

SOUTHERN CALIFORNIA EDISON®
Energy for What's Ahead℠

CHARGE READY TRANSPORT
PROGRAM HANDBOOK

Clean Energy to Fuel Southern California's Medium-and Heavy-Duty Fleets

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Disclaimer: This Handbook is intended for the convenience of the Program Participant. If there are any conflicts between this Handbook and any of the Program documents, including the CRTP Tariff, the Agreement or Quick Reference Guide, the terms of the relevant Program Document will govern.



PROGRAM OVERVIEW

SCE's Medium- and Heavy-Duty Vehicle Charging Infrastructure Program was approved by the California Public Utilities Commission (CPUC) on May 31, 2018.[1] The Program, also referred to as the Charge Ready Transport (or CR Transport) Program provides no-cost Electric Vehicle (EV) charging infrastructure and installation services to eligible SCE Customers acquiring medium- and heavy-duty vehicles, or non-road EVs for fleet applications.

The Charge Ready Transport Program supports both California's greenhouse gas (GHG)-reduction goal and local air-quality requirements. The Program assists customers with transitioning to cleaner fuels by reducing their cost for the purchase and installation of required charging infrastructure, as well as providing rebates to offset the cost of charging stations for certain eligible participants. SCE has an important role to play in all market segments within its service territory. Because the medium- and heavy-duty, and non-road transportation segments are in various stages of technological development and market maturity, the Program is designed to help address some of the existing barriers to increased adoption in these segments.

Level of Funding and Program Duration

The five-year Program has authorized funding of $342.6 million, which does not include an additional funding amount allocated for Program evaluation.

The budget will be allocated in accordance with the CPUC's direction as follows:

- A minimum 15 percent to serve transit agencies;
- A minimum 25 percent to serve ports and warehouses;
- A maximum 10 percent to serve forklifts;
- A maximum 10 percent allocated for program management; and
- A minimum 40 percent to serve sites in disadvantaged communities (DACs) or transit agency sites not in DACs.

Program Goals

The primary goals of the Program include accelerating transportation electrification within the medium- and heavy-duty, and non-road vehicle segments. The Program will strive to achieve 500 site-specific EV charging infrastructure projects by 2026, supporting a population growth of 8,490 EVs. This translates to an average of about 17 EVs per project site.

[1] *Decision 18-05-040*

How the Program Works

The CR Transport Program provides the infrastructure to support the installation of EV charging equipment at no cost to the Program Participant (also referred to as the "Participant").[2] This presents a unique opportunity for those fleet operators that choose to acquire EVs because the infrastructure required to support the installation of EV charging equipment typically represents a sizable investment.

Through this Program, SCE will design, construct and install the necessary infrastructure on both the utility-side and customer-side of the electric meter. Participants are, however, responsible for the selection, purchase and installation of the EV charging equipment.

In addition to receiving the necessary infrastructure to support EV charging equipment, this Program also provides two additional rebate options. The Charging Equipment Rebate is offered to eligible Participants in order to offset a portion of the costs associated with the purchase of the charging equipment.

The **Charging Equipment Rebate** is only available to Participants that will be acquiring and operating School Buses or Transit Buses anywhere in SCE's service territory, and to Participants who install charging equipment at a project site that is located in a designated Disadvantaged Community (DAC) where the Participant is NOT listed as a Fortune 1000 company.[3] In all cases, to be eligible for the Charging Equipment Rebate, charging equipment must be selected from SCE's Approved Product List.

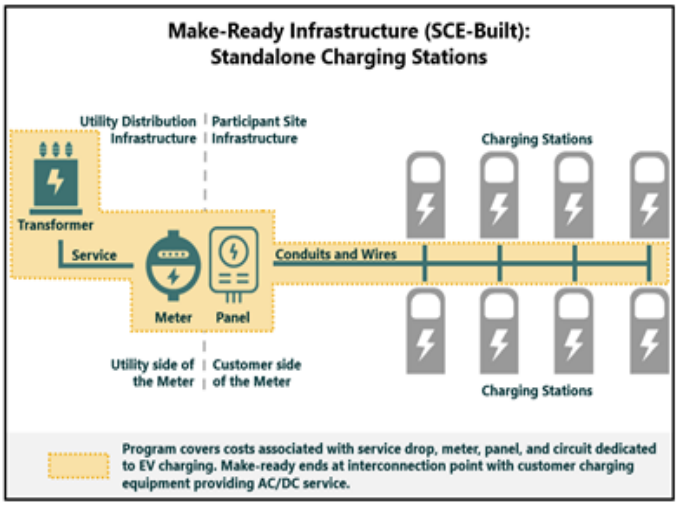
The second rebate option offered through this program is referred to as the **Make-Ready Rebate** is rebate option is available to any Participant who chooses to design, procure and install the customer side of the meter infrastructure work. The Make-Ready Rebate is intended to offset up to 80 percent of the costs that SCE would otherwise incur for performing the work. Available rebate dollars may be impacted by the amount of work SCE needs to do on the utility side. Significant utility-side improvements may reduce the available customer-side rebate dollars at a given site. Every Participant will have the choice to perform this work themselves and receive the rebate, or to have SCE perform the work at no cost to the Participant.

[2]All work and facilities necessary for participation in this Program, as determined by SCE, in SCE's sole discretion and in accordance with its applicable tarrifs and design standards, including utility distribution Infrastructure (e.g., any new transformers, services, and meters) and Infrastructure installed by SCE on the Participant's side of the meter (e.g., any new panels, stepdown transformers, conduits, wires, connectors, and any other hardware installed as part of this Program), excluding the purchase and installation of the actual EV charging equipment.

[3]Fortune 1000 list: Fortune 1000 companies include companies listed on the Fortune 1000 list, subsidiaries of Fortune 1000 companies, corporate stores of Fortune 1000 companies, and private and international companies with annual revenue at or above the lowest cutoff point in the Fortune 1000.

Figures 1 and 2 describe the three segments of infrastructure work associated with the CR Transport Program. As illustrated in Figures 1 and 2, the utility side of the meter infrastructure work includes all infrastructure from SCE's distribution system to a new circuit panel that will be installed to support EV charging. This segment of work is also referred to as the utility-side make-ready. SCE will always be responsible for designing, procuring, installing, and maintaining the necessary infrastructure located on the utility side of the meter.

Figure 1 – CR Transport Program - Infrastructure Delineation (Standalone Charging Equipment)



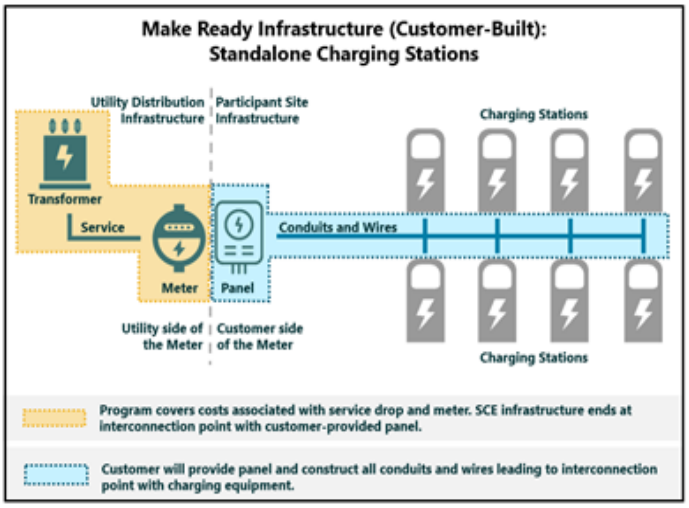
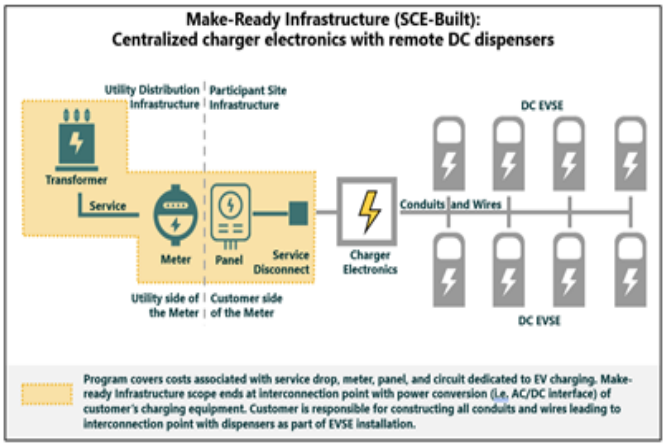
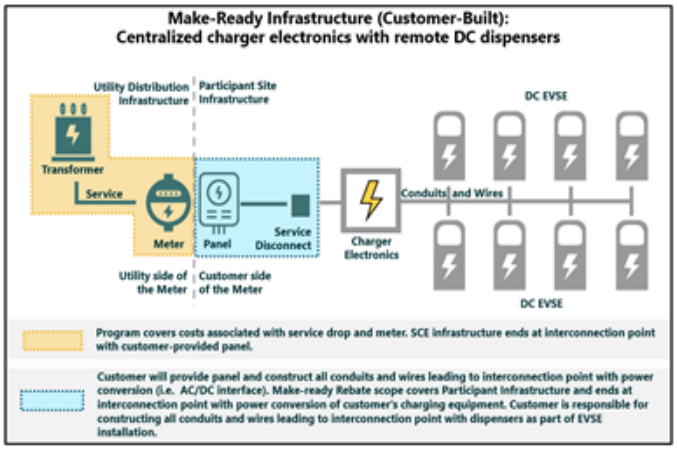


Figure 2 – CR Transport Program - Infrastructure Delineation (Centralized Charger Electronics with Remote Dispensers)





Included with the utility side infrastructure work, SCE will set an interval data recording (IDR) meter to capture EV charging equipment consumption data. The meter will track usage in 15 minute increments, and may also be used for billing purposes.

The next segment of work involves the infrastructure to be located on the customer side of the meter. This work includes all infrastructure from the new panel that will be set as part of the utility-side infrastructure work, up to the first point of interconnection with the Participant's EV charging equipment. For charging equipment with centralized charger electronics, such as a power cabinet with remote dispensers, the Make-Ready Infrastructure scope ends at the interconnection point with power conversion (AC/DC interface). All Participants will have the option to have SCE perform the customer-side infrastructure work (also referred to as the customer-side make-ready) at no cost to the Participant, or alternatively, may choose to design, procure, install and maintain the customer-side make-ready infrastructure themselves. Participants seeking to incorporate distributed energy resources may do so via the customer-built option.[4] If Participants choose to perform this work, they will be eligible for the Make-Ready Rebate.

