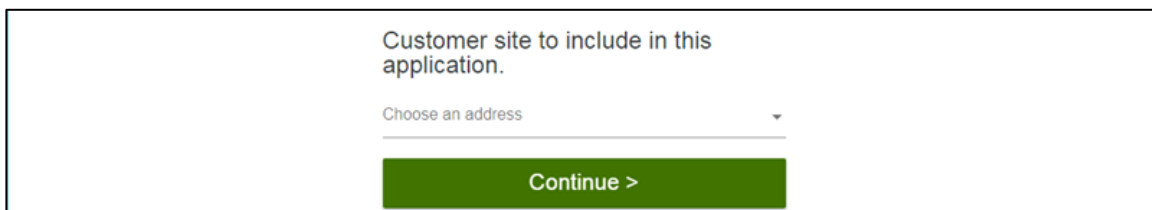
To duplicate an application, follow the steps below:

1. Click the  **Duplicate** icon.



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

2. Complete the application.



The screenshot shows a form titled 'Customer site to include in this application.' Below the title is a dropdown menu with the text 'Choose an address' and a downward arrow. At the bottom of the form is a green button labeled 'Continue >'.

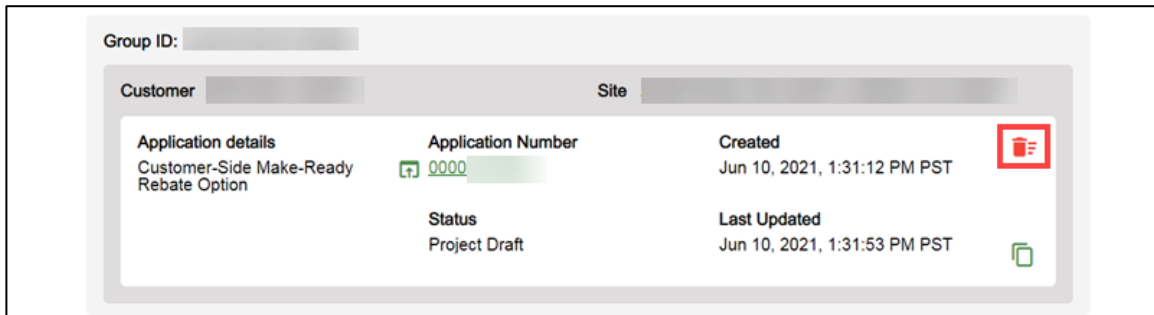
Discarding a Draft Application

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

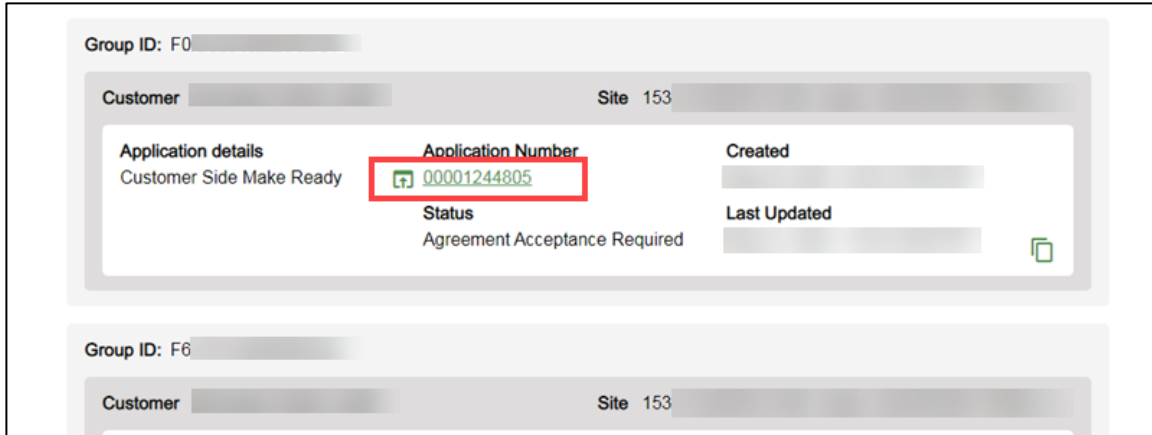
Once an Agreement Acceptance is complete, SCE executes and reserves project funds.

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**.



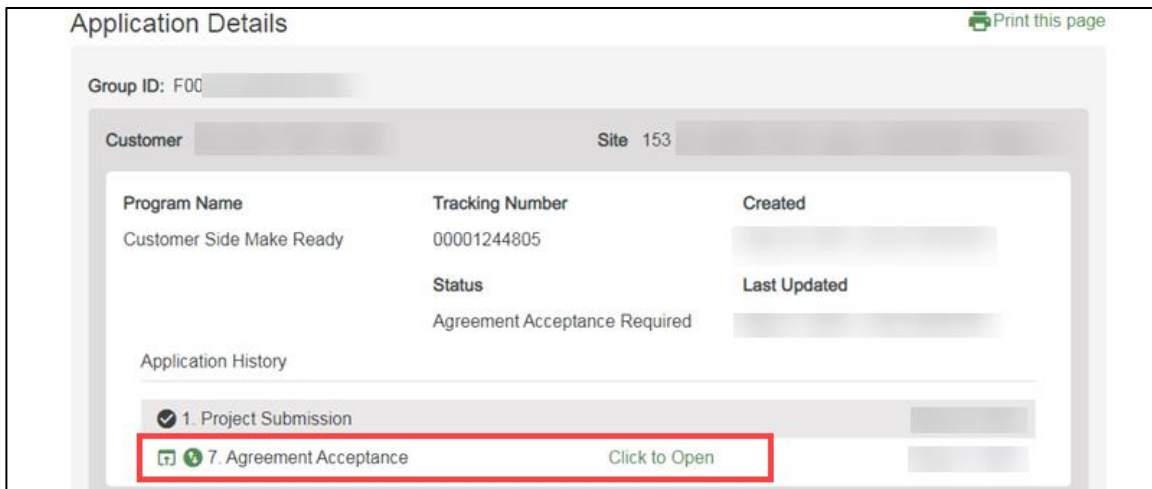
The screenshot displays a web interface for an Agreement Acceptance form. At the top, it shows 'Group ID: F0' and 'Customer' information. Below this, there is a section for 'Application details' with the following information:

Application details	Application Number	Created
Customer Side Make Ready	00001244805	
	Status	Last Updated
	Agreement Acceptance Required	

The 'Application Number' field is highlighted with a red box. Below the application details, there is another section for 'Group ID: F6' and 'Customer' information.

The **Application Details** page displays.

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



The **Project Information** page displays.

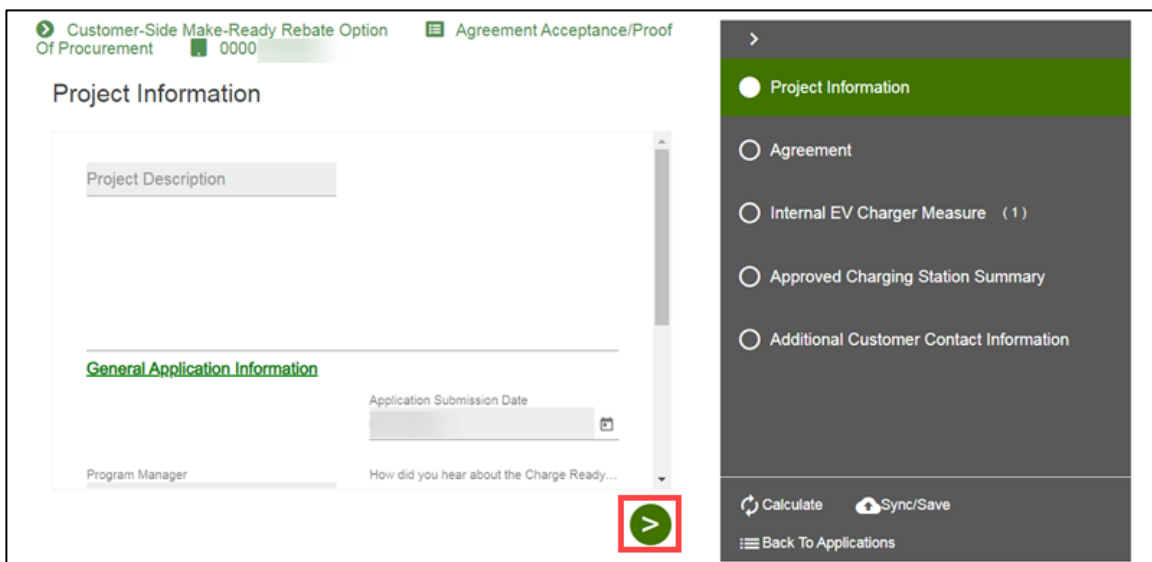
Once the Project Information page displays, you will complete all the required fields.

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**.

Agreement

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

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

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

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

Agreement Review

Reject Agreement *

CHARGER SUMMARY
Total Number of Approved Ports: 10

- Agreement
- Project Information
- Internal EV Charger Measure (1)
- Summary of Chargers
- Additional Customer Contact Information

Calculate Sync/Save
Back To Applications

An **Agreement** window displays.

6. Review the agreement.
7. Select **Close**.

Agreement

**Charge Ready
Charging Infrastructure and Rebate
Participation Agreement**

This Charge Ready Charging Infrastructure and Rebate Participation Agreement (Agreement) sets forth the terms and conditions for Program Participant to participate in the Program. Pursuant to the terms of this Agreement, SCE will (1) install the Infrastructure (as defined herein) at no cost to the Program Participant, and, (2) if applicable, remit the Charging Equipment Rebate, the Customer-Side Make-Ready Rebate, and/or the Maintenance and Networking Rebate after all terms and conditions have been met by the Program Participant.

Close Download


The **Agreement** page displays.

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

The screenshot shows the 'Agreement' screen with a sidebar on the right containing 'Project Information', 'Agreement' (highlighted), 'Approved Charging Station Summary', and 'Additional Customer Contact Information'. The main content area has instructions and a section titled 'Agreement Review'. Below this, a dropdown menu labeled 'Reject Agreement *' is highlighted with a red box. At the bottom, there are navigation arrows and buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

Reject Agreement is Yes

If Reject Agreement is Yes, follow the steps below:

9. Enter an explanation.
10. Click the  **Next** arrow.

The screenshot shows the 'Agreement' screen after step 9. The 'Reject Agreement *' dropdown is now set to 'Yes'. Below it, a text box labeled 'Agreement Rejection Explanation' is highlighted with a red box. The 'Next' arrow at the bottom right is also highlighted with a red box. The sidebar and other UI elements remain the same as in the previous screenshot.

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.

Customer-Side Make-Ready Rebate Option Agreement Acceptance/Proof Of Procurement

Agreement

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

Agreement Review

Reject Agreement *

No

Agreement Acceptance Method *

Select

Electronic Acceptance

Print and Upload

Project Information

Agreement

Approved Charging Station Summary

Additional Customer Contact Information

Calculate Sync/Save

Back To Applications

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.

Agreement

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

Agreement Review

Reject Agreement *

No

Agreement Acceptance Method *

Electronic Acceptance

Customer Accepts Agreement

Checkbox is required

Project Information

Agreement

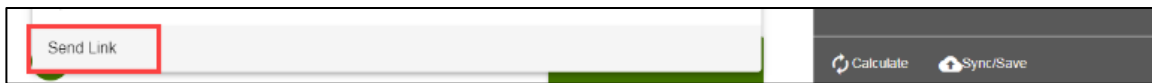
Approved Charging Station Summary

Additional Customer Contact Information

Calculate Sync/Save

Back To Applications

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

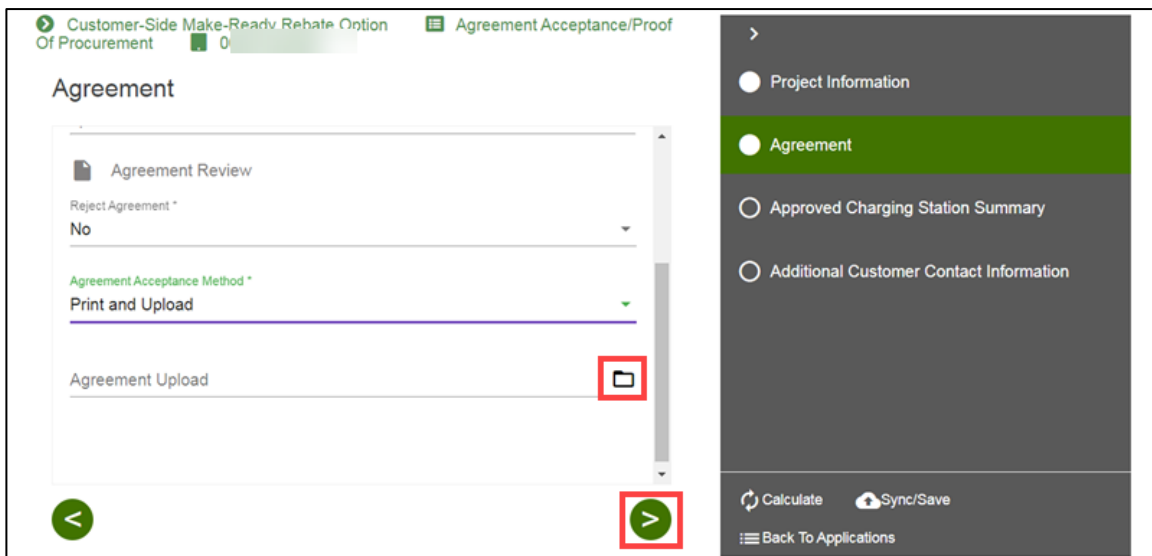


Print and Upload

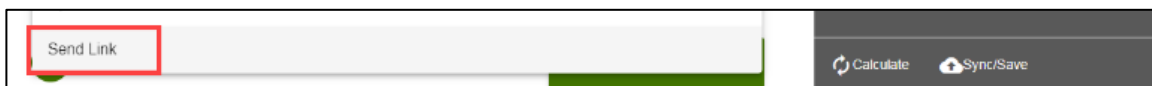
If the Agreement Acceptance Method is Print and Upload, follow the steps below:

