

SAN JOAQUIN VALLEY INCENTIVE PROJECT SAMPLE SUPPORTING DOCUMENTS



BUILDING EV INFRASTRUCTURE

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:

REQUIRED	ALTERNATIVE
DESIGN INVOICE	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.
PERMIT	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.
INSTALLATION PURCHASE INVOICE	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.
FINAL INSPECTION CARD	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.

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

San Joaquin Valley Site Verification Form



San Joaquin Valley Incentive Project applicants that do not own the property where the proposed installation site is located must provide authorization, to the satisfaction of the Center for Sustainable Energy (CSE), that the installation work is authorized by the owner of the real property and the applicant. Each owner and applicant must complete, sign and submit this form to CSE. CSE reserves the right to require that applicant and owner provide such further information as CSE may require to review and approve of the application.

The San Joaquin Valley Incentive Project promotes easy access to zero-emission vehicle infrastructure by offering rebates for the purchase and installation of eligible DC fast chargers and Level 2 chargers. Rebates of up to \$80,000 per DC fast charger and up to \$5,000 per connector for Level 2 chargers are available. More information is available at calevip.org/incentive-project/san-joaquin-valley.

Under the San Joaquin Valley Incentive Project, the applicant is the organization that will receive the rebate (rebate recipient).

APPLICANT Please complete as follows.

Applicant/organization name (rebate recipient):

Application number (e.g., F-00000):

Installation site address:

City: State: ZIP code:

Applicant hereby represents and warrants to CSE: (i) that all the foregoing information is true and correct and (ii) that the undersigned has been duly authorized by applicant to execute and submit this Site Verification Form to CSE. Applicant acknowledges and agrees that CSE is relying on applicant's foregoing certifications in reviewing and approving of the application.

Signature of authorized representative of applicant:

Name: Title:

Date:



PROPERTY OWNER Please complete as follows.

The undersigned, on behalf of (owner), hereby represents and warrants to CSE: (i) that owner is the vested owner of the real property located at (Property), (ii) that owner has consented to applicant's installation of certain EV charging station equipment at the property and (iii) that the undersigned has been duly authorized to execute and submit this Site Verification Form to CSE. Owner acknowledges and agrees that CSE is relying on owner's foregoing certifications in reviewing and approving of applicant's application.

Signature of authorized representative of owner:

Name: Title:

Date:


CSE-CALeVIP-092019



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		 BUILDING EV INFRASTRUCTURE	
If any of the information below is incorrect, please contact CALeVIP staff at san-joaquin-valley-calevip@energycenter.org .			
Project application number:			
Applicant name:			
Applicant email:			
Organization name:			
Applicant type:			
Installation street address:			
City:	State:	ZIP:	County:
Mailing address:			
Site use:			
<i>Please review all charger equipment on the following page.</i>			
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 Incentive Project Requirements as outlined within this 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:	

CSE-CALeVIP-102019

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

INVOICE

██████████
CA License # ██████████

██████████

Invoice Number: ██████████
Date: ██████████

Bill To Address
██████████
██████████

Site Address
██████████
██████████

Product Name	Product Description	Price
Engineering Design	Electrical Engineering Design & 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.	\$ ██████████
	Total	\$ ██████████

