

ODOT Community Charging Rebates Pre-Installation Application Guide

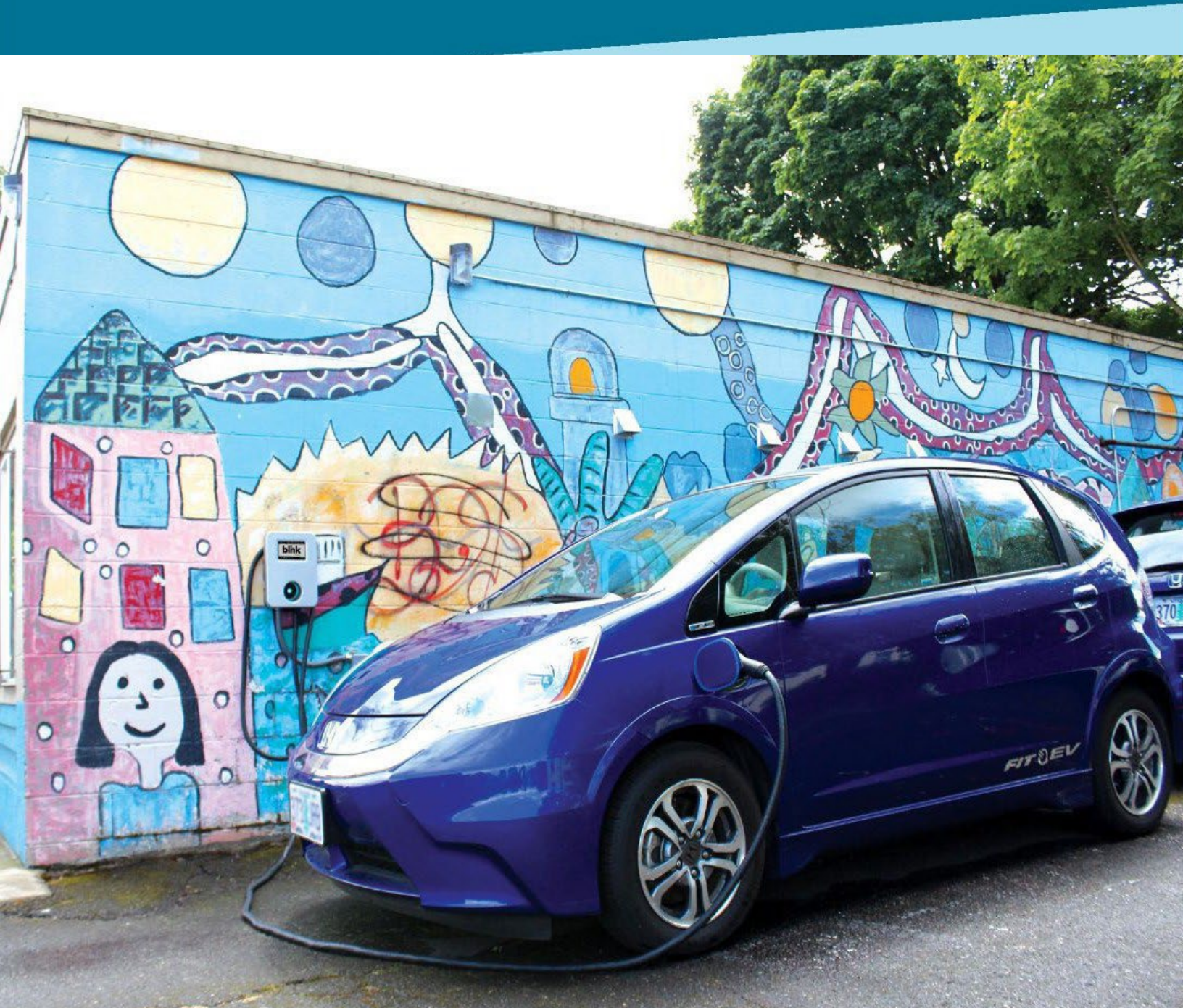


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Overview

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 December 17th, 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 the Pre-Installation Application:

- [Site Verification and Recipient Acknowledgment \(SVRA\) Form](#) (all applicants must submit the SVRA Form)
- One quote for EV charging station equipment and installation
- 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](#))
- Expected incentive amount from a utility (for applicants pursuing additional incentives only)

After you complete the project and install chargers, you will complete Part 2 of the application. You will need the following documents and information:

- 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, with a signed maintenance contract.
- Copy of final electrical inspection required
- [Form W-9](#)
- Photos

1. Installed site photo: Photo of the charging equipment installed at the site that clearly shows the required onsite signage mounted on a pole or pavement markings.
2. Serial number photo: required for each charging port.
3. Customer support number photo, showing location on or near charging equipment (required for networked equipment).
4. 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).

