New Construction Rebate (NCR) Charge Ready Application Portal

User Guide for External Users

Prepared for:

NCR 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 New Construction Rebate (NCR) program.

This document is intended for users who will submit requests for NCR rebates. These roles are:

- Customers
- Charge Ready Trade Professionals

What is NCR?

The New Construction Rebate (NCR) is a program under the larger eMobility Transportation Electrification (TE) Charge Ready (CR) program. It is used to submit requests for rebates for the installation of charging stations at new, multi-family sites.

This user guide is to support the training of the Charge Ready Application Portal tool that supports the NCR program.

For more information about Site and Participant Eligibility, refer to the NCR Program Guideline and Fact Sheet documents.

Key Terms

The table below lists key terms used in NCR and their description.

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

Project Workflow

When completing a New Construction Rebate request, the following processes take place:

1. Customer or Charge Ready Trade Professional completes a Project Submission form.
2. SCE reviews the form for completeness. If incomplete, notifies applicant of information needed for completion.
3. Customer completes Pending Installation and Incentive Request form, along with applicable attachments (only after installation occurs).
4. SCE completes the Incentive QA Review, and identifies if site inspection is required.
5. SCE schedules and conducts a site review and completes Incentive Site Review form, if required.
6. SCE approves or rejects the payment for a project.

For more information about the program, refer to the NCR Program Guidelines and Fact Sheet.

Program Forms

The NCR program consists of two forms (or tasks), and each form has multiple sections. Depending on the phase of the process, form sections and fields may be:

- Unpopulated and fillable (required 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

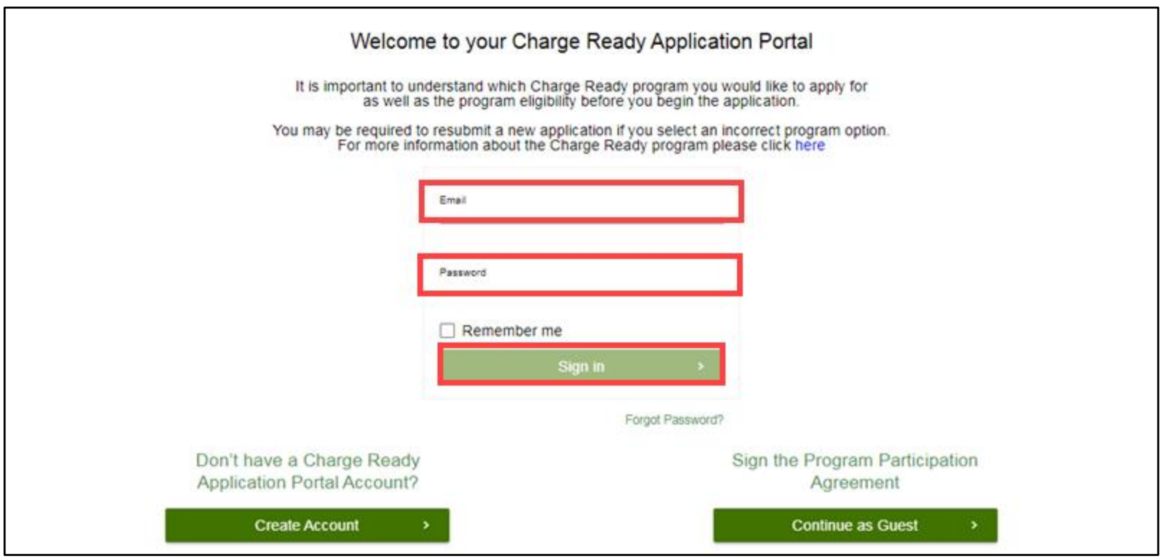
Accessing the Charge Ready Application Portal

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

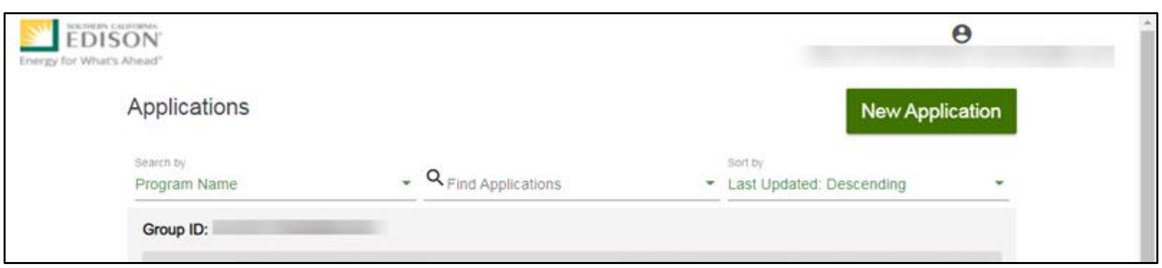
1. Navigate to https://sce-te.dsmcentral.com/traksmart4/html/pux/commercial/

   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

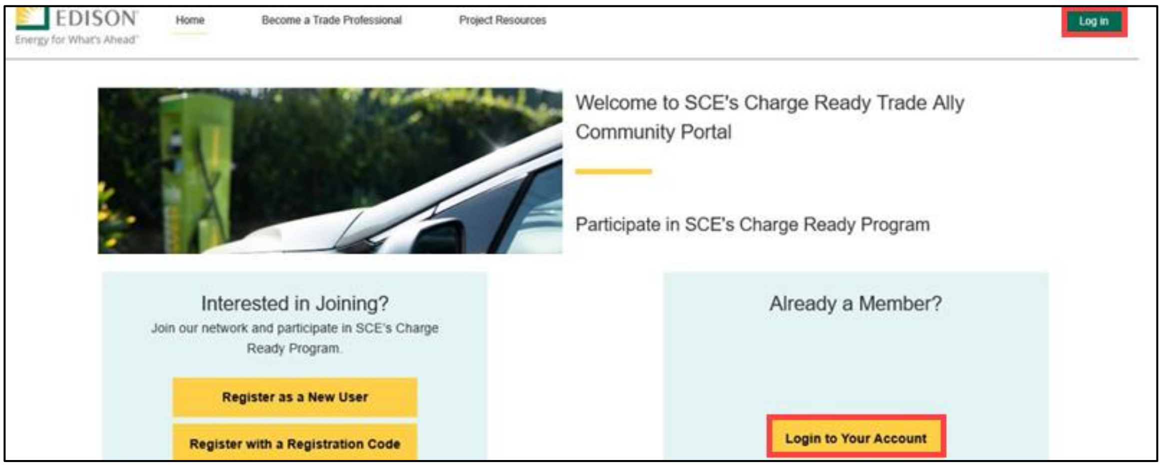
If you are a Charge Ready Trade Professional, you must have access to the Charge Ready Trade Ally Community (TAC) Portal. You and your company must also be approved by SCE to apply for rebates on behalf of the customer(s).

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

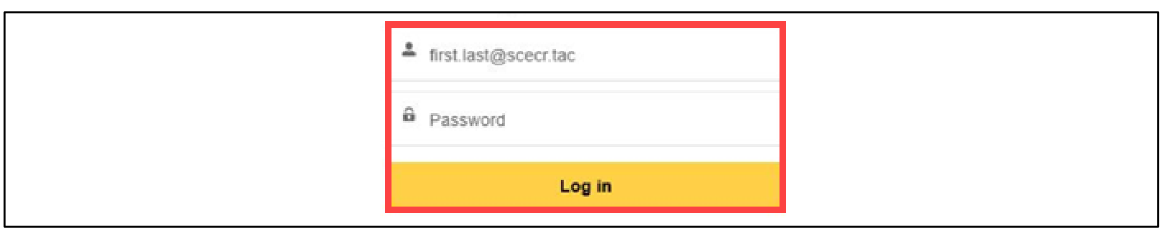
   The **TAC landing page displays**.

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

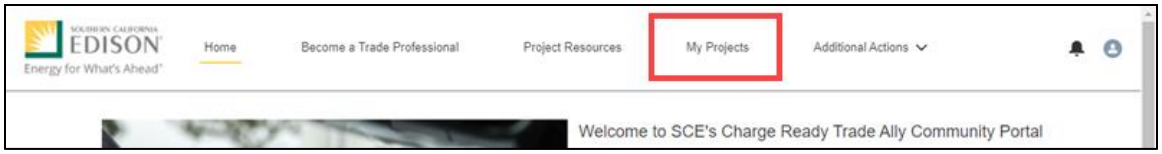
   The **Login** page displays.

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

   The **TAC Home Page** displays.

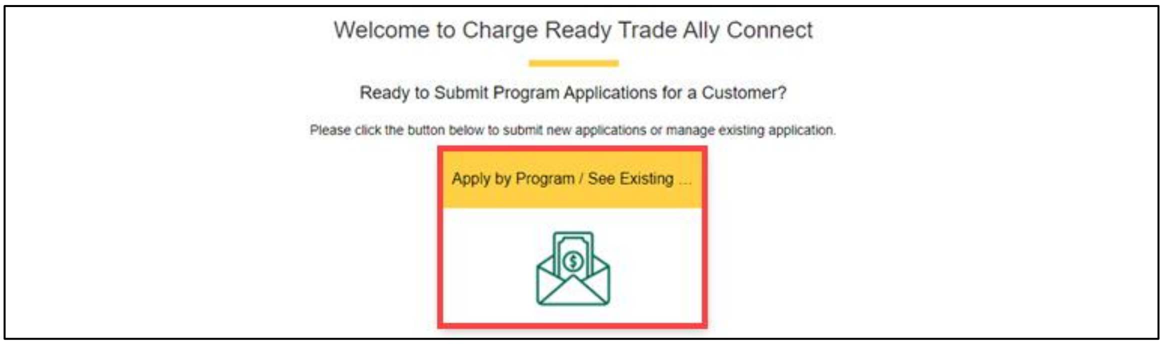
6. Select **My Projects**.



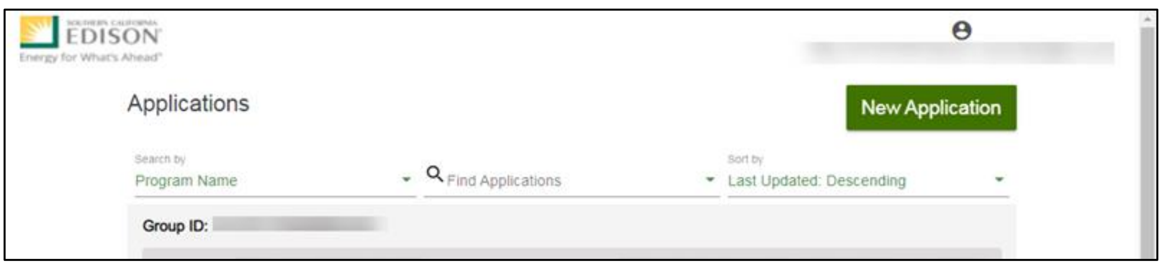
Note: If the My Projects tab is not on the screen, your company profile is not yet approved as a Charge Ready Trade Professional.

The **My Projects** page displays.

7. Click **Apply by Program**.



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



For more information about Charge Ready Trade Professionals, refer to the Charge Ready TAC Fact Sheets and Program Handbook.

Project Submission

The Project Submission form is submitted by the **Customer** or **Charge Ready Tarde Professional** through the Charge Ready Application Portal. By completing this form, participants request to reserve funding for a rebate.

Eligible participants complete this form prior to the purchase or installation of qualifying Electric Vehicle (EV) equipment. The NCR rebate only applies to newly constructed, multi-family site customers, which are defined as:

- Residential Properties
- Apartment Buildings
- Retirement Communities, Townhomes, Condominiums

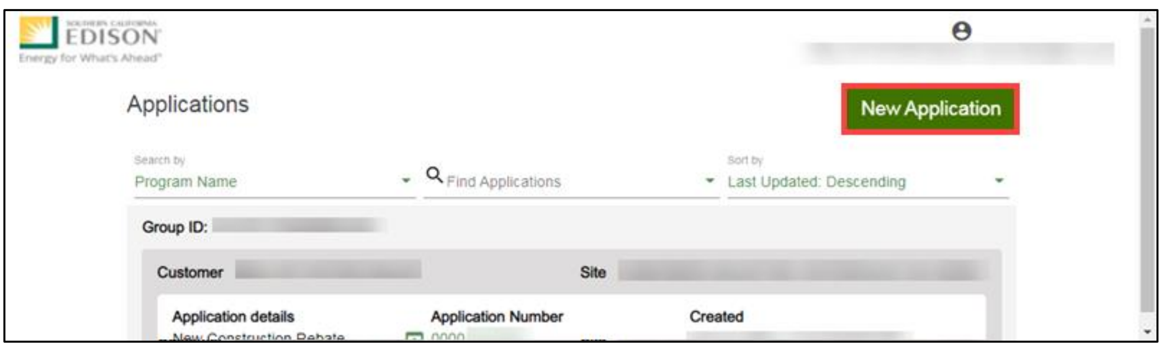
Once a Project Submission is complete, SCE determines the eligibility for program participation.

For a full list of eligible participants, or for more information about the program, refer to the NCR Program Guidelines and Fact Sheet.

Completing the Project Submission Form

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

1. Click **New Application**.

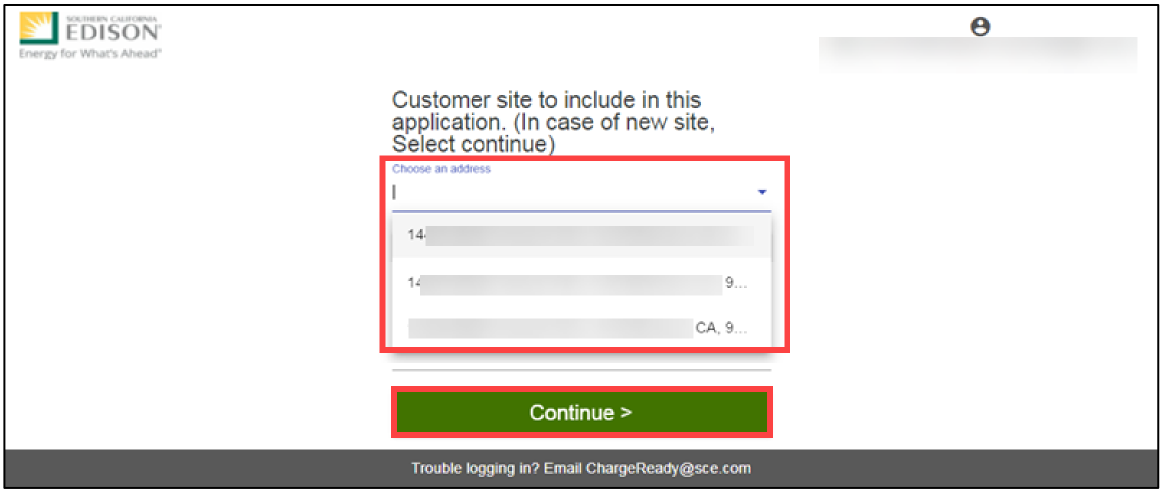


   A **Customer Site to include in this application** page displays.

