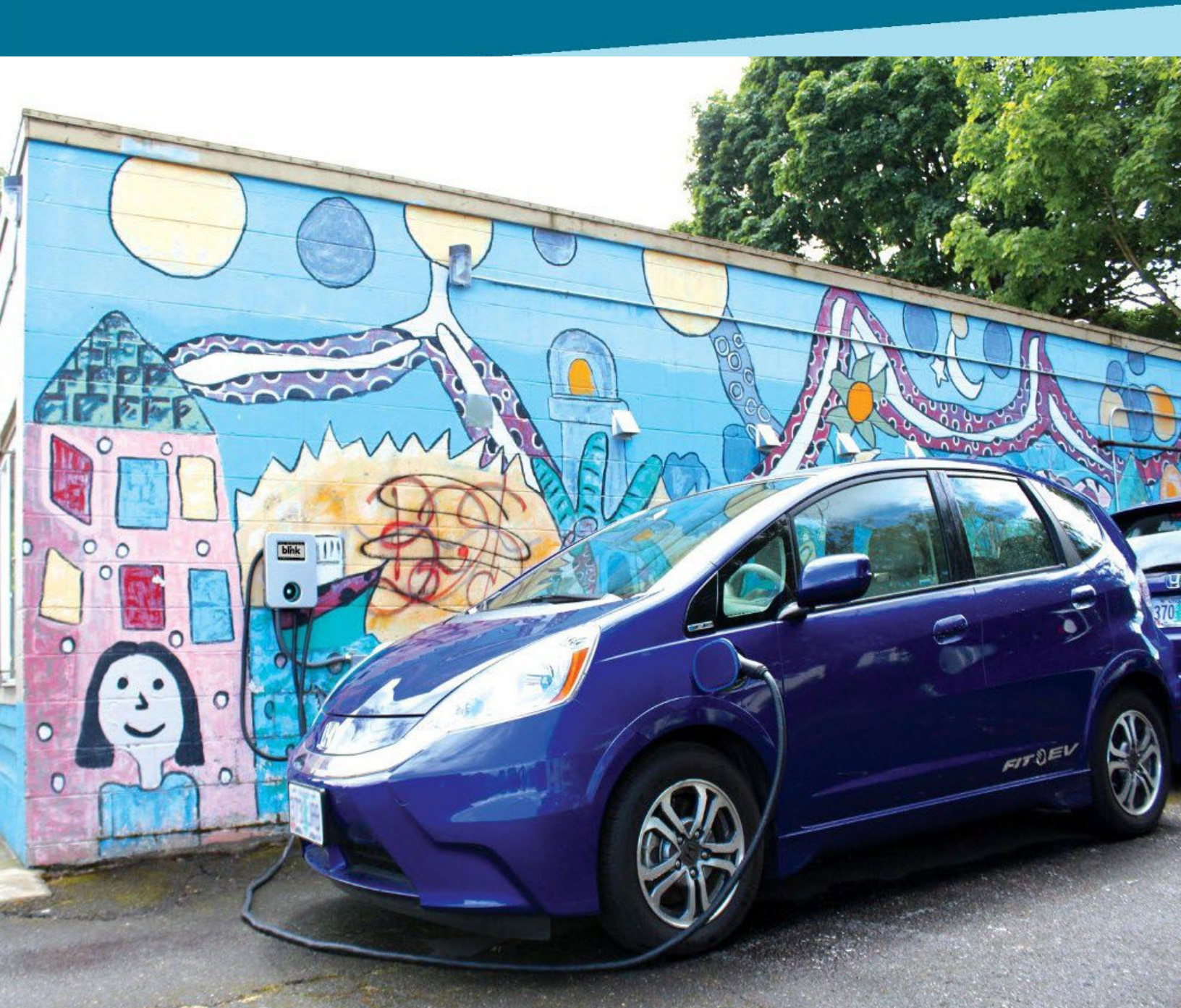


# ODOT Community Charging Rebates Post-Installation Application Guide



Version 2.0 3/1/2024

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# Overview

This guide explains how to apply for the Community Charging Rebates Program (CCR), including how to complete the application form with step-by-step screenshots and program requirement reminders.

