



# Electric Vehicle Charging Incentives Manual

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## Electric Vehicle Charging Incentives Eligibility

The Clean Cars for All (CCFA) program offers up to \$2,000 for an additional electric vehicle (EV) charger rebate to grantees, or Participants, who have purchased or leased a new or used plug-in hybrid electric vehicle (PHEV) or battery electric vehicle (BEV). Participants are eligible to apply for the EV charger rebate after they have purchased a PHEV or BEV through the program and have completed their post-inspection to dismantle their old vehicle. **Participants are required to apply for the rebate within 60 days of purchasing their replacement vehicle.** The EV charger rebate is not guaranteed and is dependent on the program's funding availability and Participant's compliance with the Terms and Conditions and requirements in the EV Charger Rebate Manual.

Contact a case manager if you have any questions about program requirements or how to fill out the required forms at [CleanCars@gridalternatives.org](mailto:CleanCars@gridalternatives.org) or by calling 855-256-3656.

Participants can choose one out of the three options under the EV charger rebate:

### 1) Level 2 home charger installation (up to \$2,000)\*

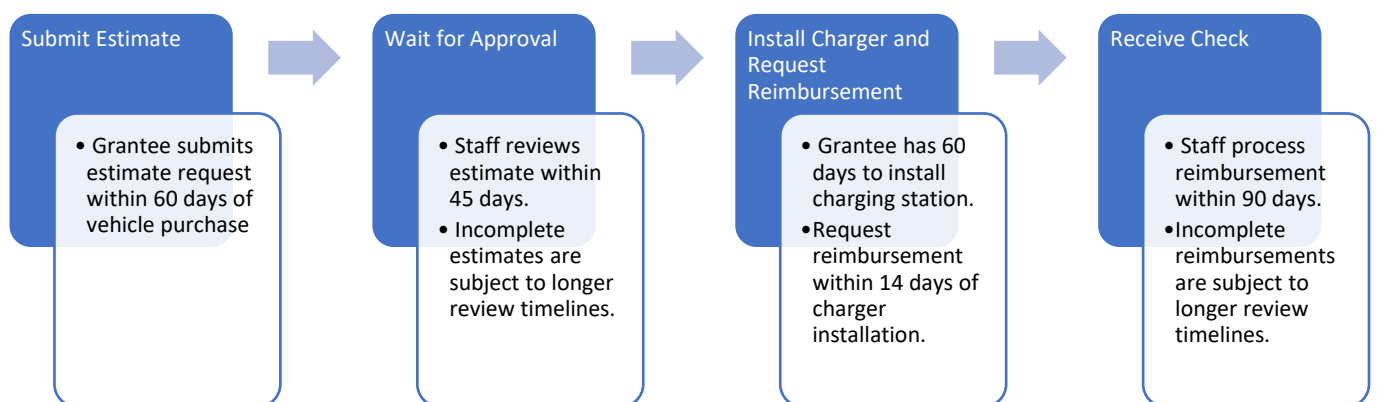
- Participant reimbursed for one level 2 charger and necessary costs for an installation at the home address listed on the original vehicle application. The charger requires a dedicated 208/240-volt supply circuit and may either be hardwired directly to an electrical service panel or plugged into a newly installed or pre-existing NEMA receptacle.

### 2) Level 2 portable charger (up to \$1,000)\*

- Participant reimbursed for one level 2 portable charger and must have a pre-existing 208/240-volt receptacle with a dedicated supply circuit at their home address listed on the original vehicle application to plug the charger into.

*\* Participants who live in a multifamily dwelling with four or more units are not eligible for the home charger installation or portable charger.*

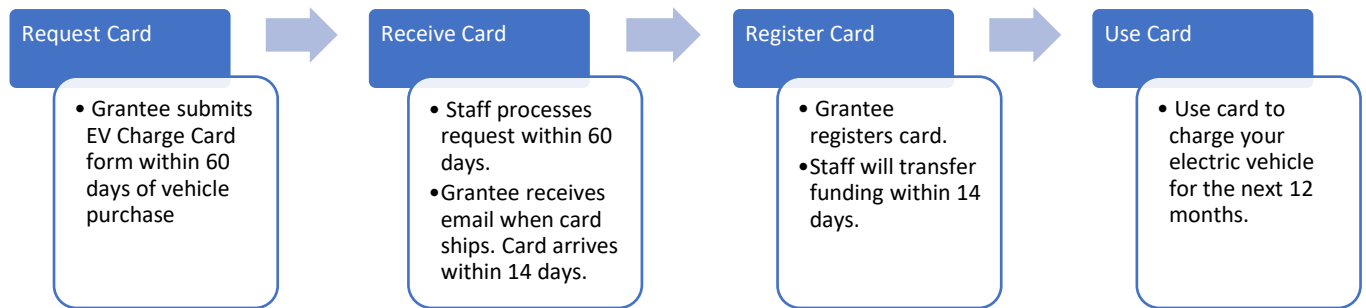
Summary of Home Charger Installation or Portable Charger Rebate Process:



### 3) EV charge card (up to \$1,000)

- Participant receives a pre-paid card (PEX card from Prepaid Expense Card Solutions) to use at eligible public EV charging stations for 12 months.