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

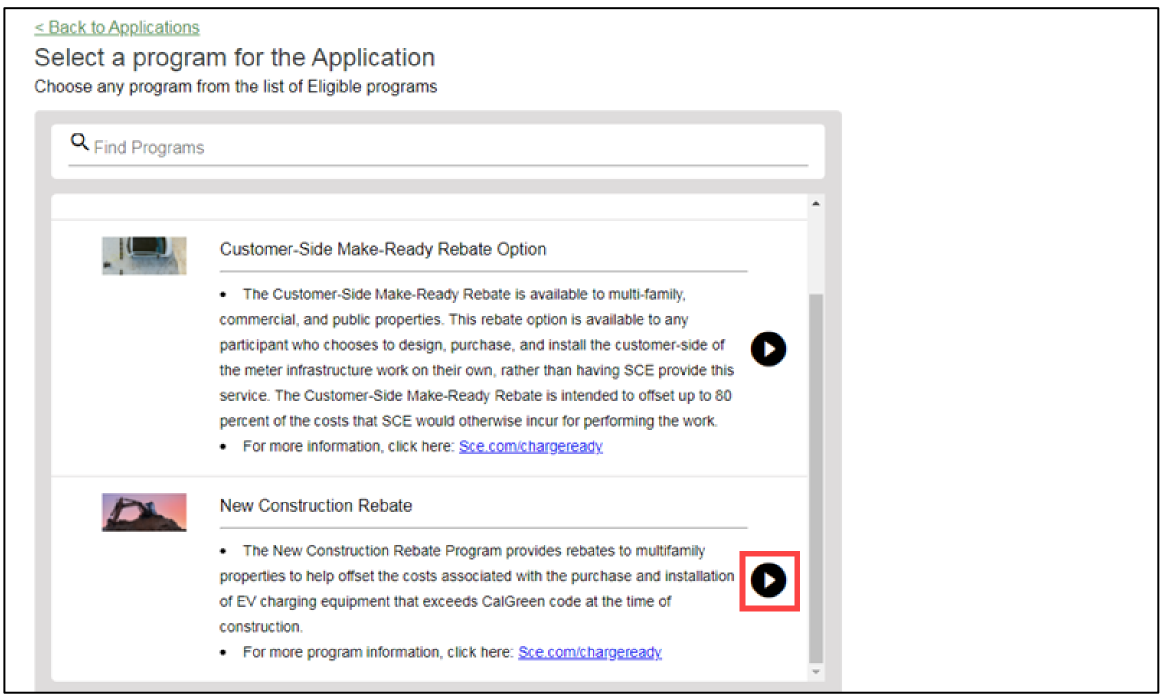
   Note: The **Choose an address** page displays for a customer with multiple sites.

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



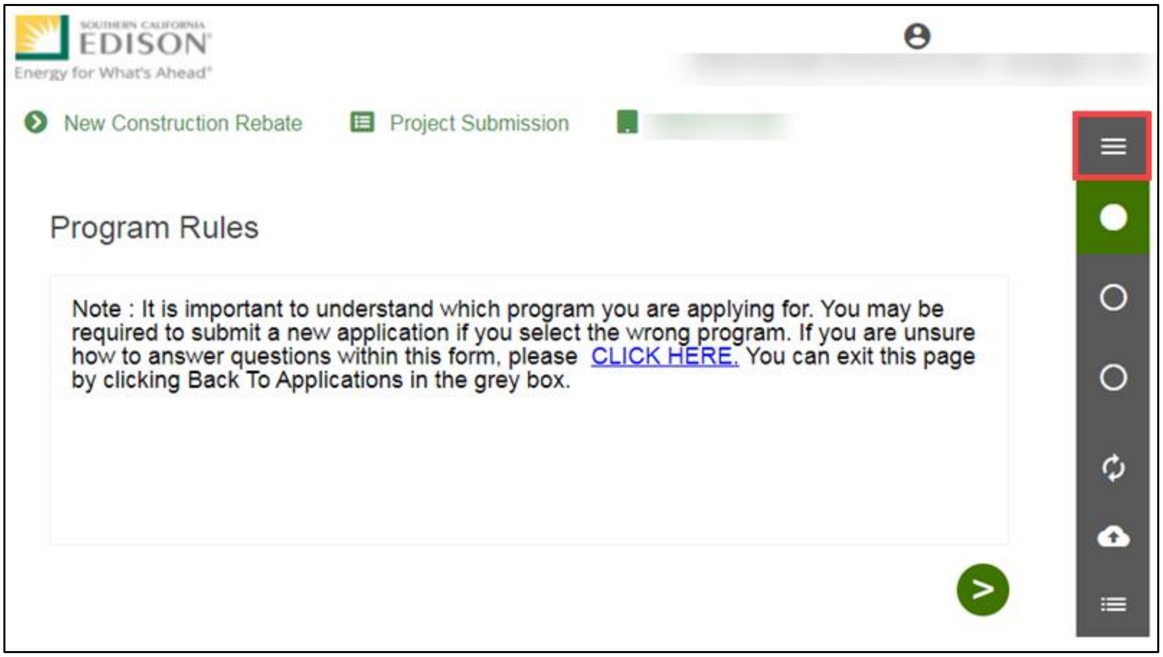
The **Select a program for the Application** page displays.

5. Select the right arrow to select **New Construction Rebate.**



The **Program Rules** page displays.

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



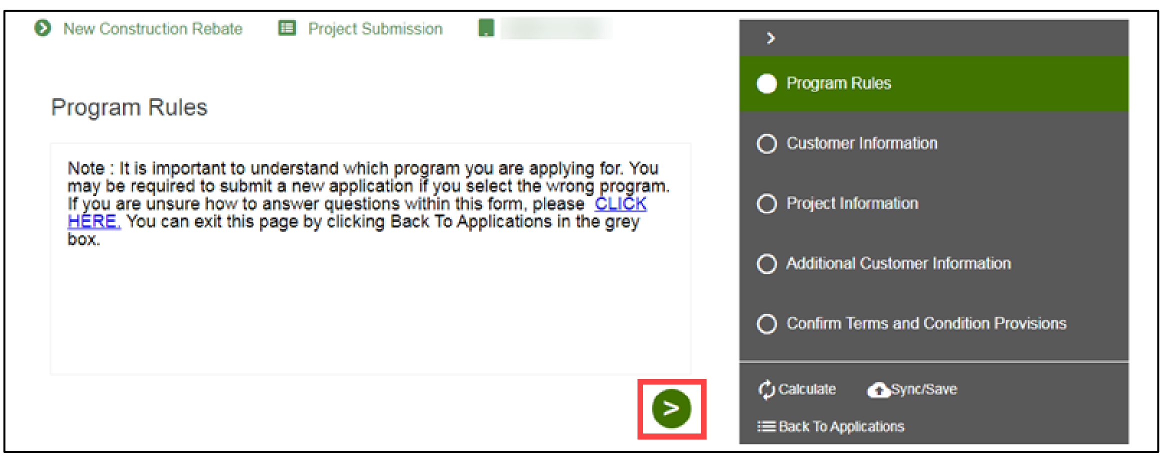
Once the Program Rules page displays, you will complete all the required fields.

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

Program Rules

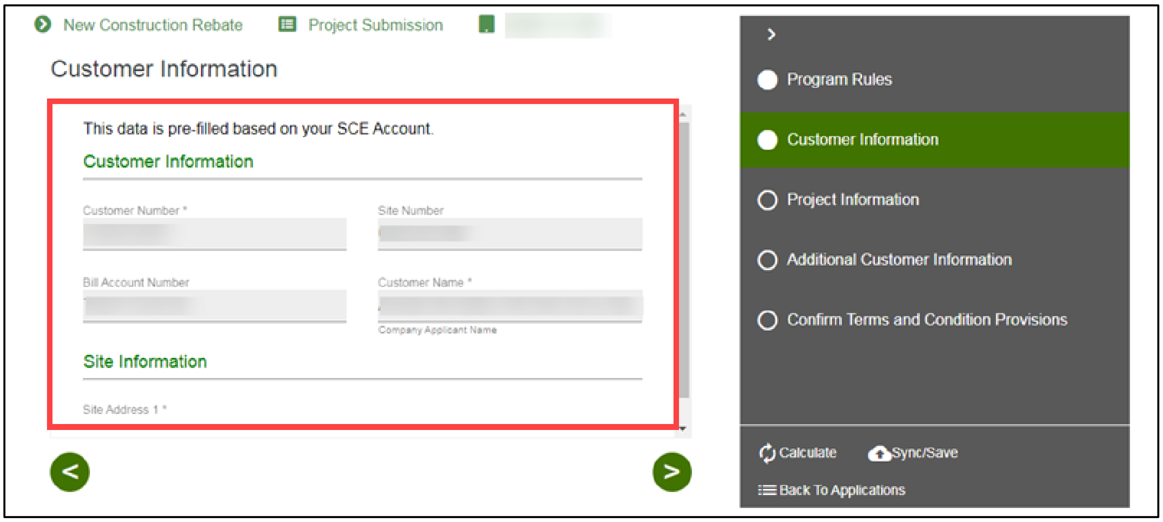
6. Review the **Program Rules**.

7. Click the > **Next** arrow.

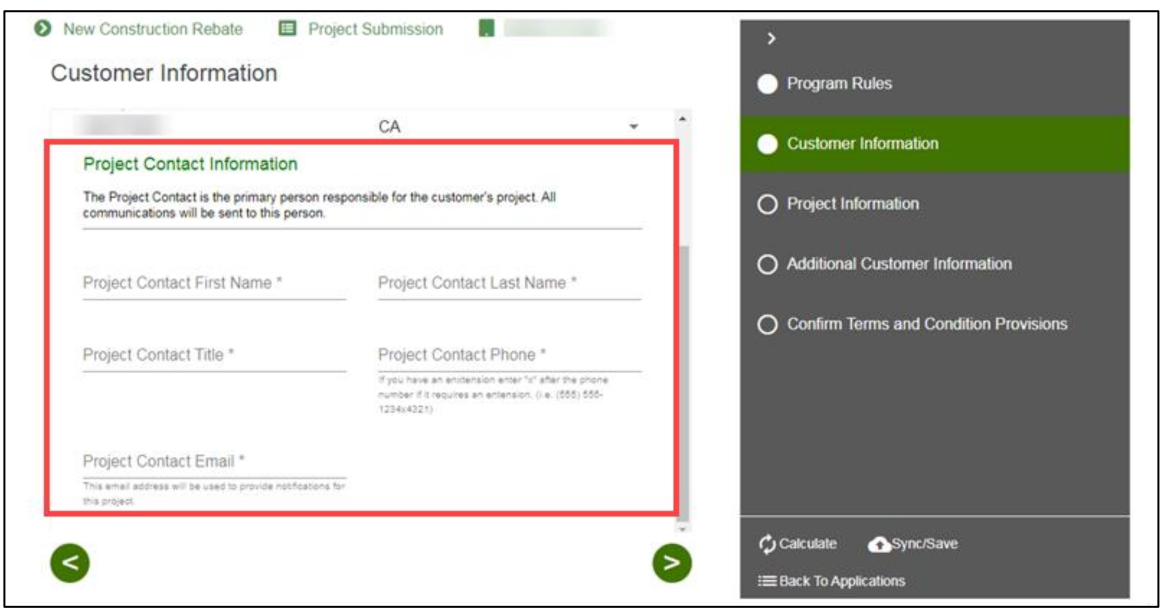


Customer Information

8. Verify the **Customer Information** and **Site Information**.
9. Scroll down.



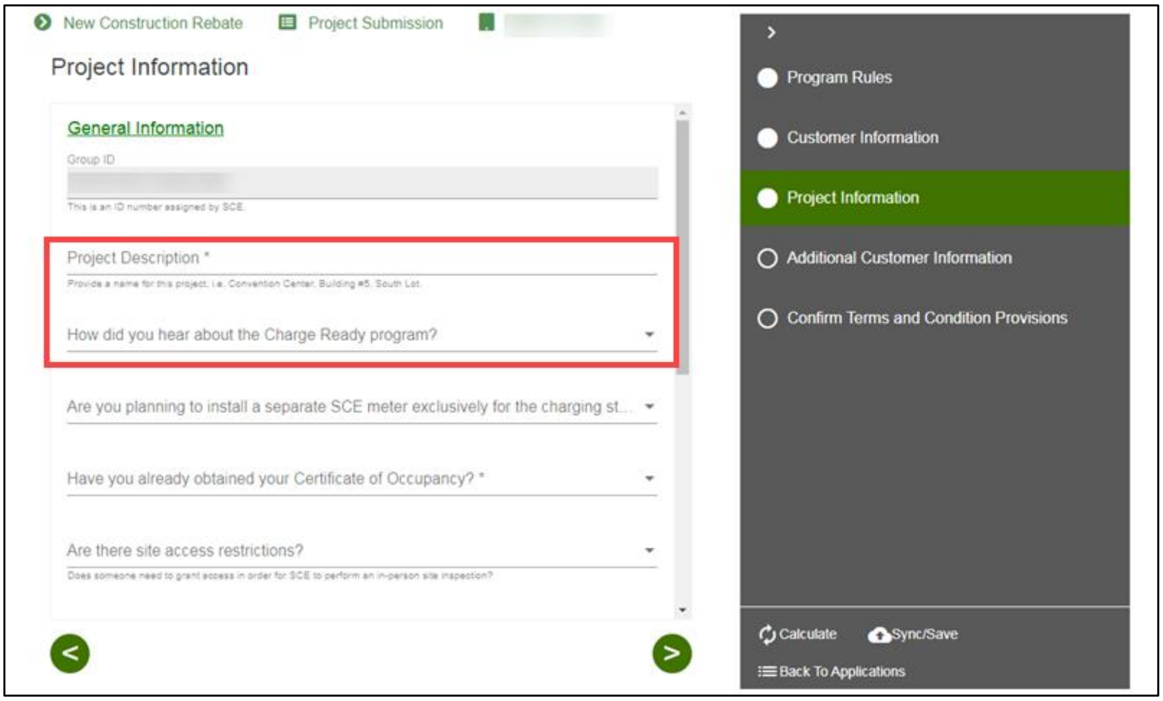
10. Enter the **Project Contact Information**.
11. Click the  **Next** arrow.



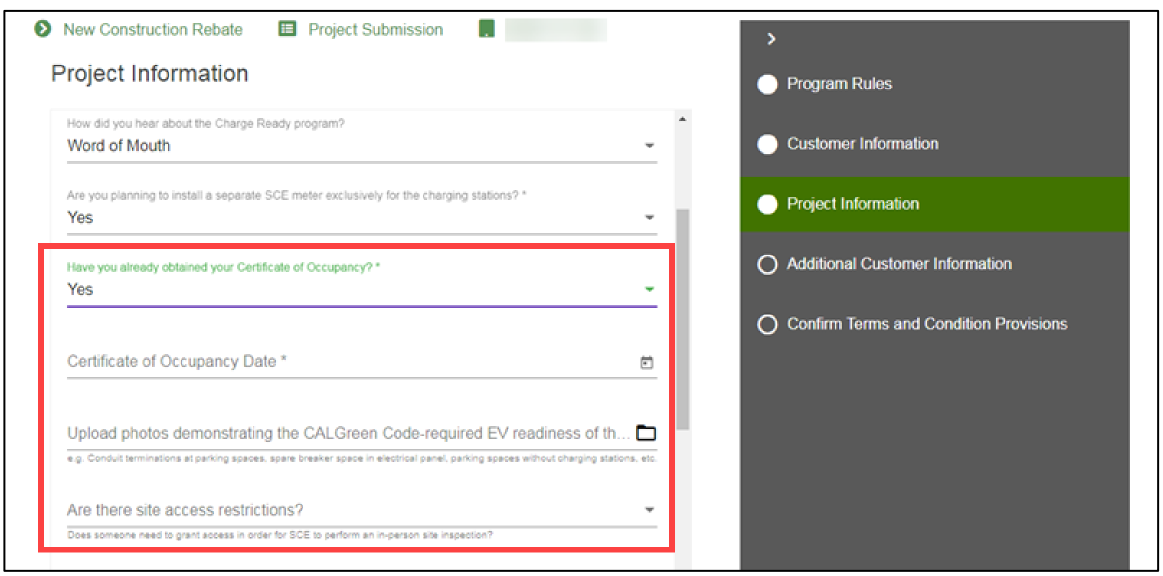
The **Project Information** page displays.

