ALAMEDA COUNTY INCENTIVE PROJECT
SAMPLE SUPPORTING DOCUMENTS

SEPTEMBER 28, 2021
Sample Supporting Documents

Table of Contents

Best Practices................................................................................................................................. 3
Proof of Payment .............................................................................................................................. 3
Larger Construction Projects............................................................................................................. 3
Authorities Having Jurisdiction (AHJs).......................................................................................... 3
Site Verification Form ....................................................................................................................... 4
Evidence of Permit Submittal or Utility Service Design Submittal ................................................. 6
Signed Application Form ................................................................................................................ 16
Design Invoice ............................................................................................................................... 18
Permit ............................................................................................................................................. 20
Equipment Purchase Invoice .......................................................................................................... 21
Installation Purchase Invoice ........................................................................................................... 23
Job Site Installation Form ................................................................................................................. 25
Final Inspection Card ....................................................................................................................... 27
Two Photos of Installed and Operational Equipment ....................................................................... 28
Photo of Equipment Serial Number ................................................................................................ 29
Network Agreement with Minimum Term ....................................................................................... 30
Utility Service Order (if applicable) ................................................................................................. 31
Sample Supporting Documents

Best Practices

All scans or photos of supporting documents must be legible and include all pages and sections, unless otherwise specified.

Proof of Payment

All invoices are required to have proof of payment, such as a paid stamp, with a payment date by the invoicing business or organization. Receipts, wire transfers or cashed checks with corresponding bank statements and a payment date may be used to supplement proof of payment.

Larger Construction Projects

For larger construction projects, work and associated costs pertaining to the EV charger project should be specifically listed and identified on all invoices.

Authorities Having Jurisdiction (AHJs)

AHJ applicants may alternatively submit other documents in lieu of the following:

<table>
<thead>
<tr>
<th>REQUIRED</th>
<th>ALTERNATIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>DESIGN INVOICE</td>
<td>AHJs with in-house design work may alternatively submit a description of</td>
</tr>
<tr>
<td></td>
<td>design work on official AHJ letterhead supplemented by an invoice or other</td>
</tr>
<tr>
<td></td>
<td>accounting document(s) clearly showing incurred design costs and the</td>
</tr>
<tr>
<td></td>
<td>dates the costs were incurred. The installation site address must be listed.</td>
</tr>
<tr>
<td>PERMIT</td>
<td>A letter on official AHJ letterhead explaining the AHJ is a self-permitting</td>
</tr>
<tr>
<td></td>
<td>agency and that a permit for the approved EV charger project at the</td>
</tr>
<tr>
<td></td>
<td>installation site is not required. The installation site address must be</td>
</tr>
<tr>
<td></td>
<td>listed.</td>
</tr>
<tr>
<td>INSTALLATION PURCHASE</td>
<td>AHJs with in-house installation may alternatively submit a description of</td>
</tr>
<tr>
<td>INVOICE</td>
<td>the installation work on official AHJ letterhead supplemented by an invoice</td>
</tr>
<tr>
<td></td>
<td>or other accounting document(s) clearly showing incurred installation costs</td>
</tr>
<tr>
<td></td>
<td>and the dates costs were incurred. The installation site address must be</td>
</tr>
<tr>
<td></td>
<td>listed.</td>
</tr>
<tr>
<td>FINAL INSPECTION CARD</td>
<td>A letter on official AHJ letterhead explaining the AHJ is a self-permitting</td>
</tr>
<tr>
<td></td>
<td>agency and that the approved EV charger project at the installation site is</td>
</tr>
<tr>
<td></td>
<td>complete and in compliance with all municipal laws, rules, codes and</td>
</tr>
<tr>
<td></td>
<td>regulations. The installation site address must be listed.</td>
</tr>
</tbody>
</table>
Sample Supporting Documents

Site Verification Form

(Required for all applicants, regardless of site ownership)

- A completed Site Verification Form must have all fields filled out.
- Digital signatures must be manual and can include signing with a pen or cursor. Digital signature stamps without a manual signature are not accepted.
- Site Verification Form must be submitted within five (5) calendar days of application submittal or the application will be automatically cancelled.

Sample

![Alameda County Site Verification Form](image-url)
PROPERTY OWNER

Please provide the name of the company, city, trust, or individual that owns the property.

Property Owner Name:

Please provide the following contact information for the Property Owner or a representative of the Property Owner who can answer follow up application questions if needed.

