# 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 by the invoicing business or organization.

Receipts, wire transfers or cashiered 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>AHJ 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>AHJ 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 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
Sonoma Coast Site Verification Form

Sonoma Coast Incentive Project Applicants must submit proof to the satisfaction of the Center for Sustainable Energy (CSE) that the installation work is authorized by the owner of the real property (Property Owner) and the Applicant. Accordingly, each Property Owner and Applicant must complete, sign and submit this form to CSE. CSE reserves the right to require the submission of additional information from either the Property Owner or Applicant as may be required.

The Sonoma Coast 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 $25,000 per connector for Level 2 chargers are available. More information is available at: calipmp.org/tescapros-projects/sonoma-coast

All fields are required to be completed. This form must be submitted via the online portal within 5 calendar days of application date or your application will be canceled.

INSTALLATION ADDRESS

The installation address must match the installation address entered on the online application form. Discrepancies will delay your application during processing.

Installation Street Address:

City: ___________________________ State: __________ ZIP Code: __________

APPLICANT ORGANIZATION

The Applicant Organization is the entity or organization that will receive the rebate payment. Please note that the Applicant Organization must incur project costs to be eligible for the rebate.

The Applicant Organization Name below must match the Applicant Organization Name you entered on the online application form.

Applicant Organization Name:

Please provide the following contact information for an individual that represents the Applicant Organization and can answer follow-up application questions if needed:

Contact Name (first and last name): ___________________________

Phone: ___________________________ Email: ___________________________

Applicant Organization hereby represents and warrants to CSE that (1) all the information provided above is true and correct, and (2) the individual signing below is duly authorized by Applicant Organization to execute and submit this Site Verification Form to CSE on behalf of Applicant Organization. Applicant Organization acknowledges and agrees that CSE is relying on Applicant Organization’s forgoing certifications in reviewing and approving the application.

Signature of Authorized Representative of Applicant Organization: ___________________________

Printed Name: ___________________________

Title: ___________________________

Date: ___________________________

CAIPMP CSP-010820

Center for Sustainable Energy

CALIPMP Project Portal
**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 vested 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 Site 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:  Please clearly write the first and last name of the person signing above. 

Title:  Date:  

---

**Center for Sustainable Energy**
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

![Sample Permitting Authority Application Image]
**CITY OF LONG BEACH**

**DEPARTMENT OF DEVELOPMENT SERVICES**

333 W. COLUMBUS BLVD 4TH FLOOR   •   LONG BEACH, CALIFORNIA 90802   •   (866) 576 - 1217   FAX (562) 570 - 8735

24 Hour Inspection Request - Phone 570-8105

---

**Job Description**

<table>
<thead>
<tr>
<th>Project Number:</th>
<th>Description: ELECTRICAL: Install level 3 EV charger with re-striping of parking space.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Present Bldg Use:</td>
<td>Commercial</td>
</tr>
<tr>
<td>Proposed Bldg Use:</td>
<td>Commercial</td>
</tr>
<tr>
<td>Type of Construction:</td>
<td></td>
</tr>
<tr>
<td>Assessor Number:</td>
<td></td>
</tr>
<tr>
<td>Historic Name:</td>
<td></td>
</tr>
</tbody>
</table>

**Owner Information**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Mailing Address:</th>
</tr>
</thead>
</table>

**Applicant Information**

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
</table>

**Contractor Information**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Mailing Address:</th>
<th>State License No.:</th>
</tr>
</thead>
</table>

**Payor Information**

<table>
<thead>
<tr>
<th>Paid by:</th>
</tr>
</thead>
</table>

**Fees Paid**

<table>
<thead>
<tr>
<th>PM Surcharge - General Plan Update</th>
<th>Electrical Permit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permit Filing</td>
<td>PM Surcharge - Technology</td>
</tr>
<tr>
<td>Plan Retention</td>
<td>Total Paid:</td>
</tr>
</tbody>
</table>

---

Customer Copy   Page 1 of 1   Project No.
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)
- [City of Healdsburg Electric Service & Project Application](#) (pages 11 and 12)
**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:** [Field]
- **Day Phone:** [Field]
- **Evening Phone:** [Field]
  
  - [ ] Individual  [ ] Partnership  [ ] Corporation  [ ] Limited Liability Corporation  [ ] Governmental Agency
  - [ ] Sole Proprietor  [ ] Other

- **Mailing address for bill:** [Street Address]
- **City:** [Field]
- **State:** [Field]
- **Zip:** [Field]

- **Does the customer currently have service with PG&E?** [ ] No  [ ] Yes
- **If yes, please provide the PG&E Account Number:** [Field]

- **Do you want the new service included on your existing bill?** [ ] No  [ ] Yes

- **NACE (North American Industrial Classification System) Code:** [Field]
- **Business Activity:** [Field]

- **Desired Electric Rate Schedule:** [Field]
- **Desired Gas Rate Schedule:** [Field]

- **If you want additional information or rate options or want to request a free rate analysis, visit:** [Website]

- **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, substructures and gas service trenching are the applicant’s responsibility. Once you make a decision as to 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/index.jsp 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
APPLICATION FOR SERVICE
COMMERCIAL / INDUSTRIAL DEVELOPMENT

Attachment – 2 copies required

A. Complete set of site improvement plans, including grading plans. (Include 3½" 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 verifying all environmental requirements within said permits, approvals and/or conditions. For additional information visit www.pge.com/mybusiness/customer_service/other_requests/new_construction.