Project Information

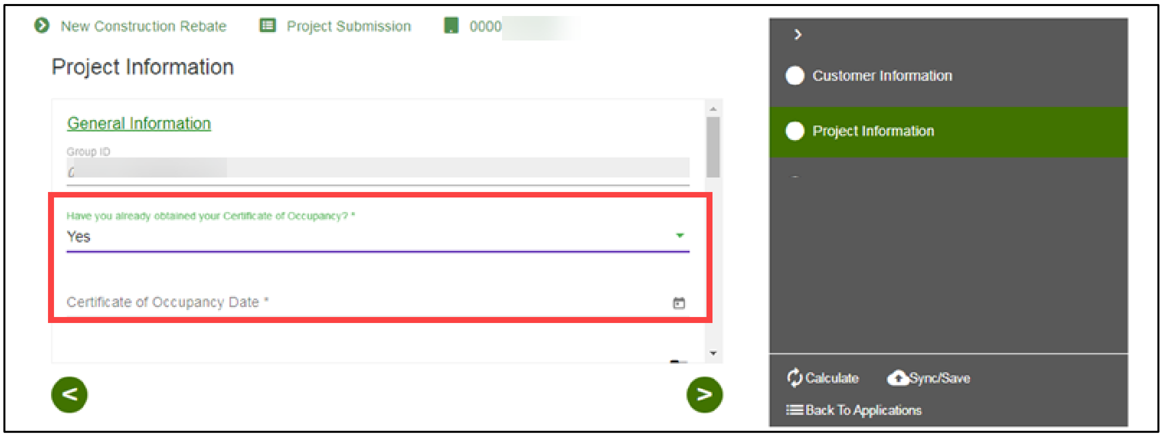
12. Enter a **Project Description**.
13. Select **How do you hear about the Charge Ready program?**
14. Scroll down.



15. Select **Yes** or **No** for **Have you obtained your Certificate of Occupancy field**.
16. Complete the required fields.

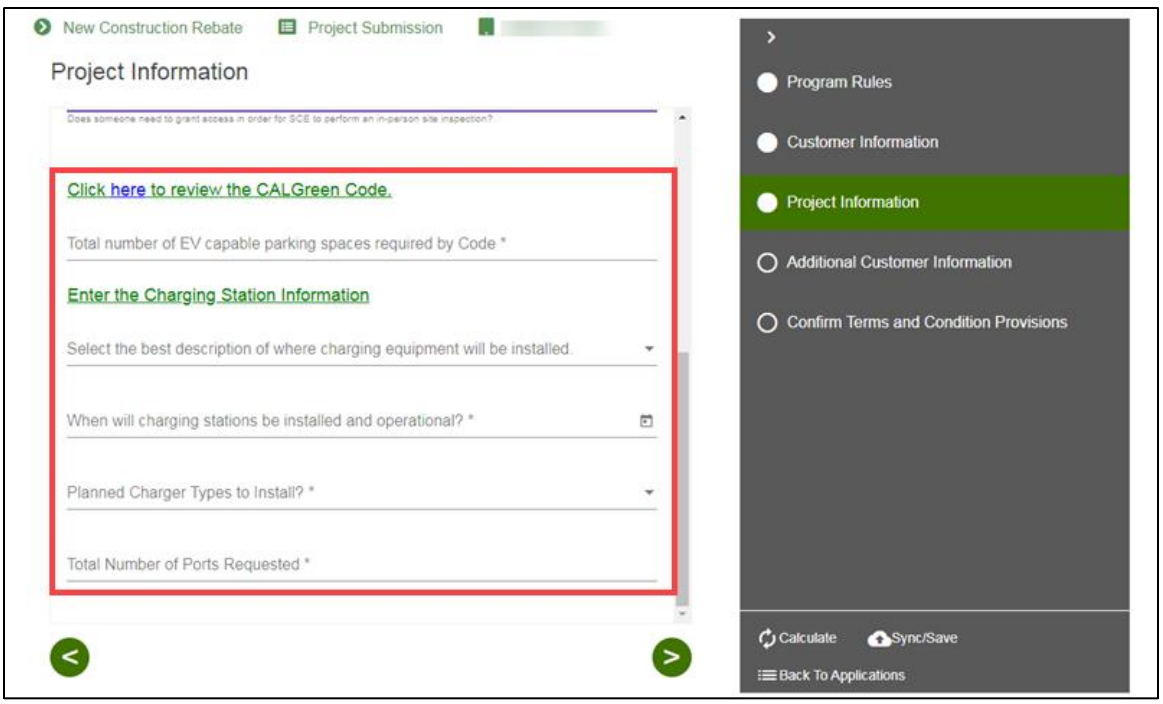


Note: If the **Certificate of Occupancy** is Yes, select a **Certificate of Occupancy Date**.



17. Enter the required information.

18. Click the **Next** arrow.

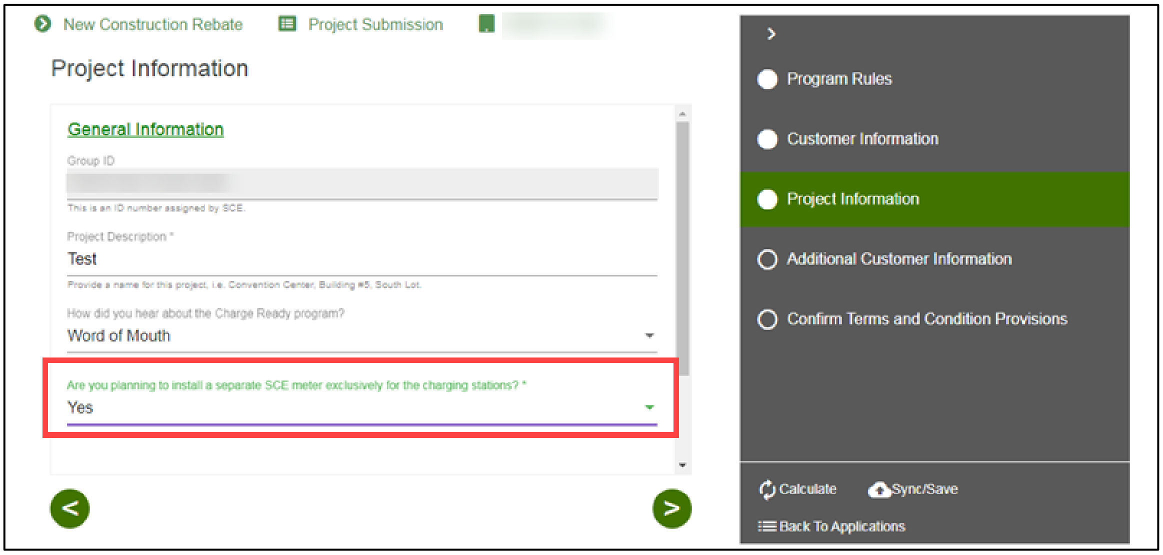


The **Additional Customer Information** page displays.

Install Separate SCE Meter is Yes

You can use the current SCE Meter or install a separate meter, as needed. **It is recommended that there is a separate meter for the project**. If installing a separate SCE Meter is Yes, follow the steps below:

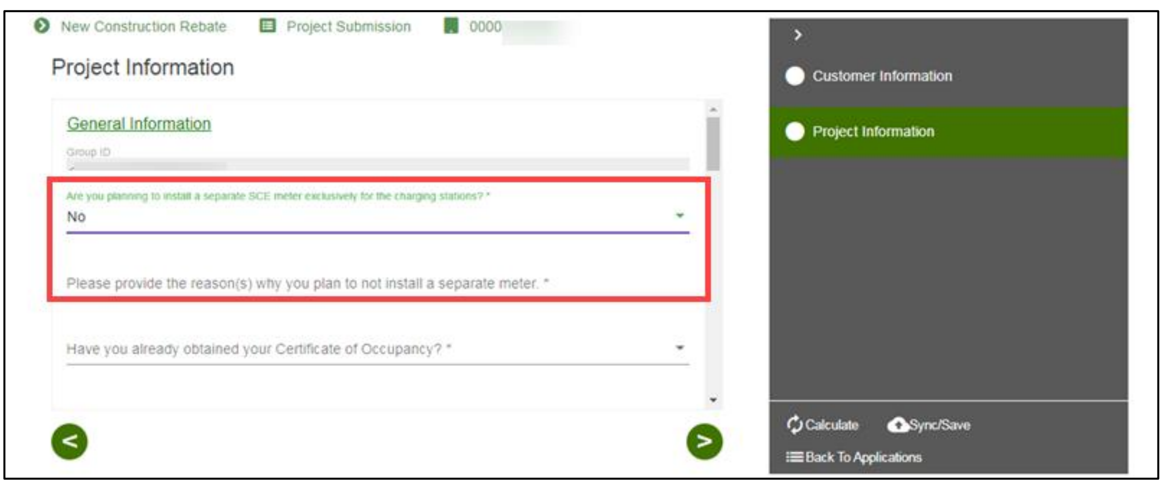
19. Select **Yes**.



Install Separate SCE Meter is No

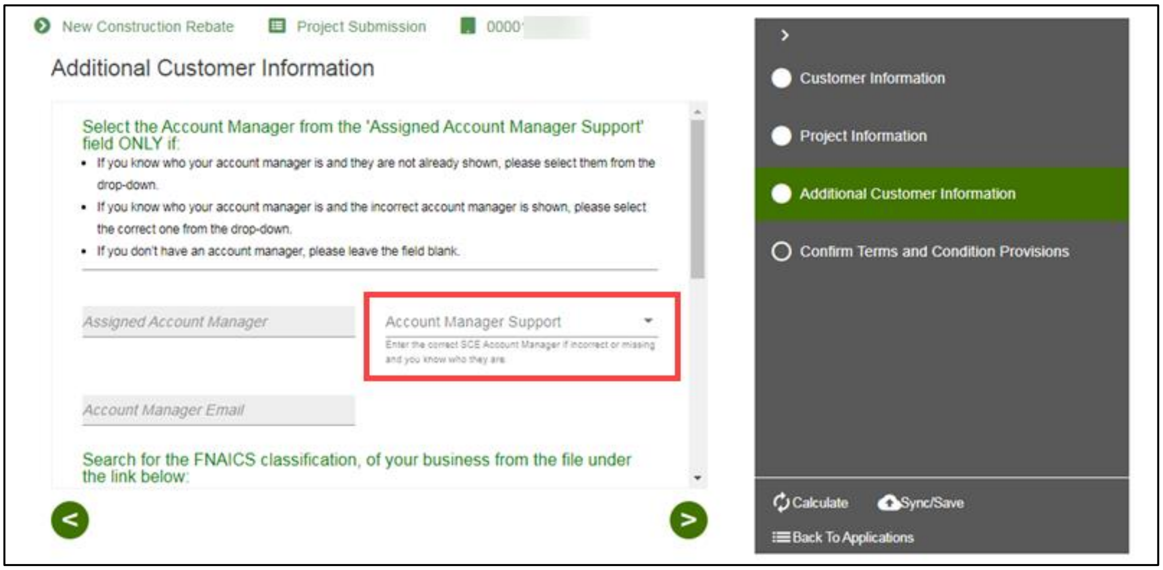
You can use the current SCE Meter or install a separate meter, as needed. **It is recommended that there is a separate meter for the project**. If installing a separate SCE Meter is No, follow the steps below:

20. Enter a reason.

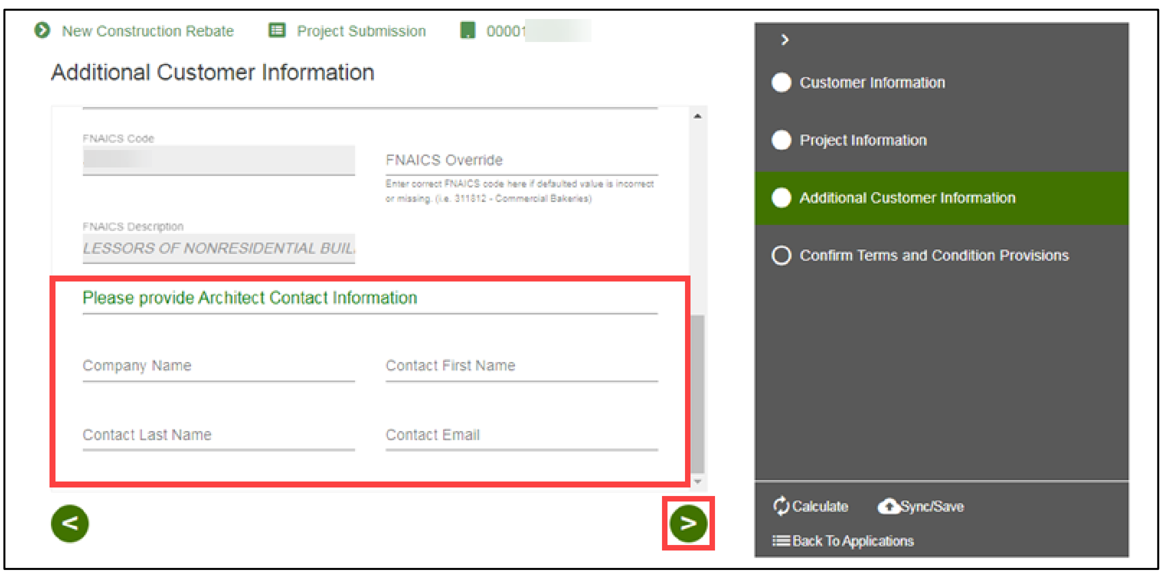


Additional Customer Information

21. Select an **Assigned Account Manager Support**, if applicable.
22. Scroll down.



23. Enter the **Architect Contact Information**, if applicable.
24. Click the > **Next** arrow.

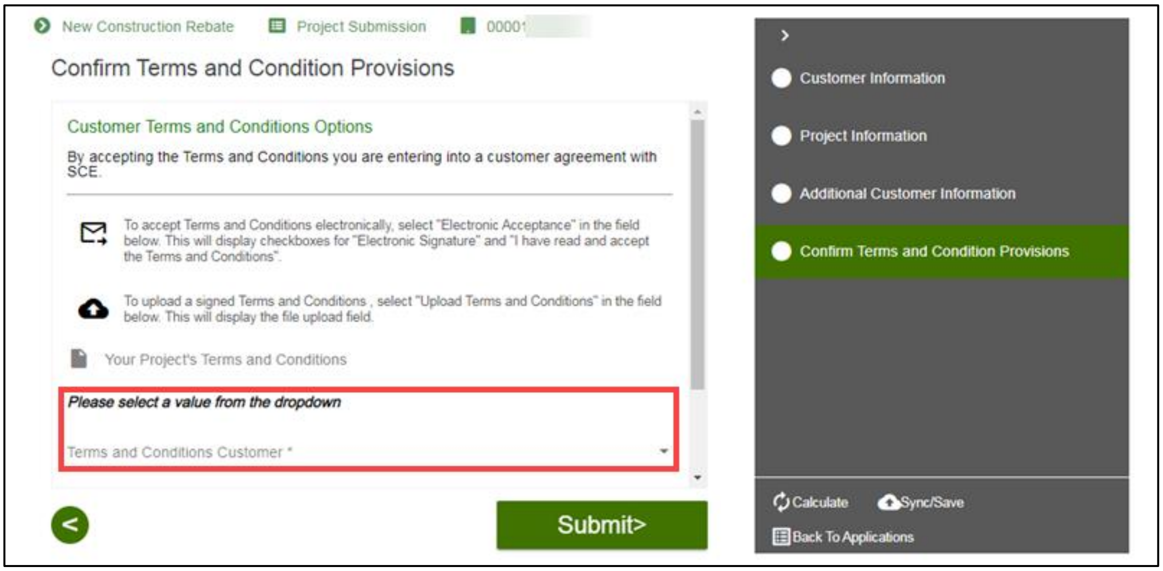


The **Confirm Terms and Condition Provisions** page displays.