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)

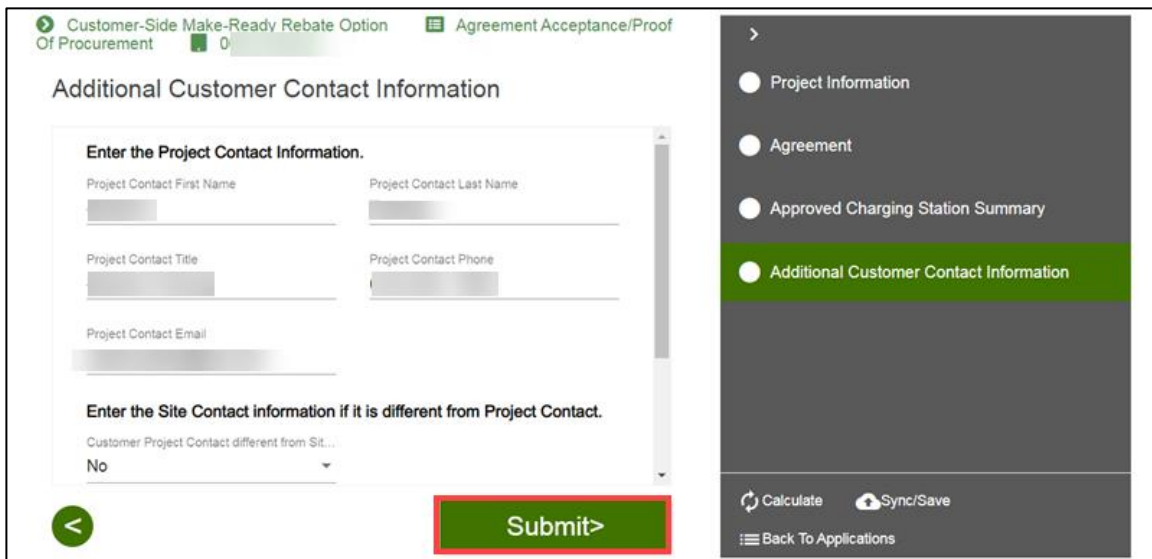
The Trade Professional Information page displays if the Trade Professional field is Yes.

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**.

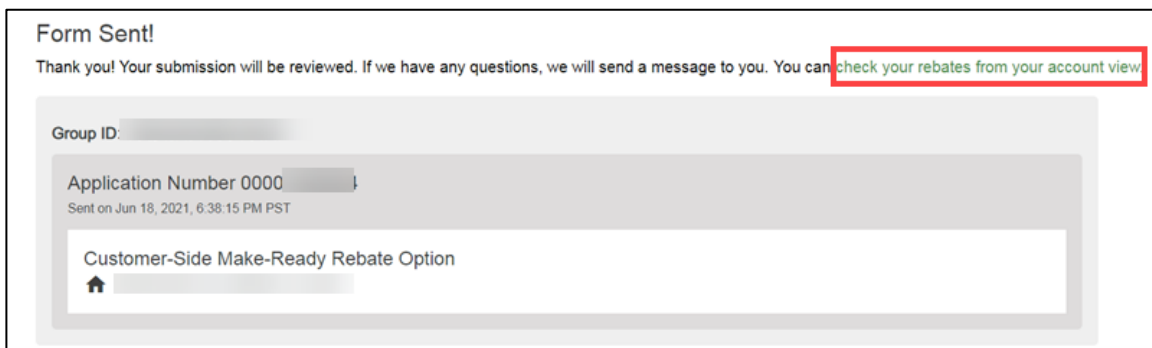


The **Form Sent** page displays.

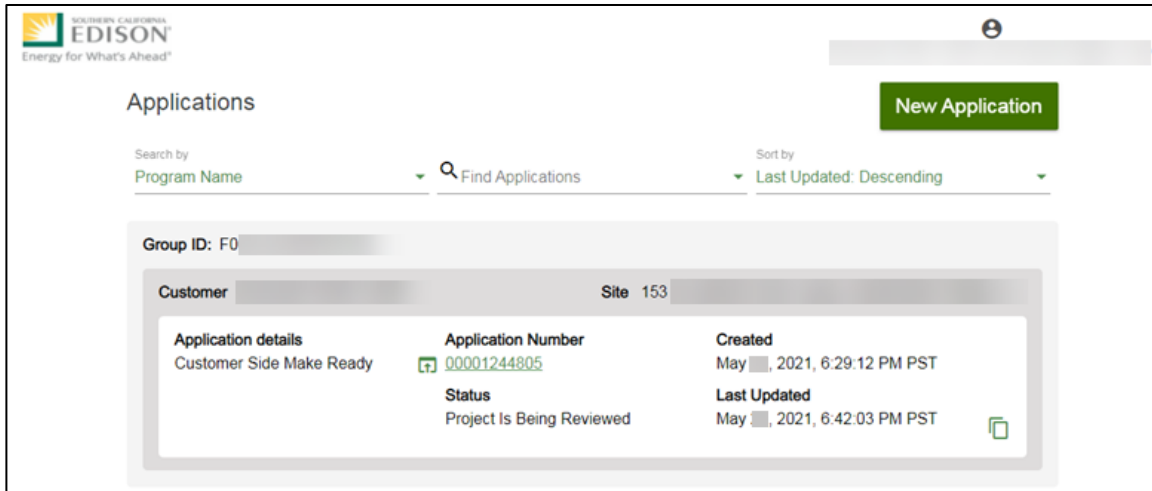
Form Sent!

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.

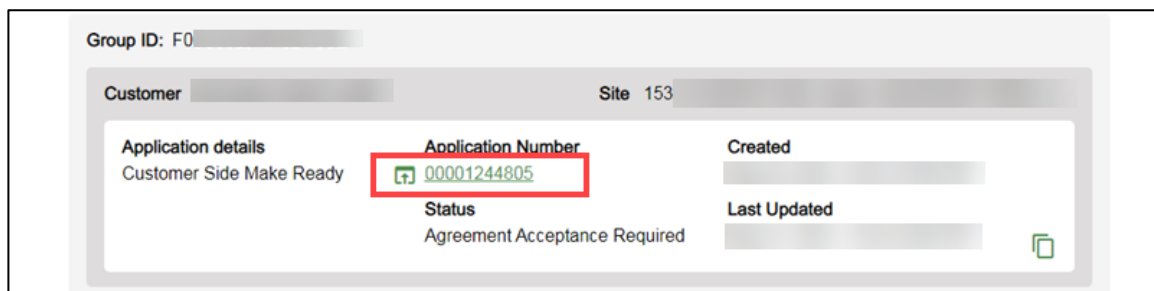
Once an Agreement Acceptance is complete, SCE reviews the Proof of Procurement.

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

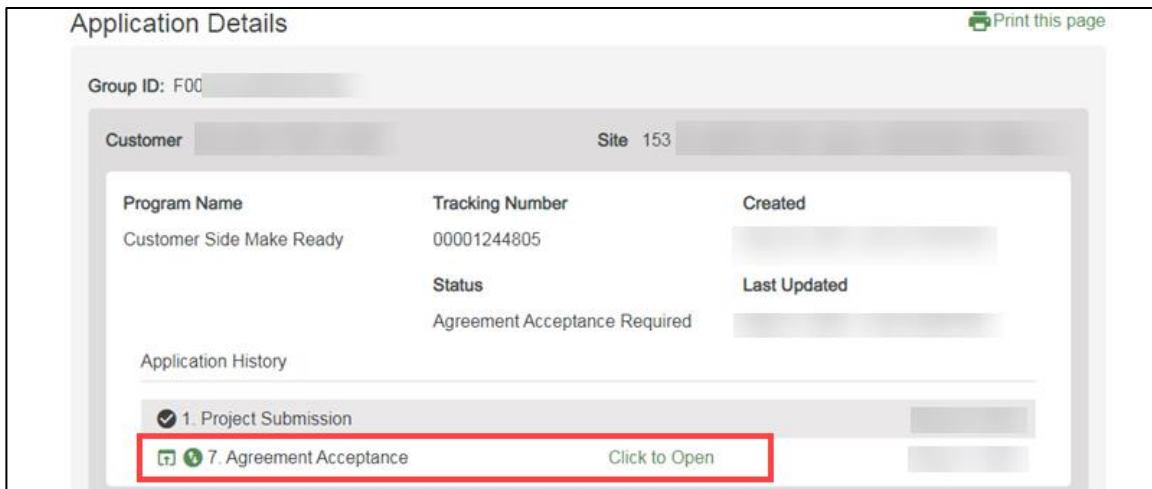
To complete the Agreement Acceptance/Proof of Procurement, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.


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

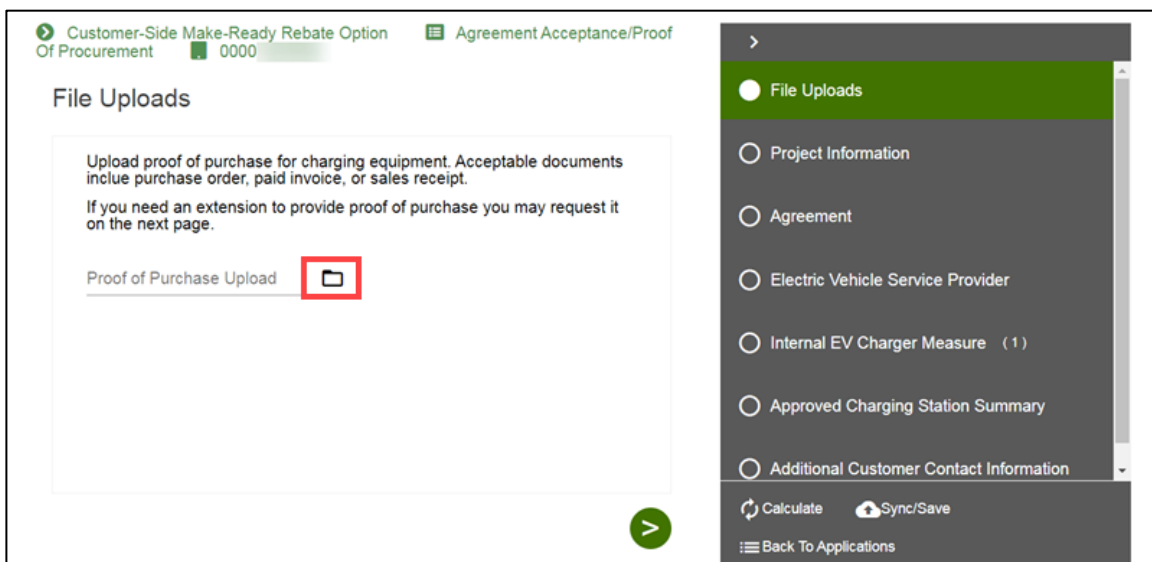


The **File Uploads** page displays.

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.