The last segment of work includes the actual installation of EV charging equipment. Participants will always be responsible for selecting, procuring and installing the EV charging equipment. If the equipment selected is listed on SCE's Approved Product List (APL) and the Participant meets the Charging Equipment Rebate eligibility requirements set forth above, the Participant will receive the Charging Equipment Rebate.

SCE will work closely with Participants to help inform their decision-making and provide guidance throughout the complex infrastructure selection and deployment process while attempting to meet their operational needs balanced with managing potential grid impacts.

PROGRAM OBJECTIVES

SCE developed the CR Transport Program to help California achieve its climate goals by reducing greenhouse gas (GHG) emissions while providing clean air and other benefits to the communities it serves.

Additional Program objectives include:

- Accelerating widespread EV adoption in segments beyond light-duty vehicle classes;
- Helping to address key cost and complexity barriers associated with the acquisition and installation of charging infrastructure to support the growth of commercial (non-light-duty) EVs including medium- and heavy-duty, and non-road vehicles used in goods and people movement;
- Facilitating the ability to collaborate with stakeholders from the private, non-profit, and public sectors that will provide expertise and funding for vehicles and equipment;
- Prioritizing deployment of infrastructure in low-income and disadvantaged communities;
- Helping Participants evaluate their charging equipment options and needs when expanding their fleets and/or site infrastructure to include Plug-in EVs and Transport Refrigeration Units (TRUs);
- Achieving the site and vehicle acquisition goals set forth by the CPUC.[5]

[4]Charge Ready Transport program funding will be limited to the vehicle charging scope.
[5]D.18-05-040, Appendix C.

PROGRAM ELIGIBILITY

To be eligible for participation in the CR Transport Program, non-residential SCE Customers are required to own, lease, manage, or be the customer of record for the charging site where the equipment is to be installed. Applicants, if not the owner of the site at which the charging equipment is to be installed, are required to obtain consent from the property owner to install the equipment and agreement that the property owner will grant any required easements. All project sites must be located within SCE's service territory.

In order to participate in the Program, applicants are required to complete an on-line enrollment application. Applicants that have previously participated in another Transportation Electrification Program offered by SCE are still eligible to participate in this Program.

Participants will be required to procure or convert at least two (2) electric on-road or non-road vehicles to participate in the Program.[6] Conversion of existing vehicles may include, for example, converting or retrofitting from gasoline- or diesel-powered vehicles to plug-in battery electric.

Participants will also be required to procure and install all vehicle charging equipment. Participants will be required to purchase equipment that complies with certain industry standards, as established by SCE, in SCE's sole discretion, as reflected on SCE's APL, or otherwise approved by SCE for installation under this Program. Use of non-standard charging equipment that is not listed on the APL will only be allowed with SCE's approval, but will NOT be eligible to receive the Charging Equipment Rebate.

SCE will review each Application received, and will determine participation eligibility based on a number of factors, including but not limited to:

- The number and timing of EVs to be acquired or converted;
- The size of the Applicant's existing fleet;
- The number of projects approved for a similar fleet sector;
- Applicant's existing or planned on-site load management technologies (such as solar, battery storage, and vehicle-to-grid technologies, etc.);
- The overall complexity and cost of the project;
- Financial viability of the Applicant; and
- The level of remaining Program funds.[7]

If the project is accepted for participation in the Program, SCE will present the Applicant with a Program Participation Agreement. This Agreement must be fully executed before SCE will reserve any Program funds.



[6]Although a participant must acquire or convert a minimum of two (2) EVs to participate in the Program, the CPUC has set a goal and corresponding budget that reflects an average of 10 vehicles per site. Thus, Applicants that propose to acquire or convert a larger number of EVs may receive priority over those that propose to acquire or convert fewer EVs.

[7]As established by available Program budget and vehicle sector allocations determined by SCE.

QUALIFYING ELECTRIC VEHICLES

SCE's CR Transport Program provides EV charging infrastructure to support various plug-in EVs and transport equipment across multiple end-use sectors for sites located throughout SCE's service territory.

Eligible vehicle and transport equipment types are classified into nine (9) sectors supporting both on-road and non-road applications.

These include:

- Medium-duty vehicles;
- Heavy-duty vehicles;
- Transit buses;
- School buses;
- Forklifts;
- Airport ground support equipment;
- Port cargo trucks;
- Transport Refrigeration Units (TRUs); and
- Truck stop electrification.

Program eligible vehicles:

- Any commercial plug-in EV approved by SCE for use in any of the sectors outlined above
- On-road vehicles with a gross vehicle weight exceeding 6,000 pounds (class 2 - 8)
- Non-road vehicles (no specific weight class applies)

Participants will be required to lease, purchase or convert at least two vehicles to electric in order to be considered for participation in the Program.[8]

QUALIFYING EV CHARGING EQUIPMENT

EV Charging Equipment interconnects the electricity grid at a charging site to an EV, whether using alternating current (AC) or direct current (DC). Only Level 2 and DC Fast Charging (DCFC) equipment are eligible for installation under this Program. Level 1 charging equipment (typically delivered at 120 volts) is not supported under this Program. SCE will provide assistance to all Participants to help them evaluate their charging equipment needs and available options.

All EV charging equipment for on-road EVs procured by the Participant must have charging-port-level networked common communication capabilities through Wi-Fi or cellular and be capable of responding to price signals, and the recording of interval usage energy consumption data. Participants installing EV charging equipment that will be used to fuel on-road vehicles are required to contract with an EV charging network

[8]*Conversion of existing vehicles may include, for example, converting or retrofitting from fossil-fueled vehicles to plug-in battery electric.*

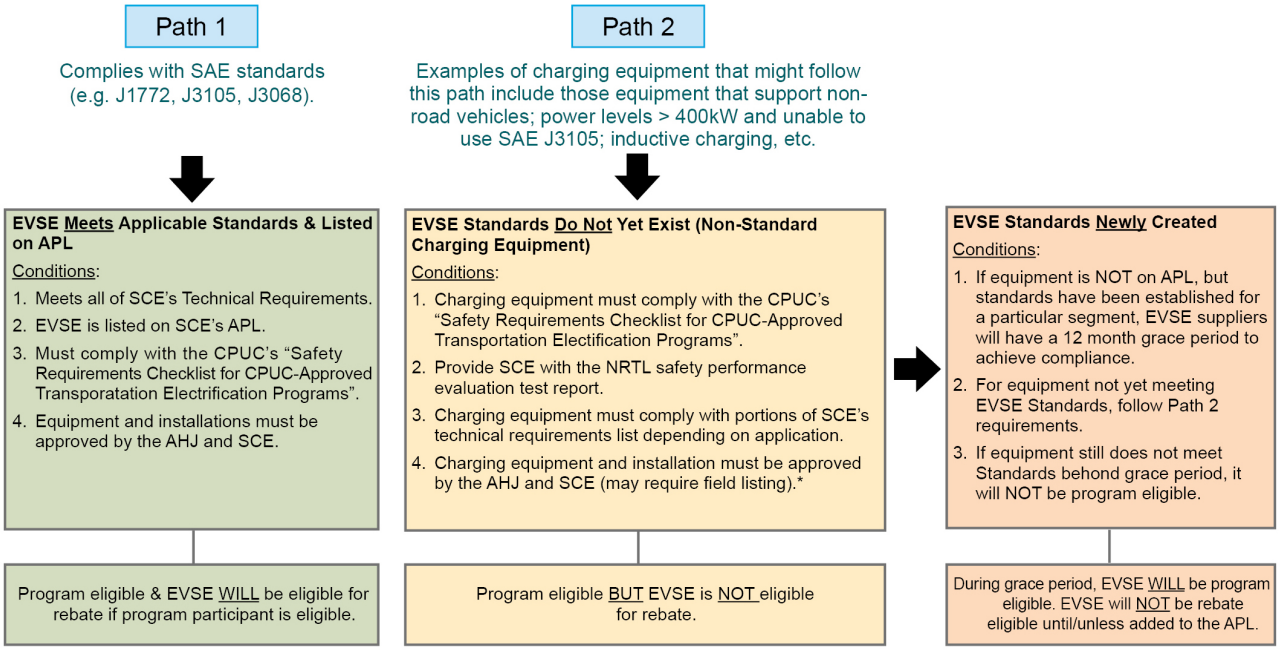
provider to establish network communications with each charging port and maintain those communications for five (5) years from the in-service date of the charging equipment. Participants are required to pay any related costs or fees resulting from such services, for the full duration the contracted services.

Participants, or their Network Services Provider, at the Participants' direction, are also required to provide SCE with usage and other related data associated with the charging equipment. The required information must be electronically transmitted to SCE on a monthly basis in the prescribed format.[9] Aggregated data (not attributable to any specific Participant) will be made publicly available as part of SCE's reporting to the CPUC and various industry stakeholders and will be used to identify load management opportunities and enhance potential vehicle-to-grid integration opportunities for future utility initiatives.

All Program-eligible EV charging equipment must comply with certain standards and safety requirements, and comply with SCE's Charging Equipment Technical Requirements.[10] SCE has developed and will have available an APL to help Participants select Program eligible equipment.[11] If the equipment selected by a Participant is not listed on the APL, SCE will work with the Participant to determine if the equipment can otherwise be approved for use under this Program.

The Charging equipment selected by a Participant will follow one of two paths. The first path **(Path 1)** denotes equipment selection from SCE's APL. The second path **(Path 2)** denotes the selection of charging equipment that is not listed on SCE's APL. Path 2 is only available where there is no existing standard because industry standards have not yet been established. An example of charging equipment that might follow Path 2 includes many that support the fueling of non-road vehicles. These two different Paths are delineated in *Figure 3,* which further describes the requirements for each. *Figure 4* relates to *Figure 3,* and attempts to help further define Program and rebate eligibility.