Confirm Terms and Condition Provisions

25. Select the project's **Terms and Conditions.**

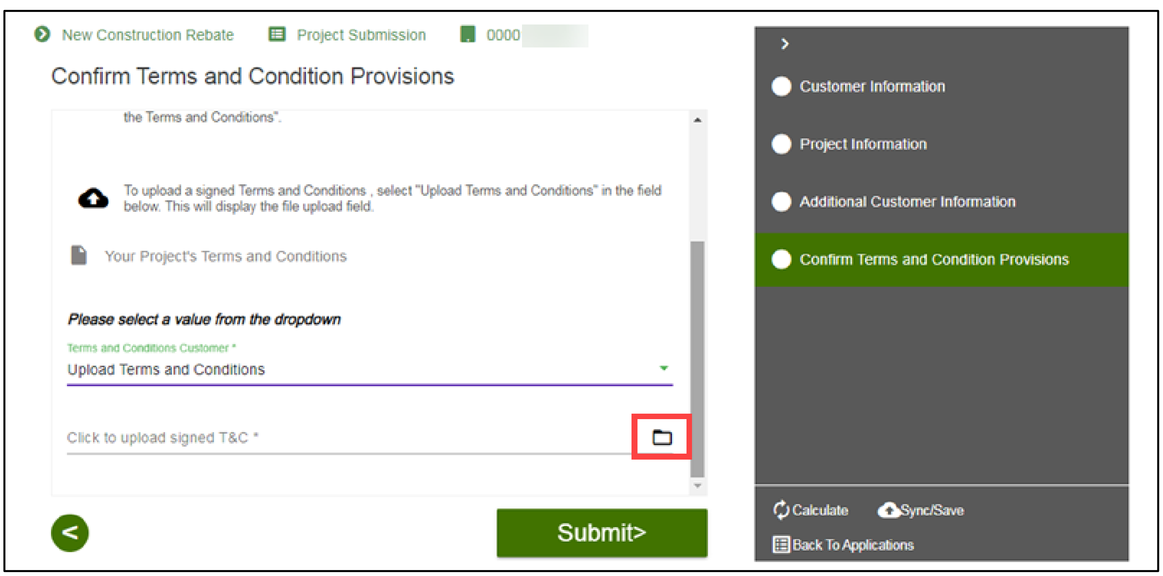
    Note: You can upload a document or complete an electronic signature.



Uploading Terms and Conditions

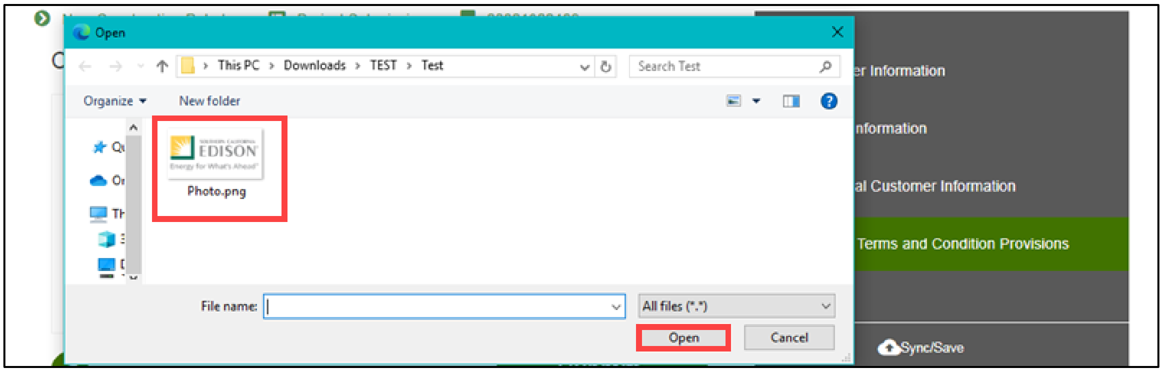
To upload terms and conditions, follow the steps below:

26. Select the **Folder** icon.



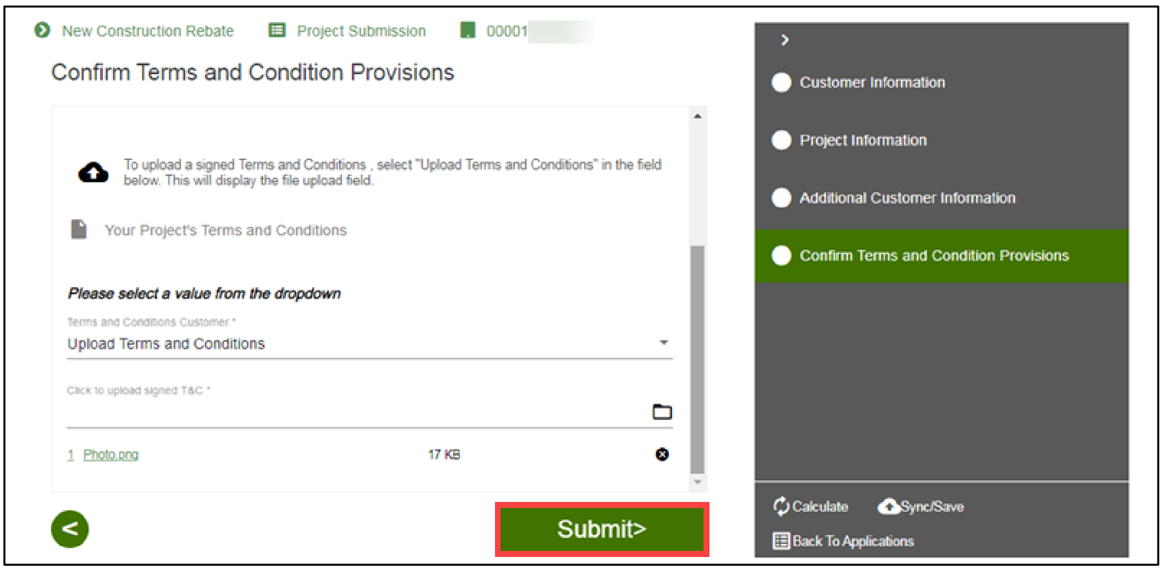
An **Open** window displays.

27. Select a document and select **Open**.



The file uploads.

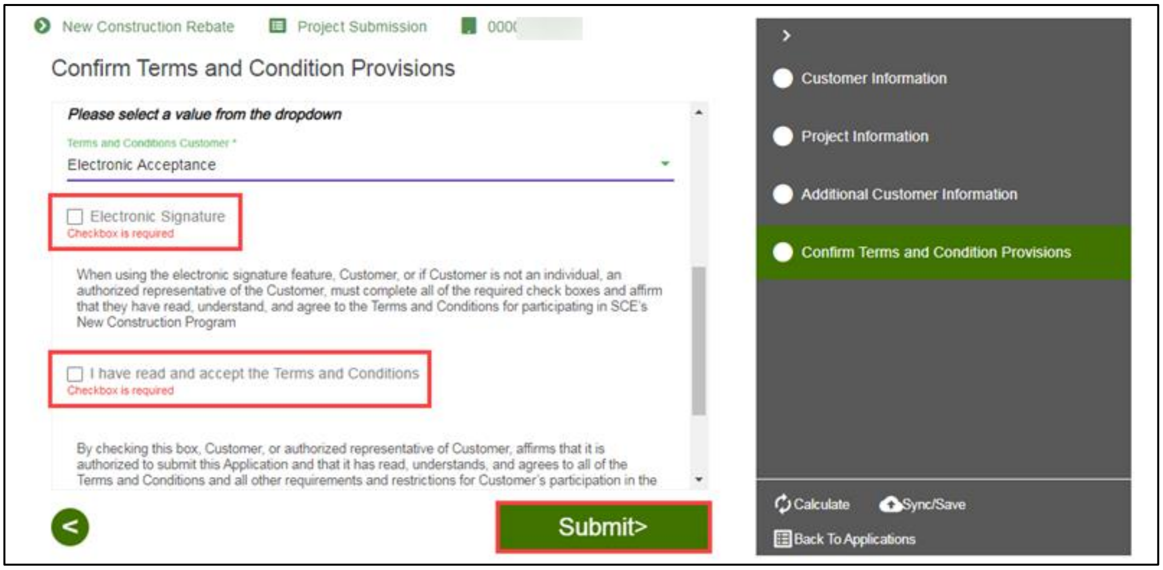
28. Click **Submit**.



Completing an Electronic Signature

To complete an electronic signature, follow the steps below:

29. For Electronic Acceptance, read and select the check boxes.
30. Click **Submit**.

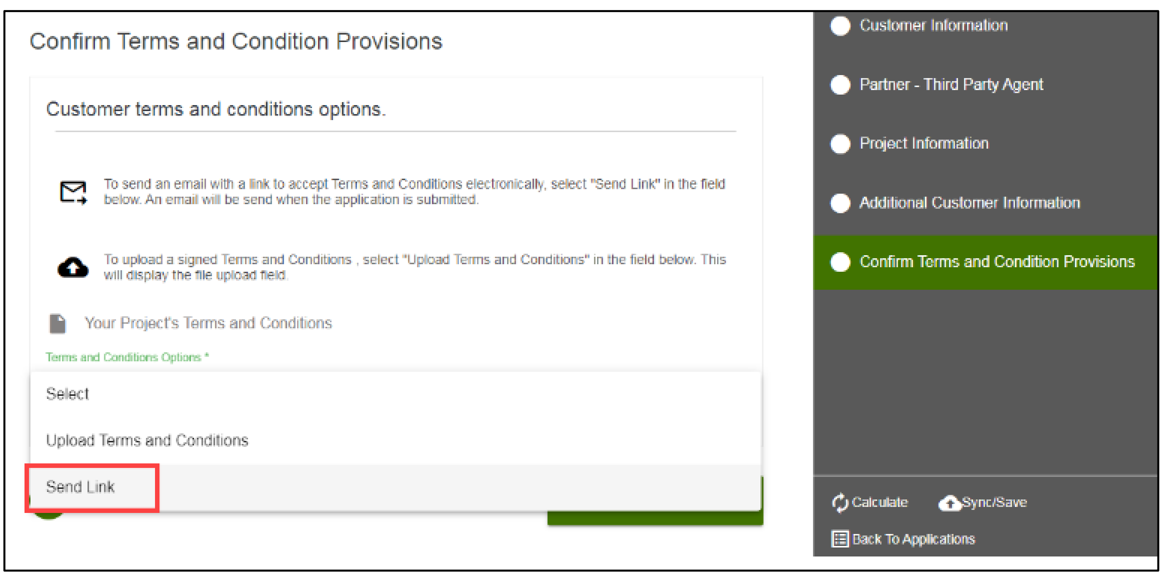


Sending Terms and Conditions to Customers for Charge Ready Trade Professionals

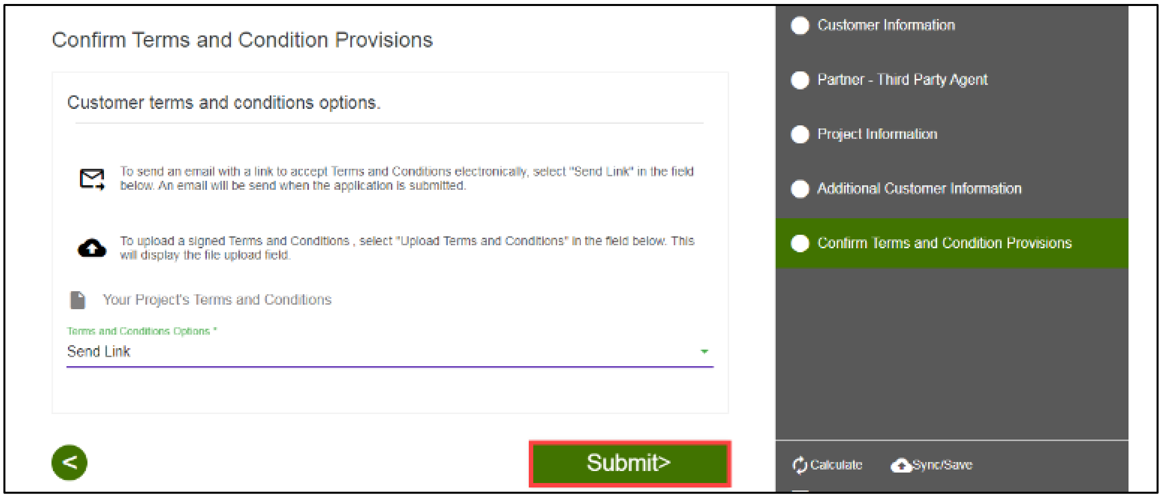
Charge Ready Trade Professionals completing an application on behalf of a customer can send a Terms and Conditions link to a customer.

To send a Terms and Conditions link, follow the steps below:

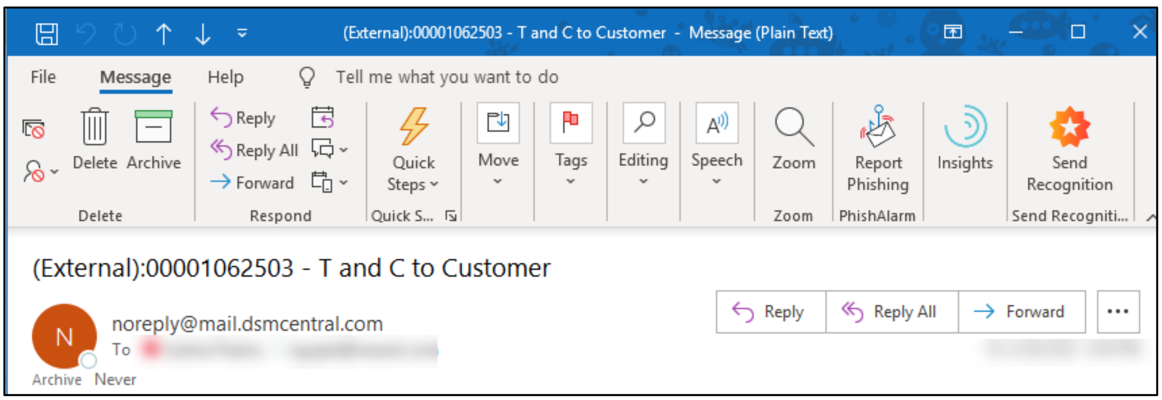
1. Select **Send Link** under Terms and Conditions.



2. Select **Submit**.



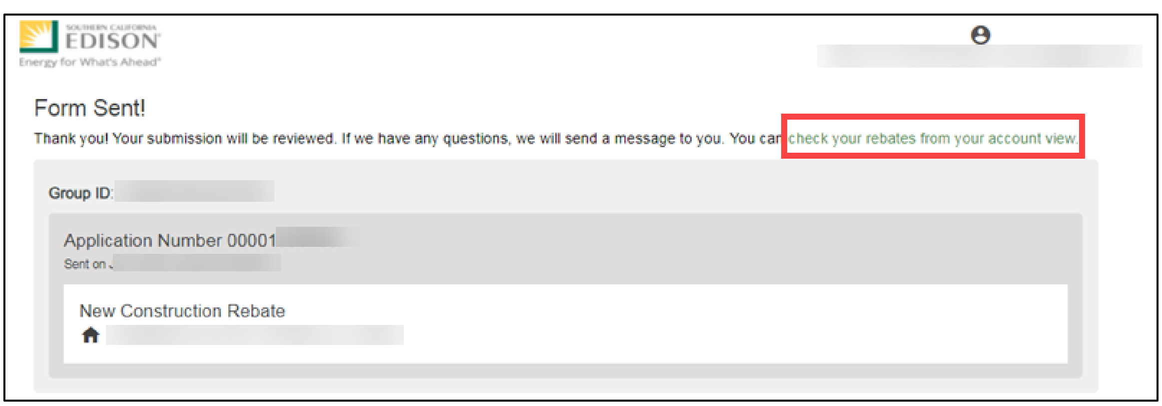
An **Application Submission** email is sent to the Customer.



Form Sent!

Once you submit an application, 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 a Project Submission is complete, SCE determines the eligibility for program participation.