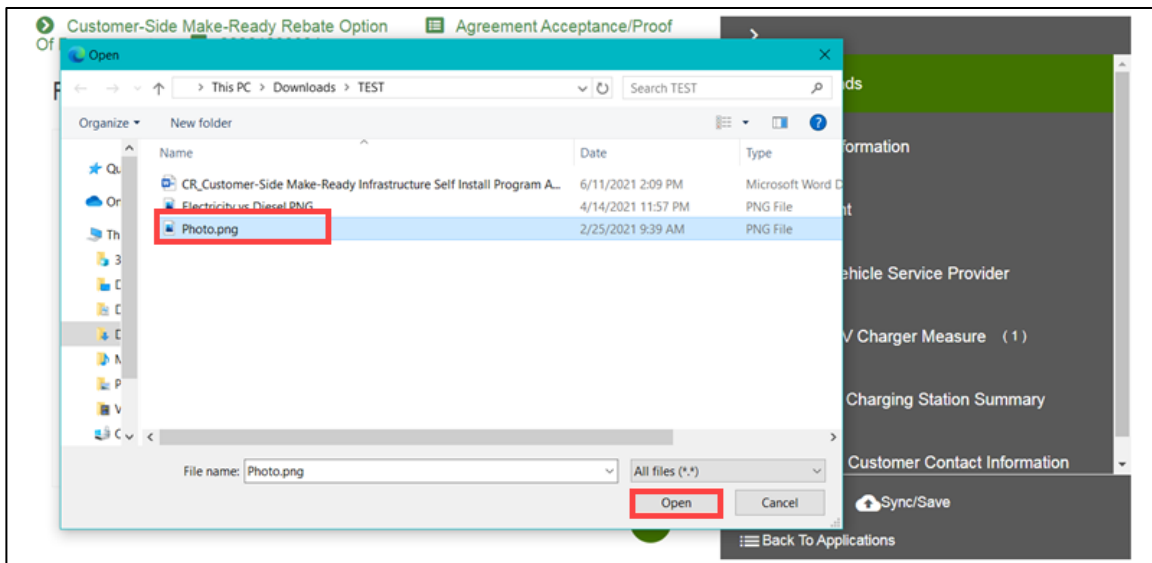
File Uploads

3. Select the  **folder** icon.



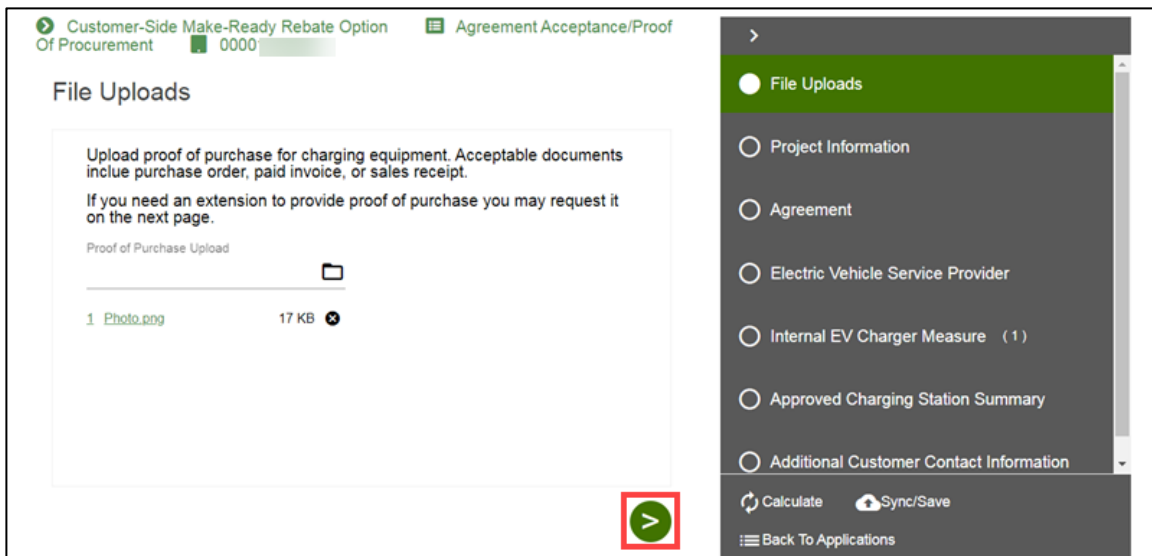
The **Open** window displays.

4. Select the file.
5. Select **Open**.




The **File Upload** page displays.

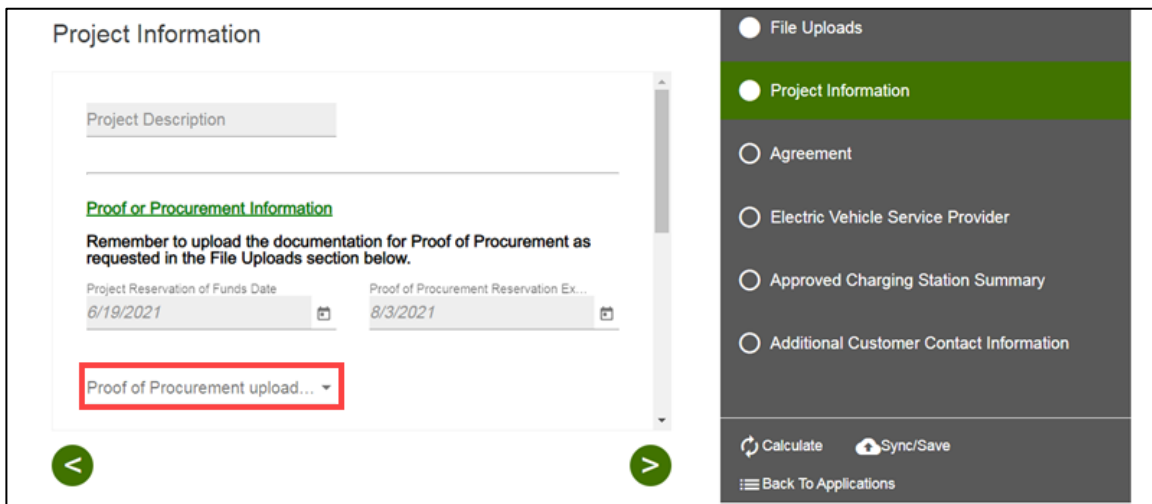
6. Click the  **Next** arrow.



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.



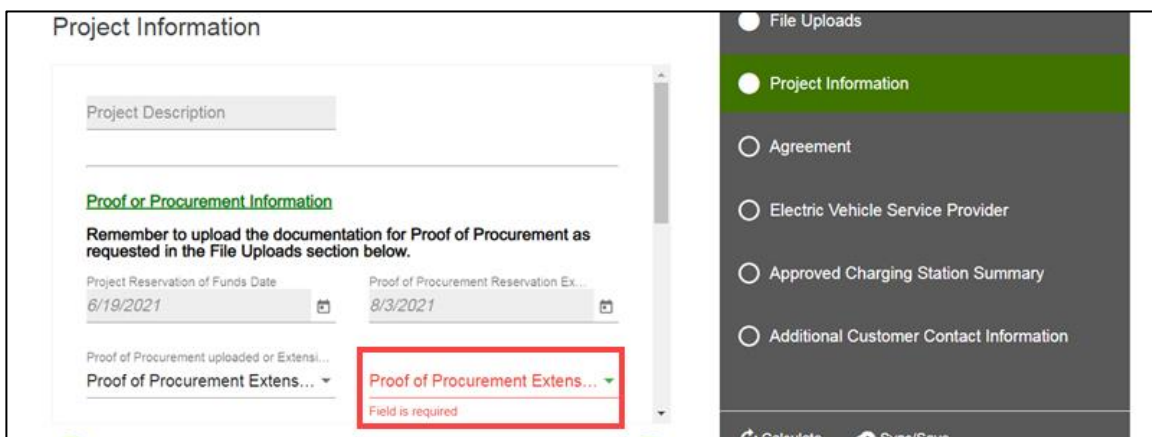
The screenshot shows the 'Project Information' page. The main content area has a 'Project Description' field, followed by a section titled 'Proof of Procurement Information'. Below this title, there is a reminder: 'Remember to upload the documentation for Proof of Procurement as requested in the File Uploads section below.' Two date fields are visible: 'Project Reservation of Funds Date' (6/19/2021) and 'Proof of Procurement Reservation Ex...' (8/3/2021). A dropdown menu labeled 'Proof of Procurement upload...' is highlighted with a red box. The sidebar on the right contains radio button options: 'File Uploads', 'Project Information' (selected), 'Agreement', 'Electric Vehicle Service Provider', 'Approved Charging Station Summary', and 'Additional Customer Contact Information'. 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.



This screenshot is similar to the previous one, showing the 'Project Information' page. In the 'Proof of Procurement Information' section, the dropdown menu is now labeled 'Proof of Procurement Extens...' and is highlighted with a red box. Below this dropdown, another red box highlights the text 'Field is required', indicating that this field is mandatory. The rest of the page, including the sidebar and navigation buttons, remains the same.

Is your charging station vendor installing the equipment?

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

Customer-Side Make-Ready Rebate Option Of Procurement 0000 Agreement Acceptance/Proof

Project Information

Program Manager: Ailsa Yew

How did you hear about the Charge Ready...: Account Manager

Currently working with a Trade Ally?: No

Special Restriction Area?: No

Port Location Type: Grade-level parking lot

Is your charging station vendor installing th...: No

Preferred Charger Deployment ...

Total Number of Port Requested: 10

File Uploads

Project Information

Installer Information

Electric Vehicle Service Provider

Construction Cost Information (1)

Approved Charging Station Summary

Charging Station Equipment (0)

Calculate Sync/Save

Back To Applications

Installer Information

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

13. Click the  **Next** arrow.

Installer Information

Business Name

Project Contact First Name

Project Contact Last Name

Project Contact Email

File Uploads

Project Information

Installer Information

Electric Vehicle Service Provider

Construction Cost Information (1)

Approved Charging Station Summary

Charging Station Equipment (0)

Calculate Sync/Save

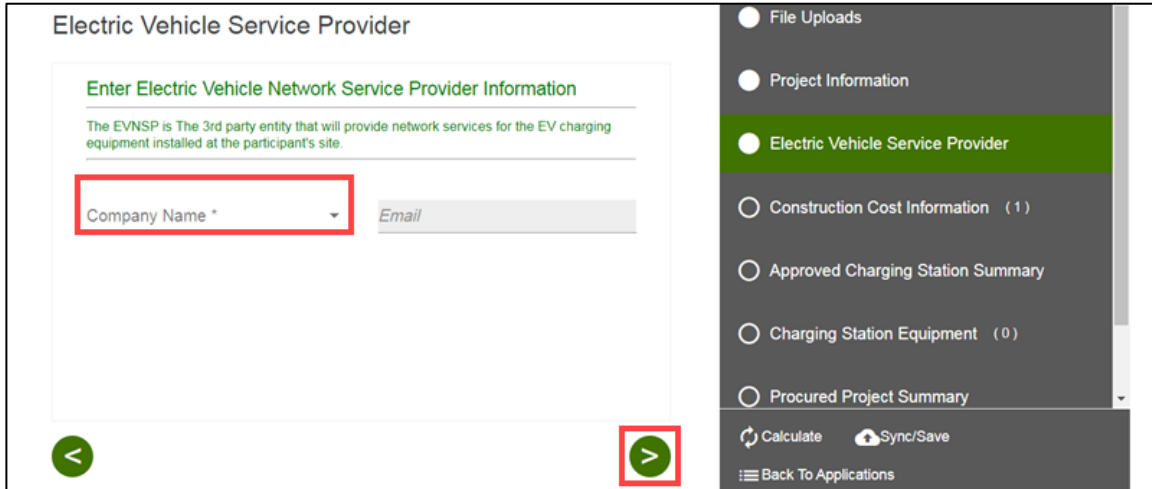
Back To Applications

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

Electric Vehicle Service Provider

14. Enter the **Company Name**.

15. Click the  **Next** arrow.



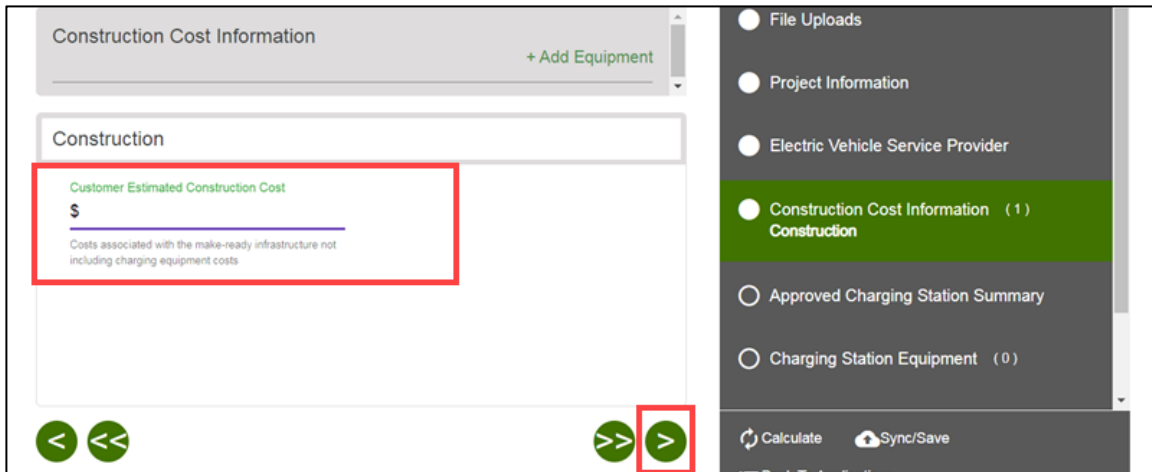
The screenshot shows the 'Electric Vehicle Service Provider' form. The main content area has a title 'Enter Electric Vehicle Network Service Provider Information' and a sub-header 'The EVNSP is The 3rd party entity that will provide network services for the EV charging equipment installed at the participant's site.' Below this, there are two input fields: 'Company Name *' (highlighted with a red box) and 'Email'. At the bottom of the form, there are two navigation arrows: a left arrow and a right arrow (highlighted with a red box). The right sidebar contains a list of steps: 'File Uploads', 'Project Information', 'Electric Vehicle Service Provider' (highlighted in green), 'Construction Cost Information (1)', 'Approved Charging Station Summary', 'Charging Station Equipment (0)', and 'Procured Project Summary'. At the bottom of the sidebar, there are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

The **Construction Cost Information** page displays.