Figure 3: EV Charging Equipment Program Participation Eligibility Requirements



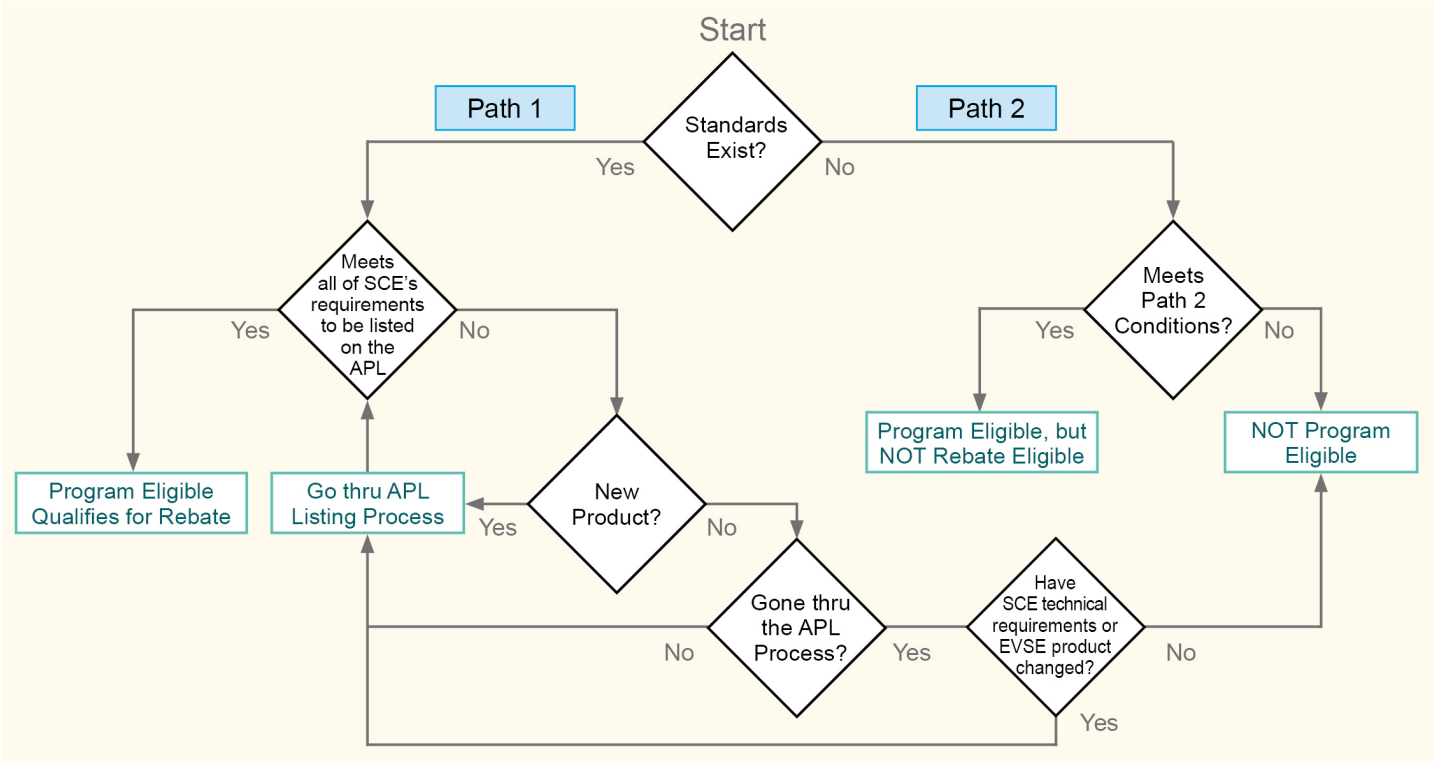
* Any proposed installations with liquid cooled cables or very high power (>150kW) should be flagged for inspection. SCE may also need to ensure: (a) the listing is valid, (b) the connector assemblies installed are the corrected versions.

[9]For reporting requirements refer to the "Charging Equipment Usage Data Monthly Report" instructions located in the Appendix of this Handbook. A sample report template is also provided.

[10]Technical requirements for both "standard" and "non-standard" equipment are included in the Appendix of this Handbook.

[11]SCE does not provide any expressed, implied or prospective warranty, including any warranty of merchantability or fitness for any particular use or application, of any EV charging equipment. The APL can be found in the Appendix of this Handbook. SCE reserves the right to modify the list at any time.

Figure 4: Decision Tree for EV Charging Equipment



RATE PLAN OPTIONS

Participants will be required to select a Time-of-Use (TOU) rate plan for the meter serving the EV charging equipment. All EV charging is required to be served on an applicable General Service (GS) TOU rate plan, or a EV TOU rate plan for the full ten (10)-year term of service. Several TOU rate plan options are available, and selecting the right plan for your fleet operations can best be accomplished by working with an SCE account representative.

The TOU rate plans available to a Participant vary, and will depend on several factors, all of which your assigned account representative can help to evaluate.

The suite of currently available EV TOU rate plans can be found online.[12] Participation in a Demand Response program is NOT a condition of participating in the CR Transport Program.

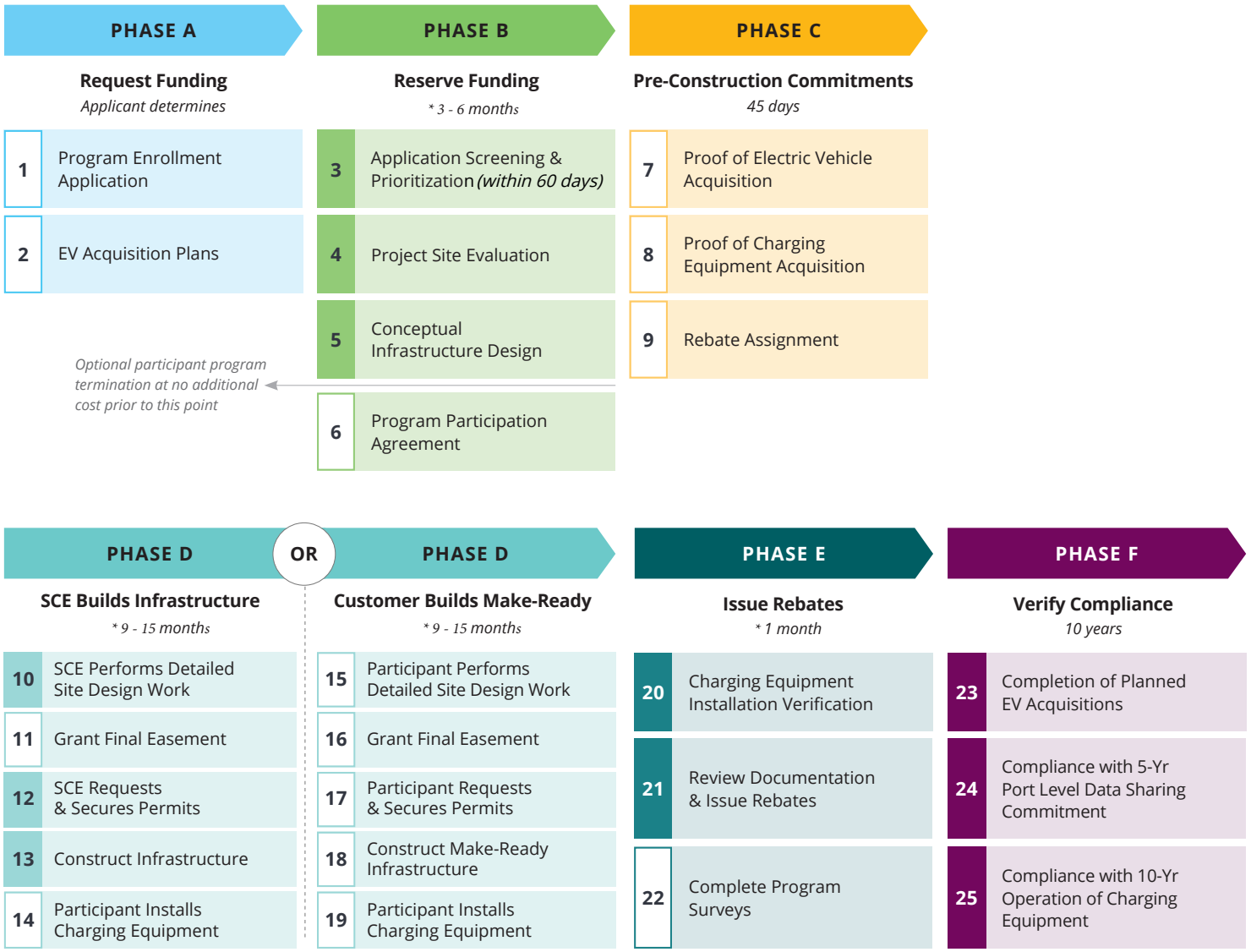


[12]Rate plan options can be found at: www.SCE.com > Regulatory > SCE Tariff Books > Rates and Pricing Choices > General Service/Industrial Rates >.

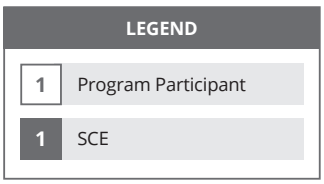
PROGRAM ACTIVITIES

A detailed activity flow chart is provided in *Figure 5,* which outlines the 25 process steps from the initial starting point of submitting a Program application through the routine operation and maintenance of the EV charging equipment. Each step in the process is more fully described in this section of the Handbook.

Figure 5: Program Design – Activity Flow Chart



** Timelines provided herein are estimates only and are subject to change based on size, scope and complexity of the project.*



PHASE A

Funding Request

A. FUNDING REQUEST



Eligible customers can apply to participate in the CR Transport Program by submitting a Program Enrollment Application which includes a vehicle acquisition plan. These documents are further described below:

1 Program Enrollment Application

Eligible customers that wish to participate in the Program are required to submit a completed on-line Program Enrollment Application, which is located on the Charge Ready Transport Enrollment Portal.[13]

In order for a customer to be eligible to participate in this Program, they must agree to procure or convert at least two (2 fleet vehicles to EVs; however, Applicants that propose to convert or acquire a greater number of EVs will receive preference. Applicants will also be required to select charging equipment that meets certain industry standards and safety requirements.

The application process will include gathering information about the Applicant's EV acquisition forecast and related charging equipment plans.

The Applicant will be required to provide a site plan with the Application. The site plan should include the proposed location of the EV charging equipment. General guidelines for selecting the location for the charging equipment include:

- Select a location in close proximity to the electric facilities currently serving the site (this can help to lower infrastructure installation costs);
- Determine a convenient location for vehicle parking while they will be charging (for both short and long dwell times);
- Consider how vehicles move through the site, and how to prevent the charging location from impeding through-traffic;
- Consider locations where adequate parking exists to serve the number of vehicles that will be routinely charged;
- Consider any labor restrictions that may prevent drivers from backing up vehicles, will a drive-through type configuration be required;
- Consider vehicle charging needs beyond the initial deployment, what future growth and expansion might be taken into account;
- Consider the type of charging equipment that will be used, the charging port to vehicle ratios, and desired parking configurations surrounding the charging stations. Will they be laid out in a radial fashion, be laid-out in rows, or other configurations;
- Consider the configuration of charging stations themselves. Will they be overhead systems, conventional pedestal mounted; wall mounted; in-ground; etc.;
- For DCFC installations, consider proximity of charging ports to the Power Conversion Units (PCU).

Following completion of the Enrollment Application, Applicants will be required to upload additional documents at the Charge Ready Transport Enrollment Portal, including:

1. A site plan annotated with the desired location of the charging equipment and vehicle parking configuration(s);
2. A copy of the civil plan (requested, but not required).