Contact Name (first and last):

Phone:________________________ Email:________________________

Please provide the full installation address in the section below, including street address, city, state and ZIP code.

Property Owner hereby represents and warrants to CSE that: (1) the Property Owner is the legal owner of the real property located at __________________________ (“Property”); (2) the Property Owner has consented to Applicant’s installation of certain EV charging station equipment at the Property; and (3) the individual signing below is duly authorized to execute and submit this Title Verification form to CSE on behalf of Property Owner. Property Owner acknowledges and agrees that CSE is relying on the foregoing certifications in reviewing and approving the Application.

Signature of Authorized Representative of Property Owner: __________________________

Printed Name: __________________________ Date: __________________________

Title: __________________________

---

Additional information:

EV chargers installed with CALIPER Incentives are eligible to generate Low Carbon Fuel Standard credits. Under California's Low Carbon Fuel Standard (LCFS), all operational electric vehicles (electric and EV Charging) can generate credits for reducing fuel and EV charging, which can offset transportation credits issued under other state programs. These credits can be claimed and sold for economic benefit. The EV charge points typically have rights to these LCFS credits, and they may be assigned or transferred to another party. For more information about LCFS, visit: https://www.arb.ca.gov/news/releases/090216a/Low-Carbon-Fuel-Standard/Overview.html.
Sample Supporting Documents

Evidence of Permit Submittal or Utility Service Design Submittal

A complete copy of Evidence of Permit submittal includes the following:

- Copy of permitting authority (City, County, Special District) building/electrical/construction permit application
- Copy of permit plan set/package submitted with building/electrical/construction permit application
- Copy of payment receipt for submittal of building/electrical/construction permit

Sample Permitting Authority Application

[Image of a permit application form]
A complete copy of Evidence of Utility Service Design submittal includes the following:

- Copy of electric utility service/project application
- Copy of drawing/plan set/package required by the electric utility to be submitted with the utility service/project application
- Copy of payment receipt for submittal of utility application for service

Sample Electric Utility Service/Project Application

- [PG&E Customer Connections Online](#) (for utility service application)
- Alameda Municipal Power
  - [Electric Vehicle Charging Equipment Form](#) (for utility service application)
  - [Non-Residential Electric Service Form](#) (include if upgrading main panel)
APPLICATION FOR SERVICE
COMMERCIAL / INDUSTRIAL DEVELOPMENT

Please complete the application and submit the completed form and attachments to PG&E Application for Service at P O Box 22847
Fresno, CA 93722-9847. You may also submit applications at www.pge.com/myservice女兒/requests/newconstruction
or call 1-877-PGE-SRVG
*Indicates optional fields

Project Type
☐ Commercial Service (new)  ☐ Commercial Industrial Development  ☐ Commercial/Industrial Service Upgrade (additional load/equipment)
☐ Industrial Service (new)  ☐ Mixed Use Commercial/Residential  Number of Buildings  Number of Electric Services

Project Information
☐ Gas Service  ☐ Electric Overhead Service  ☐ Electric Underground Service  ☐ Data Initial Service Needed
Project Address or Lot Number  City  County  Zip
Nearest Cross Street
*Assessor's Parcel No  Building Permit No.
Applicant / Company Name
☐ Individual  ☐ Partnership  ☐ Corporation  ☐ Limited Liability Corporation  ☐ Governmental Agency
☐ Sole Proprietor  ☐ Other
Day Phone (  )  ☐ Cell Phone (  )  ☐ Fax (  )  ☐ Email address
*Correspondence will be sent via e-mail
Applicant Address  City  State  Zip

Contract Information
Legal name to appear on contract
☐ Individual  ☐ Partnership  ☐ Corporation  ☐ Limited Liability Corporation  ☐ Governmental Agency
☐ Sole Proprietor  ☐ Other
*State of incorporation or LLC
Name of person authorized to sign contracts  ☐ Title
(First Name, Middle Initial, Last Name)
Mailing address for contract  City  State  Zip

Representative Information (Party who will relay project information and updates to the PG&E representative)
Name of Representative
Day Phone (  )  ☐ Cell Phone (  )  ☐ Fax (  )  ☐ Email address
Mailing address  City  State  Zip
*Contactor’s Name  ☐ Contractor’s Phone (  )
APPLICATION FOR SERVICE
COMMERCIAL / INDUSTRIAL DEVELOPMENT

Credit Information (Party responsible for energy use after the meter is installed)