Note: As you navigate through the guide, please note that all information included as part of the screenshots is meant to be illustrative.

The online application will be available starting on **March 5<sup>th</sup>, 2024 at 9:00am** and can be accessed through [ODOT's CCR website](#).

There are two pathways for applying:

1. Pre-Installation: Applicants can reserve funding prior to equipment installation.
2. Post-Installation: Applicants can apply for the rebate after eligible charging equipment is installed.

**Applicants can save their progress and return to the application at a later time by selecting the save button in the bottom right corner.** Applicants are encouraged to have the following documents and information ready and available to make the application process seamless. For additional information on required documents, please refer to the [Required Documents Checklist](#).

Required documents and information for Post-Installation Application:

- [Site Verification and Recipient Acknowledgment \(SVRA\) Form](#) (all applicants must submit the SVRA Form)
- Employer Identification Number (EIN)
- Total number of parking spaces at your site location
- Name of electric utility company providing power to the site location ([State of Oregon: Energy in Oregon - Find Your Utility](#))
- Additional incentive information (for applicants pursuing additional incentives only)
- Charging station information, including charger type, make, model, ports per charger, charger kilowatt capacity, the number of chargers, charger model number
- Network provider
- Charging fee information
- Report each new charger to the [Alternative Fuels Data Center](#)
- Register to be a credit generator under [Oregon's Clean Fuels Program](#)
- Register each charger as a fuel supply equipment in [Oregon's Clean Fuels Program](#)
- Copy of paid invoice for equipment
- Copy of paid invoice for installation
- Copy of paid invoice for a network agreement
- Copy of paid invoice for a maintenance contract
- Copy of permits required
- [Form W-9](#)
- Photos
  - Installed site photo, including any onsite signage or pavement markings.
  - Serial number photo for each charger.

- Customer support number photo (where applicable), showing location on or near equipment.
- Pricing display photo (where applicable), showing pricing per unit sale and location on/near equipment. Examples of signage can be found in the [Round 2 Program Guidelines](#)

If you have any questions or need assistance with your application, please contact the Forth CCR team at [ODOTchargingrebates@forthmobility.org](mailto:ODOTchargingrebates@forthmobility.org).

## Section 1: Applicant Information

- Prior to beginning the application, make sure to have a completed [Site Verification and Recipient Acknowledgment Form](#) (this document is required for all projects).
- Fill out your contact information.
  - *Note: The equipment owner must be the individual on receiving the rebate.*
- Add your Employer Identification Number (EIN).
  - The EIN can be found on any former paystubs or W-2 forms from your organization. The EIN number must match the number listed on the W-9 collected later in the application.
  - *Note: Documents can be submitted in PDF, .jpeg, or PNG formats.*

### Example:

#### Applicant Type \*

Select **"Site Owner"** if you are both the EV charging equipment owner and the real property owner.

Select **"Authorized Agent"** if you are the EV charging equipment owner but not the real property owner. (Note: Authorized Agents demonstrate authority from the property owner to install EV charging equipment at the project site through the Site Verification and Recipient Acknowledgement Form).

Select **"Third Party"** if you are neither the real property owner or the EV charging equipment owner. A Third Party applicant applies on behalf of a Site Owner or Authorized Agent and is not the rebate recipient. (Note: Third Party applicants must demonstrate that the equipment owner understands and agrees to the program requirements through the Site Verification and Recipient Acknowledgement Form).

#### Are you applying for pre-installation or post-installation? \*

Note: Approved pre-installation applications will have funding reserved for 270 days. Post-installation applications must be submitted within 90 days of the installation and the installation must have occurred after October 6, 2023 (the Round 1 closing date).

#### Applicant Contact Name: \*

<input type="text" value="John"/>	<input type="text" value="Doe"/>
-----------------------------------	----------------------------------

#### Applicant Contact E-mail: \*

#### Confirmation E-mail: \*

Please reenter your e-mail to ensure the correct address.