PAID
5/8/19

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

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">BUILDING PERMIT #</td> </tr> <tr> <td>JOB SITE ADDRESS (FORMER PERMIT #) :</td> </tr> <tr> <td>APN</td> </tr> <tr> <td>APPLICANT</td> </tr> <tr> <td>OWNER</td> </tr> <tr> <td>CONTRACTOR</td> </tr> <tr> <td>ARCHITECT OR ENGINEER</td> </tr> <tr> <td>DESCRIPTION OF WORK INSTALLATION OF 2 ELECTRIC CAR CHARGING STATIONS</td> </tr> <tr> <td>USE 437 Additions and Alterations - Nonresidential and non</td> </tr> <tr> <td>OCCUPANCY</td> </tr> <tr> <td>Zoning: Tract: Lot #:</td> </tr> <tr> <td>Total Valuation:</td> </tr> <tr> <td>Building SF:</td> </tr> <tr> <td>Garage SF:</td> </tr> <tr> <td>Patio SF: </td> </tr> <tr> <td style="text-align: center;">DESCRIPTION OF FEES</td> </tr> </table>	BUILDING PERMIT #	JOB SITE ADDRESS (FORMER PERMIT #) :	APN	APPLICANT	OWNER	CONTRACTOR	ARCHITECT OR ENGINEER	DESCRIPTION OF WORK INSTALLATION OF 2 ELECTRIC CAR CHARGING STATIONS	USE 437 Additions and Alterations - Nonresidential and non	OCCUPANCY	Zoning: Tract: Lot #:	Total Valuation:	Building SF:	Garage SF:	Patio SF: 	DESCRIPTION OF FEES	<p>City of [REDACTED] BUILDING DEPARTMENT [REDACTED]</p> <p style="text-align: center;">LICENSED CONTRACTORS DECLARATION</p> <p>I hereby affirm that I am licensed under the provisions of Chapter 9 (commencing with Section 7000) of Division 3 of the Business and Professions Code, and my license is in full Force and effect.</p> <p>License Class License Number Contractor <input checked="" type="checkbox"/> Date</p> <p style="text-align: center;">OWNER-BUILDER DECLARATION</p> <p>I affirm that I am exempt from the Contractor's License Law for the following reason (Sec. 7031.5, Business and Professions Code: Any city or county which requires a permit to construct, alter, improve, demolish, or repair any structure, prior to its issuance, also requires the applicant for such permit to file a signed statement that he is licensed pursuant to the provisions of the Contractor's License Law (Chapter 9 (commencing with Section 7000) of Division 3 of the Business and Professions Code) or that he is exempt therefrom and the basis for the alleged exemption. Any violation of Section 7031.5 by any applicant for a permit subjects the applicant to a civil penalty of not more than five hundred dollars (\$500).)</p> <p>I, as owner of the property, or my employees with wages as their sole compensation, will do the work, and the structure is not intended or offered for sale (sec. 7044, Business and Professions Code). The Contractor's License Law does not apply to an owner of property who builds or improves thereon, and who does such work himself or through his own employees, provide that such improvements are not intended or offered for sale. If, however, the building or improvement is sold within one year of completion, the owner-builder will have the burden of providing that he did not build or improve for purpose of sale.</p> <p>I, as owner of the property, am exclusively contracting with licensed contractors to construct the project (sec. 7044 Business and Professions Code: The Contractor's License Law does not apply to an owner of property who builds or improves thereon, and who contracts for such projects with a contractor(s) licensed pursuant to the Contractor's License Law.)</p> <p>I am exempt Under Sec. _____, B.P.C. for this reason.</p> <p>Owner Date</p> <p style="text-align: center;">WORKERS' COMPENSATION DECLARATION</p> <p>I hereby affirm under penalty of perjury one of the following declarations: I have and will maintain a certificate of consent to self-insure for workers' compensation, as provided for by Section 3700 of the Labor Code, for the performance of the work for which this permit is issued. <input checked="" type="checkbox"/> I have and will maintain workers' compensation, as required by Section 3700 of the Labor Code, for the performance of the work for which this permit is issued. My workers' compensation insurance carrier and policy number are:</p> <p>Carrier _____ Policy Number _____ (This section need not be completed of the permit is for one hundred Dollars (\$100) or less)</p> <p>I certify that in the performance of the work for which this permit is issued, I shall not employ any person in a manner so as to become subject to the workers' compensation provisions of Section 3700 of the Labor Code, I shall forthwith comply with those provisions.</p> <p>Applicant Date WARNING: Failure to secure worker's compensation coverage is unlawful, and shall subject an employer to criminal penalties and civil fines up to one hundred thousand dollars (\$100,000), in addition to the cost of compensation, damages as provided for in section 3706 of the Labor Code, interest, and attorney's fees.</p> <p>I hereby affirm under penalty of perjury that there is a construction lending agency for the performance of the work for which this permit is issued (Sec. 3097, Civil Code)</p> <p>Lenders Name _____ Lenders Address _____</p> <p>I declare under penalty of perjury that I have read this application and that the above information is true and correct. I agree to comply with all city and county ordinances and state laws relating to building construction, and hereby authorize representatives of this county to enter upon the above-mentioned property for inspection purposes.</p>
BUILDING PERMIT #																	
JOB SITE ADDRESS (FORMER PERMIT #) :																	
APN																	
APPLICANT																	
OWNER																	
CONTRACTOR																	
ARCHITECT OR ENGINEER																	
DESCRIPTION OF WORK INSTALLATION OF 2 ELECTRIC CAR CHARGING STATIONS																	
USE 437 Additions and Alterations - Nonresidential and non																	
OCCUPANCY																	
Zoning: Tract: Lot #:																	
Total Valuation:																	
Building SF:																	
Garage SF:																	
Patio SF: 																	
DESCRIPTION OF FEES																	
<p>Department Approval Date Signature of Applicant or Agent Date</p>																	

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

PAID INVOICE

Please make check payable to _____

Contractor License #: _____

Date: _____
Invoice #: _____
Reference #: _____
For: _____
Bill to: _____

Customer Name: _____
Site Location: _____

DESCRIPTION	AMOUNT
Breaker Installation	
Transformer Installation	
Conduit & Wiring	
Excavation	
Concrete/ Asphalt Work/ Mounting	
Site Modifications	
EVCS bolt-down	
Comments:	
PAID INVOICE on 10/04/19	SUBTOTAL \$ 1,200.00
	OTHER -
	TOTAL \$ 1,200.00

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

City of _____

Development and Resource Management Department

For Inspections Call:

INSPECTION RECORD CARD

LOCATION _____ OWNER _____

PERMIT _____ CONTRACTOR _____

The following inspections must be called for by the pertinent contractor: No electrical wiring, plumbing, heating, or structural members shall be covered until all rough inspections are made.