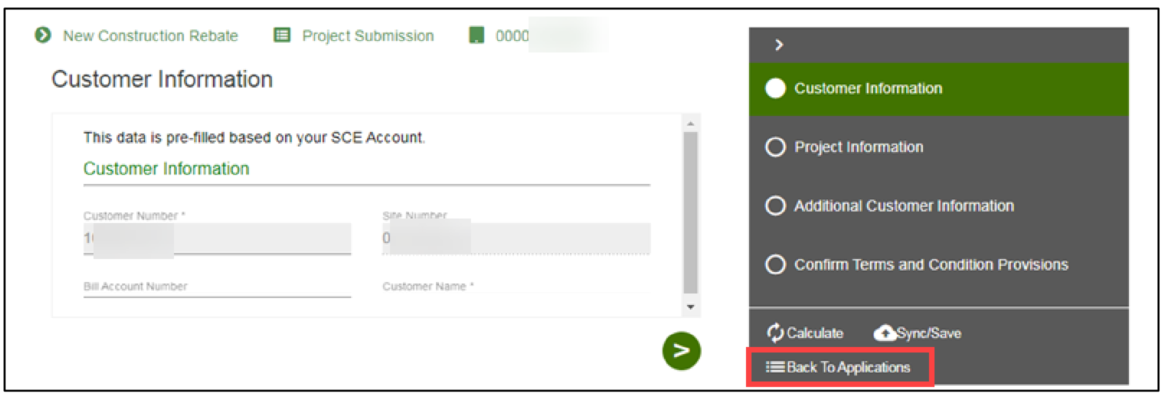
Applications in Draft Status

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

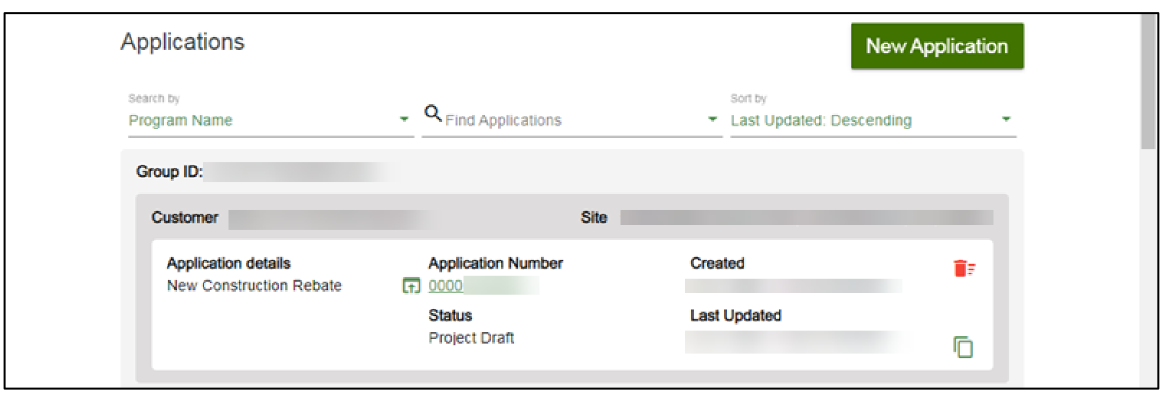
Saving an Application in Draft Status

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

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



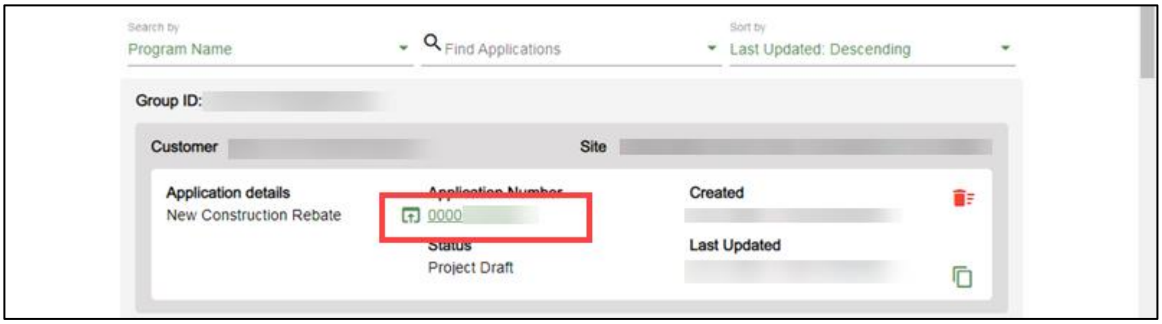
The **Applications** page displays.



Editing an Application in Draft Status

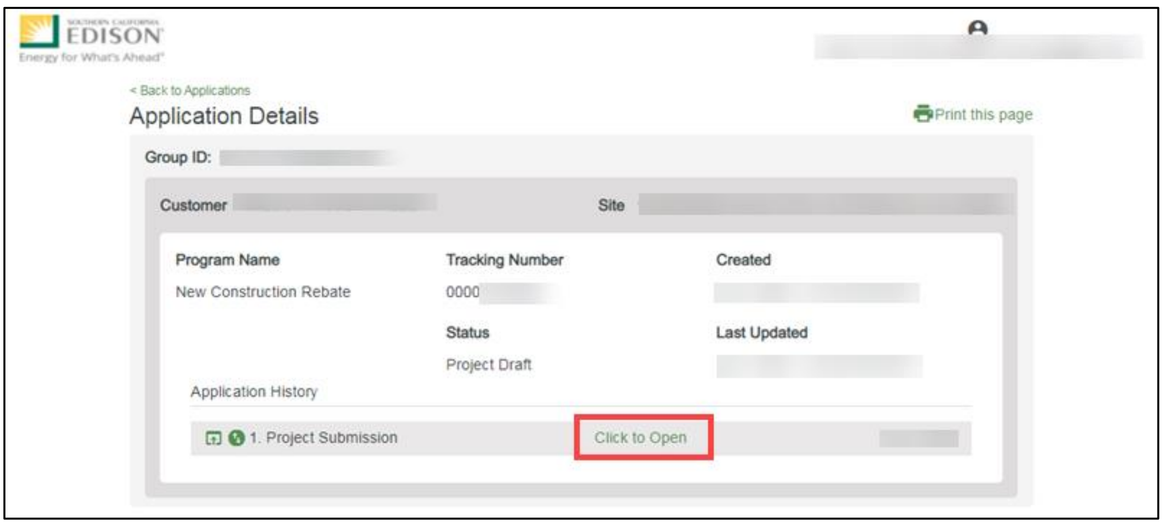
To edit an application in Draft status, follow the steps below:

1. Select the **Application Number**.



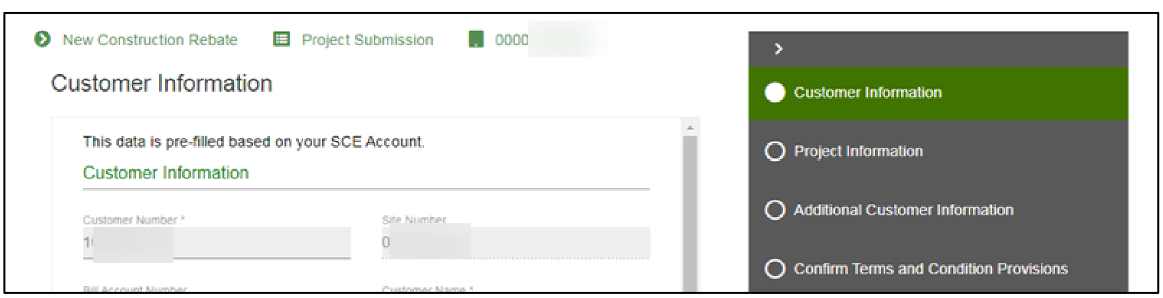
   The **Application Details** page displays.

2. Select **Click to Open**.



   The **Customer Information** page displays.

3. Complete the application.



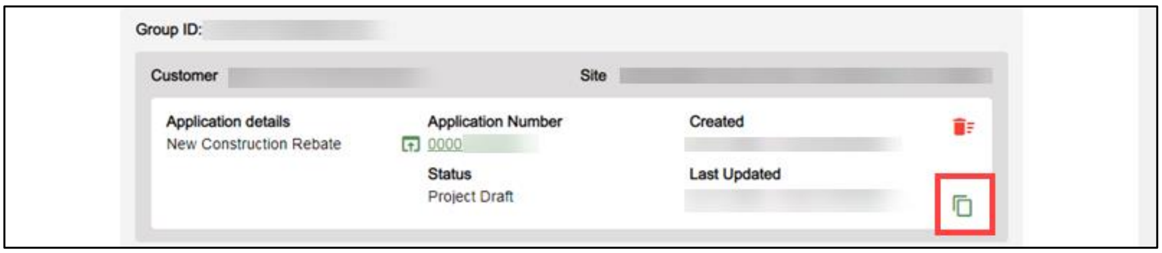
Duplicating an Application

You can duplicate an application in the following statuses:

- Draft
- Submitted
- Withdrawn
- Complete

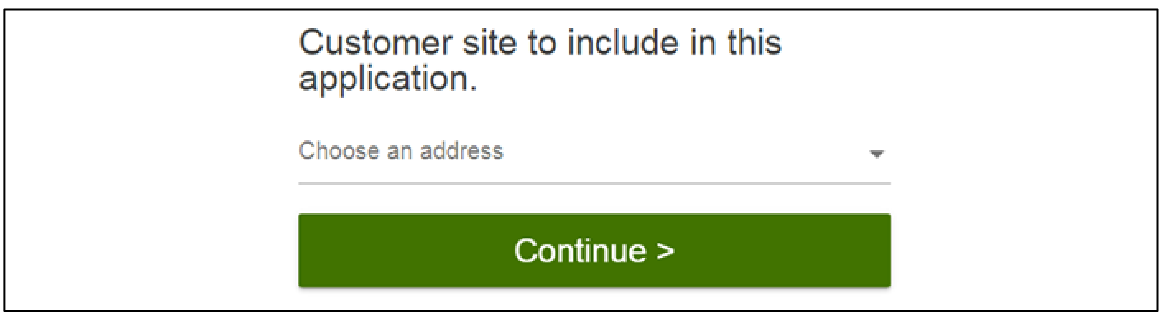
To duplicate an application, follow the steps below:

1. Click the **Duplicate** icon.



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

2. Complete the application.



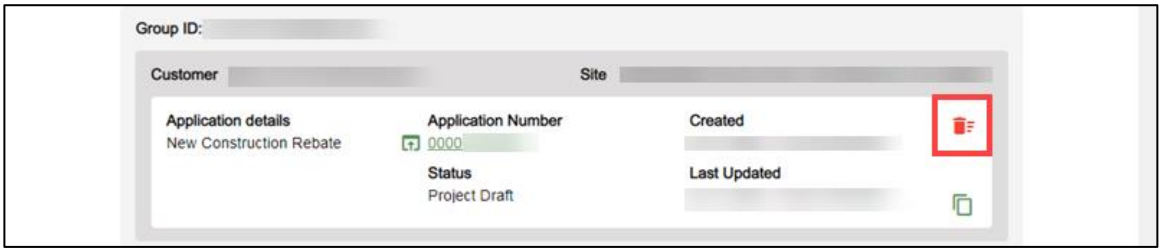
Discarding a Draft Application

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:

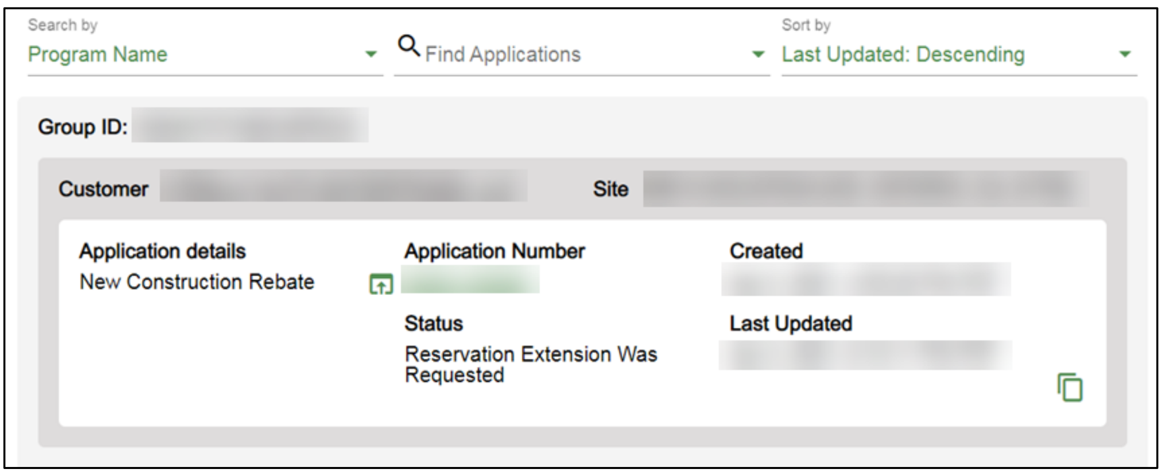
1. Select the **Delete icon**.



   A **warning message** displays.

2. Select **OK**.

   The application disappears from the Applications page.



Pending Installation and Incentive Request

The Pending Installation and Incentive Request form is submitted by the **Customer** or **Charge Ready Trade Professional** through the Charge Ready Application Portal. By completing this form, participants are requesting their rebate.

Eligible participants complete this form after the installation of qualifying EV equipment is complete. This form:

- Specifies the equipment installed at the site
- Includes documentation such as final invoices, site photos, and proof of ownership

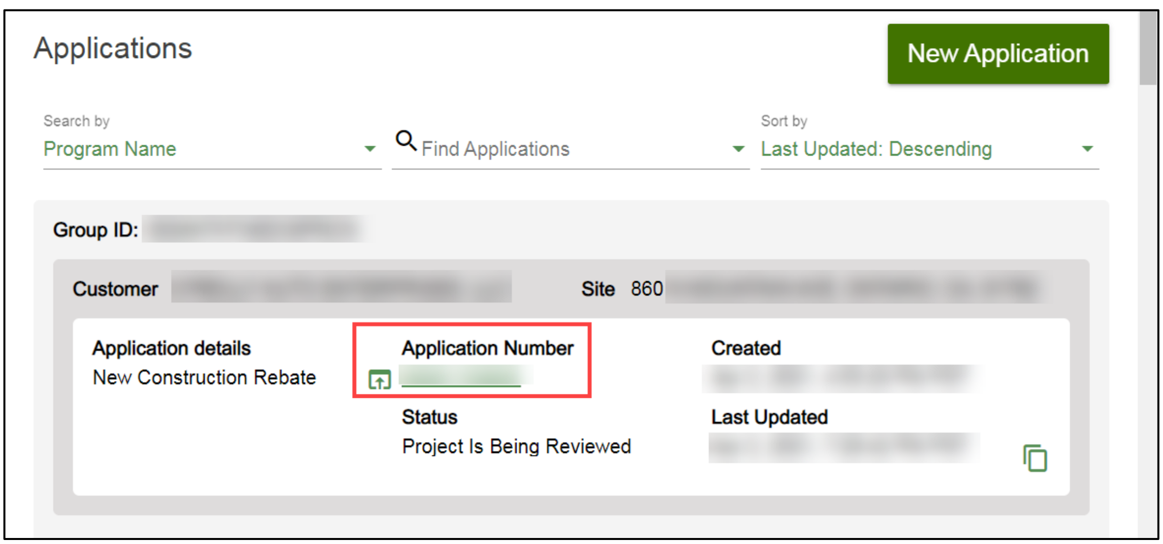
Once a Pending Installation and Incentive Request is complete, SCE reviews all equipment information and documentation to verify eligibility.

For a full list of required documents, or for more information about the program, refer to the NCR Program Guidelines and Fact Sheet.

Completing the Pending Installation and Incentive Request Form

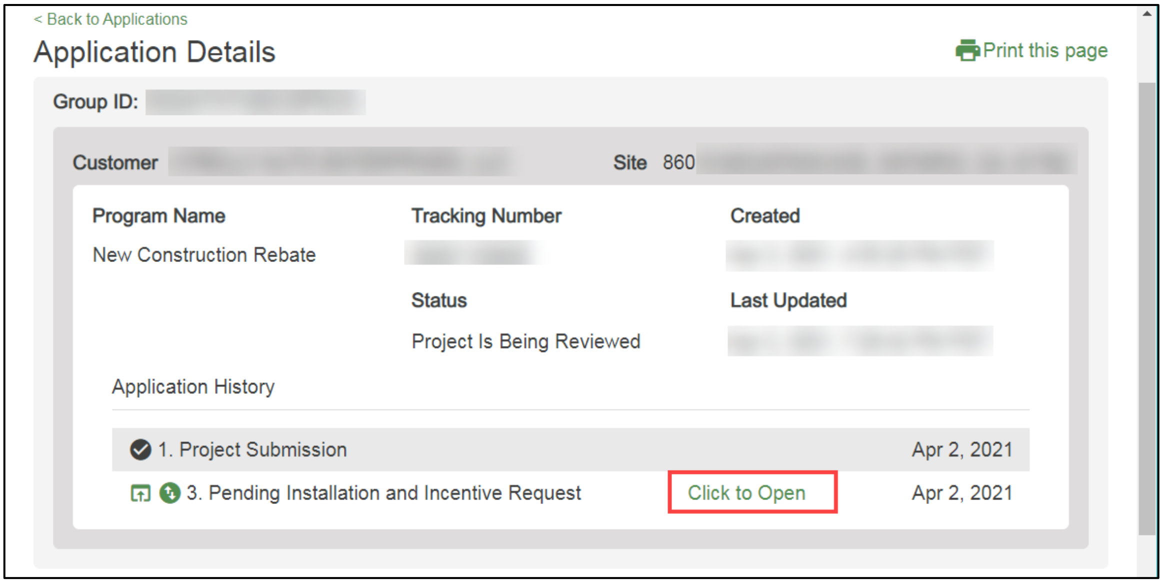
To complete the Pending Installation and Incentive Request form, follow the steps below.