SCE will evaluate all applications received and determine initial eligibility for Program participation. Applications will be accepted until SCE closes the Program due to funds being fully subscribed or exhausted, or for any other reason, in SCE's sole discretion.

[13]*The Charge Ready Transport Enrollment Portal is located at* ***www.sce.com/chargereadytransport***

2 EV Acquisition Plans

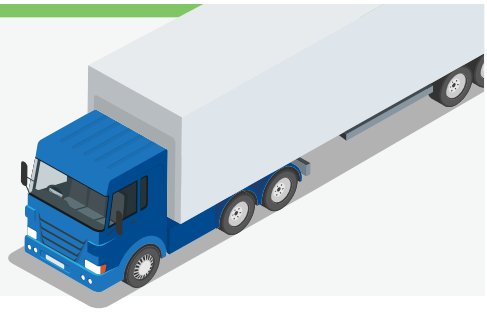
The Applicant's EV acquisition plans will be captured in the Application and are intended to reflect the Applicant's actual procurement plans (timing and volume) for EVs over a ten (10)-year period. The EV acquisition plan should be completed to the best of the Applicant's ability at time of application. Applicants should ensure their EV acquisition plans include a minimum of two EVs to be on-site within 18 months. SCE will leverage the information provided in the plan and work directly with the Applicant in determining what infrastructure may be needed, balanced by the level of infrastructure that can be supported through the Program given the quantity and timing of vehicles to be procured. SCE's goal is to design and install an appropriate amount of infrastructure (neither under nor overbuilt) that will be both used and useful during its installed life. In order to accomplish this goal, the EV acquisition plan needs to accurately reflect the number of EVs the Applicant plans to acquire and must meet a minimum 1:1 port-to-vehicle ratio.

The more EVs the Applicant proposes to acquire or convert, in both the near and medium term, the greater priority the application will be given.

PHASE B

Funding Reservation

B. FUNDING RESERVATION



Program funds will be reserved for each approved project following the completion of the following activities (Steps 3-6).

3 Application Screening and Prioritization

After receiving a completed Enrollment Application, SCE will screen and prioritize each application within 60 days.

SCE will review each received application, and based on a number of factors, including but not limited to, the number and timing of vehicles to be acquired, the financial viability of the Program Applicant, the size of the existing vehicle fleet, overall complexity and cost of the project, existing or planned on-site load management technologies (such as solar, battery storage, or vehicle-to-grid, etc.), and the remaining Program funds.[14] These factors and others will all be used to prioritize and determine if the project will be accepted for further consideration.

If SCE determines the project will move forward to the next step, based on the information provided in the application, SCE will schedule a site visit in order evaluate the site, discuss the project with the Applicant and develop a conceptual infrastructure design (conceptual design).

4 Project Site Evaluation

Applicants may be requested to participate in the site evaluation activity. SCE will request that someone familiar with the site, the vehicles, and the proposed project, typically the Facility Manager or Yard Manager, participate during the site visit.

If the Applicant has already decided which charging equipment it plans to purchase, the Applicant should email a copy of the charging equipment product specification sheet(s) to SCE at **TEPMChargeReadyTransport@sce.com**[15] in advance of the scheduled meeting. SCE also recommends that the Applicant's charging equipment supplier attend the site assessment if possible.

SCE's team will leverage the site plans, sketches, and drawings provided by the Applicant to perform additional planning and design activities. The SCE team is typically comprised of a T&D infrastructure Project Manager, an engineer from one of SCE's design firms that performs the customer-side make-ready design work, and a SCE field inspector that is able to assess and evaluate the existing distribution facilities that are at or near the site.

During the visit, the SCE team will lay the groundwork for developing a conceptual infrastructure design. This includes identifying where SCE will bring in power; where the charging equipment will be located; visually laying out the foot print of the planned location for equipment; looking at and evaluating the area where the vehicles are going to charge; and developing a physical infrastructure layout. SCE will also evaluate the existing distribution infrastructure and the site's existing service connection; assess the possible integration opportunities with on-site or planned distributed energy resources (i.e., solar, battery storage, etc.) for customer-built projects. If feasible, SCE will use the site's existing service connection to reduce costs. Regardless of whether SCE can use the existing service connection or the site requires a new service connection, SCE will install a separate meter for the new EV load at each participating site.

During the site visit, SCE representatives may determine that the Applicant's proposed location for the installation of infrastructure would be more costly than other alternatives identified by SCE. The Applicant and SCE will discuss in good faith appropriate alternate locations for a more cost-effective installation.

[14]As established by available budget and vehicle sector allocations authorized by the CPUC and further delineated by SCE.
[15]Please include your application number in the subject line, e.g. CRT-2022-xxxx, followed by "STEP 4").

It is the Program Participant's responsibility to provide a clean and suitable site, free of hazardous contamination, other safety hazards, and other environmental or physical conditions impacting the ability to perform work on or at the site, before SCE has an obligation to perform any work, including obtaining easements or other property rights or commencing construction. To that end, before commencing any work, SCE may require the Program Participant to fully complete, to the best of its ability, an SCE questionnaire regarding the relevant condition and history of the site; and SCE and/or its contractors shall have the right to visually inspect all of the site. Based on the questionnaire and site visual inspection and any other available information, SCE, in its reasonable discretion: (i) may decline to proceed with any further work at the site; or (ii) may decline to proceed with any further work at the site except with Program Participant's agreement to further, reasonable environmental and other review and investigation of the site, at Program Participant's expense, and reasonable remediation or mitigation of any such identified environmental or safety conditions, at Program Participant's expense. Similarly, even after SCE has commenced work, if SCE at any time discovers any such conditions, then SCE in its reasonable discretion may decline to proceed with any further work at the site, unless and until such conditions are remediated to SCE's reasonable satisfaction, at Program Participant's expense. The Program Participant also agrees as a term and condition to participate in the program to indemnify, hold harmless, and release SCE from any harm or cost, known or unknown, associated with any hazardous materials, conditions, or site contamination, including, but not limited to, harm to SCE personnel, third parties, or customer applicant's employees, contractors, agents, and assigns. If the Program Participant fails to satisfy any of the foregoing safety and environmental requirements, SCE reserves the right, in its sole discretion, to halt all work and terminate the agreement for, among other things, failure to cure a safety violation, as set forth in Section 10 of the Agreement.

5 Conceptual Infrastructure Design

The conceptual design will be completed after SCE performs the initial site assessment and determines that the project may move forward for final consideration.

SCE will utilize the information collected during the site visit (photographs, sketches, measurements, notes, and any additional information that may have been provided by the Applicant or its representative), combined with additional off-site due diligence activities (i.e., engaging the local AHJ regarding permitting requirements, ensuring there are no environmental issues associated with the construction area, etc.) in order to draft the initial Design for the project.

SCE will also prepare high-level cost estimates for the utility-side and customer-side infrastructure, engineering, design and permitting. This cost estimate will then be reviewed to ensure it meets Program cost thresholds.

If the proposed project meets Program criteria and cost thresholds, SCE will provide the Design exhibit to the Applicant for approval. The Applicant will be requested to accept and approve the Design within ten (10) calendar days of receipt. If the Applicant does not approve the design, the Applicant must work with SCE to reach agreement on alternate potential lay-out or withdraw its application.

Applicants are also responsible for notifying SCE of any other infrastructure projects that are planned or underway at the site. Any infrastructure projects could potentially impact the designs provided by SCE. If the Applicant is not the site owner, the Applicant will need to communicate with the site owner to verify and share the information with SCE.

At this stage, the Applicant must decide if it will elect to design, build, and install the customer-side make-ready Infrastructure or have SCE perform the work. Applicants should also review the sample "Grant Easement" document to better understand how the project easement document(s) will be structured. If the Applicant is not the site owner, the Applicant should share the sample Grant Easement[16] with the owner.

[16] *A sample Grant Easement is included in the Appendix of this Handbook.*

6 Program Participation Agreement

Following the Applicant's approval of the conceptual designs provided by SCE, and SCE's decision to approve the project, the Applicant will be presented with a Program Participation Agreement (Agreement).

Before executing the Agreement, the Applicant must affirmatively commit to and communicate the specific charging equipment that will be purchased and installed, as well as to a final proposed vehicle acquisition plan. SCE will include these elements in the Agreement for the Applicant's final review and signature. Applicant must also notify SCE of any change in the volume or timing of planned EV acquisitions.

The Applicant may choose to withdraw its application, or cancel any further participation in this Program upon providing notice to SCE at any time prior to submission of a signed Agreement. Once an Agreement is signed by the Applicant, and executed by SCE, Program funds will be reserved and the Program Applicant's status moves to Participant.

Within forty-five (45) calendar days of the date funds are reserved for the project, Participants are required to provide the following:

1. Documented proof of procurement of at least two new EVs that will be onsite within 18 months, or proof that the Participant has converted at least two fossil-fueled vehicles to EVs.[17] Vehicle procured or converted after January 20, 2017 (the date SCE filed its request to implement the MDHD Program), but prior to May 2019, will be evaluated on a case-by-case basis, and depending on the specific circumstances surrounding those EV acquisitions, a determination will be made by SCE regarding Program applicability.

2. Proof of procurement of ALL vehicle charging equipment designated for the project.

3. A completed "Rebate Assignment Form," where applicable. This form is used to capture the information necessary for SCE to process and remit applicable rebate payments.

Participants may be granted an extension beyond the forty-five (45) day window at SCE's sole discretion.

Participants will be bound to the contractual obligations specified in the Agreement once executed. Deviation from these obligations may lead to cancelation of participation and trigger activities leading up to, and including, SCE's pursuit of direct reimbursement of certain Program related expenditures. If the Participant fails to comply with the terms and conditions set forth in the Agreement, SCE may terminate participation in the Program by sending the Participant a notice of default. If the issues specified in the notice remain uncured for five (5) business days from the Participant's receipt (except for safety or security violations, in which case, SCE may terminate the agreement immediately and take all actions, including, but not limited to, disconnecting the vehicle charging equipment), SCE may terminate the Agreement and Participant's continued participation in the Program. Such cancellation may result in the Participant owing SCE reimbursement for Program-related expenditures, as set forth in the Agreement.

SCE may seek reimbursement of certain costs if the Agreement terminates, due to Participant's actions or inactions, prior to the end of the 10-year Term of Service. For example, Participant is liable for SCE's costs if the Participant, after executing the Agreement (1) elects to terminate its participation in this Program, or (2) SCE terminates the Agreement because of Participant's noncompliance with the Program requirements (as described above) or other material breach of the Agreement. Under these conditions, the Participant will be responsible for reimbursing costs incurred by SCE in connection with deploying the Infrastructure at the participating charging site on a prorated basis (over the 10-year Term of Service), including any Rebate Payment(s) (if already paid), within 60 days from the termination date.