Name/Company Name to appear on bill Day Phone ( ) *Evening Phone ( )
(First Name, Middle Initial, Last Name)
[ ] Individual [ ] Partnership [ ] Corporation [ ] Limited Liability Corporation [ ] Governmental Agency
[ ] Sole Proprietor [ ] Other
Mailing address for bill City State Zip
Does the customer currently have service with PG&E? [ ] No [ ] Yes
*If yes, please provide the PG&E Account Number
*Do you want the new service included on your existing bill? [ ] No [ ] Yes
*NACS North America Industrial Classification System Code Business Activity
*Desired Electric Rate Schedule *Desired Gas Rate Schedule

If you want additional information or rate options or want to request a free rate analysis, visit
http://www.pge.com/mybusiness/myaccount/rates/ or call 1-877-PGE-SRVC. If a rate schedule is not selected, PG&E will select an
applicable rate schedule.

Applicant Design and Installation Options

As an applicant for new gas or electric service, you can choose either PG&E or a qualified contractor to design new gas/electric
distribution and/or service facilities. You can also choose either PG&E or a qualified contractor to construct all or a portion of new gas/electric
distribution and/or service facilities. PG&E will provide you with a bid for the design and the construction work, to assist you in making a
selection. You will then have the opportunity to choose either a qualified contractor to perform the design/construction work.

In accordance with PG&E’s filed tariffs, electric trenching, conduit, substructure and gas service trenching are the applicant’s
responsibility. Once you make a decision about who will perform the work, if you subsequently change your selection, you will be
responsible for any re-engineering charges incurred as a result of that change.

You should become familiar with the applicant design installation requirements, including PG&E’s Applicant Design Guide and General
Terms and Conditions, before you make your selection. For copies of these documents and/or additional information, visit Document,
Preliminary Statement Part A www.pge.com/newconstruction/processguide/site/appprod.html or request information by calling 1-877-
PGE-SRVC.

PG&E must provide project specific information to design contractors. PG&E can provide this information sooner
if we know whether or not you are considering using a design contractor to design gas/electric distribution or
service facilities.

Providing this information on this Application is voluntary and is not binding. PG&E will provide you with a bid for
the design work regardless of whether or not you answer this question now and will not require a final decision
from you until later in the process.

Are you currently planning to use a design contractor? Yes [ ] No [ ]

Automated Document - Preliminary Statement Part A
Page 2 of 6
Form 02-2005
Advice 034304141E
November 2012
APPLICATION FOR SERVICE
COMMERCIAL / INDUSTRIAL DEVELOPMENT

Attachment – 2 copies required

A. Complete set of site improvement plans, including grading plans. (Include 3 1/4 high-density disk with AutoCAD 2000i.dwg file of the site plan.)
B. Building floor plan and exterior elevations.
C. Electric drawings and schedules with complete breakdown of equipment; include single line drawing if available.
D. Electric switchboard drawings. (Must be approved by PG&E prior to manufacturing the main panel.)
E. Plumbing plans.
F. Assessor’s parcel map showing all easements, rights-of-way, property lines, etc.
G. Detailed site plan showing roads, sidewalks, driveways, location of fire hydrants and other structures, proposed location of gas and electric meters, building elevations, and proposed future improvements. (Meter locations are subject to PG&E approval.)
H. Landscaping plans including sprinkler controller meter location.
I. Streetlight and traffic signal plans.
J. Title 34 Utility Report or building permit.
K. Copies of all environmental permits and/or conditions of approval.

Applicant is responsible for following all environmental requirements within said permits, approvals and/or conditions. For additional information visit www.pge.com/mybusiness/custserv/otherrequest/newconstruction.

Agreement to Pay and Signature

I understand that service will be engineered and installed based upon the information provided here. I agree to pay PG&E on demand, for all work PG&E performs and all costs PG&E incurs for this application for service. PG&E may cancel this Application for Service (a) if the application is incomplete and I do not provide all necessary supporting documents and project data after being notified by PG&E, (b) if I fail to provide an engineering advance within ninety days after one is requested by PG&E, or (c) if PG&E sends a proposed contract and I do not return the contract, with the required payment, within ninety days. If the project is postponed or cancelled, by either party, I will pay PG&E for all such work and costs incurred by PG&E prior to the postponement or cancellation. PG&E’s costs may include, for example, labor, material and supplies, including long lead time materials, transportation, and other direct costs which PG&E allocates to such work. Incomplete information or any changes made at my request during the engineering or, after it is completed, will subject me to additional charges and may delay the establishment or service. I further agree to pay for any damage to new or existing PG&E facilities caused by my contractors or me. Service shall be subject to all of PG&E’s applicable tariff schedules on file with and authorized by the California Public Utilities Commission (CPUC) and shall at all times be subject to such changes or modifications as the CPUC may direct from time to time in the exercise of its jurisdiction.