#### Summary of EV Charge Card Process:



### Eligible Home Charger and Portable Charger Costs

Eligible costs include equipment, materials, labor, and permits necessary for a Participant to safely charge their vehicle at a residence. The following items are reimbursable costs:

- Level 2 EV charger
- Labor costs related to site preparation, permit submission, charger installation, and time spent at final inspection
- Permitting costs
- Panel and sub-panel upgrades
- Material costs including, but not limited to receptacles, conduit, wire, breakers, miscellaneous fittings and connectors
- NEMA adapters for portable chargers that are designed to safely work with a specific charger brand
- Taxes and shipping

### Ineligible Charger Costs:

The following items are not reimbursable costs. Staff may deem other costs ineligible during the estimate approval process, depending on the project scope.

- CCFA administrative fees (e.g. contractor specifically charging for CCFA-related paperwork)
- Warranties, software, or service plans
- Maintenance or repairs
- Utility fees, including cost of electricity
- Extension cords, outlet splitters, smoke detectors, and carbon monoxide alarms

### Charging Safety

Charging an electric vehicle is safe and easy when done with proper, independently certified equipment. Underwriter's Laboratory (UL) is a nationally recognized testing laboratory where products must pass extensive safety testing before they can be certified and sold to the public. It is recommended that all Participants purchase a UL-listed charger that meets strict safety standards and has undergone rigorous testing. Work with your contractor to determine what equipment and electrical configuration will work best for your vehicle type and residence. Participants should follow all manufacturer suggested guidelines when operating the charger for safe usage.

## Home Charger Requirements

- The level 2 charger must be new, supplied by a dedicated 208/240-volt supply circuit, and deliver a minimum of 16 amps. The charger may either be hardwired directly to an electrical service panel or plugged into a pre-existing or newly installed NEMA receptacle.
- Level 2 home chargers do not have a price cap and may be purchased by the Participant or contractor. The average cost for a level 2 home charger is between \$500-\$700. Level 2 portable chargers may also be purchased under this option.
- Installation must be completed by a licensed contractor and at least one electrician on each crew must hold an Electric Vehicle Infrastructure Training Program (EVITP) certification.
- Electrical permits are required and may be obtained from the city or county's building division's permitting office by the contractor or Participant/property owner. The permit must be issued before the installation begins and a final inspection should be performed by the permitting office after the installation is completed.

Participant must either be the property owner of the residence where the charger is installed or they are required to receive permission from the property owner (e.g. landlord, homeowners association, etc.) before completing the installation.

Level 2 chargers that have a continuous amperage supply below 40 amps require a significantly higher amount of time to charge your electric vehicle. Charging times vary depending on your electrical system capacity, charging rate, vehicle battery size, and state of charge (empty vs. full battery).

## Licensed Contractors

A home charger must be installed by a contractor with a valid **Contractors State License Board (CSLB) C-10 license** and at least one electrician on each crew, at any given time, must hold an **Electric Vehicle Infrastructure Training Program (EVITP) certification** as required by [Assembly Bill \(AB\) 841 \(Ting, 2020\)](#) and [Public Utilities Code 740.20](#). One member of each crew may be both the contractor and an EVITP certified electrician. The EVITP certification requirement does not apply to single-family home residential electric vehicle chargers that can use an existing 208/240-volt receptacle.

Work done, costs incurred, and equipment purchased/ordered for installations that are performed by non-licensed contractors and contractors without an EVITP certified electrician are not eligible for reimbursement. Participant and household members may not perform any installations, even if they are a licensed contractor or EVITP certified electrician. Participant should verify their contractor has a valid and active license on the CSLB website:

<https://www.cslb.ca.gov/onlineservices/checklicense/checklicense.aspx>. EVITP certification for electricians can be verified by certification number or last name on the EVITP website:

<https://db.evitp.org/>

Participant will pay the licensed contractor directly for the invoice balance after the installation is completed. The Air District will not reimburse contractors and will directly reimburse Participant for eligible costs after a reimbursement request with all required documentation is submitted.

The Air District does not have an authorized contractor list. Participants may utilize the following resources to find qualified installers in their area. Please note, these are not exhaustive lists and contractors may sign up to be included in these databases on a voluntary basis.

- CALeVIP's Installers and Electricians search tool: <https://calevip.org/find-an-evsp>. Search for contractors by county and utilize the filter for EVITP status.
- EVITP's "Find a Contractor" tool: <https://evitp.org/california>

## Home Charger Estimate Approval Process

Participant must receive written estimate approval for their project from CCFA staff before proceeding with purchasing any equipment and installing the charger. Work done, costs incurred, and equipment purchased/ ordered prior to the approval of the estimate will not be eligible for reimbursement.

Submit the following estimate documents to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org):

### 1) **Home Charger Installation Estimate Summary Form (Attachment A)**

- Form must be completely filled out and signed by Participant

### 2) **Contractor's Estimate**

- Official estimate from a licensed contractor that includes the following information:
  - Contractor's business name and contact information
  - Participant's full name and installation address (do not include a family member or property owner's name)
  - Estimate date
  - Scope of work
  - Itemized costs for labor, materials, and permits
  - Charger manufacturer and model

### 3) **Charger Equipment Specification Sheets**

- Provide a URL web address to product page or technical specifications document (screenshot of product page can be provided in addition)

**Estimates take up to 45 days for CCFA staff to review, but may take longer depending on application volumes.** Incomplete submissions are subject to additional delays or rejection.

