SOUTHERN CALIFORNIA 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

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SCIP Site Verification Form

Southern California Incentive Project ("SCIP") 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 each applicant must complete, sign, and submit this form to CSE. CSE reserves the rights to require that applicant and owner provide such further information as CSE may require to review and approve of applicant’s application.

Under SCIP, the Applicant is the organization that will receive the rebate (Rebate Recipient), the Applicant may or may not be the benefited of the electric vehicle (EV) charging (i.e. the organization/employee/business that will derive the greatest benefit from the EV charging).

Please list the beneficiary of the EV Charging:

Applicant. Please complete as follows:

Applicant / Organization Name (Rebate Recipient):

Application Number (e.g., A-00000):

Installation Site Address:

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 SCIP Site Verification Form to CSE. Applicant acknowledges and agrees that CSE is relying on Applicant’s foregoing certifications in reviewing and approving of Applicant’s 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 SCIP 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:
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 (Page 4 of 4)

![Sample Application Form]
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

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]

Thank you for your Business!!

5/8/19
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 Invoice Image]
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 Final Inspection 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 DC fast chargers is five years

Sample

[Attachment B of Electric Vehicle Charging Services Agreement]

Client hereby engages Provider for the Term of the 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 Exhibit A within the real property owned and/or leased by Client with property address set forth below, and/or attached hereto.

Client name:
Client date of incorporation:
Client address:
[Other relevant details]

Agreement summary:

Equipment Ownership: The Parties agree that Provider shall own all rights, title and interest in all of the electric vehicle charging equipment (the "Equipment") associated with the Project.

Service and 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: Provider shall pay all electricity costs generated from the use of the Equipment and any Additional Equipment (as defined herein) on the Property.

Term: Three (3) years commencing on the latest date before 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.

Payment Terms: Provider shall remit to Client fifty percent (50%) of the net proceeds 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) $12.00 per month in network connectivity fees related to the operation of the Equipment (the "Percentage Payments"). Any unpaid fees shall accrue to the next month.

Site Indemnity: 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, written on the Property or at another (electronic/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 for herein and memorialized by both parties signing an installation data acknowledgment form, as described in Exhibit A.

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.

By:
Name:
Title:
Date:

By:
Name:
Title:
Date:

[Signature Block]
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 Sheet](image-url)