Construction Cost Information

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

17. Click the  **Next** arrow.



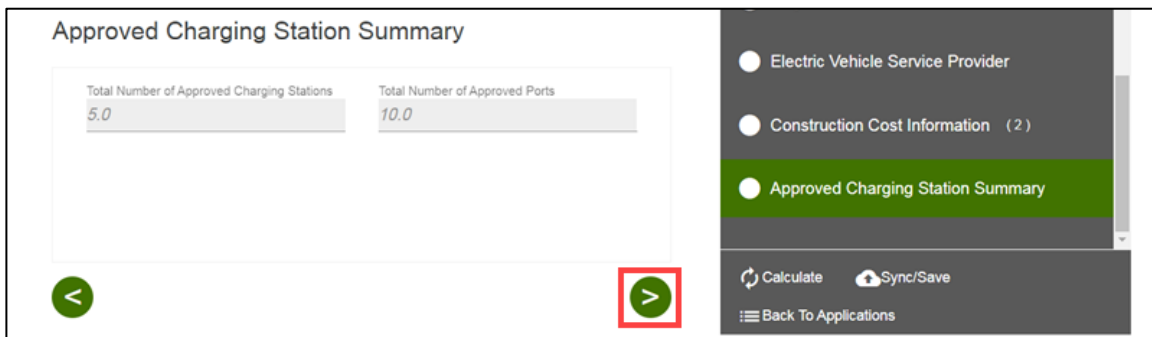
The screenshot shows the 'Construction Cost Information' form. The main content area has a title 'Construction Cost Information' and a '+ Add Equipment' button. Below this, there is a section titled 'Construction' with a sub-header 'Customer Estimated Construction Cost' and a '\$' symbol. Below the '\$' symbol, there is a text box containing the text 'Costs associated with the make-ready infrastructure not including charging equipment costs'. At the bottom of the form, there are three navigation arrows: a left arrow, a double left arrow, and a right arrow (highlighted with a red box). The right sidebar contains a list of steps: 'File Uploads', 'Project Information', 'Electric Vehicle Service Provider', 'Construction Cost Information (1) Construction' (highlighted in green), 'Approved Charging Station Summary', and 'Charging Station Equipment (0)'. At the bottom of the sidebar, there are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

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

Approved Charging Station Summary

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

19. Click the  **Next** arrow.

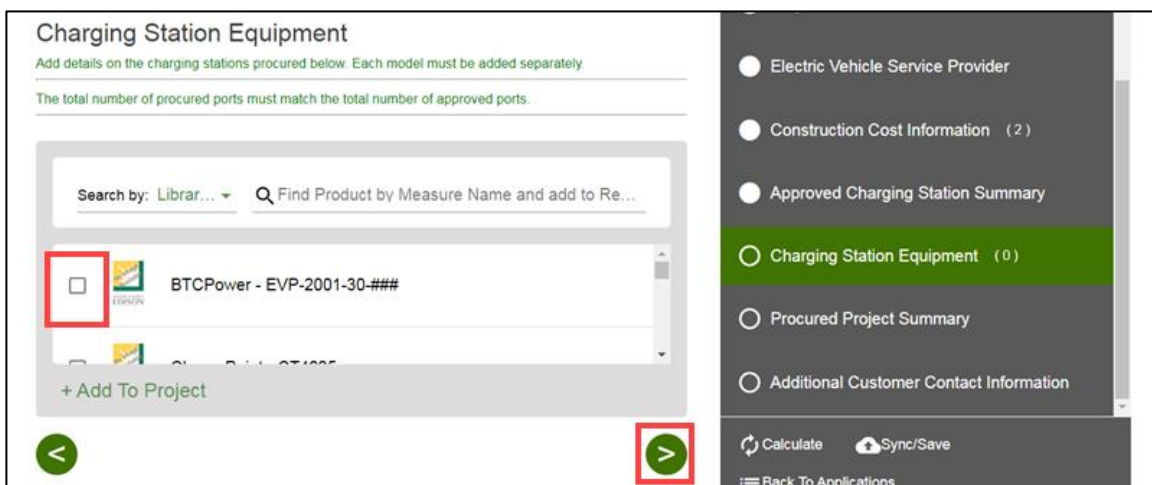


The **Charging Station Equipment** page displays.

Charging Station Equipment

20. Select the checkbox next to the equipment.

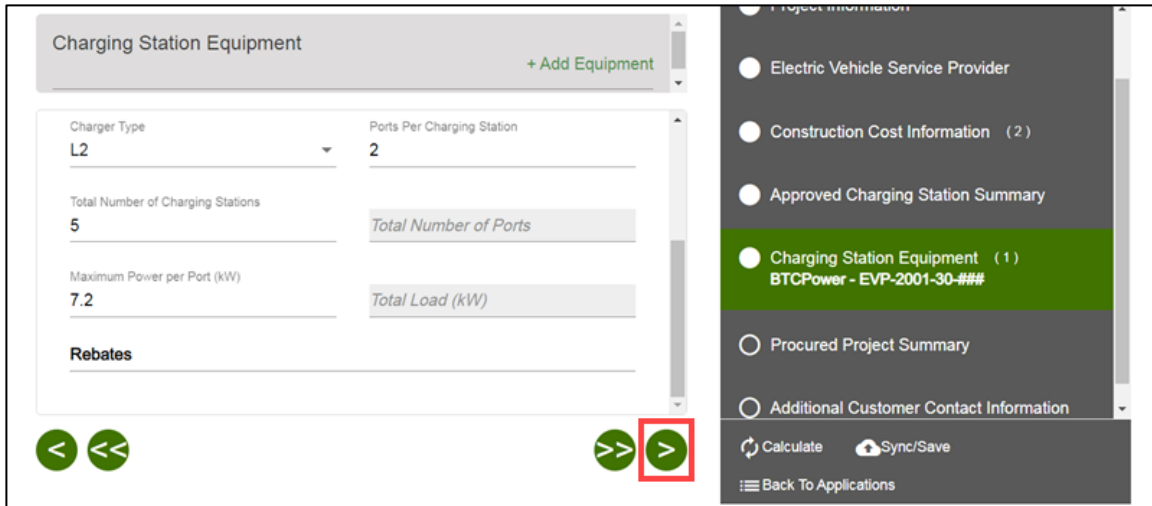
21. Click the  **Next** arrow.



Additional fields display.

22. Enter the required information.

23. Click the  **Next** arrow.

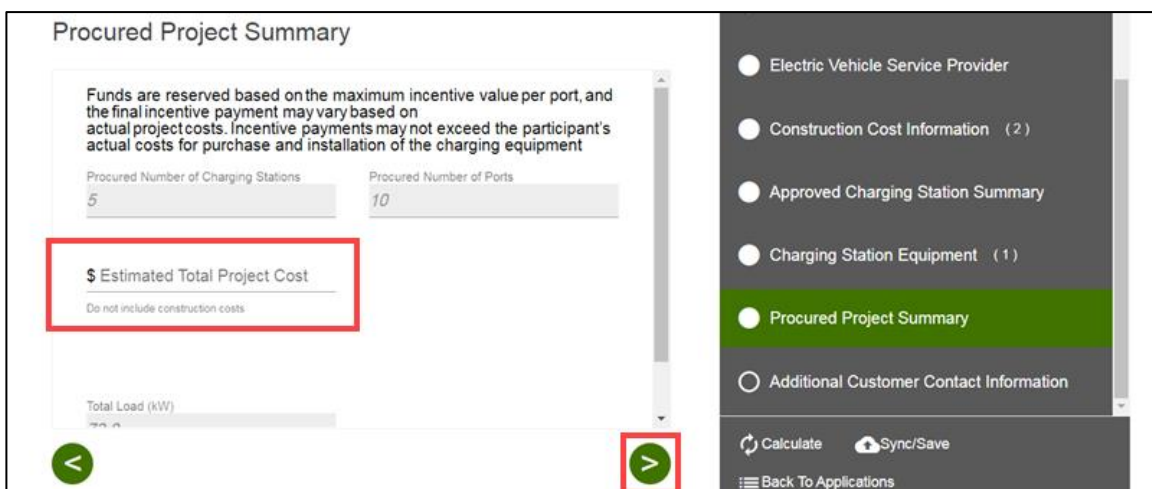


The **Procured Project Summary** page displays.

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**.

Additional Customer Contact Information

Enter the Project Contact Information.

Project Contact First Name Project Contact Last Name

Project Contact Title Project Contact Phone

Project Contact Email

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

Customer Project Contact different from Sit...
No

Submit

- Electric Vehicle Service Provider
- Construction Cost Information (2)
- Approved Charging Station Summary
- Charging Station Equipment (1)
- Procured Project Summary
- Additional Customer Contact Information

Calculate Sync/Save
Back To Applications

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.

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]

Sent on Jun 18, 2021, 6:38:15 PM PST

Customer-Side Make-Ready Rebate Option

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

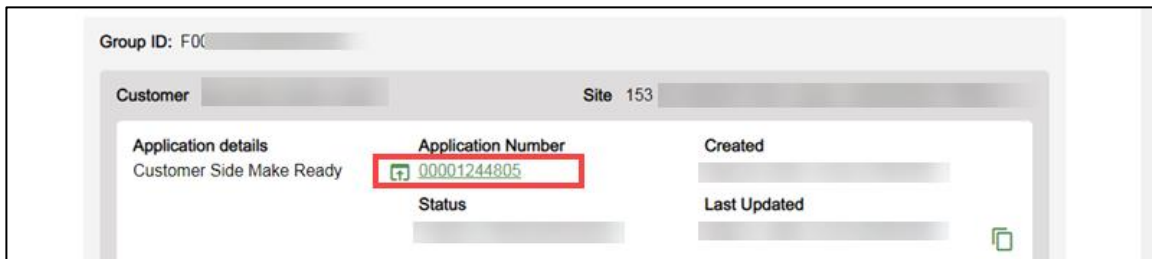
Once a Site Plan is complete, SCE reviews the site plan.

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

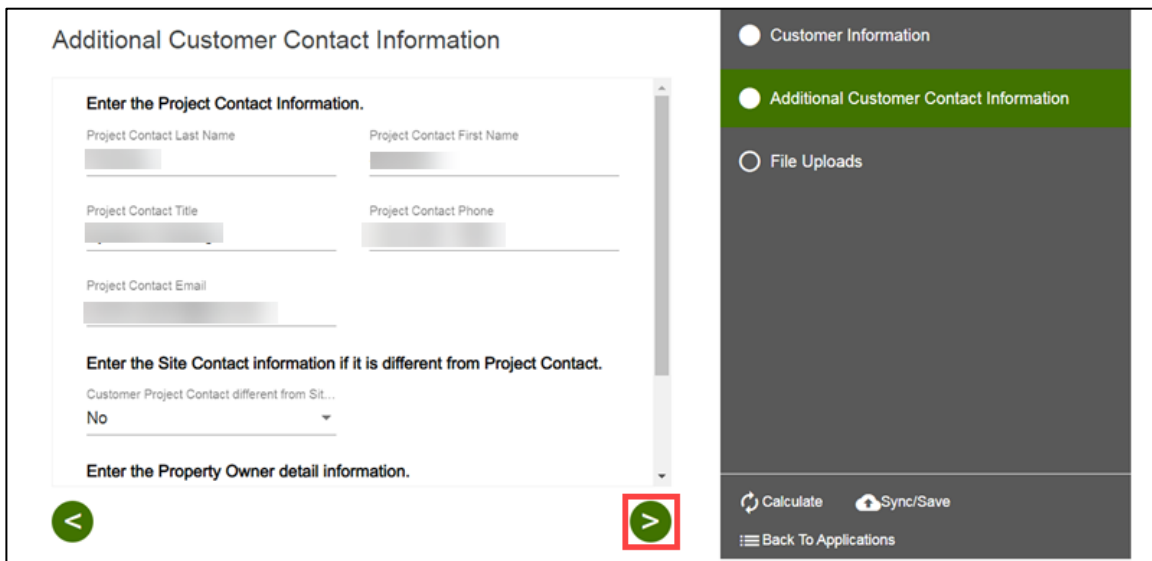
3. Verify the **Customer Information**.

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.



Additional Customer Contact Information

Enter the Project Contact Information.

Project Contact Last Name

Project Contact First Name

Project Contact Title

Project Contact Phone

Project Contact Email

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

Customer Project Contact different from Sit...
No

Enter the Property Owner detail information.

Customer Information

Additional Customer Contact Information

File Uploads

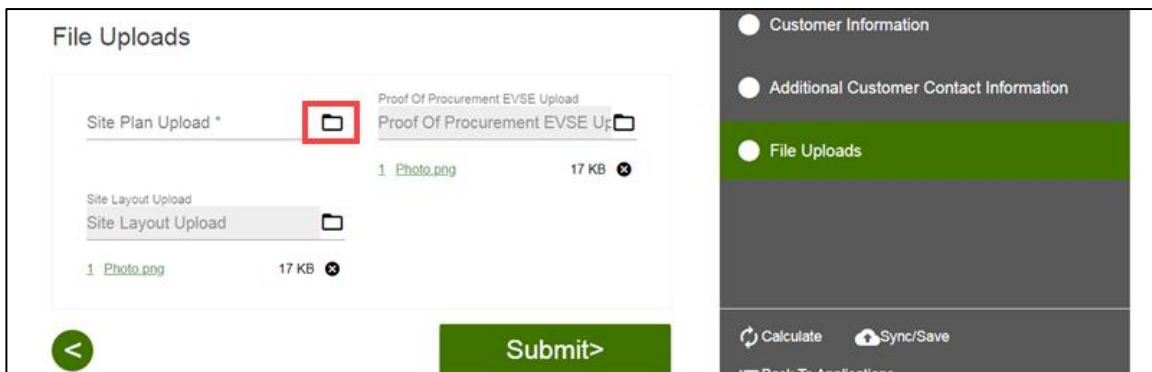
Calculate Sync/Save

Back To Applications


The **File Uploads** page displays.