**After receiving written estimate approval from CCFA staff, Participant may proceed with the licensed contractor that provided the estimate to complete the installation and purchase the charger, if the contractor will not be providing it.**

If Participant decides to change contractors after receiving an estimate approval, a new request must be submitted. Minimal changes to estimate costs and scope of work after an estimate approval do not require resubmission, but must be clearly reflected on the *Home Charger Installation Invoice Summary Form* (Attachment C) and on supporting documents with the final reimbursement request.

## Home Charger Installation

**Participant must complete the charger installation within 60 days of receiving estimate approval. Reimbursement requests must be submitted within 14 days of the project completion date or final payment of the invoice.** Requests submitted after the deadline will be evaluated on a case-by-case basis.

Electrical permits must be secured before the installation begins and may be acquired by the contractor or the Participant/property owner. All electrical work must be coordinated with utility companies and

permitting agencies and must meet all applicable state and local laws. A copy of the final electrical permit and associated costs must be submitted in order to receive reimbursement.

Once the installation is completed, Participant receives itemized invoice and pays the contractor for the amount in full. Participant should not pay the contractor for the entire invoiced amount until they verify the work has been completed, copies of permits and final inspections are obtained, and the *Home Charger Invoice Summary Form* (Attachment C) has been signed by the contractor to ensure proper documentation is obtained in a timely manner.

## Home Charger Reimbursement

Once a level 2 home charger is installed, the project has passed the final inspection, and the contractor has been paid in full, Participant must submit the following:

- 1) Home Charger Installation Reimbursement Request Form (Attachment B)**
- 2) Home Charger Installation Invoice Summary Form (Attachment C)** signed by the grantee and licensed contractor
- 3) Invoices**
  - Itemized invoice from contractor for level 2 charger installation, which includes:
    - Line-item costs for charger, labor, materials, and permit\*
    - Participant's full name and address of installation site
    - Contractor's name, business address, and phone number or email address
- 4) Proof of Payment**
  - If your total project cost is less than or equal to \$2,000, provide bank or credit card statements that match all invoiced payments. For cash payments made to a contractor, an invoice with a \$0 balance and cash listed as method of payment is accepted.
  - If your total project cost is greater than \$2,000, submit one or more of the following that match all invoiced payments:
    - Bank account or credit card statement
    - Paid invoice from contractor with \$0 balance and method of payment (e.g. credit card, check, cash)
    - Credit card receipt
    - Check copy (cancelled)
- 5) Permit**
  - Copy of the final permit that shows the permit number, issue date, site address, requestor, permit type, and description of work
- 6) Photos**
  - Photo(s) of installed charger plugged into the CCFA vehicle
- 7) Form W-9 (Request for Taxpayer Identification Number and Certification)**
  - This document should reflect the Participant's current address and is where the Air District will send the reimbursement check.
    - [Click here to download the PDF form.](#)
    - [Click here to view an example Form W-9.](#)

\*If Participant chooses to purchase the charger and/or obtain the permit themselves, separate invoices and/or proof of payment must be provided.

Reimbursements shall not exceed the final amount invoiced for the complete installation of a level 2 home charger or \$2,000, whichever is less. Reimbursement amounts will be rounded down to the nearest whole dollar amount.

Reimbursement checks will be mailed by the Air District to the address listed on the Form W9 within 90 days of receiving a complete and correctly filled out reimbursement request (invoices, proof of payment, permit, photos, *Home Charger Reimbursement Request Form* [Attachment B], and *Home Charger Invoice Summary Form* [Attachment C]). Staff may request additional information or clarification during the review process. Incomplete requests are subject to additional delays or cancellation if Participant does not respond to staff requests for information.

## Portable Charger Requirements

- Participant may purchase one new level 2 portable charger that delivers a minimum of 16 amps and any necessary adapters.
- Portable chargers must clearly state the charger is portable in the product description. Chargers that are required to be wall-mounted or do not state portable in their product description are ineligible.
- Participant must have a pre-existing NEMA receptacle, supplied by a dedicated 208/240-volt supply circuit, to plug the charger into. The receptacle must be able to safely support the charger amperage and be compatible with the selected charger.
  - If the selected charger plug is not compatible with the existing receptacle, a NEMA adapter may be selected from the same charger manufacturer and must be used according to the manufacturer's guidelines for safe operation. Only necessary NEMA adapters are eligible and may not be purchased as a back-up or if you do not have an existing compatible receptacle.

## Portable Charger Estimate Approval Process

Participant must receive written estimate approval for their project from CCFA staff before proceeding with purchasing the level 2 portable charger. Work done, costs incurred, and equipment purchased/ordered prior to the approval of the estimate will not be eligible for reimbursement.