1. Select the **Application Number**.



The **Application Details** page displays.

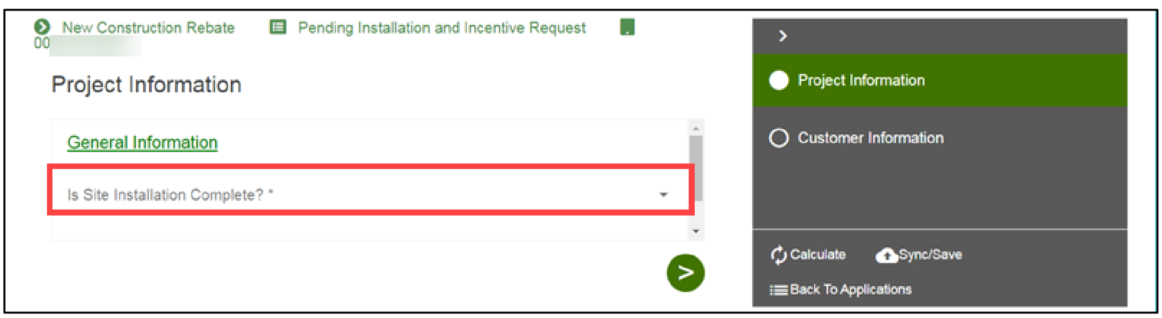
2. Select **Click to Open** under Pending Installation and Incentive Request.



The **Project Information** page displays.

Project Information

3. Select Yes or No for **Is Site Installation Complete?**



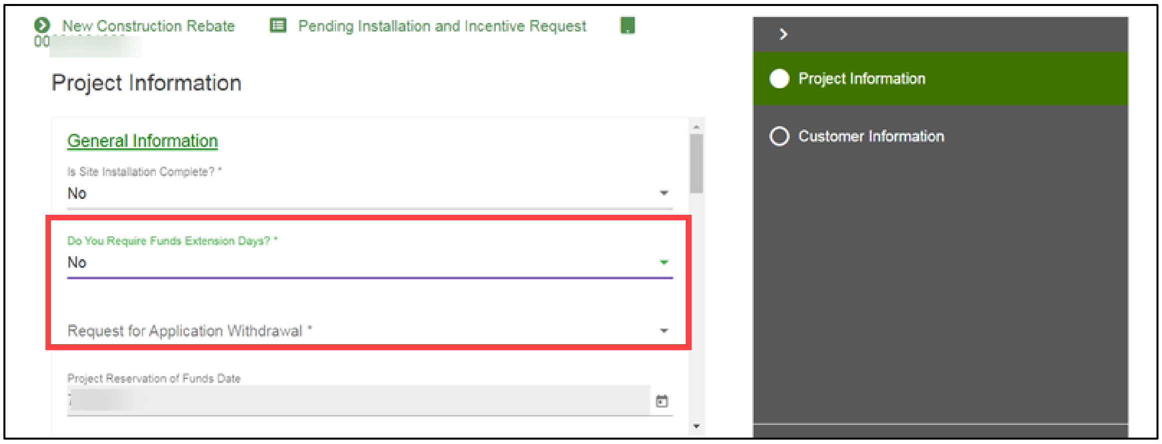
Site Installation is not Complete

If site installation is not complete, the **Do You Require Funds Extension Days** field displays. This branches into:

- Request for Application Withdrawal – This ends the application
- Funds Extension Days Required – This extends the application deadline

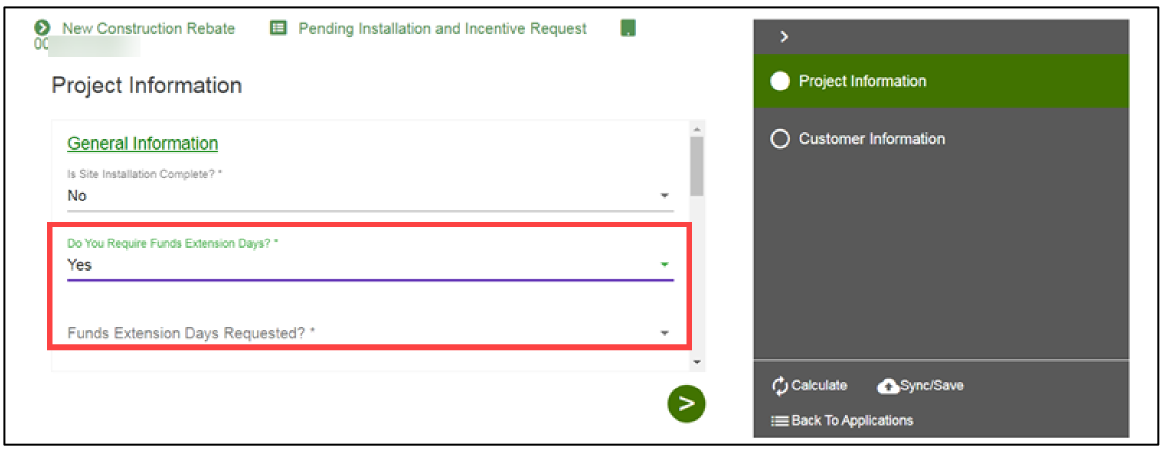
Request for Application Withdrawal

4. Select No for **Do You Require Funds Extension Days?**
5. Select **Request for Application Withdrawal**.



Funds Extension Days Required

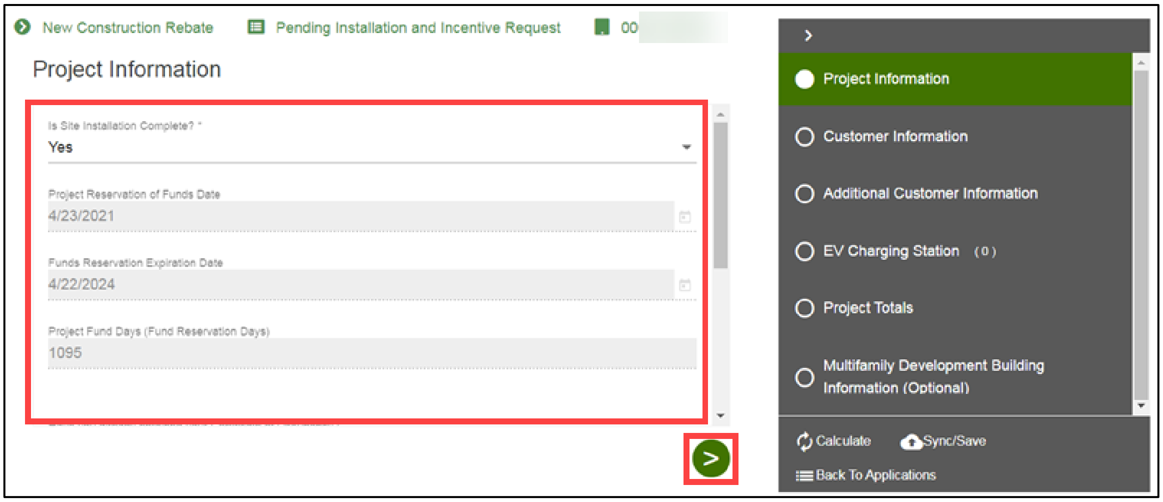
6. Select Yes for **Do You Require Funds Extension Days?**
7. Select the **Funds Extension Days Requested**.



Site Installation is Complete

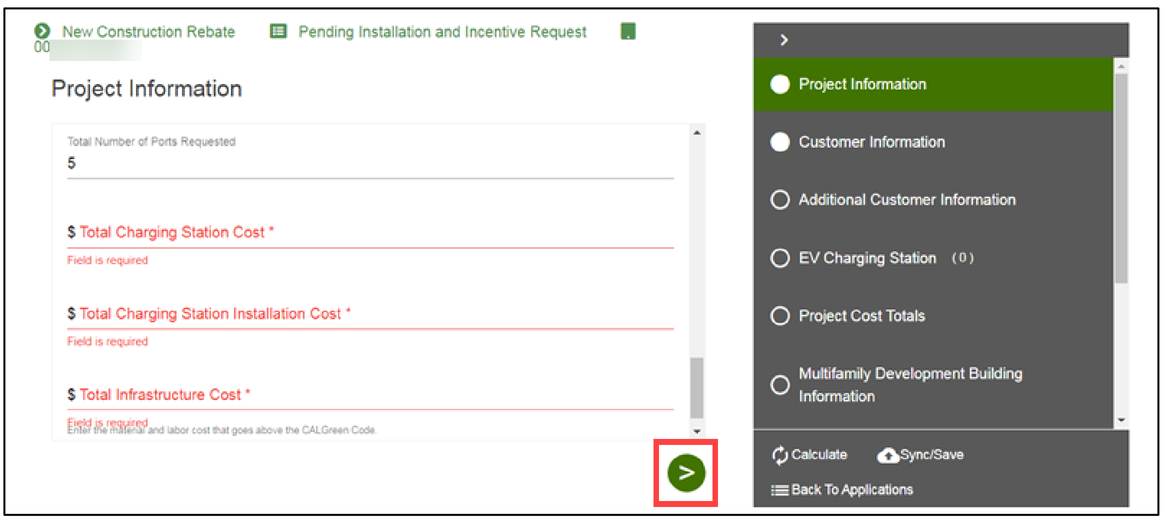
If site installation is complete, the available sections for the Pending Installation and Incentive Request expands.

8. Enter and verify the required information.
9. Scroll down.



10. Enter the required information.

11. Click the > **Next** arrow.

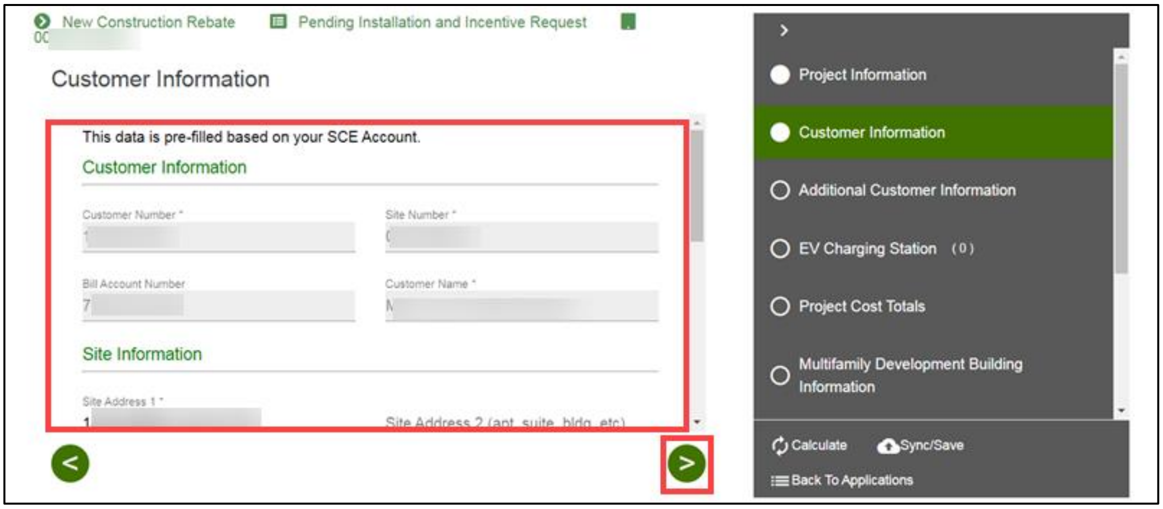


The Customer Information page displays.

Customer Information

12. Enter the **Customer Information** and **Site Information**.

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

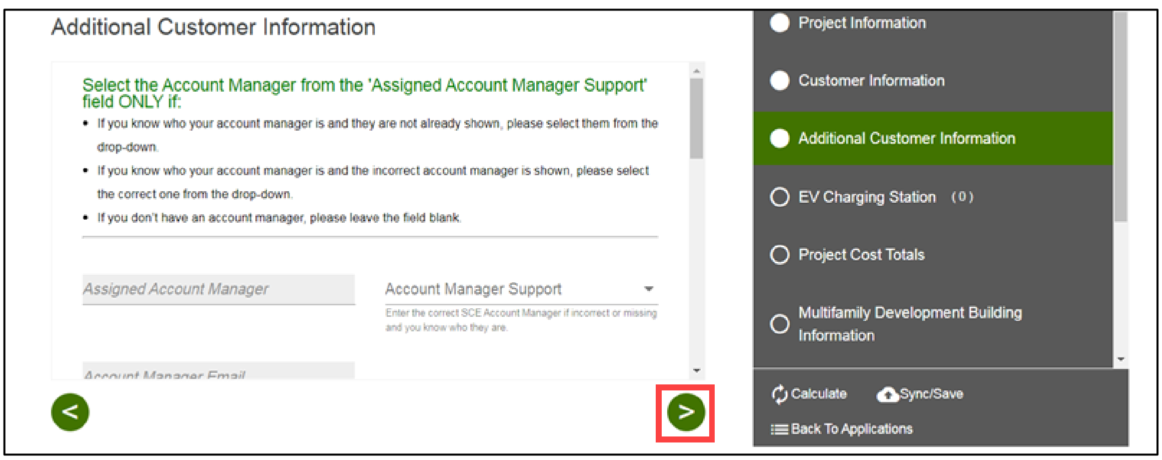


The **Additional Customer Information** page displays.

Additional Customer Information

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

15. Click the **Next** arrow.

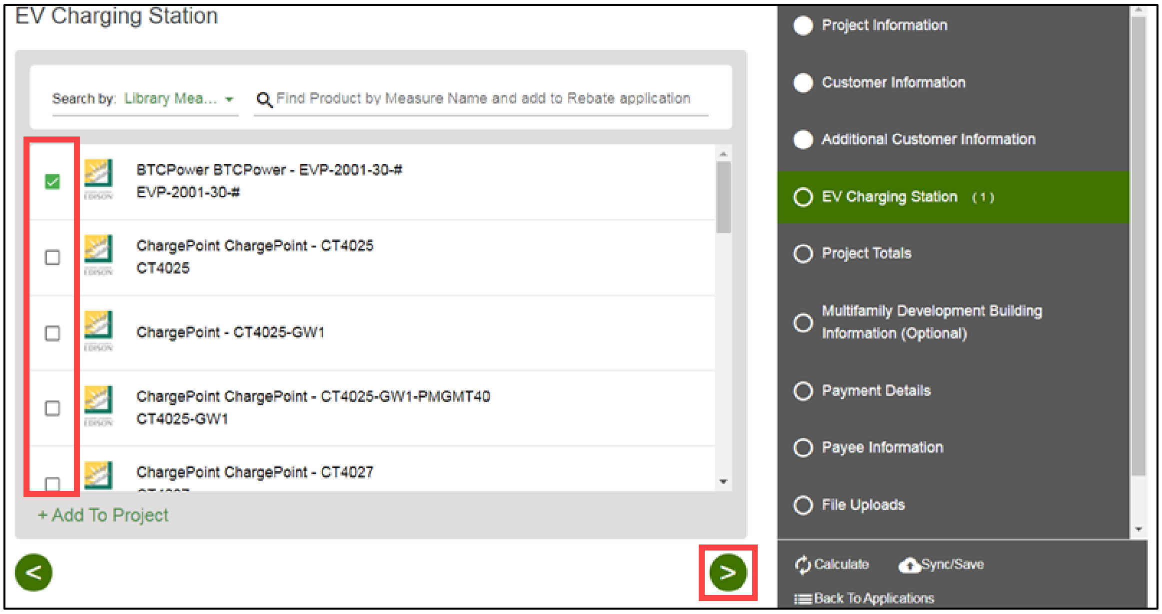


The **EV Charging Station** page displays.