#### Applicant Organization Name: \*

#### Applicant Organization Type: \*

Choose the one that best describes your entity. If none apply, write in organization type.



Have you completed the Site Verification and Recipient Acknowledgement Form?

Yes  No

\*Required for all projects, [see Site Verification Form here](#).

# Section 2: Equipment Owner Information

## Equipment Owner Information

- In Section 2 the equipment owners contact information is requested.
- The rebate will be mailed to the equipment owner, the EIN must match the information listed on the W-9 later in the application.

### Example:

#### Section 2: Equipment Owner Information

*Note: the Equipment Owner is the party incurring project costs and thus the Rebate Recipient.*

Is the Applicant also the EV charging equipment owner?

Yes  No

Equipment Owner Contact Name:

John Doe

Equipment Owner Contact Name:

John Doe

Equipment Owner E-mail:

communitychargingrebates@odot.oregon.gov

Equipment Owner Contact Phone:

(123) 456-7890

Equipment Owner Organization Name:

Forth

Equipment Owner Organization Type:

Non-Profit

Is it a Minority or Women-Owned Business Enterprise (MWBE)?

Yes  No

Equipment Owner Employer Identification Number (EIN): \*

123456789

*Please enter the EIN without the "-". EIN must match that listed on the W-9 form required for the post-installation portion of the application.*

# Section 3: Basic Project Information

In Section 3, you will enter the basic project information, including:

- The Project Site Type must be a multifamily housing site, workplace, or publicly accessible parking.
- Project Site Real Property Owner: this can be an individual name or an organization/entity name.
  - *Note: This may be different from the applicant.*
- The Project Site Address must be located in the state of Oregon.

**Example:**

**Section 3: Project Site Information**

**Project Site Type \***

Workplace ▼

**Project Site Name \***

Forth Mobility

**Project Site Real Property Owner: \***

John Doe

**Project Site Street Address \***

1234 Example St

Address Line 2

Portland

Oregon

12345

- Project Site Location Type: select from a drop-down list.
  - Public parking lot/garage
  - Retail
  - Public Park
  - Hotel
  - Grocery/Convenience Store
  - Restaurant
  - Transit/Bus Station
  - Multi-family Housing
  - School

*Note: If your site location type is not listed in the drop down, you can type the site into the text box.*

**Example:**

**Project Site Location Type (primary): \***

Public parking lot/garage

If site is a condominium, apartment complex or housing cooperative, please select "multi-family housing". If no selection describes the location type, please fill in.

- Total number of parking spaces in the parking lot/structure: enter a numerical value.
- Multifamily housing complexes must have a minimum of five parking spaces that are not deeded to individual residents

**Example:**

**Total parking spaces in the lot/structure: \***

25

Note: for MFH, there must be a minimum of 5 parking spaces on site.

CCR-designated Priority Community:

- Use the [Priority Type Locator Tool](#) to determine if your proposed project site falls in a priority or non-priority community.
  - If your site falls within both a disadvantaged and rural priority community, you can select either rural or disadvantaged on the application (there is no benefit or disadvantage related to either selection.)

**Example:**

CCR-designated Priority Community: \*

Non-priority ▼

[Click here to determine the location's priority type.](#)

- From a drop-down list, select the local electric utility that will be supplying power to the site (if you are unsure of your site's electric utility, use the [State of Oregon: Energy in Oregon - Find Your Utility](#) tool).

**Example:**

Electric Utility: \*

Portland General Electric ▼

Find your electric utility provider here: [State of Oregon: Energy in Oregon - Find Your Utility](#)

Does your electric utility offer incentives for commercial, workplace or multi-family housing Level 2 charging stations?

Yes  No

Will you apply for your electric utility incentive?

Yes  No

*Note: if yes, please notify your utility of dual participation.*

Expected Incentive Amount from Utility \*

\$100.00

- Next, indicate if the electric utility at the site location offers incentives for Level 1 or Level 2 charging stations and if you intend to apply.
  - **Note: Before applying for the CCR program, you must notify the electric utility of dual participation, and you must apply for other incentives first, prior to applying for CCR.**
- If you applied for a local utility incentive, you will enter the expected incentive amount that you are going to receive from the other program. Applicants cannot voluntarily opt out of a utility incentive. If the project site is ineligible or the utility program is out of funding applicants must provide documentation from the utility confirming this information.