Participants may not assign the Agreement without prior written consent from SCE. If SCE grants consent, the Participant's successor in interest will be required to assume all rights and obligations of the Agreement for the remaining duration of participation commitment. Any assignment and assumption relating to transfer of interests shall be in a form acceptable to SCE.

[17] *Further details about the required documentation are included in Step 7.*

PHASE C

Pre-Construction Commitments

C. PRE-CONSTRUCTION COMMITMENTS



The following outlines key activities to be completed by a Participant following the execution of the Agreement (steps 7-9).

7 Proof of Electric Vehicle Acquisition

Within forty-five (45) calendar days of the date funds are reserved for the project, the Participant will be required to provide proof of lease, purchase or conversion of a minimum of two EVs. All documents should be scanned and uploaded to the Charge Ready Transport Enrollment Portal.[18] Proof of acquisition can be satisfied by providing a scanned copy of the itemized purchase or lease agreements. The purchase or lease agreement(s) must include:

- Execution Date;
- Lease term (if leased);
- EV dealer(s) name and address;
- Model numbers and quantity of EVs purchased, leased or converted;
- Payment status (paid or payment terms);
- Expected vehicle delivery date (two of which must be within 18 months);
- Payment status (paid or payment terms).

8 Proof of Charging Equipment Acquisition

Within forty-five (45) calendar days of the date funds are reserved for the project, Participants will be required to provide proof of purchase for ALL vehicle charging equipment designated for the Project. The Participant may request a limited extension of this procurement period by submitting an extension request in writing prior to the expiration of the initial 45 day period. SCE may, at its discretion, extend a Funding Reservation beyond the initial 45 days, if, in SCE's sole judgment, the Participant is actively seeking to complete procurement of the charging equipment.

Participant's required activities to complete this step include submission of all required documents scanned and uploaded to the Charge Ready Transport Enrollment Portal. Required documentation includes:

1. Submission of a copy of the purchase order, paid invoice, or sales receipt for charging equipment (separately listed purchase price for the charging equipment from any installation costs). The receipt should include the purchase date, the make, model and serial #'s of the charging equipment, expected delivery date and individual unit pricing;
2. Submission of a copy of the Network Service Agreement, which is required if any of the to-be-installed charging stations will be used to fuel **on-road** electric vehicles;
3. For non-standard charging equipment, submission of a copy of a Nationally Recognized Testing Labs (NRTL) Safety Performance Evaluation Test Report; and
4. For non-standard equipment, submission of a signed copy of the "Technical Standards for Nonstandard Charging Equipment".

9 Rebate Assignment

Within forty-five (45) calendar days of the date funds are reserved for the project, rebate-eligible Participants are required to complete the on-line Rebate Assignment Form and upload copies of the IRS form W9, and

[18] *Related documentation can be uploaded to the Charge Ready Transport Enrollment Portal at* ***www.sce.com/chargereadytransport***

if applicable, the CA 590 to the Charge Ready Transport Enrollment Portal. The Rebate Assignment form and tax forms are used to collect the necessary information in order for SCE to process and remit the rebate payments.

Once rebates are processed, a single rebate check will be issued. If the Participant qualifies for the Charging Equipment Rebate and the Make-Ready Rebate, a single check will be made out and issued to the Participant without the ability for the Participant to designate an alternate recipient. If the Participant is to only receive the Charging Equipment Rebate, the Participant will have the option to assign an alternate (eligible) payee.[19]

Rebate-eligible Participants are required to:

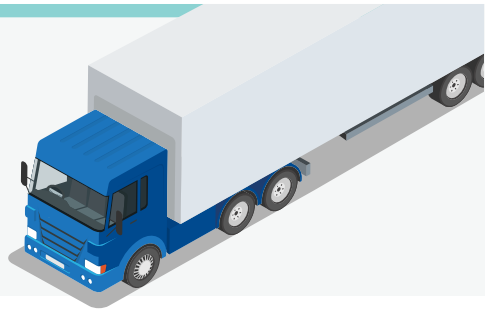
1. Complete the on-line Rebate Assignment Form;
2. Upload a copy of a completed and signed copy of IRS Form W9; and
3. If applicable, upload a completed CA Form 590.

[19] *Alternate payee must be registered with a valid SCE SAP Vendor ID.*

PHASE D

Design & Build Phase

D. DESIGN & BUILD PHASE



The design and build phase will commence following completion of the pre-construction commitments outlined above. For any infrastructure installed by SCE, the amount and extent of equipment to be installed for future EV fleet expansion will depend on various factors including costs and the time-frame for expected vehicle deliveries.

Steps 10-14 outline the activities included when SCE performs the customer-side make-ready infrastructure work, and steps 15-19 outline the activities if and when the Participant elects to perform the customer-side make-ready infrastructure work. **Participants will either follow steps 10-14 or steps 15-19, but not both.**

10 SCE Performs Detailed Site Design Work

Following the execution of an Agreement, and upon receipt of all required Pre-Construction requirements, SCE will commence drafting detailed design plans and developing final cost estimates.

To build on the established conceptual design, SCE will send a survey crew to the project site to gather more detailed information needed to develop a technical site design (preliminary design). The survey crew will take more detailed measurements and perform activities, such as identifying any existing underground utilities or infrastructure that may impact the planned build location. The team will then create a base map that will include the specific location of the charging equipment infrastructure.

SCE team members will leverage site drawings, maps and files and incorporate any other required design elements such as ADA requirements and potential guidelines set forth by the AHJ to create a digital civil plan map for the site.

These activities will result in the development of a preliminary design, which will typically match the conceptual design originally presented to the Applicant. In some cases, modifications to the design might be necessary. If, for example, during the site visit SCE's survey crew finds underground obstructions by using ground penetrating radar, relocation of some infrastructure indicated on the design would be required. Another example might include proposed changes that arise in discussions with reviewing the designs with the AHJ, which could lead to either small or significant changes from the original planned lay-out. Any of these types of changes will be reflected the revised designs. Any significant changes deviating from the design originally presented to the Applicant will be discussed when SCE presents the preliminary design. Any additional agreed-upon final changes proposed by the Participant or SCE will be made during this discussion.

The Participant will complete their review and approval of the preliminary design no later than ten (10) calendar days following receipt. Approval can be provided during the meeting or via email within the requested timeframe.[20] SCE cannot move forward with any further construction-related activities until this sign-off is complete.

After receiving approval of the preliminary design, SCE will finalize the plans and submit them to the AHJ for plan check and permitting. SCE may be required to make minor changes to the Participant-approved preliminary designs based on any potential feedback and/or required changes received by the AHJ. If the changes required are significant they will be discussed with and agreed to by the Participant. If the changes are not significant, SCE will incorporate them into the drawings. Once changes to the design are finalized, it will become

*[20]Email a copy of the preliminary design signed for approval to **TEPMChargeReadyTransport@sce.com**. Please include your application number in the subject line, e.g. CRT-2022-xxxx, followed by "STEP 10".*

the final design. SCE will prepare the legal description for the easement based on the final design. Easement documents will then be provided to the Participant and/or the Property Owner, if different, for execution.

11 Grant Final Easement

The Participant is required to execute and notarize the easement, or, if Participant is not the property owner, ensure that the property owner executes and notarizes the easement. Participant shall return the original signed easement to SCE within thirty (30) calendar days from the date of receipt.

Participants are required to:

1. Email a copy of the notarized agreement to **TEPMChargeReadyTransport@sce.com**[21] and
2. Return the original signed and notarized agreement to SCE following the directions provided. The original signed and notarized agreement is needed so that it may be recorded with the appropriate county. Counties will not record copies or PDF documents. The documents are typically returned to SCE via US Mail or courier (FedEx, UPS etc.) to SCE's Real Properties department or to its Contract firm (i.e., Spectrum Land Services). Specific mailing instructions will be included with the easement documents when provided to the Participant.

Once received, SCE will have the executed easement recorded and filed. SCE cannot move forward with any further construction-related activities until the necessary easements have been granted. Once final easements have been granted, SCE will initiate the plan check and permitting process.

12 SCE to Request & Secure Permits

SCE will submit its construction plans to the relevant AJH to secure all necessary reviews, approvals and permits for the work it performs.

The Participant may be required to sign permit application documents as may be required by the AHJ. If this is required, SCE will work with the Participant to submit the applications.

SCE must obtain all necessary easements and permits before SCE can initiate any construction work.

After permits are obtained, SCE will provide the Participant with the information necessary to establish a new SCE Service Account. Participant should discuss rate options with their SCE account representative.

13 Contruct Infrastructure

SCE will design, procure, construct and maintain the necessary equipment on both the utility-side and the customer-side of the meter up to the first point of interconnection with the planned location of the Participant's charging equipment.

The utility-side and customer-side infrastructure typically includes transformer upgrade (when necessary), service drop, meter panel/socket, circuit panel, conduit, and wires up to the point of first interconnection with Participant-procured charging equipment.[22]

There are generally four phases of construction, which include:

- **Phase 1:** Construction of the infrastructure on the customer-side of the meter. This is the infrastructure from the new meter panel to the first point of interconnection with the Participants EV charging equipment.
- **Phase 2:** Utility-side civil construction, including underground ducts and structures.
- **Phase 3:** Energizing the site. This will not occur until all hard construction from Phase 1 & 2 is complete. All circuits will be checked for proper voltage up to each make-ready stub. At this step a charging equipment commissioning report is generated to verify this final check and that proper voltage is present.
- **Phase 4:** Charging Equipment Installation. Procuring, installing and maintaining the vehicle charging equipment will always be the responsibility of the Participant.

Once SCE completes the installation of infrastructure on the utility-side of the meter and, when applicable, the

[21]Please include your application number in the subject line of the email, e.g. CRT-2022-xxxx, followed by "STEP 11".
[22]A visual representation of this segment of work is included in Figure 1.

customer-side make-ready, the Participant is required to provide approval of the work.

Within fifteen (15) calendar days after SCE provides notification of the completion of the infrastructure work, Participants are required to provide SCE with approval of the work performed by emailing a signed copy of the "Infrastructure Acceptance and Approval Certificate"[23] to **TEPMChargeReadyTransport@sce.com**[24]

The Participant is responsible for contacting the SCE call center and requesting a service "turn-on" for the newly metered Service Account.

14 Participant Installs Charging Equipment

Participants will be required to install the vehicle charging equipment within 20 calendar days from the completion of the utility-side and customer-side of the meter infrastructure work.

Participants are also required to comply with the relevant items in the CPUC's Transportation Electrification Safety Requirements Checklist.[25]

Following the completed installation of the charging equipment, the applicable inspection process will take place. If the AHJ does not provide a formal inspection process, the Participant must hire a licensed third-party inspection firm to inspect and approve the installation. The third-party inspection must perform any and all of the inspections that would typically be handled by a building & safety inspector.