EV Charging Station

16. Select a measure.

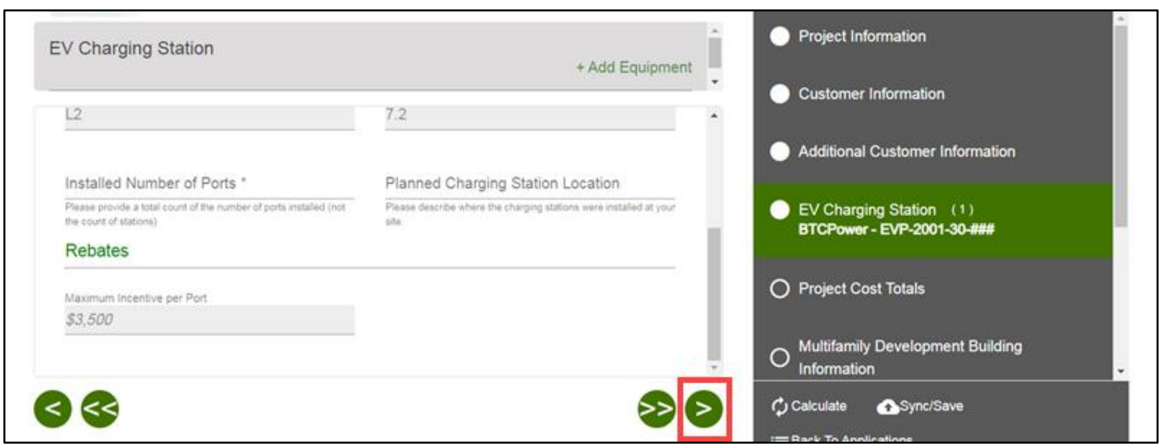
17. Click the **Next** arrow.



The selected measure displays.

18. Enter the applicable information.

19. Click the **Next** arrow

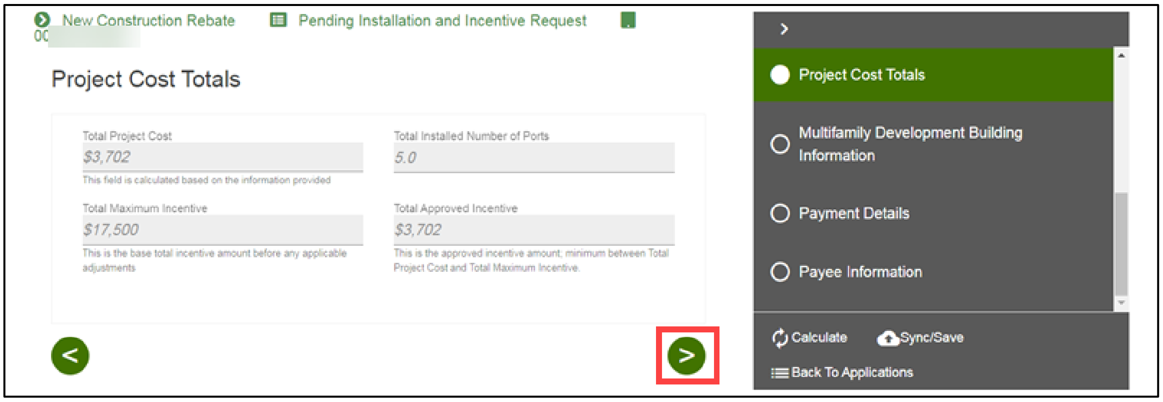


The **Project Totals** page displays.

Project Cost Totals

20. Verify the **Project Cost Totals**.

21. Click the **Next** arrow.

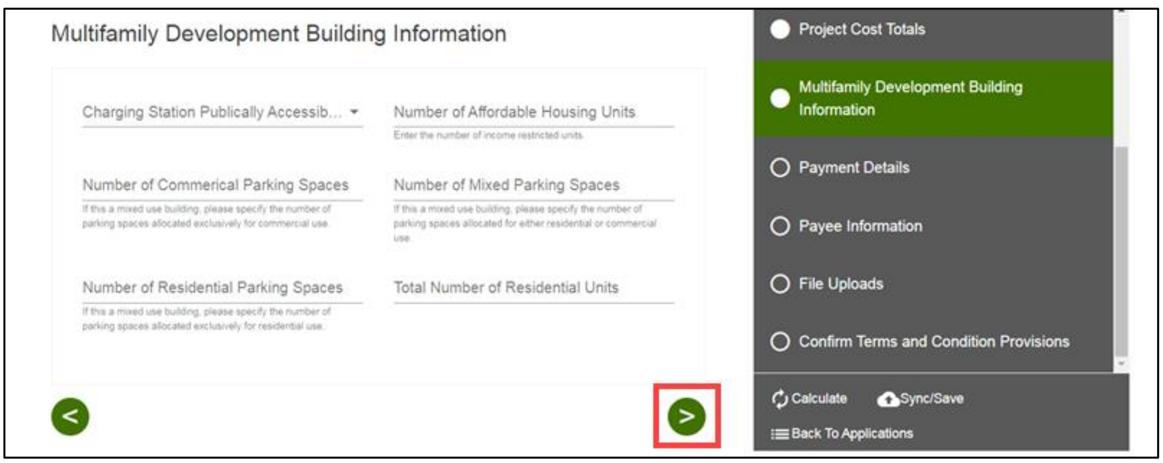


The **Multifamily Development Building Information (Optional)** page displays.

Multifamily Development Building Information

22. Enter and verify the required information.

23. Click the > **Next** arrow.



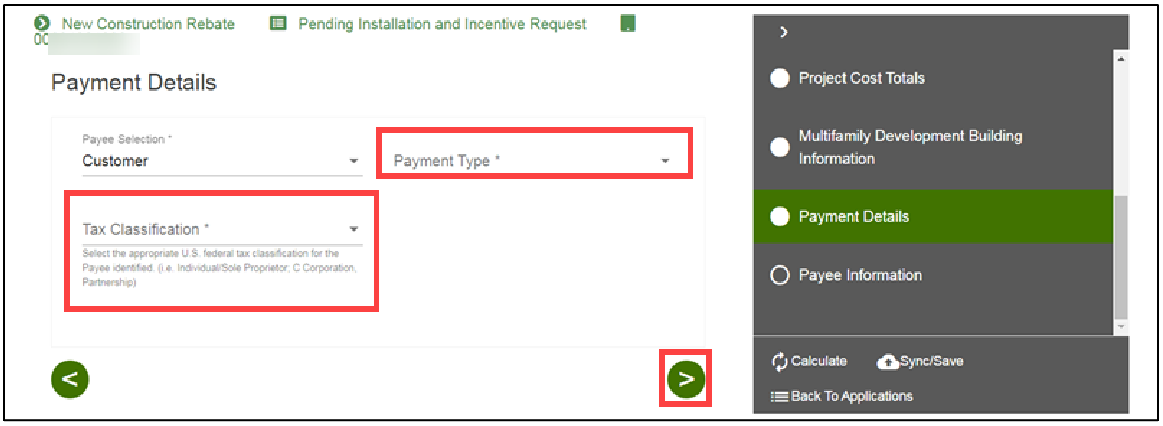
The **Payment Details** page displays.

Payment Details

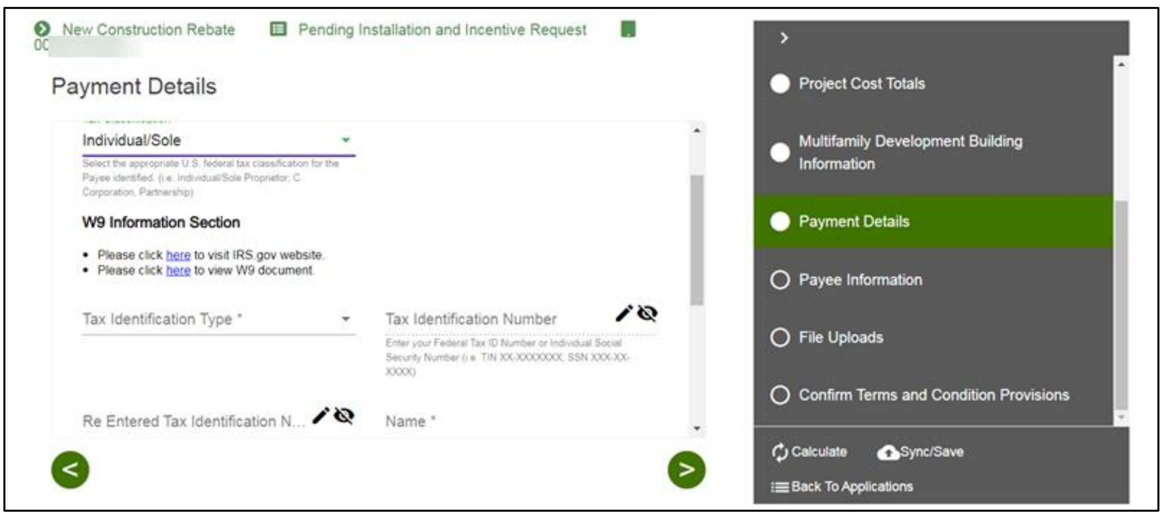
24. Select a **Payee Selection**.

Additional fields display.

25. Select a **Payment Type**.
26. Select a **Tax Classification**.
27. Click the **Next** arrow.



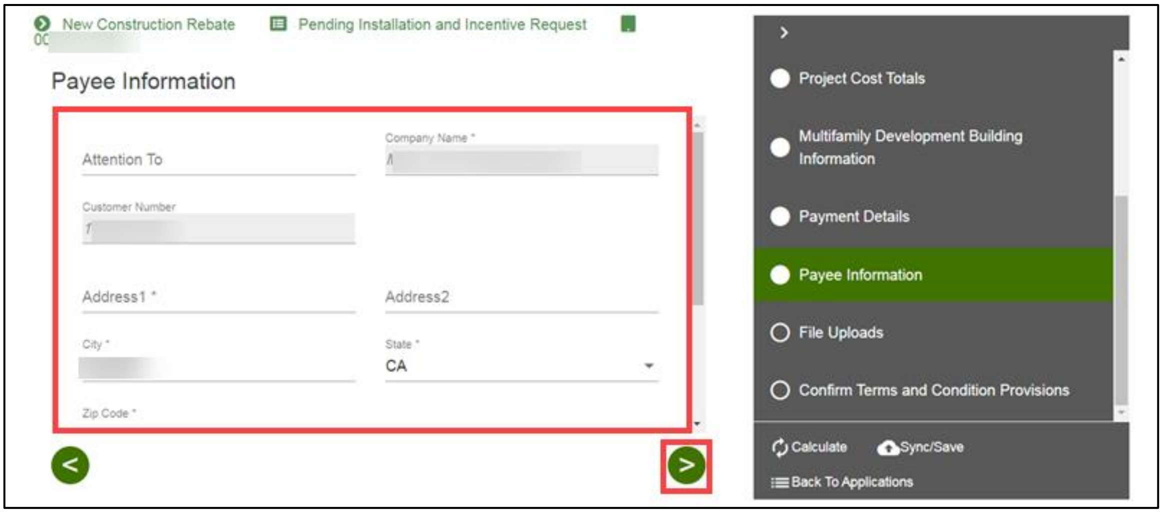
Note: Certain Tax Classifications require more information.



The **Payee Information** page displays.

Payee Information

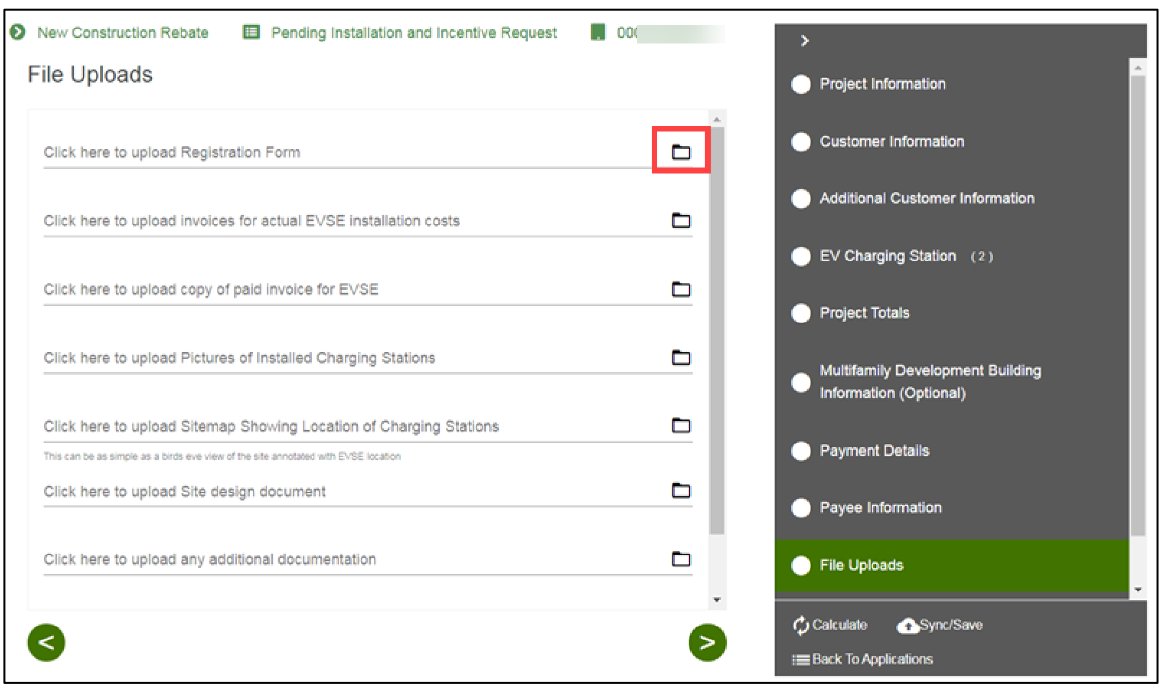
28. Enter and verify the required information.
29. Click the **Next** arrow.



The **File Uploads** page displays.