- At the end of Section 3 (bottom of the page), upload the completed [Site Verification and Recipient Acknowledgment Form](#).

Please Upload the Site Verification and Recipient Acknowledgement Form Here \*

Upload

 or drag files here.

[Site Verification and Recipient Acknowledgment Form](#)

*Please note: Only wet signatures or those made with a verifiable e-signature platform (E.g., docusign) will be accepted. Typed signatures will result in an incomplete application.*

## Section 4: Post-Installation Project Information

Section 4 begins by collecting information on the site type and the installation date.

- Select the Installation Date from the drop-down calendar.
  - *Note: Eligible costs cannot be incurred until after the Program Effective Date (June 13th, 2023) and Applicants must apply for the rebate within 90 days of the Installation Date. The only exception to this 90-day requirement is for projects installed between the close of Round 1 on October 6th, 2023, and the opening of Round 2 on March 5, 2024. Charging equipment with an Installation Date prior to October 6th are not eligible for Round 2 of this Program.*
  - *For pre-installation application, the installation date must be within 270 days of an Applicant's Reservation Date.*

### Charging Station Information

- From the drop-down list, enter the following information (add additional rows as needed):
  - Charger Type
  - Brand
  - Model
  - Model Name
  - Kilowatts
  - Ports per Charger
  - Quantity of Chargers
- The Total Level 2 Charging Ports Installed and Total Level 1 Charging Ports Installed (Multi-family Housing Site or Workplace only) will auto-populate based on the rows that you add.

**Example:**

**Level 2 Charger Information**  
*Add additional rows as needed.*

Charger Type	Brand *	Model *	Model Name *	Kilowatts (kW) †	Ports per Charger †	Quantity †
⊗ Level 2	ChargePoint	CP60##X-##A-	6000 Series	7.20	2	4

+ Add Item

- Identify the networking status:



- Charging equipment installed at public and workplace sites must be networked charging equipment.
  - If you selected a Multi-family Housing Site, you may select “Networked” or “Non- Networked.”
    - *Note: Networking is recommended at Multi-family Housing Sites with 5 or more ports.*
- Identify your network provider.

**Example:**

<p><b>Please identify the L2 networking status: *</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Networked <span style="float: right;">▼</span></div> <p><small><i>Note: public and workplace sites are required to be networked. Networking is recommended at MFH sites with 5 or more ports.</i></small></p>	<p><b>Please identify your network: *</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">ChargePoint <span style="float: right;">▼</span></div> <p><small><i>Note: networking is required for public and workplace sites and recommended for MFH sites installing 5 or more ports.</i></small></p>
--	--

- If you select “Publicly Accessible Parking Site,” or “Workplace” an additional field will show up, “How many hours will the Level 2 charger(s) be available to the public per week”. Publicly accessible parking sites must meet the requirement of at least 60 hours per week.
  - Enter the number of chargers that will be available to the public. Example: If the chargers are available 24 hours per day, 7 days per week, that is  $24 \times 7 = 168$  hours per week.
  - *Note: Under this program, public chargers must be available to the public for a minimum of 60 hours per week.*

**Example:**

**How many hours will the Level 2 chargers be available to the public per week?**

60

*Note: public chargers must be accessible to the public for a minimum of 60 hours per week.*

- 
- Next, from a drop-down menu, indicate if you plan to charge a fee for charging station use:
  - Yes
    - If yes, enter the rate of charge per kilowatt hour (kWh).
    - If yes, check the boxes for offering a Credit/Debit Card and a toll-free number. *Note: These are both requirements of the program.*
  - No
  - Undecided

**Example:**

<p><b>Will you charge a fee for charging at the ports installed under this program? *</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Yes <span style="float: right;">▼</span></div>	<p><b>If yes, please provide the rate of charge per kWh: *</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">\$0.01</div>
<p><b>If using a rate of charge other than \$/kWh, please describe and justify:</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">NA</div>	
<p><b>If yes, please select the payment methods that are offered: *</b></p> <p> <input checked="" type="checkbox"/> Credit/Debit Card*              <input type="checkbox"/> Toll free number*              <input type="checkbox"/> Other       </p>	

\*Required

- Enter the length of the warranty in years.
  - All stations must have a minimum 5-year warranty.
  - This can be issued by a manufacturer, third party, or contractor.
  - Write in the party responsible for maintenance and repair.