File Uploads

7. Upload the **Site Plan**.



File Uploads

Site Plan Upload * 

Proof Of Procurement EVSE Upload

Proof Of Procurement EVSE Up

1 Photo.png 17 KB

Site Layout Upload

Site Layout Upload

1 Photo.png 17 KB

Submit

Customer Information

Additional Customer Contact Information

File Uploads

Calculate Sync/Save

Back To Applications

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

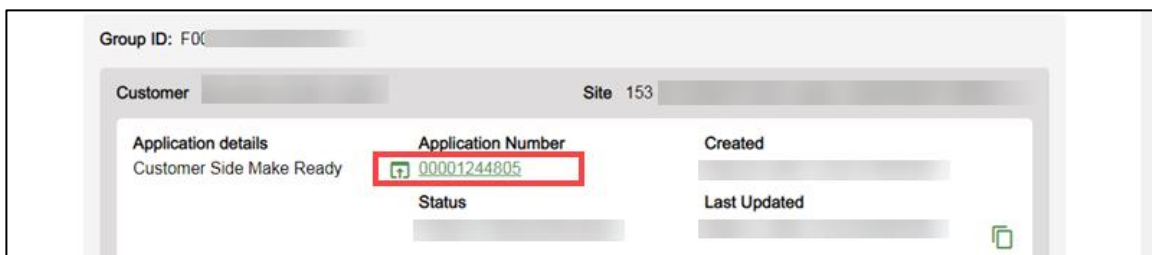
Once a Design Acceptance is complete, SCE begins work on project requirements.

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

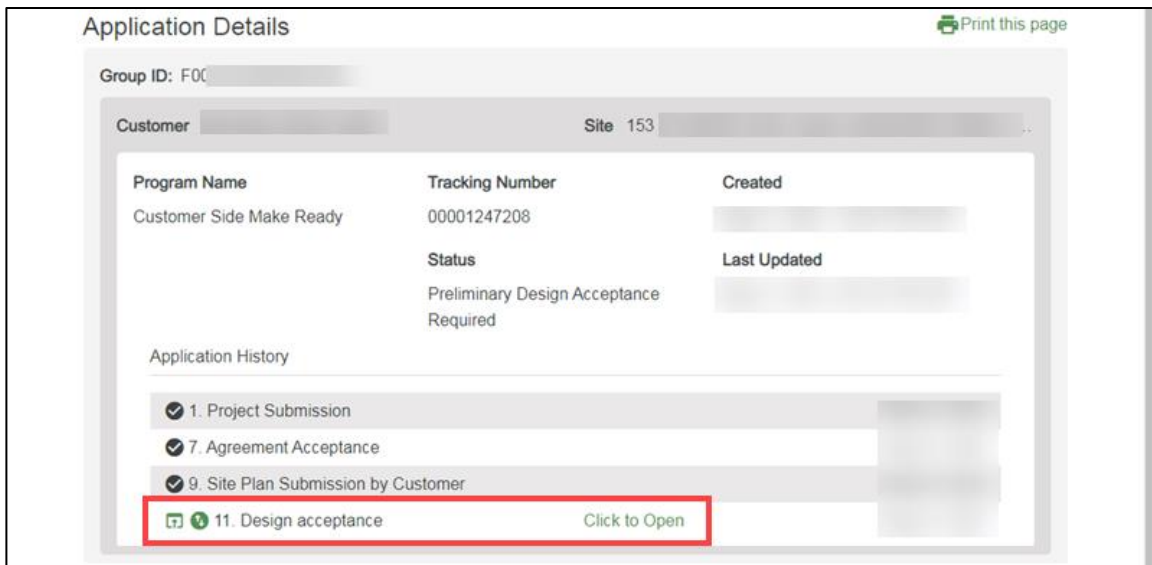
To complete the Design Acceptance, follow the steps below:

1. Select the **Application Number**.



The **Application Details** page displays.

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




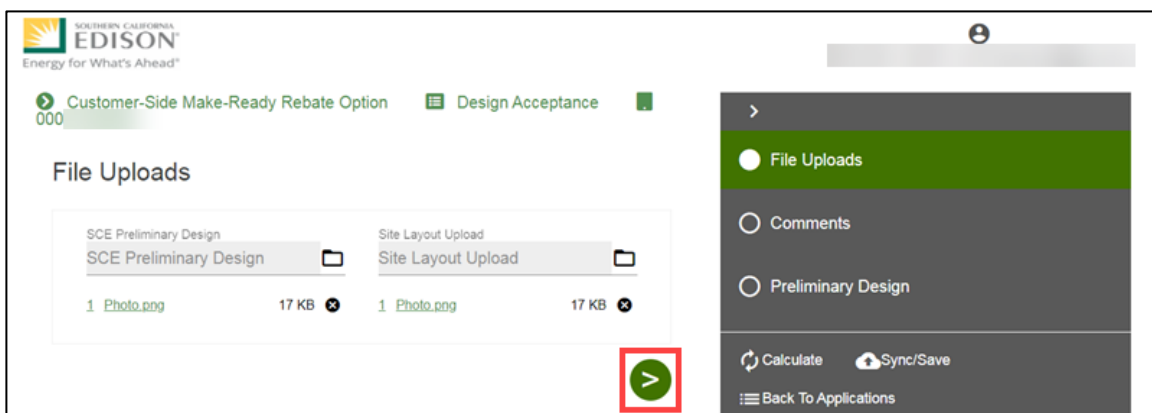
The **File Uploads** page displays.

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

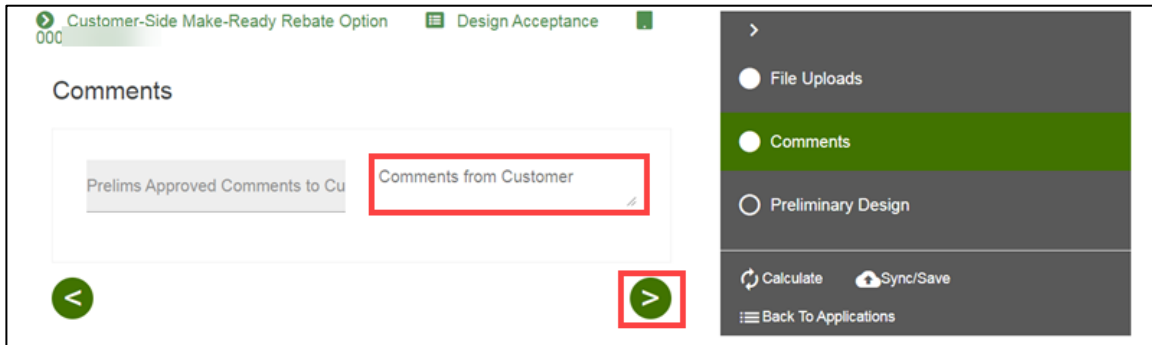
3. Review the **File Uploads**.
4. Click the  **Next** arrow.



The **Comments** page displays.


Comments

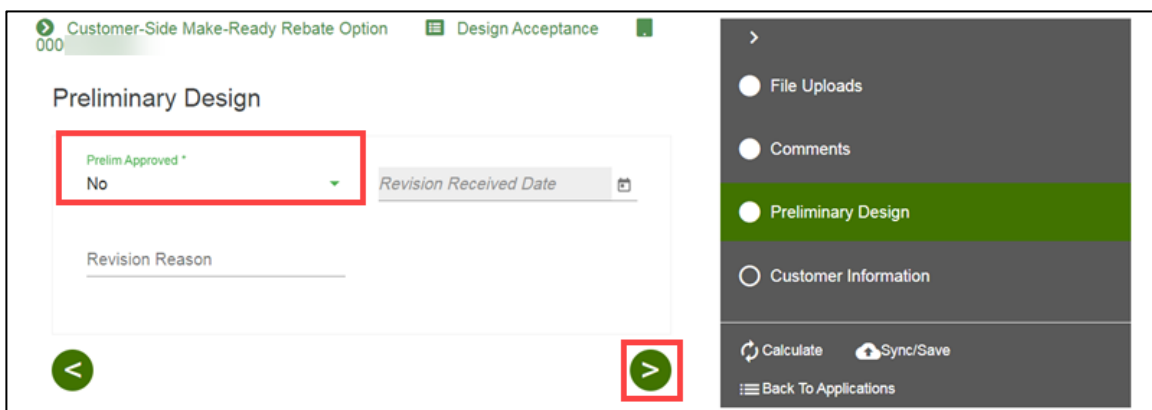
5. Enter **Comments**, if applicable.
6. Click the  **Next** arrow.



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.

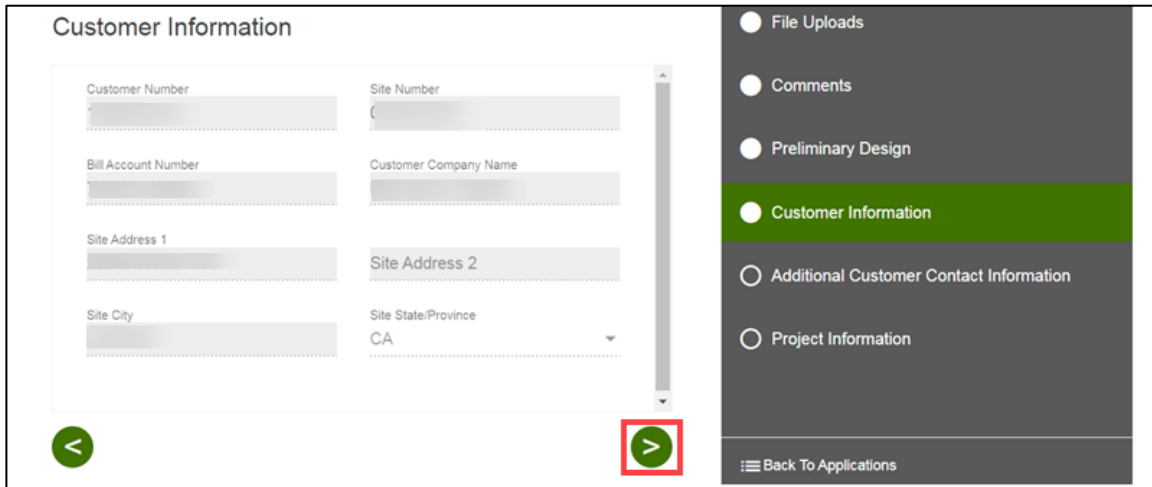


The **Customer Information** page displays.

Customer Information

9. Verify the **Customer Information**.

10. Click the  **Next** arrow.



The screenshot shows a web interface for entering customer information. The main form area is titled "Customer Information" and contains several input fields: Customer Number, Site Number, Bill Account Number, Customer Company Name, Site Address 1, Site Address 2, Site City, and Site State/Province (with "CA" selected). A vertical scrollbar is visible on the right side of the form. Below the form are two green circular navigation arrows: a left arrow and a right arrow. The right arrow is highlighted with a red square. To the right of the form is a dark grey sidebar menu with a list of options: File Uploads, Comments, Preliminary Design, Customer Information (highlighted in green), Additional Customer Contact Information, and Project Information. At the bottom of the sidebar is a "Back To Applications" button with a hamburger menu icon.

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**.

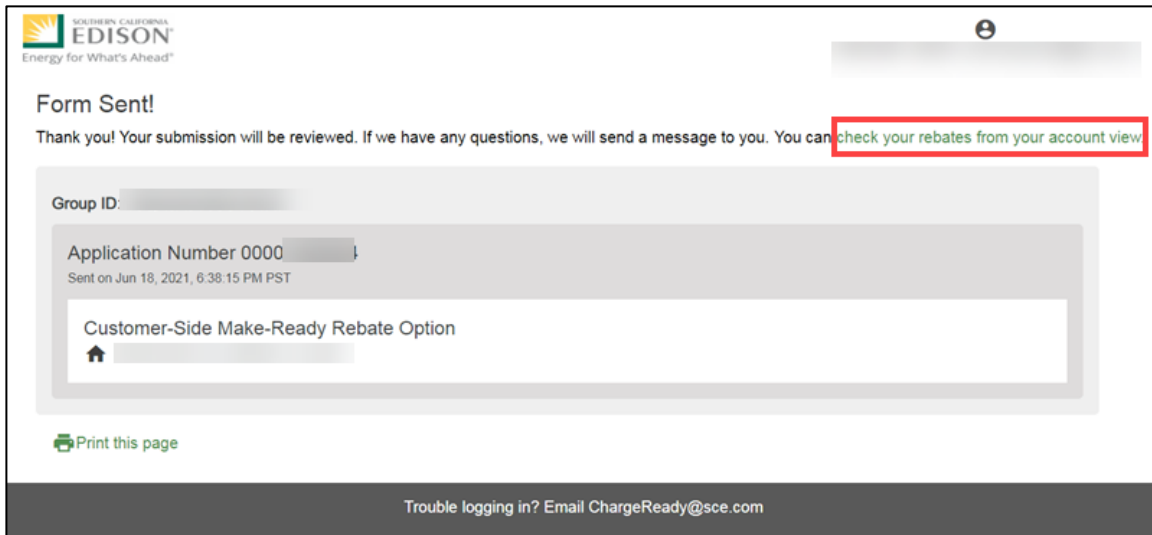
14. Select **Submit**.

The **Form Sent** page displays.