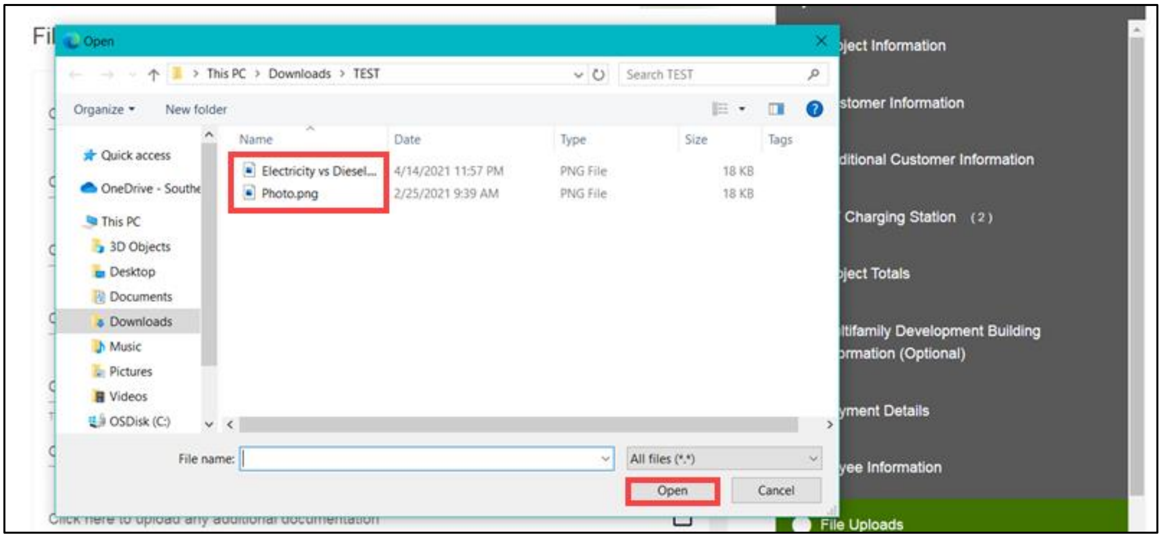
File Uploads

30. Select the **Folder** icon.



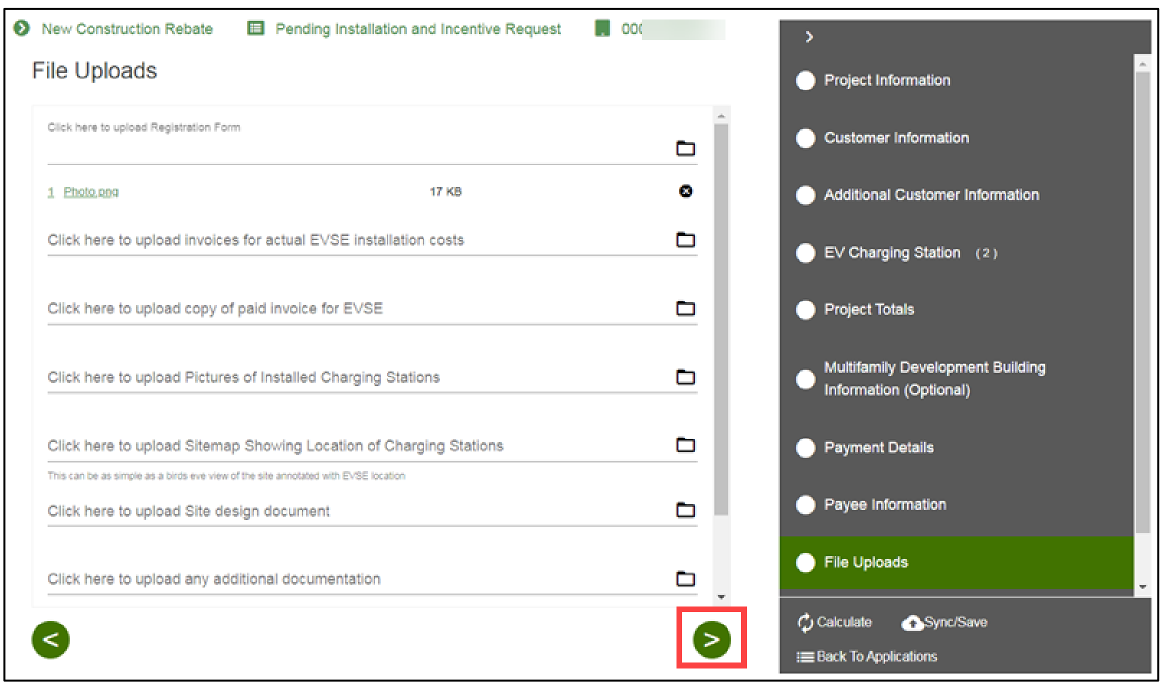
An **Open** window displays.

31. Select a document and select **Open**.



The file uploads.

32. Click the **Next** arrow.

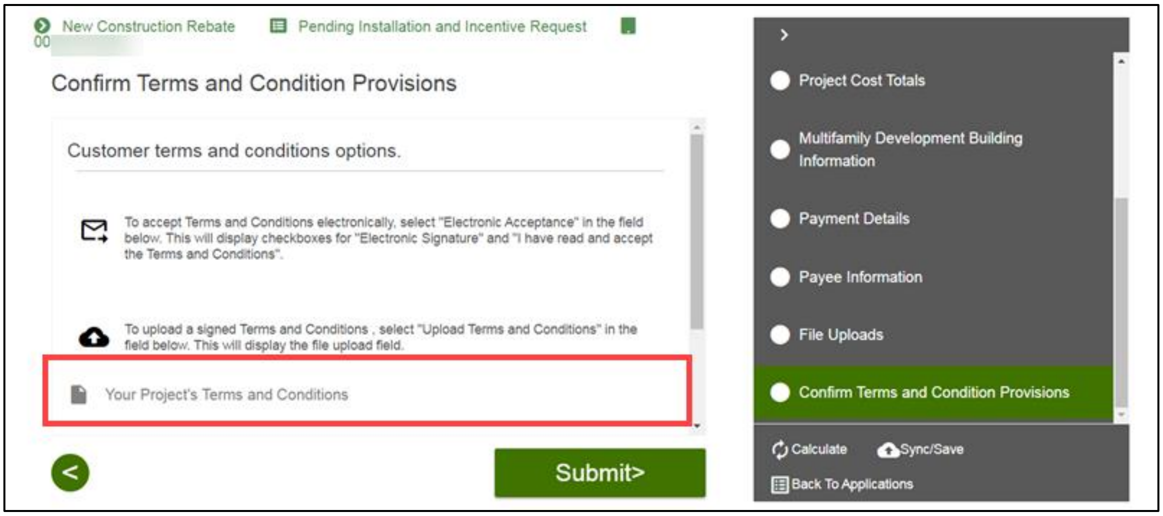


The **Confirm Terms and Condition Provisions** page displays.

Confirm Terms and Condition Provisions

33. Select the **Project's Terms and Conditions.**

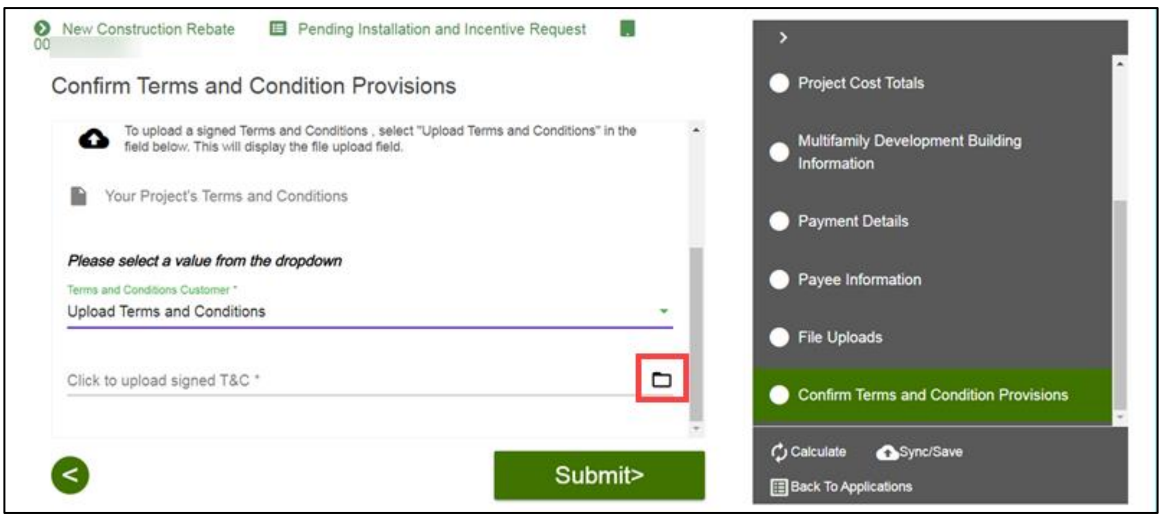
    Note: You can upload a document or complete an electronic signature.



Uploading Terms and Conditions

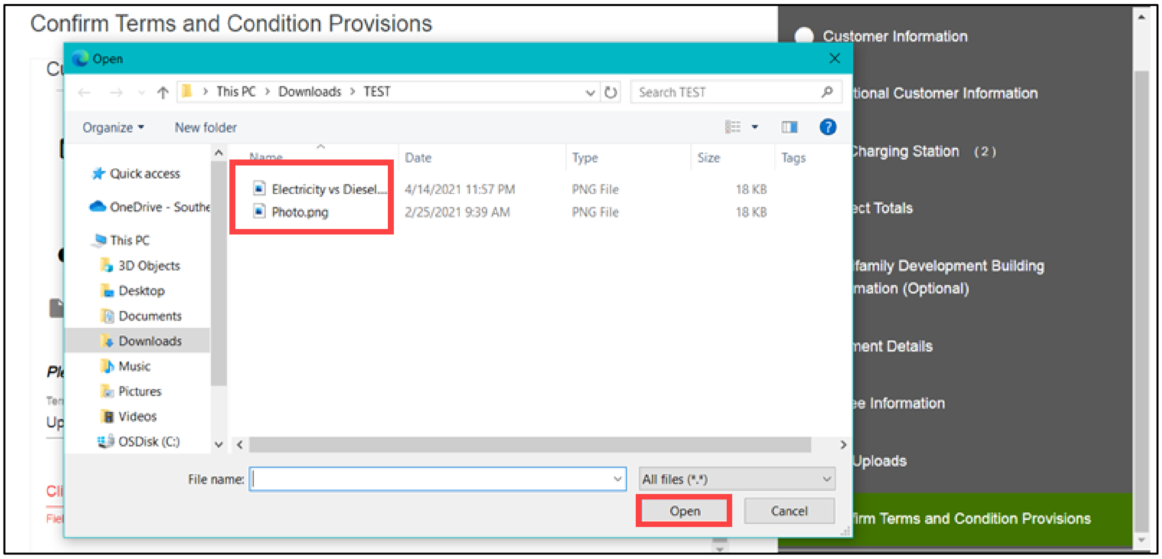
To upload terms and conditions, follow the steps below:

34. Select the **Folder** icon.

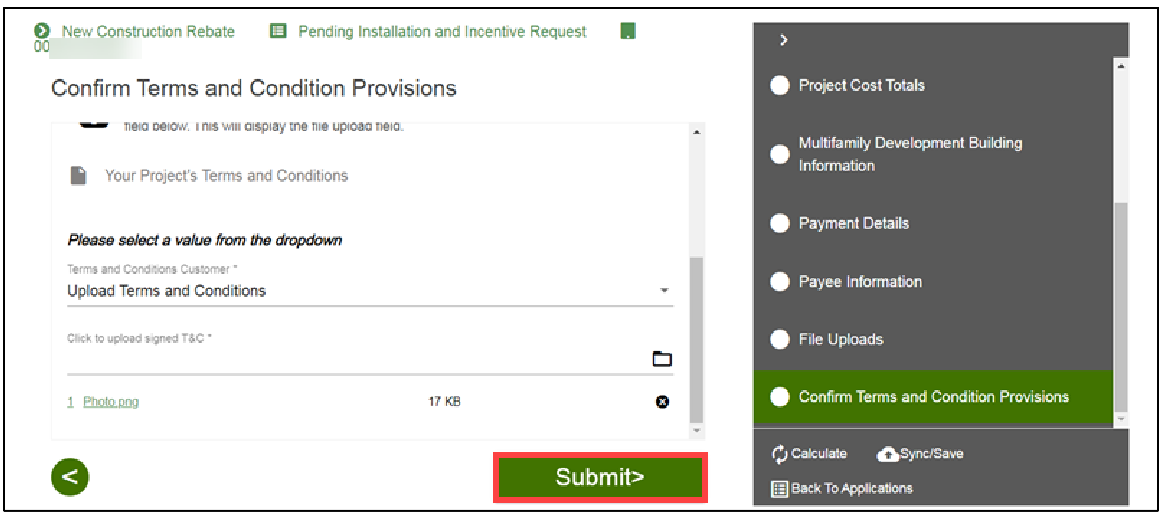


An **Open** window displays.

35. Select a document and select **Open**.



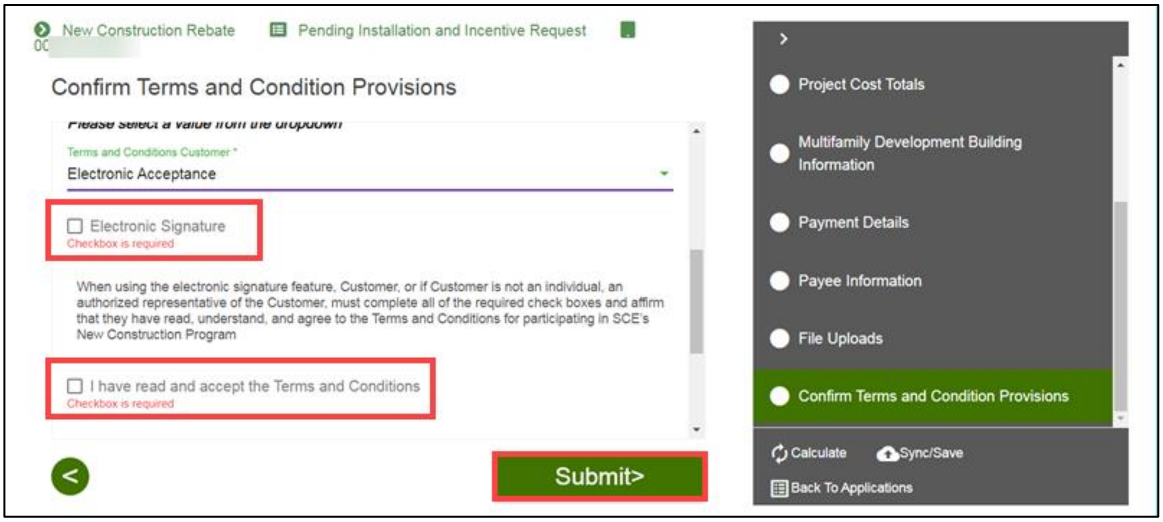
36. Click **Submit**.



Completing an Electronic Signature

To complete an electronic signature, follow the steps below:

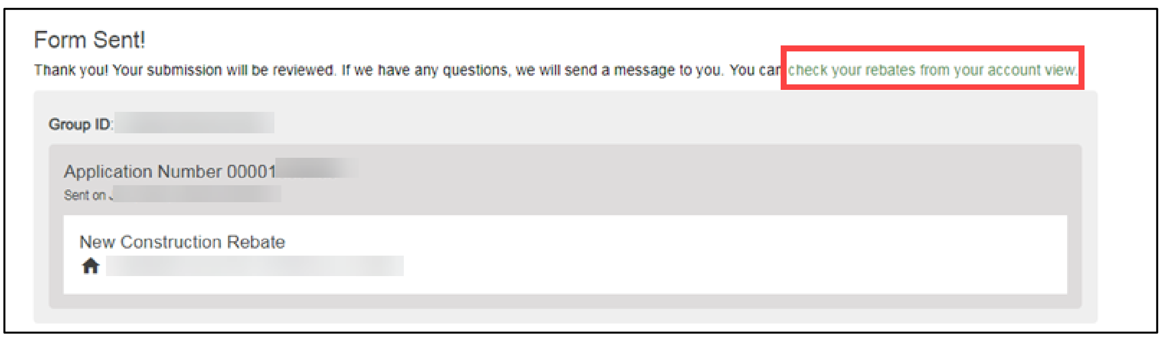
37. For Electronic Acceptance, read and select the check boxes.
38. Click **Submit**.



Form Sent!

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

39. 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.

Appendix A: Charge Ready Trade Professionals Submitting an Application for a Customer without an Existing Account

If you are a Charge Ready Trade Professional submitting an application on behalf of a customer, there may be times when:

- A Customer does not have any existing site in the SCE territory, **AND** does not have an SCE Customer Account Number

To submit an application for a customer without an existing site or an SCE Customer Account Number, follow the steps below:

1. Direct the customer to request a new account by emailing ChargeReady@sce.com. In the email, they should include the following details:
   - Subject Line: New Customer Request
   - Body of email:
     - Company Name
     - Company Address
     - Contact Name
     - Contact Email Address
     - Project Address or Adjacent Address

   The Charge Ready team will create an account, and email the customer their Customer Account Number.

   IMPORTANT: The customer must share their account number with you.

2. Once received, enter the Customer Account Number and the Project Zip Code when identifying the customer on the application to proceed with the project.