Building Section	Electrical Section	Plumbing/Mechanical Section
Compaction	Temporary Power Pole	On-Site Sewer
Ufer Ground	Temporary Power	Manholes
Foundation	Underground	Storm Drains
		Catch Basins
		On-Site Water
	Rough Wire	Chlorination Test
		Thrust Blocks
		Fire Main Rgh.
		Fire Main / 200# test
		Fire Hydrant Flush
		U.G. Rough Water
		Rough Waste
		Rough Gas
		Vents
		Water Pipe
		Condensate Drains
		H.W. Insulation
		Roof Drains
		Ducts Partial
		Ducts Complete
		Fireplace Flue
		A.C. Smoke Test
		Comm. Hood Shaft
		Comm. Hood Duct
		Comm. Hood Wall
		Fire Suppression Test
		R. P. Device
		Landscape Spkr.
		Med. Gas Rgh.
		Med Gas Test
	Final Inspection	
		Gas Test
		Temporary Gas
		Gas Meter Clearance
		Safe - to - Stock
		Safe - to - Occupy
		Mechanical Final
		Plumbing Final
Final Inspection		

NOTE: Signature of Inspector after ALL items designates approval.
See Reverse Side of this card for minimum FIRE PROTECTION REQUIREMENTS during construction. G-6

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

ELECTRIC VEHICLE CHARGING SERVICES AGREEMENT
BETWEEN

<div style="background-color: black; width: 100px; height: 40px; margin-bottom: 5px;"></div> <div style="background-color: black; width: 100px; height: 40px; margin-bottom: 5px;"></div> (hereinafter "Provider")	AND	_____ Client Name _____ Client State of Incorporation _____ _____ Client Address (hereinafter "Client")
--	-----	--

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

(all property locations collectively referred to herein as the "Property").

Agreement Summary:

Equipment Ownership. The Parties agree that Provider shall own all right, title and interest in all of the electric vehicle charging infrastructure (the "Equipment") at the Property.

Service & 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 for the Term of the Agreement (as defined in the attached Exhibit A).

Electricity. Client shall pay 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 Payment. Provider shall remit to Client fifty percent (50%) of the net profits generated by the Equipment installed as of 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) \$18.00 per month in network/connectivity fees related to the operation of the Equipment (the "Revenue Payment"). Any unpaid fees shall accrue to the next month.

Site Exclusivity. Client agrees that it will not contract with any other entity besides 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, either on the Property or at another Client-owned/managed 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 mutually agreed otherwise in writing. Client shall pay all electricity costs generated from the use of the Additional Equipment. All Additional Equipment shall be added to the Property list herein, and memorialized by both parties signing an Installation Date Acknowledgment Form, as described in Exhibit A.

Additional Equipment Revenue Payment. Provider shall remit to 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 on-screen advertising, minus: (i) any and all taxes, (ii) transaction fees, and (iii) \$18.00 per month in network/connectivity fees 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 Exhibit A. The parties hereto have executed this Electric Car Charging Services Agreement (inclusive of the terms listed on the applicable Exhibit A) on the last date written below.


CLIENT: By: _____ Name: _____ Title: _____ Date: _____ FEIN: _____	PROVIDER: By: _____ Name: _____ Title: _____ Date: _____
---	--

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

 SOUTHERN CALIFORNIA EDISON <small>An EDISON INTERNATIONAL® Company</small>		Customer/Project Information Sheet Date Received by SCE: _____	
Individual or Business Name: <small>(Customer / Developer – Tract DBA or LLC)</small>			
Address:		Email Address:	
City:	State:	Zip Code:	
Attn:		Phone No:	
Legal Contact: <small>(Individual responsible for signing contracts, paying fees and receiving potential refunds)</small>		Phone No:	
Address:		Email Address:	
City:	State:	Zip Code:	
Primary Field / Site Superintendent / Job Contact:			
Relationship to Project:		Phone No:	
E-mail Address:		FAX No:	
Project Address:			
City:		State	Zip Code:
TG Map # or GPS		Major Cross Street:	
Detailed Project Information			
Residential: <input type="checkbox"/>	Commercial: <input type="checkbox"/>	Industrial: <input type="checkbox"/>	Agricultural: <input type="checkbox"/>
Service Requested: Overhead: <input type="checkbox"/> Underground: <input type="checkbox"/>		Indoor Cultivation <input type="checkbox"/>	
Tract:	Lot(s)	Mixed-Light Cultivation <input type="checkbox"/>	
Is this project subject to Buy America Compliance? Yes <input type="checkbox"/> No <input type="checkbox"/> Temporary Service Required: Yes <input type="checkbox"/> No <input type="checkbox"/>			
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): <input type="checkbox"/> Yes <input type="checkbox"/> No			
Electric Vehicle: <input type="checkbox"/> Charge Station <input type="checkbox"/> 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): <small>Homes over 5000 sq ft larger lots require a Load Schedule. Please contact your electrician for assistance.</small>			