Once the inspection is complete, Participant shall notify SCE in order to trigger the scheduling of a verification site visit.

Within ten (10) calendar days of completion of the installation, Participants are required to provide copies of the following documents (1-6) for upload to the Charge Ready Transport Enrollment Portal:

1. A copy of the installation permit and evidence of final inspection;
2. A copy of the final invoice for the purchase of the charging equipment;
3. A copy of the final equipment installation invoice (in all cases the equipment purchase price MUST be separately listed from the equipment installation costs);
4. A copy of the "Charging Equipment Registration Form"[26];
5. A copy of the signed "Third-Party Funding Attestation Form" to disclose of any outside funding received for the project.
6. If the charging equipment procured was NOT listed on SCE's APL, the Participant is also required to provide a copy of the Field Listing Inspection Report.

Additionally, any charging equipment that is publicly-accessible must be reported by the Participant to the US Department of Energy's EV Charging Station Locations mapping tool.[27]

If the charging equipment procured by the Participant was not listed on the APL, SCE may choose to perform an equipment commissioning test. If this test is to be performed, SCE will work with the Participant to schedule and coordinate such testing.

[23]Form copy located in the Appendix of the Handbook.

[24]The Infrastructure Acceptance Form can be found in the Appendix of this Handbook. Please include your application number in the email subject line, e.g. CRT-2022-xxxx, followed by "STEP 13").

[25]The Safety Requirements Checklist applies to CPUC-Approved Transportation Electrification Programs and can be downloaded from: https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/s/6442458882-safety-requirements-checklist-final-draft-.pdf www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=6442458882.

[26]A sample of Charging Equipment Registration form can be found in the Appendix of this Handbook.

[27]Accessible at: ***https://www.afdc.energy.gov/fuels/electricity_locations.html#/find/nearest?fuel=ELEC***

D. DESIGN AND BUILD PHASE CUSTOMER BUILDS



Although the CR Transport Program provides utility-side and customer-side of the meter make-ready infrastructure at no charge, Participants may elect to instead design, procure, build and maintain the customer-side make-ready infrastructure themselves. Participants choosing this option will be responsible for managing and coordinating all related work. If Participants elect this option, they will receive the Make-Ready Rebate, which is intended to cover up to 80 percent of the cost SCE would otherwise incur.[28] The actual rebate amount will be determined by SCE on a site-by-site basis.

If the Participant chooses this option, SCE will still design and install the utility-side infrastructure up to the new meter panel and will work with the Participant to coordinate the infrastructure interconnection. Construction activities must also comply with the Transportation Electrification Safety Requirements Checklist.[29]

15 Participant Performs Detailed Site Design Work

Participants selecting to install the customer-side make-ready infrastructure will be required to design, purchase, construct and maintain the Infrastructure and are required to follow applicable ADA requirements and guidelines set forth by the AHJ.

Participants will need to create a base map and civil plan (map), for both the location of the customer-side make-ready and the location of the charging equipment, and provide copies to SCE as soon as possible so that the utility-side infrastructure design work can commence.[30]

The Participant is required to submit the following documents aggregated into a single email and submitted to SCE per SCE's instructions, which will be sent via email.

1. A copy of the CAD base map detailing the proposed location for the new meter switchgear and charger locations (include E-sheet and single-line diagram(s) following SCE's "CAD File Requirements"[32]
2. A copy of the base map in *.pdf file format;
3. A copy of the estimated construction costs broken out into three different categories. These include 1) design and engineering costs, 2) permitting costs, and 3) construction costs.[33]

SCE will then draft and share its preliminary utility-side infrastructure design with the Participant via email.[34] The Participant will be required to submit approval to **TEPMChargeReadyTransport@sce.com** within ten (10) calendar days before SCE will move forward with final design.

[28]Participants choosing this option will eligible for a rebate which will be the lesser of: (a) 80 percent of the Participant's actual installation cost or (b) 80 percent of the average utility direct cost for installing the customer-side make-ready infrastructure for the relevant sector.

[29]The Safety Requirements Checklist applies to CPUC-Approved Transportation Electrification Programs and can be downloaded from: https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/s/6442458882-safety-requirements-checklist-final-draft-.pdf www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=6442458882.

[30]The Base Map might be the same conceptual design that SCE provided the Participant, or their own full preliminary working drawings for the construction work. See also the Site Plan Job Aid and Civil Plan Sample included in the Appendix of this Handbook.

[31]Please include your application number in the subject line of the email, e.g. CRT-20xx-xxxx, followed by "STEP 15").

[32]The CAD file requirements can be found in the Appendix of this Handbook.

[33]These costs should not include any EV charging equipment costs or related EV charging equipment installation costs. A worksheet template is provided in the Appendix of this Handbook.

[34]Typically takes 3 to 4 weeks for SCE to create a preliminary design, and another two weeks after Participant's approval of the preliminary design to create the final.

The SCE team will leverage the Participant's design work to draft the legal description to be used for the utility-side infrastructure easements.

16 Grant Final Easement

The SCE team will leverage the Participant's design work to draft the legal description to be used for the utility-side infrastructure easement. The Participant will be required to provide an easement for the utility-side infrastructure that occurs on private property.

The Participant is required to execute and notarize the easement, or, if Participant is not the property owner, ensure that the property owner executes and notarizes the easement. Participant shall return the original signed easement to SCE within thirty (30) calendar days from the date of receipt.

Participants are required to:

1. Email a copy of the notarized agreement to **TEPMChargeReadyTransport@sce.com**[35] and
2. Return the originally signed and notarized agreement to SCE. The original signed and notarized agreement is needed so that it may be recorded with the appropriate county. Counties will not record copies or PDF documents. The documents are typically returned to SCE via US Mail or courier (FedEx, UPS etc.) to SCE's Real Properties department or to one of their Contract firm (i.e., Spectrum Land Services). Specific mailing instructions will be included with the easement documents when provided to the Participant.

Once received, SCE will have the executed easement recorded and filed. SCE cannot move forward with any further construction-related activities until the necessary easements have been granted. Once final easements have been granted, SCE will initiate the plan check and permitting process.

17 Participant Requests and Secures Permits

If Participants choose to design and install the make-ready, they will be required to submit their construction plans to the relevant AHJ (e.g., City, County, Fire, Division of State Architect, etc.) to secure all necessary reviews, approvals and permits. SCE will not be responsible for obtaining any permits for the make-ready work that the Participant elects to perform.

SCE will secure any necessary permits for the utility-side infrastructure.

SCE will provide the Participant with the information necessary to establish a new SCE Service Account.

18 Construct Make-Ready Infrastructure

Participants will be responsible for managing and coordinating all related customer-side make-ready infrastructure design and installation work. Once the construction plans have been finalized, Participants are required to email a copy of the detailed construction schedule to SCE at **TEPMChargeReadyTransport@sce.com**[36]

All construction of such make-ready Infrastructure must be performed by state licensed and insured contractors' holding a valid C-10 contractor's license. All contractors performing this work are to use International Brotherhood of Electrical Workers (IBEW)-signatory labor, use electricians with "Electric Vehicle Infrastructure Training Program" (EVITP)[37] certification, and provide proof of EVITP Certification prior to construction. Participants will be responsible to ensure compliance with these requirements.

The Participant activities in this step of the process include:

- Scheduling a preconstruction meeting with SCE and providing a detailed construction schedule;
- Procuring equipment;
- Managing and coordinating all customer-side make-ready infrastructure work;
- Ensuring installation contractor is state licensed, insured and that the work is performed by IBEW-signatory labor;
- Ensuring compliance with electrician training certification (EVITP) and obtaining copies of the training certificates in advance of the work being performed;

[35]Please include your application number in the subject line, e.g. CRT-20xx-xxxx, followed by "STEP 16".
[36]Please include your application number in the subject line, e.g. CRT-20xx-xxxx, followed by "STEP 18".
*[37]More information about this Program can be found at **https://evitp.org/training/**.*

- Ensuring compliance with the CPUC's Transportation Electrification Safety Requirements Checklist;[38]
- Post installation, ensuring final inspection process is complete;
- Working with SCE Account Representative to select TOU rate plan and request service turn-on (new account activation).

If the AHJ does not provide a formal inspection process, the Participant must hire a licensed third-party inspection firm to inspect and approve the installation. The third-party inspection must perform any and all of the inspections that would typically be handled by a building & safety inspector.

Following the completed installation of the make-ready infrastructure, Participants are required to email the following documents in .pdf format to SCE at **TEPMChargeReadyTransport@sce.com**[39]

1. Evidence of final inspection;
2. A copy of the final as-built map; and
3. A signed copy of the Testament of Compliance with the Safety Requirements Checklist.[40]

The Participant is responsible for contacting the SCE call center and requesting a service "turn-on" for the newly metered Service Account.

Following or concurrent with installation of the make-ready infrastructure, but no later than 20 days beyond the completion of the make-ready work, the Participant is required to complete the installation of the charging equipment.

19 Participant Installs Charging Equipment

The Participant must install the EV charging equipment within 20 calendar days of the completion of the make-ready infrastructure work.

Following the completion of installation, the AHJ's routine final inspection process should be implemented. When there isn't a formal inspection process provided by the AHJ, the Participant will need to hire a licensed third-party inspection firm to validate the installation of the make-ready infrastructure and charging equipment. The third-party inspection would include any of the inspections that would typically be handled by a building & safety inspector. This will include inspection of items such as, but not limited to: ensuring proper trench depth; ensuring adequate cover and compaction of trenches; proper conduit spacing; correct installation of electrical equipment including connection, torque settings etc.; panel release to SCE for energizing; and a final safety inspection.

Within ten (10) calendar days of completion of the installation, Participants are required to provide copies of the following documents (1-6) for upload to the Charge Ready Transport Enrollment Portal as they relate to the installation of the customer-side make-ready infrastructure and charging equipment installation:[41]

1. A copy of the installation permit and evidence of final inspection;
2. A copy of the final invoice for the purchase of the charging equipment;
3. A copy of the final equipment installation invoice (in all cases the equipment purchase price MUST be separately listed from the equipment installation costs);
4. A copy of the "Charging Equipment Registration Form";
5. A copy of the "EVSE Commissioning Report";
6. A copy of the "CRT IBEW Labor Attestation Form";
7. If the charging equipment procured was NOT listed on SCE's APL, the Participant is also required to provide a copy of the Field Listing Inspection Report.