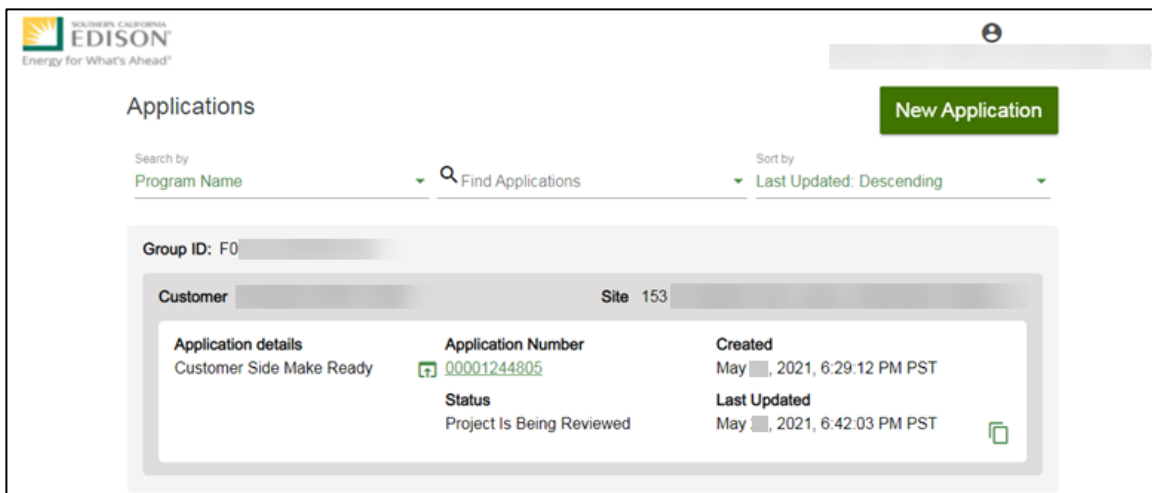
Form Sent!

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

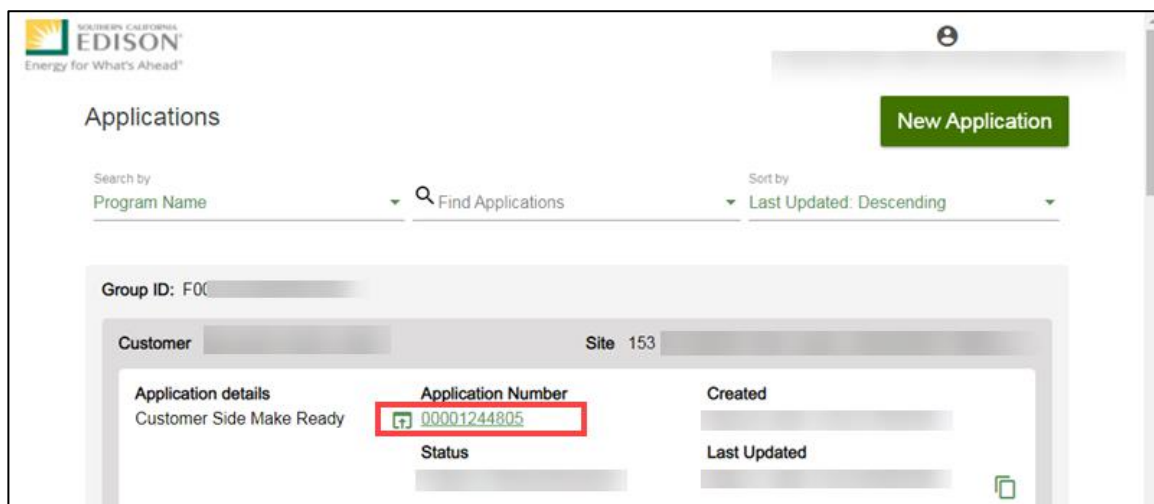
Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

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

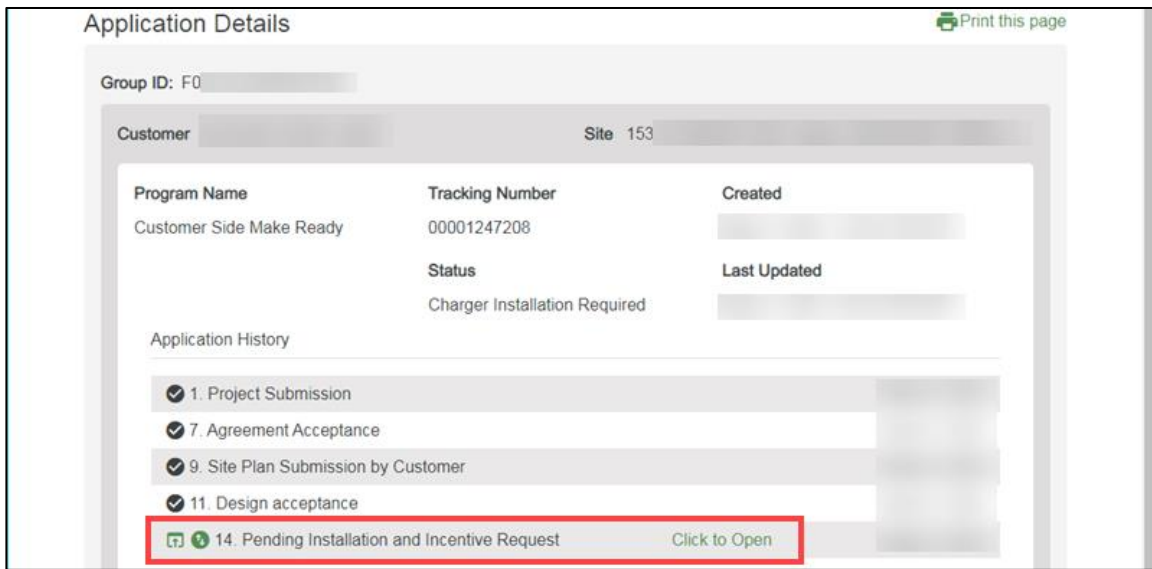
To complete the Pending Installation and Incentive Request form, follow the steps below.

1. Select the **Application Number**.




The **Application Details** page displays.

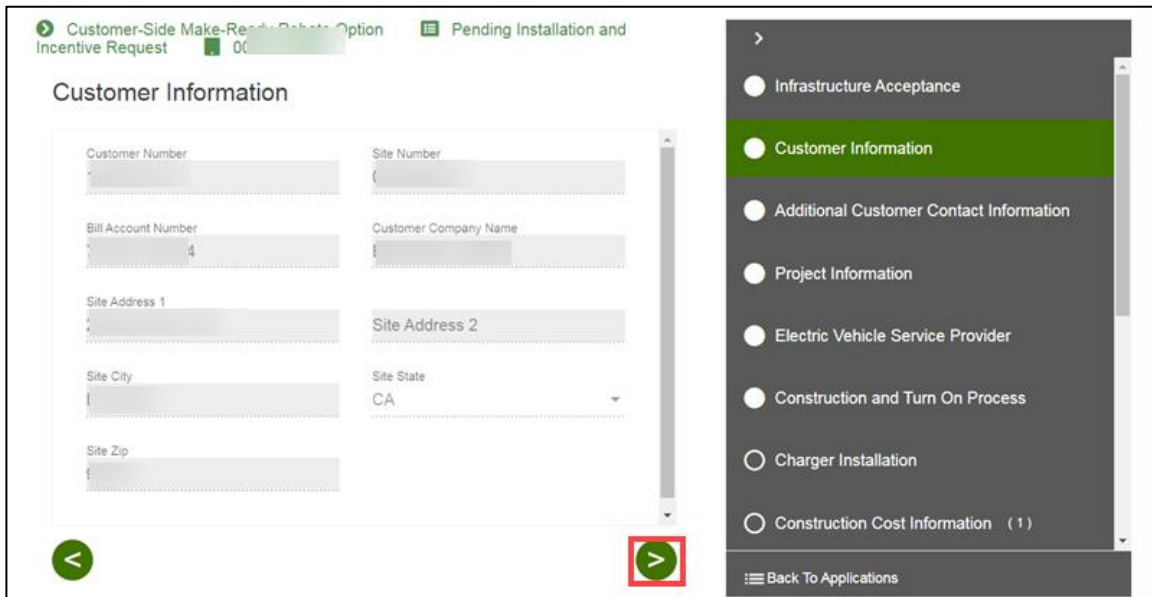
2. Select **Click to Open** under 14. Pending Installation and Incentive Request.



The **Customer Information** page displays.


Customer Information

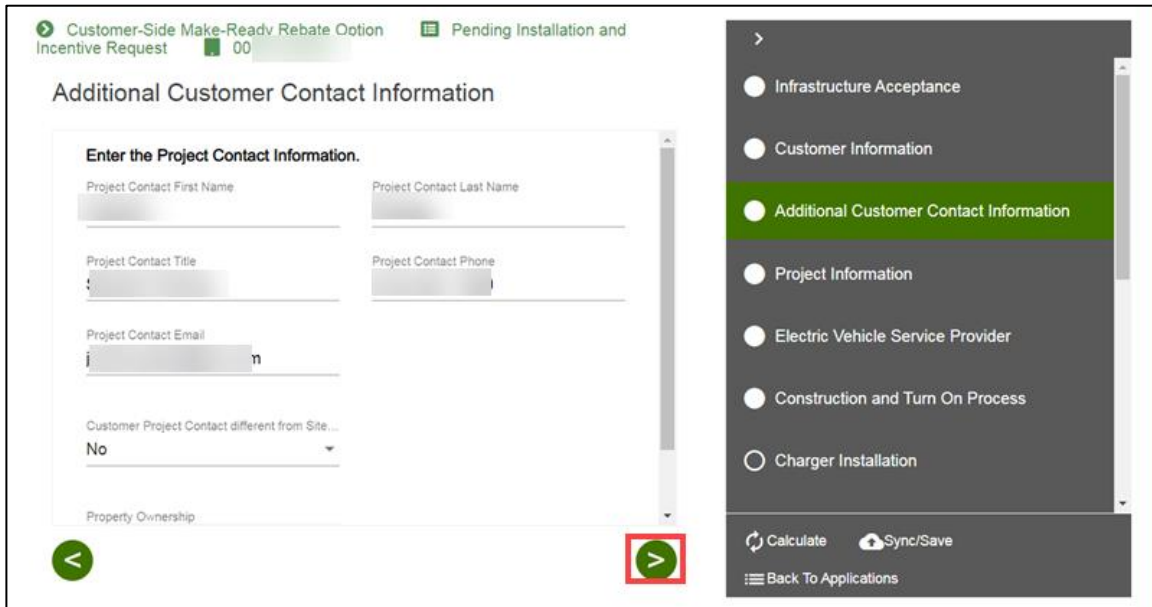
3. Verify the **Customer Information**.
4. Click the  **Next** arrow.



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

Additional Customer Contact Information

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



Customer-Side Make-Ready Rebate Option Incentive Request 00 Pending Installation and

Additional Customer Contact Information

Enter the Project Contact Information.

Project Contact First Name Project Contact Last Name

Project Contact Title Project Contact Phone

Project Contact Email

Customer Project Contact different from Site...
No

Property Ownership

Infrastructure Acceptance

Customer Information

Additional Customer Contact Information

Project Information

Electric Vehicle Service Provider

Construction and Turn On Process

Charger Installation

Calculate Sync/Save

Back To Applications

The **Project Information** page displays.

Project Information

7. Verify the **Project Information**.
8. Click the  **Next** arrow.

Customer-Side Make-Ready Rebate Option Incentive Request 0

Pending Installation and

Project Information

Group ID

Project Description

General Application Information:

Application Submission Date

Program Manager
Ailsa Yew

How did you hear about the Charge Ready ...
Account Manager

Currently working with a Trade Ally?
No

Is your charging station vendor installing the...
Yes

Special Restriction Area?
No

Preferred Charger Deployment Loc

Total Number of Port Requested
10

Infrastructure Acceptance

Customer Information

Additional Customer Contact Information

Project Information

Electric Vehicle Service Provider

Construction and Turn On Process

Charger Installation

Construction Cost Information (1)

Back To Applications

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

Electric Vehicle Service Provider

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

10. Click the **Next** arrow.

Customer-Side Make-Ready Rebate Option Incentive Request 00

Pending Installation and

Electric Vehicle Service Provider

Enter Electric Vehicle Network Service Provider Information

The EVNSP is The 3rd party entity that will provide network services for the EV charging equipment installed at the participant's site

Company Name
Blink

Email

Infrastructure Acceptance

Customer Information

Additional Customer Contact Information

Project Information

Electric Vehicle Service Provider

Construction and Turn On Process

Charger Installation

Calculate Sync/Save

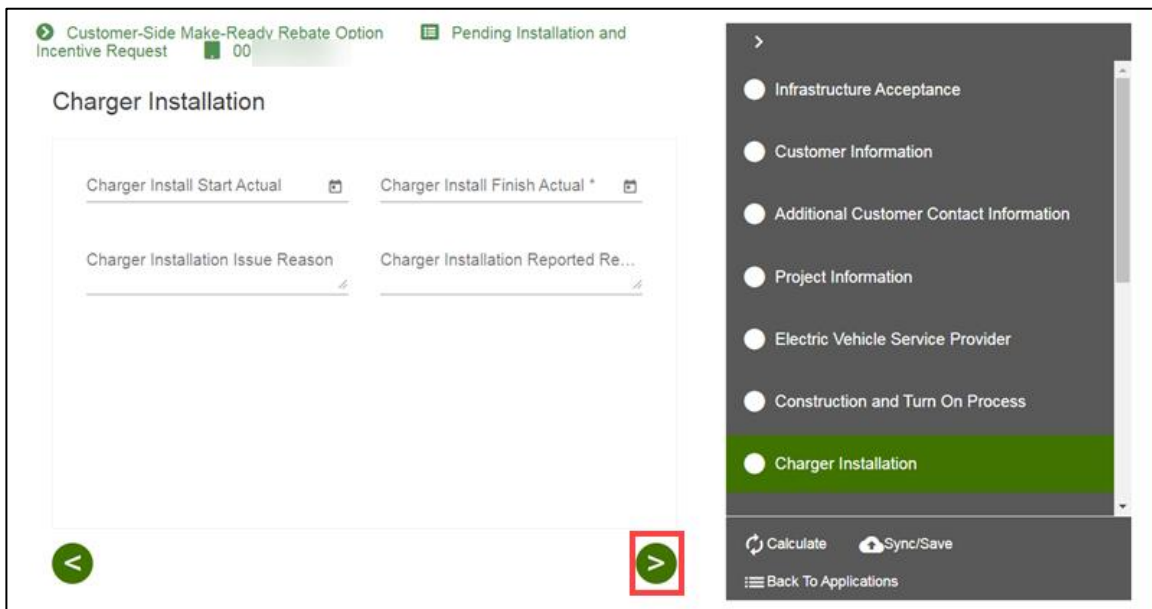
Back To Applications

The **Charger Installation** page displays.