Submit the following estimate documents to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org):

- 1) Portable Charger Estimate Summary Form (Attachment D)**
  - Supporting documentation that shows where the charger will be purchased and confirms the make, model, and amperage. Examples include:
    - Website URL link or screenshot of product page can be provided in addition)
    - Estimate (in-store or online)
  - Form must be completely filled out and signed by Participant
- 2) Photo of pre-existing NEMA receptacle**
- 3) Level 2 portable charger equipment specification sheet or website URL link**

**Estimates take up to 45 days for CCFA staff to review. Incomplete submissions are subject to additional delays or rejection. After receiving written estimate approval from CCFA staff, Participant may proceed with purchasing the portable charger.**

If Participant chooses to purchase a different portable charger after receiving estimate approval, a new request must be submitted.

## Portable Charger Installation and Reimbursement

**Participant must complete the charger installation within 60 days of receiving estimate approval.** Requests submitted after the deadline will be evaluated on a case-by-case basis.

After a level 2 portable charger is purchased and received, plug the charger into the existing 208/240-volt receptacle and plug the charger connector into the vehicle to verify the charger works.



Participant must submit the following to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org):

- 1) *Portable Charger Reimbursement Request Form (Attachment E)***
- 2) *Invoice or Receipt***
  - Itemized invoice or receipt for portable charger and any adapter that includes the make, model, cost and method of payment.
- 3) *Proof of Payment***
  - Bank or credit card statements that shows the amount paid for transactions that match the invoice/receipt amount(s) for the portable charger and any adapter.
- 4) *Photos***
  - Photo(s) of portable charger and any adapter plugged into the 208/240-volt receptacle and plugged into the CCFA vehicle
- 5) *Form W-9 (Request for Taxpayer Identification Number and Certification)***
  - This form should have your current address and is where the Air District will send your reimbursement check.
    - [Click here to download the PDF form.](#)
    - [Click here to view an example Form W-9.](#)

Reimbursements shall not exceed the final amount paid for the level 2 portable charger and any adapters, or \$1,000, whichever is smaller. Reimbursement amounts may be rounded down to the nearest whole dollar amount.

Reimbursement checks will be mailed out by the Air District within 90 days of receiving a complete reimbursement packet, which includes the *Portable Charger Reimbursement Request Form* (Attachment E), proof of payment, and photos. Staff may request additional information or clarification during the review process. Incomplete requests are subject to additional delays or cancellation if Participant does not respond to staff requests for information.

## EV Charge Card Overview

Participants who submit a CCFA application after February 2, 2024 and purchase a PHEV or BEV through the program are eligible to receive one EV charge card with an amount up to \$1,000. The amount issued may vary depending on funding availability. Funding is provided through a pre-paid card, or PEX card, by Prepaid Expense Card Solutions.

Participants have a 12-month timeframe, which begins on the date the card is issued, to spend the funding at public EV charging stations. Participants will receive an email notifying them when their card has been issued and shipped and what the deadline is to spend their funding. After 12 months, the card will be closed and any remaining funds are returned to the CCFA program. PEX cards come with a standard 3-year expiration date, which is unrelated to the 12-month timeframe to spend the funds.

If there is a balance after the 12-month deadline, Participants will automatically have a 30-day grace period to spend any remaining funds. This grace period accounts for the initial amount of time it takes for the Participant to receive the card and for staff to transfer funding.

## EV Charge Card Process

- 1) **Request card:** Submit your request within 60 days of purchasing a vehicle through the CCFA Program by filling out this form: <https://forms.office.com/r/Otufu34Yk6>. Staff will aim to process your request within 60 days of receiving a completed form.
- 2) **Receive card:** Participant will receive an email when the EV charge card is issued and mailed to their home address listed on their original vehicle application, which will also be the card's billing address. The card will take up to 14 days to arrive and is sent directly from PEX. For security reasons, cards arrive in plain white envelopes, do not reference the CCFA program, and are inactive until registered.
- 3) **Register card** on the PEX website: <https://dashboard.pexcard.com/registration>. You will be asked for your 16-digit card number and a six-digit verification code, which will be sent to your email address. CCFA staff will transfer funding and activate the card within 14 days of registration.
- 4) **Use card** to pay for charging sessions at public EV chargers for the next 12 months.

## EV Charge Card Use

EV charge cards can be used to pay for charging sessions to charge an electric vehicle at Level 1, Level 2, and Supercharger/DC Fast charging stations that are open to the public or may have restricted access, such as workplaces, residential properties, and private parking lots.

The card is designed to work with the following charging station providers:

- Blink
- ChargePoint
- Chargeie
- ClipperCreek
- Electrify America
- EV Connect
- EverCharge
- EVgo
- FLO
- Powerflex
- Rivian
- SemaConnect
- Shell Recharge
- Tesla
- Volta

Most charging stations will require you to download an app on your smartphone and attach the card as your method of payment. Other chargers may have card readers or a phone number to pay over the

phone. If you have trouble initially adding the card, try adding it multiple times, through another payment platform, such as Apple Pay or Google Wallet, or contacting the charging company's customer service. Specifically for Tesla, Participants have reported success after attempting to add the card at least four times to the app in the Charging section as the method of payment before the card was accepted.