I understand that PG&E may require an engineering advance to cover some or all of its costs for project review, design work and cost development in connection with this application for service. I understand that any advance will be based upon current costs and the amount of work anticipated by PG&E based upon the information submitted in this application. I understand that any advance will be credited against the amount I owe, applied to the amount I may owe on the resulting line extension agreement, or refunded to me without interest when PG&E has completed its engineering work or if the project has been cancelled or postponed.

I have read the above information. I understand and agree with the provisions and my responsibilities.

Applicant’s Signature ____________________________ Print Name ____________________________ Date ____________________________

First Name: Middle Initial: Last Name

Automated Document – Preliminary Statement Part A
Sample Supporting Documents

Signed Application Form

- A completed Application Form must have all fields filled out.
- DCFC applicants must fill out charger information on the second page.
- Digital signatures must be manual and can include signing with a pen or cursor. Digital signature stamps without a manual signature are not accepted.

Sample

![Sample Application Form](image-url)
Alameda County Incentive Project
Application Form

For DC Fast Chargers, applicants must adhere to the following requirements:
1. The quantity of CCS connectors will equal or exceed the quantity of CHAdeMO connectors in the Group,
and
2. At least one connector will be CCS and at least one connector will be CHAdeMO in the Group. This
requirement does NOT apply to L2 Incentives.

<table>
<thead>
<tr>
<th>Charger Incentive Type</th>
<th>Charger Model/Model and number of connectors</th>
<th>Number of CCS connectors</th>
<th>Number of CHAdeMO connectors</th>
<th>Total household connections</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Sample Supporting Documents

Design Invoice

A completed copy of the paid design invoice includes the following:

- Installation site address
- Purchaser name
- Description of design and engineering work
- Required signatures, if applicable
- An itemization of eligible costs, and if applicable, all credits, discounts and incentives received
- Proof of payment with a payment date (see Best Practices)
- Applicants are encouraged to use the CALeVIP Voluntary Invoice Template

Sample

![Design Invoice Example](image)

Thank you for your Business!!
Sample Supporting Documents

Permit

An issued permit includes the following:

- Installation site address
- Project description (e.g., EV charger installation)
- Issued date and/or status, if applicable
- All required signatures, if applicable

Sample
Sample Supporting Documents

Equipment Purchase Invoice

A completed copy of the paid equipment purchase invoice includes the following:

✔ Equipment make, model and quantity
✔ Purchaser name
✔ Required signatures, if applicable
✔ An itemization of eligible costs, and if applicable, all credits, discounts and incentives received
✔ Proof of payment with a payment date (see Best Practices)
✔ Applicants are encouraged to use the CALeVIP Voluntary Invoice Template

Sample

![Sample Invoice Image]
## Invoice

**Your Company Name**
**Your Street Address**
**Your Street Address 2**
**Your City, State, ZIP Code**
**Your Phone**
**Your Email**

### Invoiced To

<table>
<thead>
<tr>
<th>Customer Company Name</th>
<th>Customer Street Address</th>
<th>Customer Street Address 2</th>
<th>Customer City, State, ZIP Code</th>
<th>Customer Phone</th>
<th>Customer Fax</th>
<th>Customer Email</th>
</tr>
</thead>
</table>

### Installation Site

<table>
<thead>
<tr>
<th>Recipient Organization</th>
<th>Installation Street Address</th>
<th>Installation Street Address 2</th>
<th>Installation City, State, ZIP Code</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Payment Terms</th>
<th>Due Date</th>
</tr>
</thead>
</table>

### Job Description

<table>
<thead>
<tr>
<th>Description</th>
<th>QTY</th>
<th>Unit Price</th>
<th>Cost</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment - Include Make &amp; Model</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| SubTotal | 0 |
| Shidding | 0 |
| Taxes    | 0 |
| TOTAL    | 0 |

---

ROSS WILKINS
with CAL eVIP

FILE: eVIP-03130

Date: [ ]
Invoice Number:
CSP Number:

---

Page 22
Sample Supporting Documents

Installation Purchase Invoice

A completed copy of the paid installation purchase invoice includes the following:

✓ Installation site address
✓ Purchaser name
✓ Description of installation work
✓ Contractor license number
✓ Required signatures, if applicable
✓ An itemization of eligible costs, and if applicable, all credits, discounts and incentives received
✓ Proof of payment with a payment date (see Best Practices)
✓ Applicants are encouraged to use the CALeVIP Voluntary Invoice Template

Sample

![Sample Invoice Image]
## Invoice

### Customer Information
- **Company Name:**
- **Street Address:**
- **City, State, ZIP Code:**
- **Phone:**
- **Email:**

### Invoice Details
- **Date:**
- **Invoice Number:**
- **CSLB Number:**

### Installation Site
- **Recipient Organization:**
  - **Street Address:**
  - **City, State, ZIP Code:**
- **Phone:**
- **Fax:**
- **Email:**

### Job Description

<table>
<thead>
<tr>
<th>Description</th>
<th>QTY</th>
<th>Unit Price</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment - Include Make &amp; Model</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Costs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Subtotal | 0 |
| VAT | 0 |
| Total | 0 |

*Note: Editable fields with code here.*
Sample Supporting Documents

Job Site Installation Form

A complete Job Site Installation Form includes the following:

- Only the Project Description section filled out on Page 2 if no construction has commenced.
- Signatures on both pages.
- Digital signatures must be manual and can include signing with a pen or cursor. Digital signature stamps without a manual signature are not accepted.

Sample

[Image: Affidavit Ensuring Adherence to Electric Vehicle Infrastructure Training Program (EVITP) Requirements]
Sample Supporting Documents

Final Inspection Card

A final inspection card includes the following:

- Installation site address
- Final sign-off date for EV charger installation
- All required signatures, if applicable

Sample
Sample Supporting Documents

Two Photos of Installed and Operational Equipment

Equipment photos must include the following:

✓ Required project labeling is clearly visible. Contact project implementers for stickers.
✓ All installed EV charger(s) included in your application must be photographed. Photos may include more than one EV charger.
✓ A complete view of the front of the installed operational and accessible EV charger(s). Partial or incomplete views will not be accepted.

Sample
Sample Supporting Documents

Photo of Equipment Serial Number

Serial number photo(s) must include the following:

- The complete equipment serial number for each EV charger included in your application. For example, if you applied for and installed 10 EV chargers, you are required to submit a total of 10 photos.
- The serial number must be shown on the EV charger.

Sample
Sample Supporting Documents

Network Agreement with Minimum Term

A completed network agreement includes the following:

✓ Execution of the agreement including all required signatures
✓ All pages and sections of the agreement, including the full contract
✓ Term length – the contract of your agreement may be supplemented by a paid invoice showing the term length
✓ The required term for Level 2 chargers is two years and the required term for DC fast chargers is five years

Sample
Sample Supporting Documents

Utility Service Order (if applicable)

✓ A completed utility service order includes the costs for design of service request from the utility planner.

Sample

![Application Form]

[Image of Application Form]

[Description: Application for Service Commercial/Industrial Development]

- Project Type:
  - Commercial Service (new)
  - Commercial/Industrial Development
  - Commercial/Industrial Service Upgrade (additional load/equipment)
  - Industrial Service (new)
  - Mixed Use Commercial/Residential

- Project Information:
  - Project Address or Lot Number
  - City
  - County
  - Zip
  - Building Permit No.

- Applicant/Company Name:
  - Individual
  - Partnership
  - Corporation
  - Limited Liability Corporation
  - Governmental Agency

- Sole Proprietor

- Day Phone
- *Cell Phone
- *Fax
- *Email address
- Correspondence will be sent via e-mail

- Applicant Address
- City
- State
- Zip

- Contract Information:
  - Legal name to appear on contract
  - Individual
  - Partnership
  - Corporation
  - Limited Liability Corporation
  - Governmental Agency
  - Sole Proprietor
  - Other
  - State of incorporation or LLC
  - Name of person authorized to sign contracts
  - *Title
  - Mailing address for contract
  - City
  - State
  - Zip

- Representative Information:
  - (Party who will relay project information and updates to the PG&E representative)
  - Name of Representative
  - Day Phone
  - *Cell Phone
  - *Fax
  - *Email address
  - Mailing address
  - City
  - State
  - Zip
  - Contractor's Name
  - Contractor's Phone

[Form Details]

Page 1 of 6
Form 92-2665
Advice 3343-G1415-E
November 2015