Additionally, any charging equipment that is publicly-accessible must be reported by the Participant to the US Department of Energy's EV Charging Station Location Mapping Tool.[42]

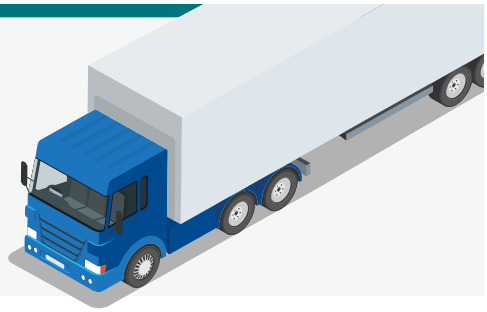
If the charging equipment procured by the Participant was not listed on SCE's APL, SCE may choose to perform an equipment commissioning test. If this test is to be performed, SCE will work with the Participant to schedule and coordinate such testing.

[38]The Safety Requirements Checklist applies to CPUC-Approved Transportation Electrification Programs and can be downloaded from: https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/s/6442458882-safety-requirements-checklist-final-draft-.pdf
[39]Please include your application number in the subject line, e.g. CRT-20xx-xxxx, followed by "STEP 18".
[40]A copy of this document can be found in the Appendix of this handbook.
[41]Document samples are available for many of these documents in the Appendix of this Handbook
*[42]Accessible at: **https://www.afdc.energy.gov/fuels/electricity_locations.html#/find/nearest?fuel=ELEC***

PHASE E

Issue Rebates

E. ISSUE REBATES



At this step in the process, SCE will initiate the activities involved with issuing the Charging Equipment Rebate and the Make-Ready Rebate, if applicable.

Following the completed installation of the vehicle charging equipment and submission of the required documentation, SCE will verify and initiate the rebate remittance process (steps 20-21).

20. Charging Equipment Installation Verification

After the Participant notifies SCE of the completed installation of the vehicle charging equipment and has submitted the required documentation, SCE will perform a final site inspection. The inspection will primarily involve verifying the charging equipment has been successfully installed and is operational. This will also include ensuring the installed equipment matches the make, models, and counts specified on the invoice, and that the units are energized.

If the Participant had also chosen to install the customer-side make-ready infrastructure, SCE will also verify the information included in the "as-built" map prior to issuing the Make-Ready Rebate.

21. Review Documentation & Issue Rebates

The rebate payment will be processed by SCE after receiving any required documentation and verifying the operational status of the charging equipment.

A. Charging Equipment Rebate
The only charging equipment eligible for rebate will be listed on SCE's APL. The rebate value shown on the APL is the maximum rebate that will be paid. The actual rebate amount paid to the rebate-eligible Participant may be reduced to ensure that when combined with any other third-party rebates or incentives, the total rebate does not exceed the total equipment purchase costs.

Once the charging equipment has been verified as operational, no additional documentation is required from the Participant for SCE to process and remit payment for the Charging Equipment Rebate.

B. Customer-Installed Make-Ready Rebate
Participants choosing to install the customer-side make-ready Infrastructure will receive a rebate which will be the lesser of: (a) 80 percent of the Participant's actual installation cost or (b) 80 percent of the average utility direct cost for installing the customer-side make-ready infrastructure for the relevant sector.

In order to receive a rebate for the completion of the infrastructure build, and within ten (10) calendar days after completed installation of the charging equipment, the following documents should be scanned and uploaded to the Charge Ready Transport Enrollment Portal:

1. Submit a copy (following the instructions on the Charge Ready Transport Enrollment Portal) of the "Participant Installed Make-Ready Cost Breakdown Worksheet";[44]
2. A copy of the final "as-built" map for the make-ready infrastructure;
3. A copy of the final inspection for the make-ready Infrastructure.

22. Complete Program Participation Survey(s)

Participants may be provided with Program-related information request(s) and surveys at various times throughout the Program. As a provision of participation in the CR Transport Program, SCE requires that Participants provide timely responses to surveys and other data requests in order to assist with Program evaluation and improvement initiatives.

[44] *A copy of this worksheet can be found in the Appendix of this Handbook.*

PHASE F

Compliance Verification

F. COMPLIANCE VERIFICATION



Participants are required to adhere to all Program requirements. SCE will verify three (3) specific commitments in an on-going manner, to ensure compliance with such commitments. These include 1) compliance with planned EV acquisitions, 2) compliance with ten-year commitment to operate charging equipment, and 3) compliance with commitment to share five-year port-level data. These are further described in Steps 23-25.

23 Completion of Planned EV Acquisitions

SCE will monitor Participant's EV acquisitions and conversions to ensure that the Participant follows the acquisition plan reflected in the Agreement. This is an important component of the Project because of the significant infrastructure investments SCE will be making based upon the contractual commitments made by the Participants. SCE will work with Participants to track and monitor EV fleet growth over the commitment period.

Participant activities included in this Step:

- Purchase, lease, or convert EVs as outlined in the Agreement (adhere to volume and timing of vehicle delivery). If for any reason, the volume or timing of delivery deviates from the Agreement, notify SCE in writing of the deviation and the reason for same.

Documents Required:

1. On-going response to SCE's annual vehicle acquisition survey. Participants will be asked to provide the make and model of vehicles acquired during that calendar year, and for information relating to the retirement of any EV during that calendar year.

24 Compliance with 10-Year Operation of Charging Equipment Commitment

The Participant is required, at its own expense, to operate and maintain charging equipment in good working order at the originally installed location for at least ten (10) years. Within this timeframe, Participants may upgrade or replace their equipment at any time with a qualified replacement provided that the Participant is responsible for all associated costs, and the new equipment is operated and maintained for the remainder of the ten (10)-year duration.

25 Compliance with 5-Year Port-Level Data Sharing Commitment

All Participants must contract with a third party that provides EV charging network services to manage the charging equipment and access related usage data for Charging Equipment fueling **on-road** vehicles. Participants will be responsible for payment of all costs and charges associated with such services, which must be maintained for at least five (5) years following the date the equipment is placed in service.

For the same five (5)-year period, Participants and their network services provider must agree to provide SCE with access to usage data for each charging episode.

Contractors must electronically transmit to SCE on a monthly basis the required data for all charging equipment deployed under the Program **supporting on-road charging** in the defined format. Aggregated data (not attributable to any specific Participant) will be made publicly available as part of SCE's reporting to the CPUC and various industry stakeholders and will be used to identify load management opportunities and enhance vehicle-grid integration for future utility initiatives.

Participant activities included in this step:

- Maintain 5-year contract with Network Service Provider to capture and share port-level usage data for charging stations **fueling on-road vehicles** with SCE.

Documents Required:

1. Must provide monthly electronic usage data files (conforming to SCE's "Charging Equipment Usage Data Monthly Report") instructions.[44]

[44]The specific content and format for the routine report are included in the "Charging Equipment Usage Data Monthly Report" instructions located in the Appendix of this Handbook.

APPENDIX

Glossary of Terms

Program Documents

GLOSSARY OF TERMS

Account Representative: An SCE employee in the BCD organization serving as the SCE liaison for business customers. Each Account Representative is typically assigned as an account representative for a particular industry segment (i.e., government, hospitals, schools, etc.)

AHJ – (Authority Having Jurisdiction): the responsible government entity having geographically based jurisdiction that typically approves, inspects and permits construction projects (e.g., City, County, Fire, Division of State Architect, etc.)

APL: see "Approved Product List"

Approved Product List: The list of charging stations approved by SCE and meeting SCE's technical requirements. Eligible Participants must select charging stations from the Approved Product List in order to receive a Charging Equipment Rebate. SCE does not provide any expressed, implied or prospective warranty, including any warranty of merchantability or fitness for any particular use or application, of any EV charging equipment. The APL can be found in the Appendix of this Handbook. SCE reserves the right to modify the list at any time.

As-Built Map: Construction drawings created by the contractor and submitted by the Participant at the completion of construction detailing any field approved revisions to the self-installed customer-side make-ready infrastructure. The final as-built map (in .pdf file format) is required for submission if the customer chooses to perform the customer side of the meter make-ready work.

Base Map: The Base Map is to be prepared in CAD format from a detailed site survey. It is an overhead view of the project site that includes property lines, streets, curb and sidewalk, above ground structures and building footprints, existing underground utilities and obstructions, and the desired location of planned EV charging equipment. Submission of a Base Map is required if the Participant chooses to perform the customer side of the meter make-ready work. A sample base map can be found in the Appendix of the Program Handbook.

BCD (Business Customer Division): The Business Customer Division (BCD) of Customer Service is the primary contact for SCE's business customers and serves as their Trusted Energy Advisor by meeting the energy-related needs of the various business, government and agricultural customers.

CAD File Requirements: The Base Map is to be created in AutoCAD 2009 or earlier format without cross-reference drawings (XREFs). SCE's CAD file requirements are included in the Appendix of this Handbook.

Charging Equipment Approved Product List: See Approved Product List.

Charging Equipment Rebate: Financial reimbursement paid to eligible Participant, or its designee, pursuant to this Agreement to offset a portion of the purchase of approved Charging Equipment.

Charge Ready Transport Enrollment Portal: The website where Applicants can apply for the Program, check application status, and upload most required documents for the Program. Participants can visit the Charge Ready Transport Enrollment Portal at **www.sce.com/chargereadytransport**.

Charging Equipment Registration Form: A form the Charging Equipment Installer can provide showing the subject Charging equipment serial numbers and other pertinent station data.

Charge Ready Transport Program (CRTP): The Charge Ready Transport Program is administered by SCE under the auspices of the CPUC that, among other incentives, provides no-cost charging infrastructure for eligible Participants that is needed to electrify their on-road and non-road fleets.

Charging Station – (EV Charging Station): An individual charging station unit that may contain one or more charging ports for the purpose of connecting the electric vehicle to a grid connected power source capable of

recharging the vehicles battery pack. The individual connectors of the Charging Station are referred to as ports. Each charging station can charge one or more vehicles depending on the number of ports of which each unit is equipped.

Civil Plan: Engineered site drawings detailing existing site structures, roads, curb face, utilities etc. Typically the civil plan is produced using the base map as the underlying "base" with the new improvements drawn in and labeled as either 'future' or 'proposed'. The civil plan should be saved in a .pdf file format and is required for submission if the Participant chooses to perform the customer side of the meter make-ready work. A sample civil plan can be found in the Appendix of the Program Handbook.

Conceptual Design: Map and related documents, as applicable, that show the proposed layout of the infrastructure and charging stations, including but not limited to, conduit routing and equipment placement. The conceptual design is high level and will be completed prior to execution of the Agreement and will be further refined after funds are reserved.

CPUC – (California Public Utilities Commission): The California state regulatory agency that is responsible for regulating privately owned electric, natural gas, telecommunications, water, railroad, rail transit, and passenger transportation companies.

CPUC's Transportation Electrification Safety Requirements Checklist: The Safety Requirements Checklist applies to CPUC-Approved Transportation Electrification Programs and can be downloaded from: **https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/s/6442458882-safety-requirements-checklist-final-draft-.pdf**

Customer-Side Infrastructure: Also referred to as the "make-ready" Infrastructure; see Make-Ready Infrastructure.