EV charge cards may not work in cases where the charging station operator is not using an EV charging merchant code or standard merchant name that matches the providers in the list above. Participants may not be able to use the full amount of an issued PEX card due to charging vendors preauthorization charges and requiring a minimum card balance. For example, if a Participant only has \$10 remaining on their EV charge card and tries to use a charger with a vendor that requires a \$50 pre-authorization amount, the card will be declined for insufficient funds. The EV charge card will also be declined if a charging session cost is greater than the balance remaining on the card. For example, if the EV charge card has a \$10 balance and the charging session is \$12, the card will be declined.

If the EV charge card balance falls below \$50, Participant will have 30 days to spend any remaining funds. After 30 days, CCFA staff may close the card and any remaining funds will be forfeited.

If you encounter any issues using the EV charge card, contact a case manager by emailing [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org).

## Ineligible Purchases

EV charge cards can only be used to pay for EV charging. Any other purchases, including alternative fuels (gasoline, hydrogen, biofuel, natural gas, etc.), charging station equipment, personally owned EV chargers, adapters, batteries, electricity costs, insurance, vehicle connectivity services or upgrades, maintenance, repairs, or any merchandise sold by vendors are not eligible. Use of the card for anything other than EV charging from an EV charging provider will be considered a violation of the program's terms and conditions and the charges will be subject to repayment, cancellation of the card, and forfeiture of any remaining funds. Staff are notified of all transactions and reserve the right to ask for supporting documentation for any suspicious transactions.

## PEX Card Support

**PEX Cardholder Guide:** For answers to common questions, view the Cardholder Guide on the PEX website: <https://support.pexcard.com/s/>.

**Check your card balance:** After you set up your PEX account, you can manage your card and check your card balance on the website ([dashboard.pexcard.com](https://dashboard.pexcard.com)), the mobile app, or by calling 866-685-0898.

**Lost, stolen, or damaged cards** should be reported to PEX immediately. PEX will issue a replacement card. After you receive the replacement card, contact CCFA staff at [cleancarsforall@baaqmd.gov](mailto:cleancarsforall@baaqmd.gov) for assistance with setting up your replacement card and restoring your card balance. If you need to dispute a transaction, disputes must be reported to PEX Customer Service no later than 60 calendar days after the transaction is posted to the PEX card account. For fraudulent transactions, contact CCFA staff and PEX Customer Services immediately for support with blocking future transactions or closing the card.

## Where to Find Public EV Charging Stations

- Alternative Fuels Data Center: <https://afdc.energy.gov/fuels/electricity-locations>
- ChargeHub: [chargehub.com/map](http://chargehub.com/map)
- ChargePoint: [driver.chargepoint.com](http://driver.chargepoint.com)
- Electrify America: [www.electrifyamerica.com/locate-charger/](http://www.electrifyamerica.com/locate-charger/)
- EVgo: [www.evgo.com/find-a-charger](http://www.evgo.com/find-a-charger)
- PG&E: [ev.pge.com/charging-stations](http://ev.pge.com/charging-stations)
- Plugshare: [www.plugshare.com](http://www.plugshare.com)
- Tesla: [www.tesla.com/findus](http://www.tesla.com/findus)

## Frequently Asked Questions

### **Can I obtain an estimate from a contractor before I've purchased a replacement vehicle or dismantled my old vehicle?**

Yes, Participants may pursue an estimate from a licensed contractor, but cannot enter into any agreements with the contractor for the work, begin work, or purchase the charger before they receive written estimate approval.

### **Can I receive a grant for only the charger installation if I already have a new level 2 charger?**

These situations will be considered on a case-by-case basis if you are able to provide documentation that your replacement vehicle came with a new level 2 charger or you are receiving the charger from another incentive program.

### **Do I need a permit?**

Home charger installations require a permit that must be issued before any work on the installation begins. The permit may be obtained from the city or county's building division's permitting office by the contractor or the Participant/property owner. After the installation is completed, Participant should coordinate with the contractor on the final inspection. Installations performed without a permit will not be eligible for reimbursement. The portable charger option does not require a permit, but a Participant must have a pre-existing 240-volt receptacle to plug the charger into.

### **Can I get reimbursed for installing a charger at a different location than the address I used to apply to Clean Cars for All?**

No, a Participant may not install a charger at a different address other than the home address listed on their original CCFA application. However, if the Participant has moved and the new address is located in an eligible zip code, an installation may be permitted with pre-approval from CCFA program staff. Email [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org) with the request and include a new [Form W-9](#) and proof of residency that is dated within the last 90 days (e.g. utility bill, cell phone bill, pay stub, property tax, or a USPS change of address confirmation).

### **Do I need to use an EVITP certified electrician?**

Participants are required to use an EVITP certified electrician for the home charger installation. The only exception is if you live in a single-family residence and have a pre-existing 208/240-volt NEMA receptacle for the charger (in this case only a C-10 licensed contractor is required).

### **Can I purchase a level 2 charger that is not portable and needs to be wall-mounted under the portable charger option?**

No, chargers that need to be wall-mounted still require a C-10 licensed contractor to perform a site assessment, calculate the electrical load, and mount the charger. This project type would fall under the home charger installation rebate. In these cases, permits may be required depending on the type of work performed. Consult with your contractor and local building permit department for more information.

**Can I install my own charger and get reimbursed for my time?**

No, even if a Participant is a licensed contractor or EVITP certified electrician, Participants are not permitted to install their own home charger.