If you have any questions or need assistance with your application, please contact the Forth CCR team at 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 applicant must be the person/entity incurring the project costs.*
- 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:

Section 1: Applicant Information

Applicant Type *

Site Owner



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? *

Pre-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: *

John

Doe

Applicant Contact E-mail: *

communitychargingrebates@odot.oregon.gov

Confirmation E-mail: *

communitychargingrebates@odot.oregon.gov

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

Applicant Contact Phone: *

(123) 456-7890

Applicant Organization Name: *

Forth

Applicant Organization Type: *

Non-Profit

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: Pre-Qualification Checklist

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 (5) 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.](#)

After entering the basic project information, you will move the planned number of Level 2 Ports:

- Enter the number of Level 2 (Level 1 is for Workplace or Multi-family Housing only) charging ports that you intend to install, which will then auto-calculate the total maximum rebate amount you are eligible for.

Example:

Planned # of Level 2 Ports: *

8

Note: a minimum of 4 ports are required for MFH applications.

Planned # of Level 1 Ports: *

0

Level 1 ports must be installed in conjunction with L2 ports and minimum L2 port requirements must be met to be eligible for a L1 rebate.

Rebate Reservation Amount

\$28,000.00

- ☒ I understand that the rebate reservation amount is an estimate only, calculated by multiplying the base rebate by the number of ports. Final rebate levels are awarded based on the lesser of the reserved amount or 75% of eligible project costs. This may result in final rebates that are less than the amount of reserved funding.

- *Note: The final rebate amount is determined by the per-port rebate multiplied by the total number of ports or 75% of Eligible Project Costs, whichever is less. The Rebate will be recalculated once the post installation portion of the application is filled out. List the charging station operator.*

Example:

Have you submitted more than one application for this project site address?

☒ Yes ☐ No

Select "Yes" if you're adding chargers to this site (including from previous rounds) or applying for chargers at the same address for different purposes (e.g., some chargers for employee use only and others for resident use only).

Please list the application ID: *

CCR-1-00, CCR-2-00

Include all application IDs that apply, except those labeled as denied or cancelled.

- If the applicant has submitted more than one application for a project site, list the Application ID in the text box to the right.
- 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).
- Next, indicate if the electric utility at the site location offers incentives for commercial or multi-family housing Level 2 charging stations and if you intend to apply.
 - *Note: Before applying for the CCR program, you must notify their 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.

Example:

Charging Station(s) Operator: *

Operator 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

- At the end of Section 3 (bottom of the page), upload the completed [Site Verification and Recipient Acknowledgment Form](#) and one quotes for EV charging station equipment and

installation.

- *Note: Each quote must reflect the same site design (e.g., number of ports by charger type), and those numbers must be identical to the information entered in the application form. Quotes must at least contain the equipment costs and the number of ports. A detailed engineering estimate must contain installation and equipment costs, the network agreement (including the number of months/length of time), and maintenance contact (including the number of months/length of time).*

Example:

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.

Please Upload a Project Quote Here *

Upload

 or drag files here.

A quote from a qualified charging station manufacturer or installed is required. ODOT highly recommends getting more than one quote where possible, to get a more realistic estimate of project costs.

Please note: quotes must include the number of ports by power level, the project site address and the total estimated project costs. Failure to include this information will result in an incomplete application.

Section 4: Signature

In Section 4, 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@cognitoforms.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 folder or other email filter folders for a confirmation from Cognito. See the example confirmation below.

Example:



Make sure to save the application ID (ex: CCR-1-25) 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 email with a message clarifying one of the following:

1. Your application was accepted, and funds have been reserved. The email will contain your Reservation Date (the same as the date you receive the notice that funding has been reserved). You will have 300 days from the Reservation Date to complete the installation, complete Part 2 of the application (Sections 4-6) and provide final documents to ODOT.
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.

After your project is complete and chargers are installed, return to the application to complete Part 2. Refer to the Post-Installation Application Guide for additional information.

If the project is reserved, you will be sent an email stating that the rebate has been reserved for the specific project.

You will select “open form” in the email to continue with the application, as seen below:

Applicants have 300 days from the Reservation Date to complete the installation and submit final documents, otherwise the application will be cancelled and any reserved funding will be reallocated.

Installation and final documents for this project must be complete and submitted by . When the installation is complete, please use the link provided to complete your application and upload the additional required documents.

If you have questions about your application, please contact the ODOT at communitychargingrebates@odot.oregon.gov. If you need technical assistance, please contact Forth at ODOTchargingrebates@forthmobility.org.

Thank you,

Community Charging Rebates Team

Open Form