**Example:**

**Length of warranty (years): \***

5

*Warranty can be issued by a manufacturer, third party, or contractor and must be for a minimum of 2 years. Extended warranties are encouraged.*

**Party responsible for maintenance and repair: \***

ChargePoint

*Note: public projects must have a maintenance contract or Service Level Agreement (SLA) with a third-party qualified to maintain the equipment.*

- For the question, “Is the project site participating in another EV infrastructure incentive program(s)?” Select “Yes” or “No.”
  - If “Yes,” please list the other incentive programs from which your project will benefit (e.g., utility program, federal grants (not including federal tax credits) and rebates).
  - Write in the total incentive amount that is expected for the project site (not including the CCR rebate).

**Example:**

**Is the project site participating in another EV infrastructure incentive program(s)?**

Yes  No

*Note: This includes utility, state, local and federal grants and rebates.*

**Please list the other incentive programs from which this project will benefit (e.g. utility incentives, other state or federal grants, etc): \***

Utility Incentive \$100  
State Incentive \$100

**Total incentive amount expected for the project site (not including CCR rebate): \***

\$200.00

The following questions relate to the Alternate Fuels Data Center (AFDC). You must be able to answer “Yes” to all of the following questions.

- *Note: This is a requirement of the program.*

**Example:**

**Has each new charger installed as part of this project been reported to the Alternative Fuels Data Center for inclusion in their Alternative Fueling Station Locator tool?**

Yes  No

*Note: this is a requirement of the program. [Submit a new station here](#)*

The following questions relate to Oregon's Clean Fuels Program. You must be able to answer yes to the following questions.

- *Note: This is a requirement of the program.*
- The Clean Fuels Program encourages reductions in carbon intensity by allowing a fuel provider to sell credits they have earned by going beyond the reduction goals for that year.
- Those excess credits can be saved to offset future deficits the entity may incur or for future sales as demand increases.

**Example:**

Has the EV charging equipment owner registered to be a credit generator in Oregon's Clean Fuels Program?

Yes  No

*Note: this is a requirement of the program. [Visit the link here.](#)*

Has each charger been registered as a fuel supply equipment in Oregon's Clean Fuels Program?

Yes  No

*Note: this is a requirement of the program. [Visit the link here.](#) Email this address for additional assistance [OregonCleanFuels@deq.oregon.gov](mailto:OregonCleanFuels@deq.oregon.gov)*

## File Uploads

- **Identify any permits required for installation.**
  - Write out all permits that were required for installation.
  - Upload a scan of any required permits in PDF format.
  - If no permits were required, upload a letter from the Authority Having Jurisdiction that no permit was required.
  - If you are unsure of what permits were required, contact your county or licensed installer.

**Example:**

### File Uploads

Please identify any permits required for installation: \*

Final Electrical

*Contact your county or installer for local permitting requirements. If no permit is required, note that and upload a letter from the Authority Having Jurisdiction stating that no permit is required.*

Scan of Required Permits (pdf format): \*

or drag files here.

*\*Alternatively, please upload a letter from the Authority Having Jurisdiction (AHJ) that no permit was required.*

- **Upload requires site photos of installed charging equipment.**
  - Photos must be in (PDF or PNG format).
    - Photo(s) of the charging equipment installed at the site that clearly shows the required onsite signage or pavement markings.
    - Serial number photo: required for each charging port.
    - Customer support number photo, showing location on or near charging equipment (required for networked equipment).
    - Pricing display photo, clearly showing pricing per unit of sale and location on or near charging equipment (required for projects that charge a fee for charging).

**Example:**

**Required Site Photos (pdf or png format): \***

or drag files here.