Charger Installation

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

12. Click the  **Next** arrow.

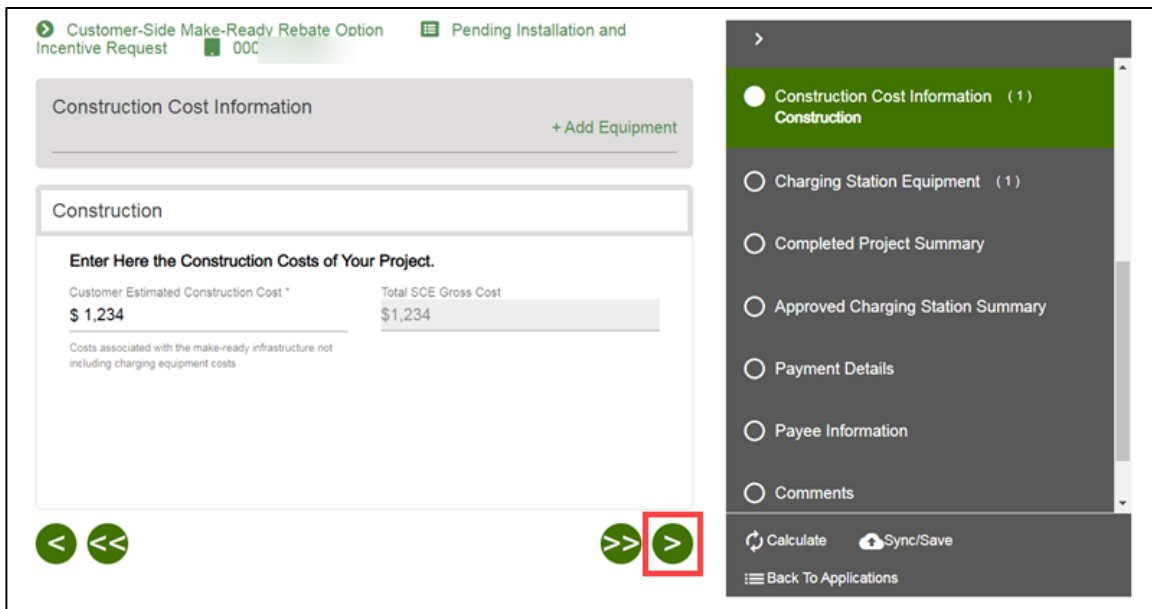


The **Construction Cost Information** page displays.

Construction Cost Information

13. Enter and verify the required information.

14. Click the  **Next** arrow.

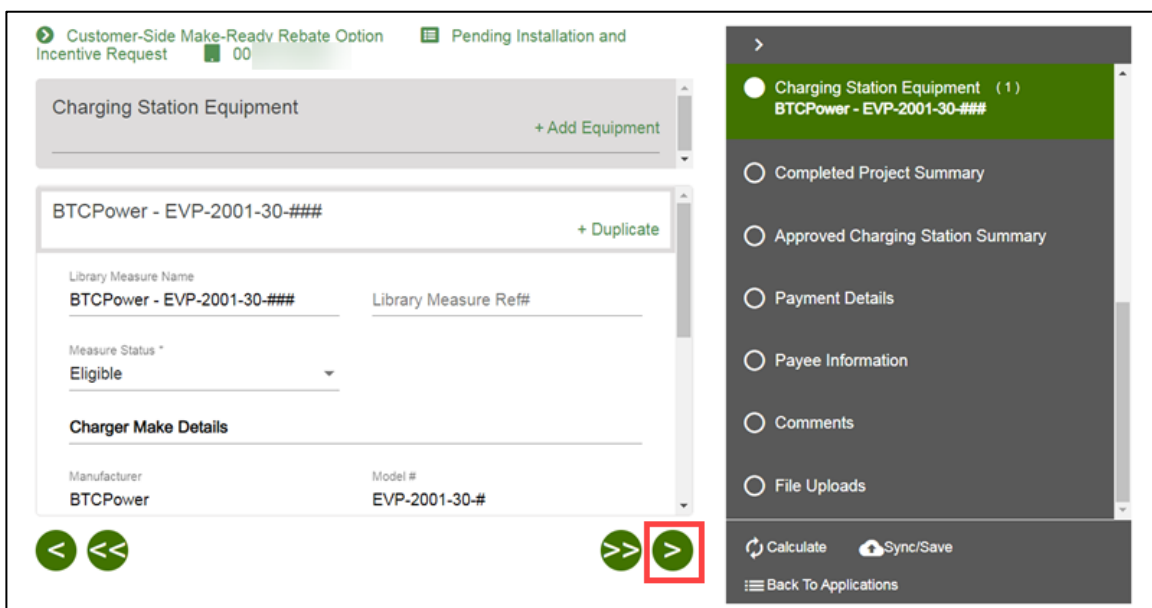


The **Charging Station Equipment** page displays.

Charging Station Equipment

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

16. Click the  **Next** arrow.

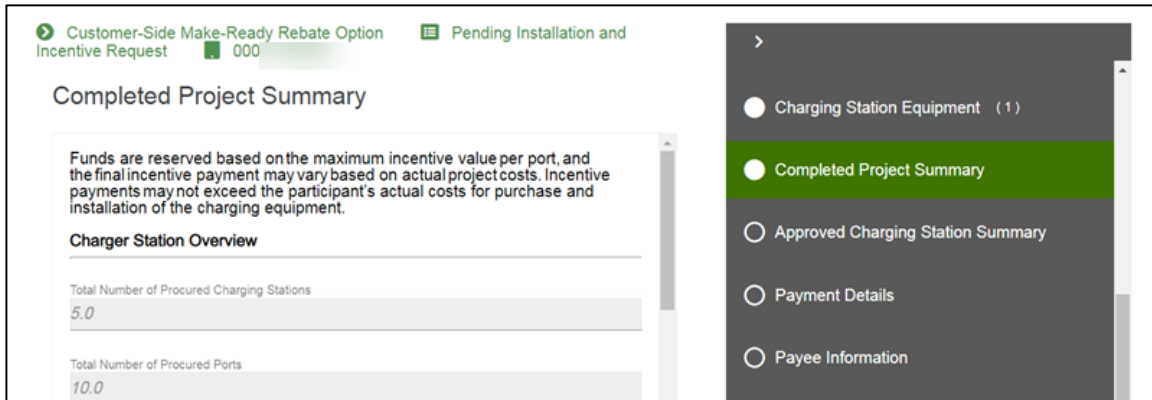


The **Completed Project Summary** page displays.

Completed Project Summary Totals

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

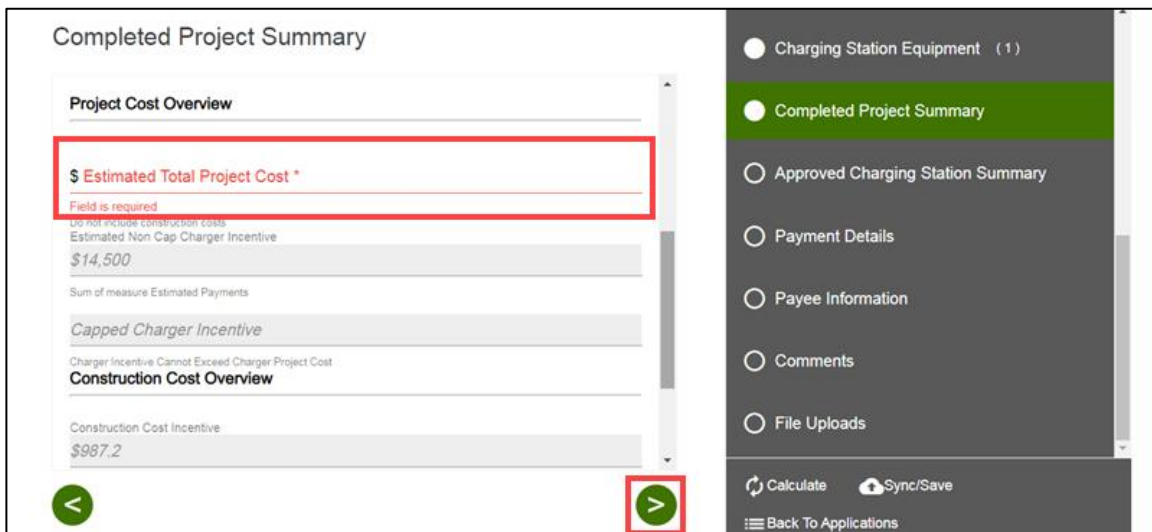
18. Scroll down.



The screenshot shows the 'Completed Project Summary' page. At the top, there are two status indicators: 'Customer-Side Make-Ready Rebate Option Incentive Request' with a green checkmark and '000', and 'Pending Installation and Incentive Request' with a green checkmark. The main content area is titled 'Completed Project Summary' and contains a paragraph of text: '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.' Below this is a section titled 'Charger Station Overview' with two rows of data: 'Total Number of Procured Charging Stations' with the value '5.0' and 'Total Number of Procured Ports' with the value '10.0'. On the right side, there is a sidebar menu with several options: 'Charging Station Equipment (1)', 'Completed Project Summary' (which is highlighted in green), 'Approved Charging Station Summary', 'Payment Details', and 'Payee Information'.

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

20. Click the  **Next** arrow.



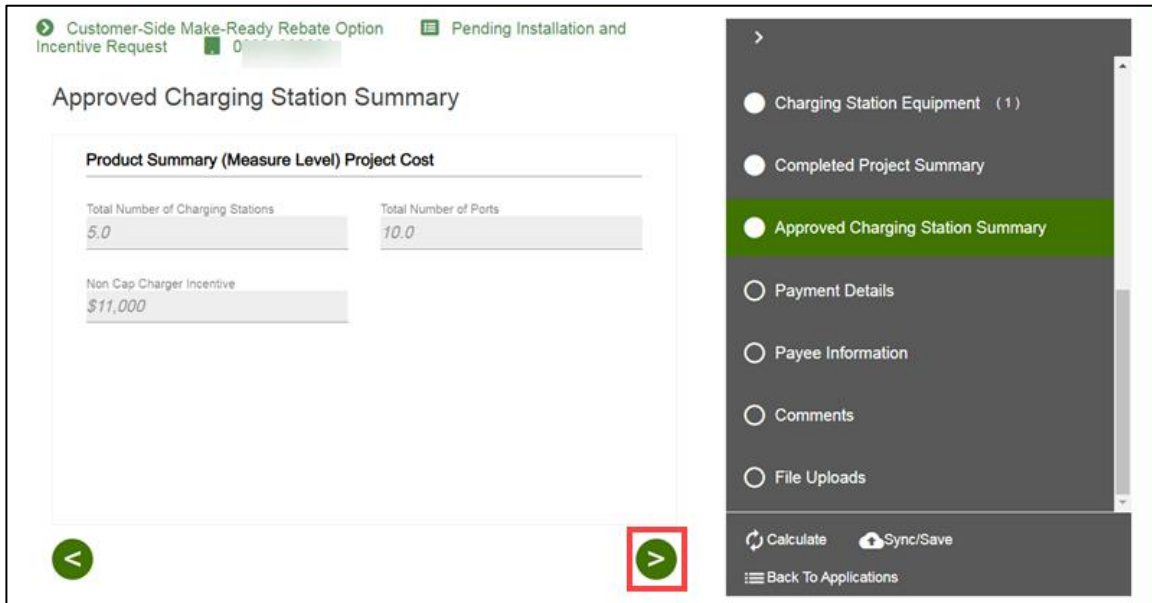
The screenshot shows the 'Completed Project Summary' page with the 'Project Cost Overview' section highlighted. The 'Estimated Total Project Cost' field is highlighted with a red box and contains the text '\$ Estimated Total Project Cost *' and 'Field is required'. Below this field, there are several rows of data: 'Estimated Non Cap Charger Incentive' with the value '\$14,500', 'Sum of measure Estimated Payments' with the value 'Capped Charger Incentive', and 'Construction Cost Incentive' with the value '\$987.2'. The 'Construction Cost Overview' section is also visible. At the bottom of the page, there are two navigation arrows: a green left arrow and a green right arrow (highlighted with a red box). The sidebar menu on the right is the same as in the previous screenshot, but with additional options: 'Comments' and 'File Uploads'. At the bottom of the sidebar, there are buttons for 'Calculate', 'Sync/Save', and 'Back To Applications'.