DCFC – (Direct Current Fast Charging): Stations that provide a high-power DC current, generally at least 25 kW, to the electric vehicle's battery without passing through any onboard AC/DC converter, which means the current is connected directly to the battery.

Disadvantaged Communities - (DACs): Census tracts in SCE's service territory with a top quartile score according to California Environmental Protection Agency's latest version of the CalEnviroScreen tool available at the time of the application submittal. The California Communities Environmental Health Screening Tool (CalEnviroScreen) was released by the Office of Environmental Health Hazard Assessment (OEHHA), on behalf of the California Environmental Protection Agency (CalEPA). CalEnviroScreen identifies California communities by census tract that are disproportionately burdened by, and vulnerable to, multiple sources of pollution. These communities are also referred to as "Disadvantaged". For more information, please visit **https://oehha.ca.gov/calenviroscreen**

DR – (Demand Response): Demand response provides an opportunity for consumers to play a role in the operation of the electric grid by reducing or shifting their electricity usage during peak periods (usage or cost based) in response to curtailment requests.

E-sheet and load calculations: Chart or graphical representation of all connected load to an existing or proposed switchgear or panel, shown in kW, kVA, kVAR etc. Should be accompanied by a single line exhibit of the switchgear.

Equipment Commissioning Test: SCE's Field testing of energized EV charging equipment at completion of installation.

EV – (Electric Vehicle): A plug-in electric vehicle that is propelled by one or more electric motors and powered by an onboard battery pack.

EVITP – (Electric Vehicle Infrastructure Training Program) Certification: The document certifying an electrician or contractor that has gone through the Electric Vehicle Infrastructure Training Program process. The EVITP Training Program has rigorous training standards and is taught by instructors who have well documented qualifications and considerable experience in their areas of expertise. For more information, please visit **https://www.evitp.org**.

EVSE Commissioning Report: This report is created after the make-ready infrastructure work is complete and the site is energized. At this step a charging equipment commissioning report is generated to verify all circuits have proper voltage at each make-ready stub. A sample report can be found in the Appendix of the Program Handbook.

Field Listing Inspection Report: Where required, a qualified NRTL representative shall conduct a field inspection of installed equipment prior to energization. A passing field inspection record, signed by a qualified person, shall be delivered to SCE prior to SCE's approval of the equipment for operation.

Final Design: Map and related documents, as applicable, that show the proposed layout of the Infrastructure and Charging Stations, including but not limited to, conduit routing and equipment placement. The Final Design is the engineered construction drawing submitted for permitting and will be completed prior to start of construction.

Final Invoice: Statement of the total amount paid by Participant to Charging Station Supplier(s) for the purchase of Charging Stations.

Fortune 1000 list: An annual list of the 1000 largest companies measured by revenue compiled and published by Fortunate Magazine.

IBEW Signatory Labor: General contractor and subcontractor staff who are signatory to an IBEW union contract.

IDR – (interval data recording [meter]): SCE will install a new meter for all EV charging equipment installed under this Program. Each meter will be capable of recording, storing and transmitting usage data. Usage data for non-residential customers is captured in 15-minute intervals.

Infrastructure: All work and facilities, as determined by SCE, in SCE's sole discretion and subject to change in SCE's sole discretion, to be located, designed and installed by SCE, necessary to allow the Participant to install and operate the Charging Stations. Infrastructure may include, but is not limited to new transformers, services, and meters, new panels, stepdown transformers, conduits, wires, connectors, and any other hardware installed by SCE on the Site. If the Participant elects SCE to build the customer-side make ready infrastructure, it will become a part of the Infrastructure.

Infrastructure Acceptance and Approval Certificate: Form establishing the Participants certification that the Infrastructure installed by SCE has been fully performed and complies with design. This form is to be signed by the participant after SCE completes installation of Infrastructure, and prior to installation of Charging Stations.

Level 1 – (Charging): Low power charging, typically at or below 120 volts.

Level 2 - (Charging): Medium power charging, typically delivered between 220 and 240 volts.

Make-Ready Infrastructure: The infrastructure that includes all infrastructure on the customer-side of the meter, from the new panel included in the completed "utility-side" infrastructure work, up to the first point of interconnection with the customer's EV charging equipment.

Make Ready Rebate: If Participant elects to perform the customer-side make-ready Infrastructure work, following the completed installation and submission of required documentation, SCE will process a rebate payment that is intended to offset a portion of the Participants associated costs.

Network Service Agreement: A contractual Agreement between a Network Service Provider and a Participant for the purpose of proving Networking Services for the installed Charging Equipment.

Network Services Provider: The 3rd party entity that will provide Network Services for the EV Charging Equipment installed at the Participants site. The Network Service Provider will be required to transmit port level data and other information to SCE complying with Program requirements.

Non-Standard Equipment – (EV charging equipment): Charging equipment that complies with SCE's non-standard technical requirements which must be approved by SCE for use.

Participant: see Program Participant.

Preliminary Design – (Preliminary infrastructure design): Engineered infrastructure drawings at a minimum of 50% completion. Must include conduit and structure sizes and locations, load calculations and single line exhibit with switchgear specifications.

Program: Also referred to as the Charge Ready Transport Program (CRTP). The Charge Ready Transport Program is designed to help Program Participants install the charging infrastructure needed to electrify their medium- and heavy-duty fleets and non-road vehicles.

Program Participant: The SCE non-residential customer that applies for the Program and executes the Agreement. Also referred to as the "Participant".

Program Participation Agreement: An agreement between SCE and the Participant that includes the terms and conditions for participating in the Program and is provided to an Applicant following SCE determination that a project has be approved for the infrastructure work required for the installation of EV charging equipment.

Rebate: Financial reimbursement paid to eligible Participant, or its designee, pursuant to this Agreement to encourage the purchase and installation of approved Charging Stations. The Charge Ready Transport Program offers two different rebates to eligible Participants, the Charging Equipment Rebate and, if applicable, the Make Ready Rebate.

Rebate Assignment Form: An on-line web form the Participant is required to complete if it wishes to have SCE process and remit any applicable Rebate payments.

Rebate Payment: The payment made by SCE to Participant, or its designated assignee, for all applicable Rebates, if any, pursuant to the Program.

Safety Compliance Checklist: see also "CPUC TE Safety Checklist".

Service Account: An account associated with a particular on-site meter established by SCE upon customer request. To establish a new Service Account, the Participant is responsible for contacting SCE's Customer Service Department (listed on the customer's monthly billing statement) and requesting a new service Turn-on.

Site: The premises, owned, leased or operated by the Participant, where the Charging Stations will be installed.

Site Plan: The site plan is a birds-eye exhibit of a site with building footprints, roads, parking areas and other above ground structures notated. May be an engineered drawing or may just be a satellite image with notes. A site plan (in .pdf file format) is required to be submitted with a Program Application. A site plan job aid can be found in the Appendix of this Program Handbook.

Standard Equipment – (EV charging equipment): Charging equipment that complies with SCE's technical requirements and is included on SCE's Approved Product List.

TEPFS – (Transportation Electrification Project Feasibility Sheet): Field checklist prepared by a SCE Business Customer Division (BCD) representative. This checklist gathers high-level information such as the customer's electrification plans, site topography and existing utility equipment at the site.

Technical Requirements for Non-Standard Charging Equipment: A list of charging equipment technical requirements for non-standard charging equipment. These requirements must be met in selecting charging stations to be installed under this Program. The Requirements can be found in the Appendix of the Program Handbook.

Technical Requirements for Standard Charging Equipment: A list of charging equipment technical requirements for standard charging equipment. These requirements must be met in order for charging stations to be added to SCE's Approved Product List, and can be found in the Appendix of the Program Handbook.

TOU – (Time-of-Use) Rate Plans: All TOU plans feature energy charges that vary based on the time of day, the day of the week, and the season. Some plans also include demand charges that are based on the maximum amount of electricity your business uses at once. For more information about TOU rate plan options, please visit **https://www.sce.com/business/rates/time-of-use**, or **https://www.sce.com/business/rates/electric-car-business-rates** on TOU-EV rates.

TRU – (Transport Refrigeration Units): Climate control devices that provide the ability to heat or cool the trailer when the engine is shut off.

TSE – (Truck Stop Electrification): EV Charging Stations installed at a designated Truck Stop location for the purpose of providing EV battery charging (L2 or above) for vehicles in transit.

Turn-on: *see Service Account*

Utility-Side Infrastructure: all infrastructure from SCE's distribution system to a new circuit panel that will be designed and installed by SCE to support EV charging.

Vehicle acquisition plan: This plan is provided by the Program Applicant and is included in the Charge Ready Transport Program Application. The plan outlines the Applicant's planned acquisition of EVs over a ten-year period. This plan will be utilized to determine Program eligibility and for determining the site's electrical infrastructure needs.

PROGRAM DOCUMENTS

Charge Ready Transport Enrollment Portal: www.sce.com/ChargeReadyTransport

Please refer to the portal to access these documents unless a different URL is provided.

- Charging Equipment Approved Product List (on sce.com/crapl)
- Charging Equipment Registration Form - instructions
- Charging Equipment Registration Worksheet - template
- Charging Equipment Usage Data Monthly Report - Instructions
- Charging Equipment Usage Data Monthly Report – Template
- Civil Plan – Sample
- Digital CAD file requirements – instructions
- EVSE Commissioning Report – Sample
- Grant of Easement - Sample
- Infrastructure and EVSE for Transport Refrigeration Units- Informational
- Infrastructure Approval and Acceptance Certificate
- Participant Installed Make-Ready Cost Breakdown worksheet
- Program Enrollment Application – Sample
- Program FAQ
- Program Participation Agreement – Sample
- Addendum Agreement - Customer-Side Make-Ready Infrastructure Installation – Sample
- Program Participation Guide
- Program Participation Quick Reference Guide
- Rebate Assignment Form – Sample
- Safety Requirements Checklist for CPUC-Approved Transportation Electrification Programs (https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/s/6442458882-safety-requirements-checklist-final-draft-.pdf)
- Site Plan Job Aid
- Technical Requirements for Non-Standard Charging Equipment
- Technical Requirements for Standard Charging Equipment
- Testament of Compliance with SCE's Technical Requirements for Non-Standard Charging Equipment
- Testament of Compliance with the Safety Requirements Checklist for CPUC-Approved Transportation Electrification Programs
- TRU and TSE Worksheet

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Have questions or want to discuss your transportation electrification plans?

Please call your SCE Account Representative or 1 (800) 990-7788 to discuss next steps.

Or for more information, visit www.sce.com/ChargeReadyTransport.