SACRAMENTO COUNTY INCENTIVE PROJECT
SAMPLE SUPPORTING DOCUMENTS

FEBRUARY 10, 2020
# Sample Supporting Documents

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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.

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

Site Verification Form

(Required if the applicant organization receiving the rebate is NOT the site owner)

✓ 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.

Sample

[Image of the Site Verification Form]

Sacramento County Site Verification Form

[Form details]

CAL
eVIP

Building EV Infrastructure

[Image of logos: California Energy Commission and Center for Sustainable Energy]
Sample Supporting Documents

Signed Application Form

 ✓ A completed Application Form must have all fields filled out.
 ✓ Only the single signature page is required.
 ✓ 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)
# 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](#))

### Sample

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Product Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering Design</td>
<td>Electrical Engineering Design &amp; Drawing, Planning and Engineering design for development of drawings and plans meeting the American with Disabilities Act requirements for EV DCFC chargers and necessary project signage.</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>$PAID</td>
</tr>
</tbody>
</table>

*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)

Sample

![Sample Equipment Purchase Invoice]

PAID INVOICE on 09/27/19
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)

Sample

![Sample PAID INVOICE]

PAID INVOICE

Customer Name: [Redacted]

Site Location: [Redacted]

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breaker Installation</td>
<td></td>
</tr>
<tr>
<td>Transformer Installation</td>
<td></td>
</tr>
<tr>
<td>Conduit &amp; Wiring</td>
<td></td>
</tr>
<tr>
<td>Excavation</td>
<td></td>
</tr>
<tr>
<td>Concrete/Asphalt Work/Mounting</td>
<td></td>
</tr>
<tr>
<td>Site Modifications</td>
<td></td>
</tr>
<tr>
<td>SVCS Bolt-down</td>
<td></td>
</tr>
</tbody>
</table>

Comments:

PAID INVOICE on 10/04/19

SUBTOTAL $10,000

OTHER $0

TOTAL $10,000
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

![Inspection Record Card](image)
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

Copy of 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

![Attachment B](image)

**Sample Electric Vehicle Charging Services Agreement**

Client hereby engages Provider for the term of this Electric Vehicle Charging Services Agreement (the "Agreement") and any renewals and/or extensions thereof, to provide the services described in the terms and conditions attached hereto as Schedule A within the real property owned and/or leased by client with property address(es) set forth below, and as described in Schedule A.

**Agreement Summary**

- **Equipment Ownership:** The Parties agree that Provider shall own all right, title, and interest in all the electric vehicle charging infrastructure (the "Infrastructure") at the Property.
- **Operation & Maintenance:** Provider agrees that it shall bear all costs associated with the service and maintenance of the equipment and any additional equipment (as defined herein) at the Property. The term of the Agreement (as defined in Schedule A). Provider shall charge Client all electricity costs generated from the use of the Equipment and all additional Equipment (as defined herein) on the Property.

**Term:** Three (3) years commencing on the latest date below; the term shall automatically renew for one additional three (3) year term, upon written agreement by both parties in advance of the end of the then-current term.

**Revenue Payments:** Provider shall remit to Client fifty percent (50%) of the net profits generated by the equipment installed as of the date this Agreement was executed, and not be limited to, the gross revenues generated by electric vehicle charging fees and advertising, minus (i) any and all taxes, (ii) transaction fees, and (iii) $20.00 per month in network connectivity related to the operation of the Equipment (the "Revenue Payment"). Any unpaid fees shall accrue to the next month.

**Exclusions:** Client agrees that it will not contract with any other utility provider to install, maintain, service or operate any electric vehicle charging equipment during the term of this Agreement.

**Additional Equipment:** If at any time during the term of this Agreement, it should be determined that additional equipment should be installed on the Property or at another (electronic) dispensing location (the "Additional Equipment"). Provider shall have the exclusive right to provide the Additional Equipment at no cost to Client. Client shall pay installation costs of any Additional Equipment, including all infrastructure and labor costs. Provider shall own all right, title, and interest in all Additional equipment, unless otherwise agreed in writing. Client shall only be paid electricity costs generated from the use of the Additional Equipment. Additional equipment shall be added to the Property for future use and maintained by both parties signing an installation data acknowledgment form, as described in Schedule A.

**Additional Equipment Revenue Payment:** Provider shall receive Client fifty percent (50%) of the net profits generated by any additional equipment installed after the date of this Agreement, which shall include but not be limited to, the gross revenues generated by electric vehicle charging fees and advertising, minus (i) any and all taxes, (ii) transaction fees, and (iii) $20.00 per month in network connectivity related to the operation of the Additional Equipment (the "Additional Equipment Revenue Payment"). Any unpaid fees shall accrue to the next month.

**By entering into this Agreement with Provider, Client agrees to be bound by all of the terms and conditions stated in Schedule A.**
Sample Supporting Documents

Copy of Utility Service Order (if applicable)

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

Sample

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**Customer/Project Information Sheet**

**Date Received by SCE:**

<table>
<thead>
<tr>
<th>Individual or Business Name:</th>
<th>Email Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>Zip Code:</td>
</tr>
<tr>
<td>City:</td>
<td>State:</td>
</tr>
<tr>
<td>Att.:</td>
<td>Phone No.:</td>
</tr>
<tr>
<td>Legal Contact:</td>
<td>Email Address:</td>
</tr>
<tr>
<td>Address:</td>
<td>Zip Code:</td>
</tr>
<tr>
<td>City:</td>
<td>State:</td>
</tr>
<tr>
<td>Primary Field / Site Superintendent / Job Contact:</td>
<td>Phone No.:</td>
</tr>
<tr>
<td>Relationship to Project:</td>
<td>FAX No.:</td>
</tr>
<tr>
<td>E-mail Address:</td>
<td></td>
</tr>
<tr>
<td>Project Address:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>State:</td>
</tr>
<tr>
<td>TG Map # or GPS:</td>
<td>Major Cross Street:</td>
</tr>
</tbody>
</table>

**Detailed Project Information**

- Residential: [ ]
- Commercial: [ ]
- Industrial: [ ]
- Agricultural: [ ]

- Service Requested: [ ] Overhead  [ ] Underground  [ ] Industrial  [ ] Agricultural

- Tract: [ ] Lot(s)
- Is this project subject to Buy America Compliance? Yes [ ] No [ ]

- Temporary Service Required: Yes [ ] No [ ]

- Approximate start work date for SCE crews: [ ]
- Your Construction Start Date:

- Approximate date you would like the job completed and energized:

- Scope of Project:

- Solar or Generation Equipment to be installed (if yes, please attach additional descriptions/specifications): Yes [ ] No [ ]

- Electric Vehicle: [ ] Charge Station  [ ] Plug-In Electric Vehicle (PEV)

- Panel Size (amps): [ ]
- Service Voltage/Phase:

- Total Tons of A/C: [ ]
- Total # of A/C Units: [ ]
- Largest A/C Unit (tons):

- Total HP of Pumps: [ ]
- Total # of Pump Units: [ ]
- Largest Pump (HP):

- Installing Gas or Electric: [ ]
- Heater: [ ]
- Water Heater: [ ]
- Range:

Square Footage of Buildings (if multiple buildings give all footages):

Notes over 5,000 sq. ft. may require a Load Schedule. Please contact your electrician for assistance.