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

Approved Charging Station Summary

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

22. Click the  **Next** arrow.

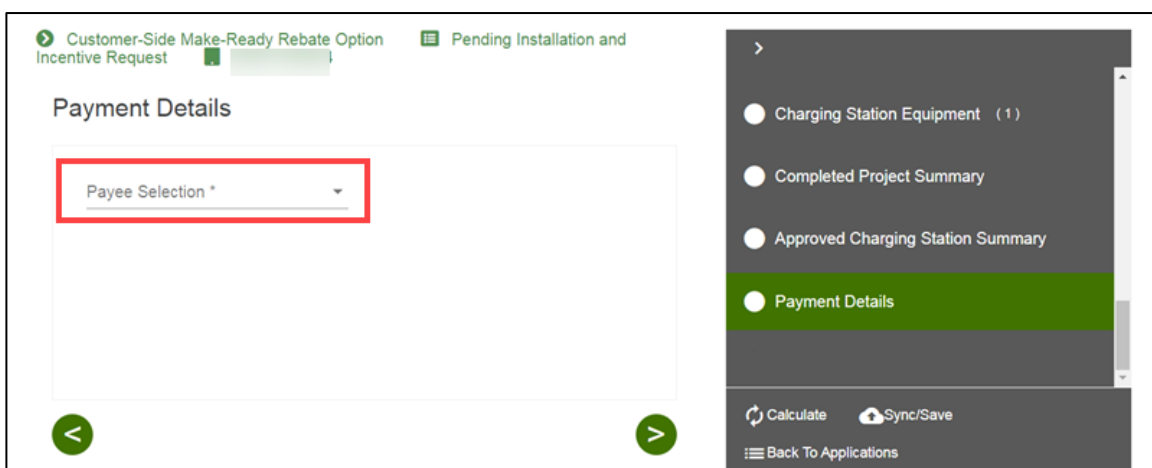


Product Summary (Measure Level) Project Cost	
Total Number of Charging Stations	Total Number of Ports
5.0	10.0
Non Cap Charger Incentive	
\$11,000	

The **Payment Details** page displays.

Payment Details

23. Select a **Payee Selection**.

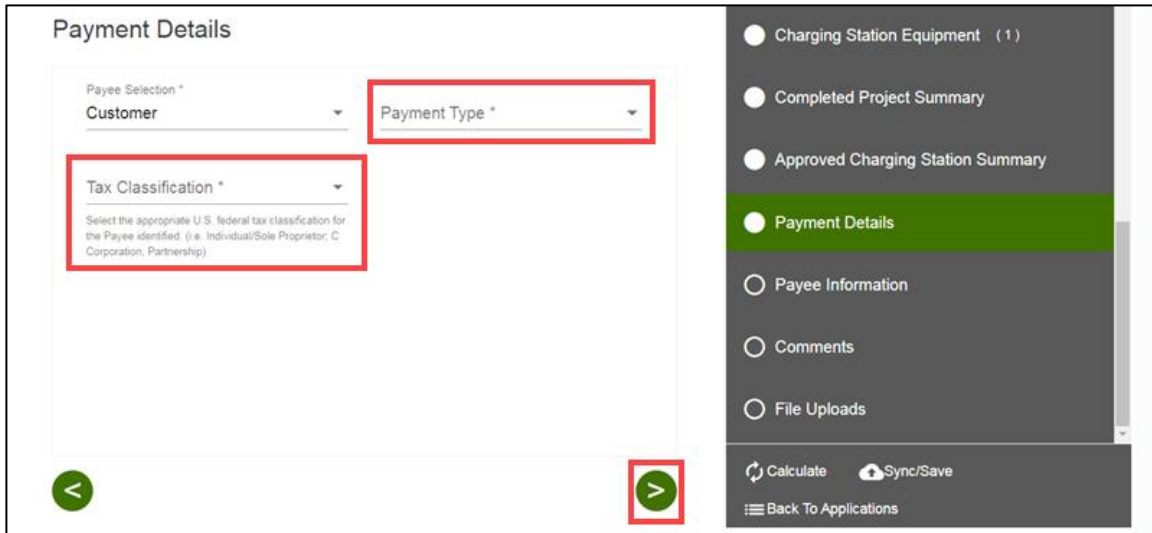


Additional fields display.

24. Select the **Payment Type**.

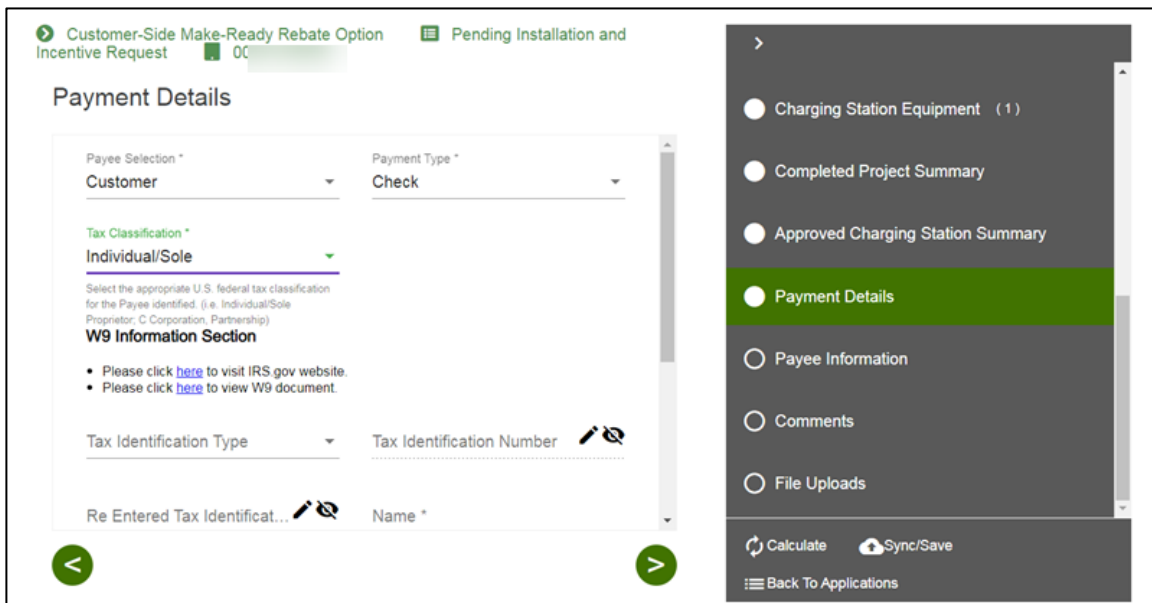
25. Select the **Tax Classification**.

26. Click the  **Next** arrow.



The **Payee Information** page displays.

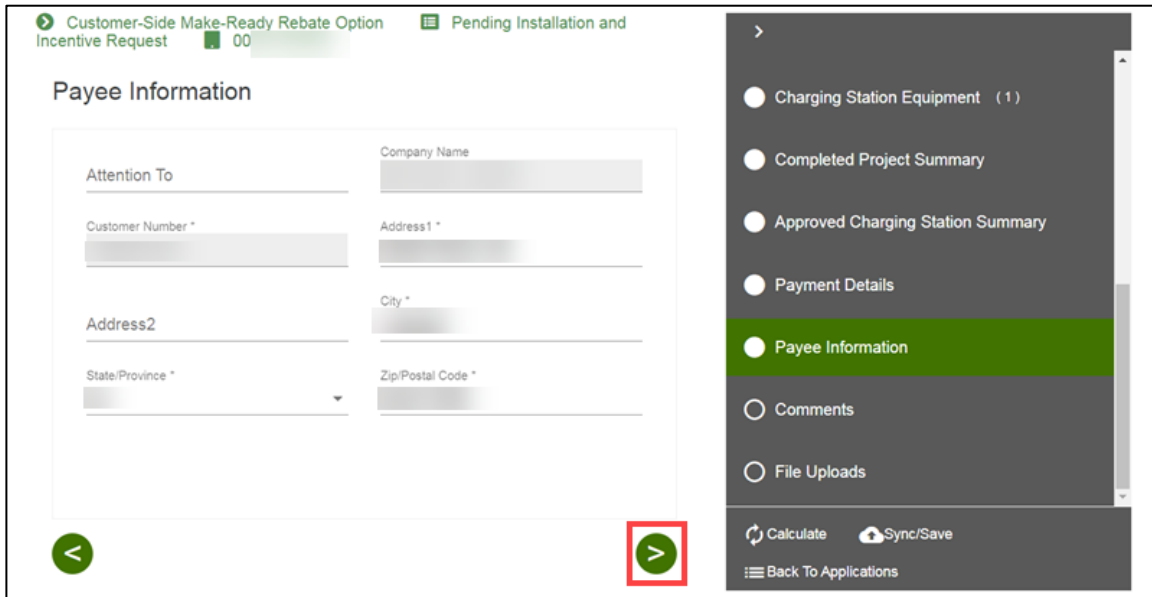
Note: Certain Tax Classifications require more information.



Payee Information

27. Enter and verify the required information.

28. Click the  **Next** arrow.



The screenshot shows a mobile application interface for entering payee information. The main form has the following fields:

- Attention To
- Company Name
- Customer Number *
- Address1 *
- Address2
- City *
- State/Province *
- Zip/Postal Code *

A red box highlights the green right-pointing arrow icon at the bottom right of the form. The right sidebar contains a list of menu items:

- Charging Station Equipment (1)
- Completed Project Summary
- Approved Charging Station Summary
- Payment Details
- Payee Information (highlighted)
- Comments
- File Uploads

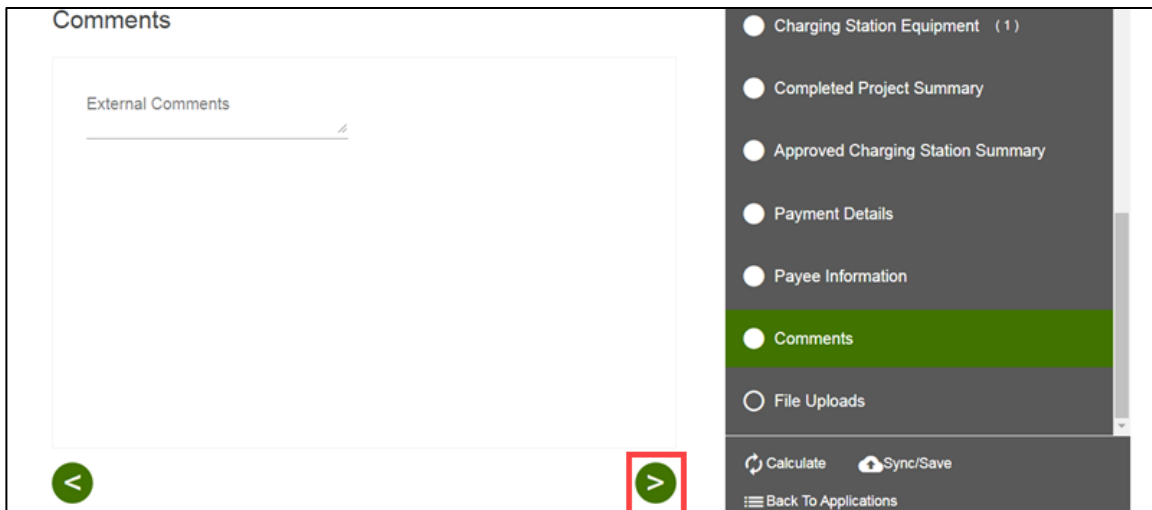
At the bottom of the sidebar are buttons for Calculate, Sync/Save, and Back To Applications.

The **Comments** page displays.

Comments

29. Review the comments.

30. Click the  **Next** arrow.

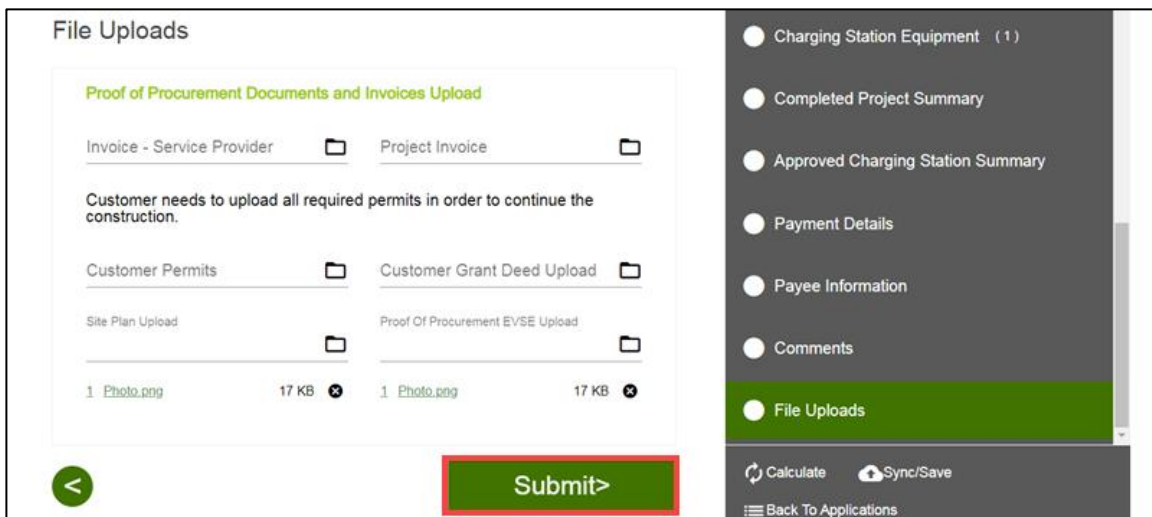


The **File Uploads** page displays.

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.