**Do I need to pay taxes on the rebate amount?**

As of January 1, 2023, the Air District no longer issues a Form 1099-G (Certain Government Payments) to CCFA Participants. The Air District cannot give you individual tax advice, and we would recommend that you talk to a tax professional about your own tax situation.

## Home Charger Installation Estimate Summary Form

This form is filled out by the Participant and summarizes the cost estimates for your level 2 home charger installation project. Estimate approval is required before purchasing any equipment and installing the charger.

Participant Information		
Participant Name:		Electric Vehicle Project Number:
Home Address (on electric vehicle application):		Vehicle Purchase Date:
Installation Address (if installation address is different from home address, a Form W-9 and Proof of Residency is required for submission):		
Contractor and Electrician Information		
Business Name:		Business Address:
Phone Number:		E-mail Address:
Contractor's Name:		C-10 License Number:
Electrician's Name:		EVITP Certification Number:
Charger Type and Costs		
Charging Station Cost:		Manufacturer:
Sales Tax	Shipping and Handling:	Model
<b>Total Charger Cost:</b>		Amperage:
Charger will be purchased by: <input type="checkbox"/> Contractor <input type="checkbox"/> Participant		
If charger is purchased by Participant, include a website URL link, screenshot, or quote from store where charger will be purchased:		
Installation Costs		
Labor Cost:		Permit Cost
Materials Cost:		Permit will be obtained by: <input type="checkbox"/> Contractor <input type="checkbox"/> Participant
Panel/Subpanel Upgrade Cost:		Taxes:
<b>Total Installation Cost:</b>		Charger Installation Type: <input type="checkbox"/> Hardwired <input type="checkbox"/> NEMA Outlet
<b>Total Project Costs (charger costs + installation costs):</b>		

Project Installation Requirements Checklist	
<b>Participant Signature REQUIRED:</b>	
<b>Confirm the following:</b>	
<input type="checkbox"/> CCFA replacement vehicle is a plug-in hybrid or battery electric vehicle.	
<input type="checkbox"/> Previous vehicle has been brought to an authorized dismantler for a post-inspection and final dismantling.	
<input type="checkbox"/> EVSE is a new Level 2 charger with a minimum of 16 amps.	
<input type="checkbox"/> EVSE will have a dedicated 208/240-volt supply circuit and either be hard wired directly to an electrical service panel or plugged into a newly installed or pre-existing NEMA receptacle.	
<input type="checkbox"/> If the continuous amperage supplied to the EVSE is below 40 amps, I understand the use of lower amperage EVSE may significantly increase the time required to fully charge my vehicle.	
<input type="checkbox"/> An electrical permit will be requested by the contractor or myself and finalized before the project installation begins.	
<input type="checkbox"/> I certify that this project will comply with all <a href="#">AB 841 (2020)</a> requirements and the EVSE will be installed by a contractor with a C-10 license and an electrician with an Electric Vehicle Infrastructure Training Program (EVITP) certification.	
<input type="checkbox"/> I understand that work done, costs incurred, and equipment purchased/ ordered prior to the approval of the estimate will not be eligible for reimbursement.	
<input type="checkbox"/> I have confirmed the above requirements with the licensed contractor and procured an EVSE installation cost estimate that includes the following items:	
<input type="checkbox"/> Participant's full name, installation location, load calculations (demonstrating that the supply circuit and electrical service panels are sized for continuous EVSE load), itemized costs for labor, materials, and permits necessary for Level 2 charger installation.	
<input type="checkbox"/> If EVSE is not purchased by contractor, I have provided a separate cost estimate for the charger.	
<input type="checkbox"/> I intend to operate the charger for the remaining operational period of the CCFA replacement vehicle.	
<b>Participant Signature:</b> _____	<b>Date:</b> _____
<b>Comments:</b>	

## How to Submit Your Estimate Request

Submit your estimate request within 60 days of purchasing your plug-in hybrid or battery electric vehicle to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org) for approval before purchasing any equipment and beginning your installation. Estimate approvals may take up to 45 days.

### Required Documents

- 1) **Home Charger Installation Estimate Summary Form (Attachment A)**
- 2) **Official estimate from licensed contractor**
- 3) **Level 2 charger equipment specification sheet** or URL web address to product page with technical specifications





## Home Charger Installation Reimbursement Request Form

After your Clean Cars for All (CCFA) home charger project is completed, submit this form and the required supplemental documents to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org).

Participant Name: \_\_\_\_\_

Home Address Listed on original CCFA application: \_\_\_\_\_

Installation Address: \_\_\_\_\_

Date Installation Completed: \_\_\_\_\_

Total Eligible Project Costs (charger, installation, permit costs): \$ \_\_\_\_\_

Total Amount Requested for Reimbursement (max \$2,000): \$ \_\_\_\_\_

Please check the boxes below:

I have purchased a Plug-in Hybrid or Battery Electric Vehicle and retired my old car at an Authorized Dismantler through the CCFA Program.