Please include:

- Photo of EV charging equipment installed at the site that clearly displays the onsite signage or pavement markings.
- Photos of serial numbers for each station
- Photo of customer support number, showing location on or near charging equipment
- Photo of pricing display, showing pricing per unit of sale and location on or near charging equipment (where applicable)

- As the final step on this page, enter your W-9 address as stated on your W-9 form and upload the form.
  - Enter the address that is listed on the W-9 form.
    - *Note: Rebates will be sent to the address that is listed on the W-9 form.*
  - Upload the W-9 form in PDF format. Confirm that the information on the W-9 is correct by selecting the check box.
    - *Note: The W-9 form must be signed and dated within the last year.*
    - *The EIN listed in the application must match the EIN on the W-9.*

**Example:**

**W-9 Street Address (Equipment Owner Organization): \***

1234 Example St

Address Line 2

Portland Oregon 12345

*The rebate will be sent to the address listed on the W-9.*

**Current W-9 Form (pdf format): \***

or drag files here.

*Must be signed and dated within the last year. Please do not include a social security number.*

I have double-checked that the information entered on the W-9 form uploaded above is correct.

*Note: errors in the W-9 form will delay payment. Please be sure both the organization and business names (if applicable) are correct.*

**Employer Identification Number (EIN)**

123456789

## Section 5:Rebate Calculation Worksheet

- Enter itemized project costs in the appropriate fields. The costs must match the amounts listed on the invoices.
- Upload paid invoice for equipment in PDF format.
- Upload paid invoice for installation in PDF format.
- The Total Eligible Project Costs are calculated from all of the itemized costs that you entered above.

### Example:

#### Section 5: Rebate Calculation Worksheet

Please enter itemized project costs below.

##### Equipment: \*

\$100.00

##### Installation, including labor and materials: \*

\$100.00

##### Planning, engineering, design: \*

\$100.00

##### Electric service upgrades (incl. stub outs, transformer, electric panels, utility service order, etc): \*

\$100.00

##### Project signage: \*

\$100.00

##### Site lighting: \*

\$100.00

##### Network agreement (up to 3 years, paid in advance): \*

\$100.00

##### Maintenance contract (up to 5 years, paid in advance): \*

\$100.00

##### ADA compliance costs (e.g. curb cuts, path of travels, striping): \*

\$100.00

##### Electric Micromobility Accomodations (e.g. add-ons for device security, 110/120V outlet): \*

\$0.00

##### Extended Warranty (up to five years): \*

\$100.00

- Next, enter the total ineligible costs, with details on the breakdown of ineligible project costs.
  - *Note: Ineligible costs include: pre-existing equipment, EV charging equipment leasing costs, real estate acquisition costs, construction or general maintenance of buildings and parking facilities, local permit costs, administrative costs, electric supply costs, any project costs offset by other incentive programs, and any costs incurred prior to the Program Effective Date.*

**Example:**

**Total Ineligible Project Costs: \***

\$50.00

*Ineligible costs include: pre-existing equipment, EV charging equipment leasing costs, real estate acquisition costs, construction or general maintenance of buildings and parking facilities, local permit costs, administrative costs, electric supply costs, any project costs offset by other incentive programs, and any costs incurred prior to the Program Effective Date.*

**Please share details on breakdown of ineligible project costs: \***

Permitting Costs

*Details provided will help ODOT better understand project costs for future funding rounds.*

- The Base Rebate Calculation is based on the per-port rebate.
  - Example: If 8 charging ports are installed for a Workplace Site, the base rebate calculation is  $\$3,500 \text{ per port} \times 8 \text{ ports} = \$28,000$ .
- The Eligible Project Costs are calculated as 75% of the Total Eligible Project Costs.
  - Example:  $\$1,000 - \$200 \text{ additional incentives} \times 0.75 = \$600$ .
- A final rebate amount listed as the Total Rebate is determined by the per-port rebate multiplied by the total number of ports (with a maximum of 8 ports per site) or 75% of Eligible Project Costs, whichever is less. This applicant would receive \$600 in rebates.