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 engineer advance to cover some or all of its costs for project review, design work and cost design 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: ___________________
ELECTRIC SERVICE & PROJECT APPLICATION
City of Healdsburg Electric Department

Contact Info
Site Address ___________________________ Project Name ___________________________
Project Contact's Name ___________________________
Contact's Address (if different) ___________________________
Title ___________________________ Tel. ___________________________
Email ___________________________

Project Info
New construction □ Yes □ No
Adding load to existing building □ Yes □ No
Total square footage of all structures upon completion ____________ S.F.
Site use upon completion (residence, restaurant, etc.) ___________________________
Desired date of service ___________________________
Please describe your project and what you’re requesting from the utility; also note if and how your load will change (i.e., “underground conversion, no new load” or, “adding 5-ton HVAC & need to upgrade service from 50A” or, “expanding house and need to relocate existing electric-trench”):
______________________________
______________________________
______________________________

Qty. of EXISTING meters: ________ ADDITIONAL meters requested: ________
Main panel: _____________ Amps
Service voltage (choose one): □ 120/240V (3-wire, 1-phase)
                                 □ 120/238V (4-wire, 3-phase)
                                 □ 277/480V (4 wire, 3-phase)
                                 □ Primary-voltage service
Note: Not all voltages and service sizes are available in all areas

CONTINUE TO NEXT PAGE.
ELECTRIC SERVICE & PROJECT APPLICATION
City of Healdsburg Electric Department

Load

Will your load be increasing from what it is now? □ Yes □ No
If not, please skip to the next section

<table>
<thead>
<tr>
<th>Total connected load (upon completion of project)</th>
<th>1-ph (kVA)</th>
<th>3-ph (kVA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appliances</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receptacles (not including appliances)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HVAC, max of heat or AC (1 Ton = 1.52 kVA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motors incl. elevators (1 HP = 1 kVA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please explain)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please explain)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If commercial, hours per day of operation ________ hours
Average expected current draw during operating hours ________ Amps per phase

Miscellaneous

Please list any other information which will help us correctly size our infrastructure (improperly sized infrastructure will lead to higher-rates and voltage-quality problems)

________________________________________________________________________________________________________________________________________________

________________________________________________________________________________________________________________________________________________

________________________________________________________________________________________________________________________________________________

To complete this application, please attach a site-plan showing the intended work. Include the desired (and/or existing) meter location, the desired (and/or existing) electric service route, other utilities, structures, landscaping and any other pertinent features.

This Application is accurate and complete to the best of my knowledge:

Print Name__________________________ Signed__________________________ Date__________________

Please return the completed package to Healdsburg Electric Department, 401 Grove St. Healdsburg CA 95448.

pg. 12
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]
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 Design 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

![Sample Equipment Purchase Invoice](image-url)
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 Installation Purchase Invoice]

PAID INVOICE on 10/04/19
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
<table>
<thead>
<tr>
<th>Make</th>
<th>Model</th>
<th>kW Maximum Output</th>
<th>Quantity of Chargers in This Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Name of contractor on site: ____________________________
Contractor’s License Number: ________________
Total number of state certified general electricians on site: ________________

Name(s) of Electric Vehicle Infrastructure Training Program (EVITP) certified electrician(s) on site with valid EVITP certifications and who worked at all times during work hours on site:

<table>
<thead>
<tr>
<th>Electrician’s Name</th>
<th>EVITP Certification Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

I declare under penalty of perjury, under the laws of the State of California, that all of the foregoing statements are true and correct.

Contractor:
Signature: ____________________________
Contractor’s Name: ____________________________
Title: ____________________________
Company Name (as it appears on contractor’s CSR): ____________________________
C-10 license if applicable: ____________________________
Contractor’s License Number: ____________________________

Applicant:
Signature: ____________________________
Printed Applicant Name/Name of Applicant’s Authorized Representative: ____________________________
Title: ____________________________
Company Name: ____________________________
Date: ____________________________
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

<table>
<thead>
<tr>
<th>Building Section</th>
<th>Electrical Section</th>
<th>Plumbing/Mechanical Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composition</td>
<td>Temporary Power Pole</td>
<td>Gas Test</td>
</tr>
<tr>
<td>User Ground</td>
<td>Temporary Power</td>
<td>Gas Meter Clearance</td>
</tr>
<tr>
<td>Foundation</td>
<td>Underground</td>
<td>Safety to - Stack</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Safety to - Outlet</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mechanical Penal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Powering Fire</td>
</tr>
<tr>
<td>Final Inspection</td>
<td>Fire Prevention:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: Signature of Inspector after ALL items designated (applicable)
See Reverse Side of this card for minimum FIRE PROTECTION REQUIREMENTS during construction.
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

![Sample Utility Service Order Form](image-url)