I will submit the following required documents to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org):

**1) Home Charger Installation Reimbursement Request Form (Attachment B)**

**2) Home Charger Installation Invoice Summary Form (Attachment C)**

**3) Invoices**

- Itemized invoice from contractor for level 2 charger installation, which includes:

- a) Line-item costs for charger, labor, materials, and permit
- b) Participant's full name and address of installation site
- c) Contractor's name, business address, and phone number or email address

**4) Proof of Payment**

- If your total project cost is less than or equal to \$2,000, provide bank or credit card statements that match all invoiced payments. For cash payments made to a contractor, an invoice with a \$0 balance and cash listed as method of payment is accepted.

- If your total project cost is greater than \$2,000, submit one or more of the following that match all invoiced payments:

- a) Bank account or credit card statement
- b) Paid invoice from contractor with \$0 balance and method of payment (e.g. credit card, check, cash)
- c) Credit card receipt
- d) Check copy (cancelled)

**5) Copy of final permit**

**6) Photo(s) of installed charger plugged into the CCFA vehicle**

**7) Form W-9 (Request for Taxpayer Identification Number and Certification)**

## Home Charger Installation Invoice Summary Form

This form summarizes the final costs for the Participant's level 2 home charger installation project. The form is filled out by the Participant (contractor may assist if information is not available on the invoice) and signed by both the Participant and contractor. Participants have 60 days to complete the installation after receiving estimate approval.

Participant and Project Information		
Participant Name:		Electric Vehicle Project Number:
Estimate Approval Date*:		Installation Address:
Contractor and Electrician Information		
Business Name:		Business Address:
Phone Number:		E-mail Address:
Contractor's Name:		C-10 License Number:
Electrician's Name:		EVITP Certification Number:
Charger Type and Costs		
Charging Station Cost:		Manufacturer:
Sales Tax	Shipping and Handling:	Model
<b>Total Charger Cost:</b>		Amperage:
Charger purchased by: <input type="checkbox"/> Contractor <input type="checkbox"/> Participant		
Installation Costs		
Labor Cost:		Total Hours Spent on Installation:
Materials Cost:		Hourly Labor Rate (divide labor costs by total hours):
Permit Cost:		Permit obtained by: <input type="checkbox"/> Contractor <input type="checkbox"/> Participant
Panel/Subpanel Upgrade Cost:	Taxes:	Charger Installation Type: <input type="checkbox"/> Hardwired <input type="checkbox"/> NEMA Outlet
<b>Total Installation Cost:</b>		
<b>Total Project Costs (charger costs + installation costs):</b>		

**Project Installation Requirements Checklist****Participant Signature REQUIRED****Confirm the following:**

- EVSE is a new Level 2 charger with a minimum of 16 amps.
- EVSE has a dedicated 208/240-volt supply circuit and is either hardwired directly to an electrical service panel or plugged into a newly installed or pre-existing NEMA receptacle.
- If the continuous amperage supplied to the EVSE is below 40 amps, I understand the use of lower amperage EVSE may significantly increase the time required to fully charge my vehicle.
- A finalized electrical permit was obtained for the project installation.
- I certify that this project complied with all [AB 841 \(2020\)](#) requirements and the EVSE was installed by a contractor with a C-10 license and an electrician with an Electric Vehicle Infrastructure Training Program (EVITP) certification.
- I understand that work done, costs incurred, and equipment purchased/ ordered prior to the approval of the estimate will not be eligible for reimbursement.
- I have confirmed the above requirements with the licensed contractor and have received an itemized invoice for the EVSE installation that includes the following items:
  - Participant's full name, installation location, load calculations (demonstrating that the supply circuit and electrical service panels are sized for continuous EVSE load), itemized costs for labor, materials, and permits necessary for Level 2 charger installation.
    - If EVSE and/or permit is not paid for by the contractor, I have provided a separate invoice and proof of payment.
- I intend to operate the charger for the remaining operational period of the CCFA replacement vehicle.

I, \_\_\_\_\_, confirm the above requirements are correct and true and that the Home Charger Installation Invoice Summary Form is just a summary of the invoice(s) and not a contract.

**Participant Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Contractor Signature REQUIRED**

I, \_\_\_\_\_, confirm the above installation requirements are correct and true. I confirm that at least one electrician who holds an Electric Vehicle Infrastructure Training Program certification was on the installation crew. I understand that the Home Charger Invoice Summary Form is just a summary of the invoice(s) and not a contract.

**Contractor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Comments:****How to Submit Your Reimbursement Request**

This form is required to be submitted as part of the reimbursement request for your home charger installation project within 14 days of project completion or final payment to the contractor. Refer to the **Reimbursement Request Form (Attachment B)** for a complete list of required documents.

## Portable Charger Estimate Summary Form

This form is filled out by the Participant and summarizes the cost estimates for your level 2 portable charger project. Estimate approval is required before purchasing the equipment and plugging the charger into your existing receptacle.