**Example:**

**Total Project Costs**

\$1,050.00

**Project Site Type**

Workplace

**Total Level 2 Charging Ports:**

8

**Total Level 1 Charging Ports (MFH or Workplace only):**

0

**Additional incentives received:**

\$200.00

**Total Eligible Project Costs Less Additional Incentives**

\$800.00

**Base Rebate Calculation**

28,000.00

**Eligible Project Costs - 75% Calculation**

600.00

**Total Rebate:**

\$600.00

*Note: this calculation represents the lesser of the base rebate \* # plugs or 75% of total eligible project costs.*

## Section 6: Signature

In Section 6, read and check all relevant boxes, digitally sign by typing or drawing your signature, and date the application. Click “Submit.”

## Example:

### Section 6: Signature

Please read, check all relevant boxes below, and sign.

- I have read and agree to the requirements outlined in the Round 2 Program Guidelines.
  
- I have uploaded the following required documents:
  1. A copy of at least one itemized project quote from equipment providers/installers for EV charging station installation **(pre-installation only)**
  2. Site Verification and Recipient Acknowledgement Form **(all applications)** [Site Verification and Recipient Acknowledgement Form](#)
  3. A copy of paid invoices for the following: equipment, installation, networking agreement, if applicable (up to 3 years), maintenance or service level agreement (required for public projects, encouraged for others; up to five years) **(post-installation only)**
  4. A copy of any required permits or a letter from the Authority Having Jurisdiction (AHJ) that no permits are required **(post-installation only)**
  5. Equipment Owner W-9, signed and dated in last year **(post-installation only)** [W-9 Form](#)
  6. The following photos **(post-installation only)**:
    - Installed site photo, clearly showing both the charging equipment and the required onsite signage.
    - Serial number photo, required for each unit
    - Customer support number photo, clearly showing its location on or near the charging equipment (required for networked projects)
    - Pricing display photo, clearly showing the price per unit of sale and its location on or near the charging equipment (required for projects that collect a fee for charging)
  
- I certify under penalty of perjury that, to the best of my knowledge, the information provided in this application and supporting documentation is accurate.

#### Comments for Application Reviewer:

Please enter any additional information that you would like the CCR program staff to know about the project.

#### Signature \*

John Doe

draw type

#### Date \*

3/1/2024

By submitting this application, you acknowledge that you have read, understand and agree to the Community Charging Rebates program terms and conditions.

Once you submit your online application, you will receive an email confirmation from Community Charging Rebates <[notifications@cognitofrms.com](mailto:notifications@cognitofrms.com)> to the email address that was submitted in the

online application. If you do not see a confirmation email shortly after submitting your application, check your spam or other email filter folders for a confirmation from Cognito. See the example confirmation below.

**Example:**

Make sure to save the application number in case you need to contact ODOT or Forth about your application.



Applications will be accepted, reviewed, and reserved on a first-come, first-served basis. Once ODOT reviews your application, you will be notified through with message clarifying one of the following:

1. Your application was accepted, and you will receive your rebate within 45 business days of application approval.
2. Your application was found incomplete and additional information is requested. You will have 10 calendar days to correct any errors. If errors are not corrected in this timeframe, the application will be denied, and the reserved funds will be reallocated.
3. Your application was found ineligible. You will receive an email letting you know why your application is ineligible and the application will be denied.

## Resources

All the resources and links that have been mentioned in this guide or developed to support applicants through the process are listed below.

- [Community Charging Rebates Program Guidelines](#)
- [CCR Frequently Asked Questions](#)
- [Site Verification and Recipient Acknowledgment Form](#)
- [List of Qualified Chargers](#)
- [Required Documents Checklist](#)
- [Detailed List of Eligibility Requirements](#)
- [Form W-9](#)
- [Questions to Ask Your Utility Provider](#)
- [Ideal Site Host Locations](#)



- [EV Charging 101](#)
- [State of Oregon - Find Your Utility](#)
- [Alternative Fueling Station Locator](#)
- [Oregon Fuels Reporting System](#)
- [Registering Fuel Supply Equipment](#)