SAN JOAQUIN VALLEY INCENTIVE PROJECT
SAMPLE SUPPORTING DOCUMENTS

FEBRUARY 10, 2020

CENTER FOR SUSTAINABLE ENERGY
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</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 dates</td>
</tr>
<tr>
<td></td>
<td>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 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</td>
</tr>
<tr>
<td></td>
<td>installation work on official AHJ letterhead supplemented by an invoice or</td>
</tr>
<tr>
<td></td>
<td>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 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 Site Verification Form]

San Joaquin Valley Site Verification Form

[Form fields and instructions]

APPLICANT Please complete as follows:

Applicant/organization name (rebate recipient):
Application number (e.g., F-00000):
Installation site address:
City: State: ZIP code:

Property Owner Please complete as follows:

[Form fields and instructions]
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

San Joaquin Valley Incentive Project Application Form

If any of the information below is incorrect, please contact CALeVIP staff at san-joaquin-valley-calvip@energy.ca.gov.

Project application number:

Applicant name:
Applicant email:
Organization name:
Applicant type:
Installation street address:
City: State: ZIP: County:

Mailing address:
Site use:
Please review all charger equipment on the following page.

By signing this form, the applicant agrees to the following:
1. I understand that the Energy Commission reserves all rights and remedies available under the law to enforce the San Joaquin Valley Incentive Project Requirements.
2. I acknowledge that I have read, understand, and agree to be bound by the San Joaquin Valley Incentive Project Requirements as outlined within the Rebate Application Form.

I certify, under the penalty of perjury, that the information provided herein and all supporting documentation is true, accurate, and complete.

Name of applicant or authorized representative: Total reserved rebate amount:

Signature: Date:
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

![Sample Invoice 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](#))

Sample

![Paid Invoice Example](image-url)

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>The total cost of two (2) EVCS unit(s) / Service(s):</td>
<td></td>
</tr>
</tbody>
</table>
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 details provided, showing various elements such as customer name, site location, description of work, amount, and payment details.)
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

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
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

![Customer/Project Information Information Sheet](image-url)