Participant Information	
Participant Name:	Electric Vehicle Project Number:
Home Address (on electric vehicle application):	Vehicle Purchase Date:
Installation Address (if installation address is different from home address, a Form W-9 and Proof of Residency is required for submission):	
Pre-existing Receptacle Type (e.g. NEMA 6-20R, 14-50R, etc.):	
Charger Type and Costs	
Charger Cost:	Charger Manufacturer:
Charger Sales Tax:	Charger Model:
Charger Shipping and Handling:	Charger Amperage:
<b>Total Charger Cost:</b>	Charger Plug Type (e.g. NEMA 6-20P):
Where will the charger be purchased? Include a website URL link or attach a store quote.	
Adapter Type and Costs (optional)	
Adapter Cost:	
Adapter Sales Tax:	Adapter Manufacturer:
Adapter Shipping and Handling:	NEMA Adapter Type (e.g. 6-20, 6-20R to 14-50P):
Where will the adapter be purchased? Include a website URL link or attach a store quote.	
<b>Total Project Costs (charger costs + optional adapter):</b>	

Project Requirements Checklist
<p><b>Participant Signature REQUIRED:</b></p> <p><b>Confirm the following:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> CCFA replacement vehicle is a plug-in hybrid or battery electric vehicle.</li> <li><input type="checkbox"/> Previous vehicle has been brought to an authorized dismantler for a post-inspection and final dismantling.</li> <li><input type="checkbox"/> EVSE is a new Level 2 portable charger with a minimum of 16 amps.</li> <li><input type="checkbox"/> I certify that I have a pre-existing NEMA receptacle with a dedicated 208/240-volt supply circuit to plug the charger into and therefore <a href="#">AB 841 (2020)</a> requirements do not apply to my project.</li> <li><input type="checkbox"/> If the continuous amperage supplied to the EVSE is below 40 amps, I understand the use of lower amperage EVSE may significantly increase the time required to fully charge my vehicle.</li> <li><input type="checkbox"/> I understand that work done, costs incurred, and equipment purchased/ ordered prior to the approval of the estimate will not be eligible for reimbursement.</li> <li><input type="checkbox"/> I intend to operate the charger for the remaining operational period of the CCFA replacement vehicle.</li> </ul> <p><b>Participant Signature:</b> _____ <b>Date:</b> _____</p>
<p><b>Comments:</b></p>    

## How to Submit Your Estimate Request

Submit your estimate request within 60 days of purchasing your plug-in hybrid or battery electric vehicle to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org) for approval before purchasing any equipment. Estimate approvals may take up to 45 days.

### Required Documents

- 1) **Portable Charger Estimate Summary Form (Attachment D)**
- 2) **Photo of pre-existing NEMA receptacle**
- 3) **Level 2 portable charger equipment specification sheet** or URL web address to product page with technical specifications

## Portable Charger Reimbursement Request Form

After your Clean Cars for All (CCFA) portable charger is received and plugged into your pre-existing receptacle, submit this form and the required supplemental documents to [cleancars@gridalternatives.org](mailto:cleancars@gridalternatives.org).

Participant Information	
Participant Name:	Electric Vehicle Project Number:
Estimate Approval Date:	Installation Completion Date:
Installation Address:	Pre-existing Receptacle Type (e.g. NEMA 6-20R, 14-50R, etc.):
Project Equipment and Costs:	
Charger Manufacturer and Model:	Charger Amperage:
<b>Total Charger Cost (charger, taxes, shipping &amp; handling):</b>	<b>Total Adapter Costs (adapter, taxes, shipping &amp; handling):</b>
<b>Total Project Costs (charger costs + optional adapter):</b>	
<b>Amount requested for reimbursement (max \$1,000):</b>	

Please confirm the following and sign below:

- I have purchased a Plug-in Hybrid or Battery Electric Vehicle and retired my old car at an Authorized Dismantler through the CCFA Program.
- I understand that if the continuous amperage supplied to the installed EVSE is below 40 amps, the lower amperage may significantly increase the time required to fully charge my vehicle.
- I understand that work done, costs incurred, and equipment purchased/ ordered prior to the approval of the estimate will not be eligible for reimbursement.
- I intend to operate the charger for the remaining operational period of the CCFA replacement vehicle.
- I will submit the following required documents to [cleancars@gridalternatives.com](mailto:cleancars@gridalternatives.com):
- 1) Home Charger Installation Reimbursement Request Form (Attachment E)**
  - 2) Invoice/Proof of Payment**
    - Invoice/receipt for level 2 portable charger and any adapter that includes the manufacturer make & model, amperage, and costs.
    - o Proof of Payment: Bank or credit card statements that show the amount paid for transactions that match the invoice/receipt amounts for the portable charger and any adapter.
  - 3) Photo(s) of portable charger and any adapter plugged into pre-existing outlet and charger plugged into CCFA vehicle**
  - 4) Form W-9 (Request for Taxpayer Identification Number and Certification)**

I confirm that the above requirements provided in this request are correct and true.

Participant Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Request for Taxpayer Identification Number and Certification

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

**Give form to the  
 requester. Do not  
 send to the IRS.**

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	<b>1</b> Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)	
	<b>2</b> Business name/disregarded entity name, if different from above.	
	<b>3a</b> Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ <b>Note:</b> Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	Exempt payee code (if any) _____  Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____
	<b>3b</b> If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>	
	<b>5</b> Address (number, street, and apt. or suite no.). See instructions.	Requester's name and address (optional)
	<b>6</b> City, state, and ZIP code	
<b>7</b> List account number(s) here (optional)		

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

<b>Social security number</b>																														
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**Note:** If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person	Date
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they