

CHARGE READY PROGRAM TRACKING DATABASE BCD REFERENCE GUIDE



PURPOSE

The Charge Ready Program Tracking Database [AKA - *Back Office System (BOS)*] is a repository for program customer applications that were submitted via the Charge Ready Program Web Portal. The Tracking Database also serves as a tool for internal SCE stakeholders to track and progress an application through the entire Charge Ready Program process.

Each application depends on various stakeholders to update application statuses, add project notes, and add key meeting dates, etc. in order for the project to move smoothly through the Charge Ready Program process.

Important: Before using the Charge Ready Program BOS, please ensure you have access rights to the following SharePoint site and SCE shared folders. If you do not have access rights, please contact ChargeReady@sce.com to request access rights to the:

- Charge Ready Program SharePoint site
- Customer service CSBU5 shared folder:
<\\sce\workgroup\CSBU5\Energy Efficiency\ChargeReadyProgram>

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INSTALL MICROSOFT ACCESS TO SCE COMPUTER

If you do not have Microsoft (MS) Access on your computer, please use the job aid at the following link to request software to be installed on your machine:

<https://edisonintl.sharepoint.com/services/technology/Job%20Aids/Creating%20and%20Submitting%20a%20Software%20Request.pdf>

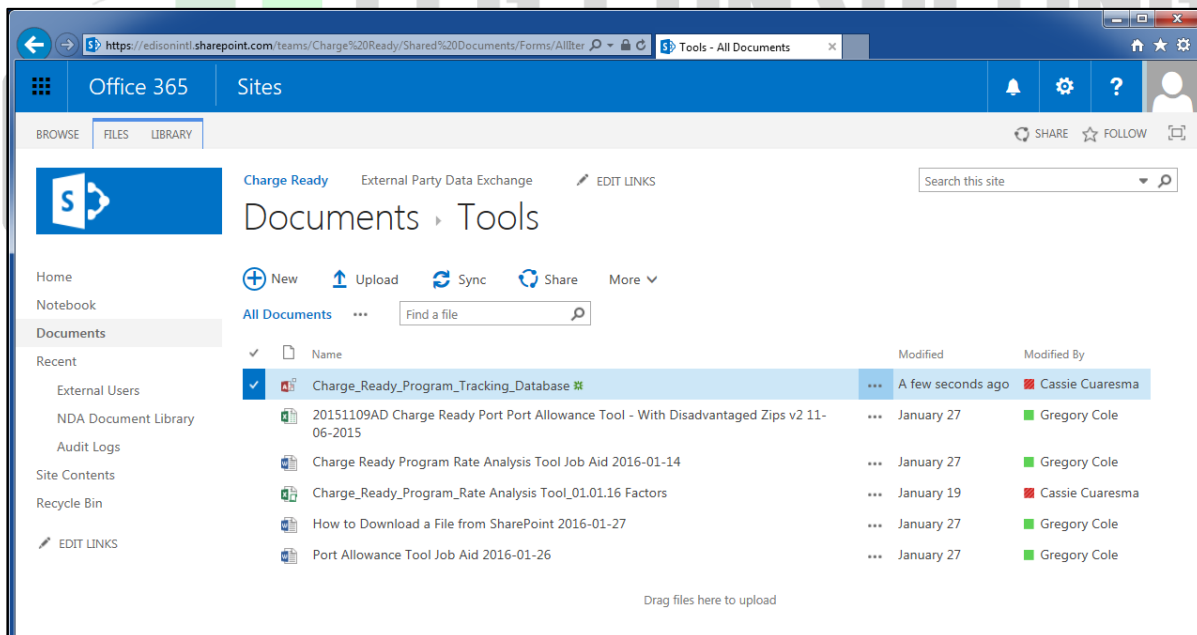
INSTALL THE CHARGE READY PROGRAM TRACKING DATABASE ON YOUR SCE COMPUTER

1. In your Internet Browser, copy and paste the following link and press Enter on your keyboard.

https://edisonintl.sharepoint.com/teams/Charge%20Ready/_layouts/15/start.aspx#/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fteams%2fCharge%20Ready%2fShared%20Documents%2fTools&Folder

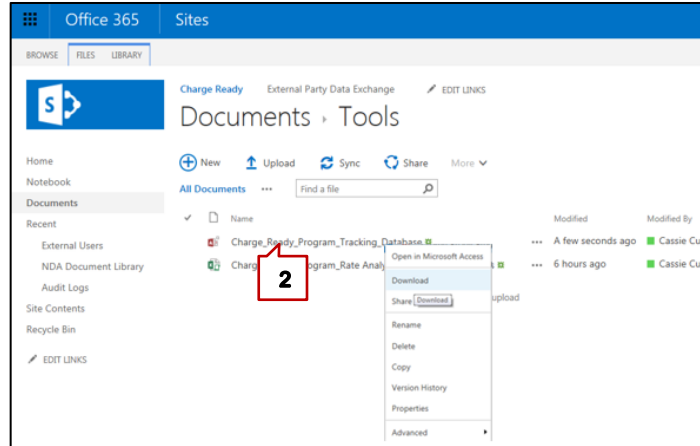
The Charge Ready Program SharePoint Document Tools screen displays.

Important: If you cannot access the site, contact ChargeReady@sce.com and request to provide access rights to this SharePoint folder. You will also need to request to the shared folder CSBU5.

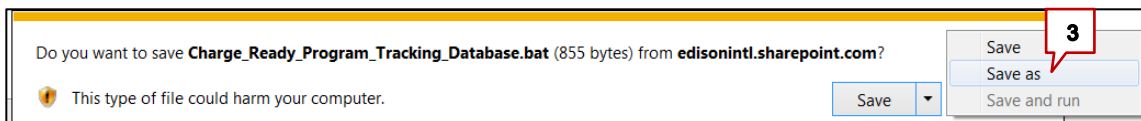


Important: Do not open the Tracking Database file on SharePoint. **It must be downloaded.**

- To download the file, right-click the Charge_Ready_Program Tracking_Database, and select Download.



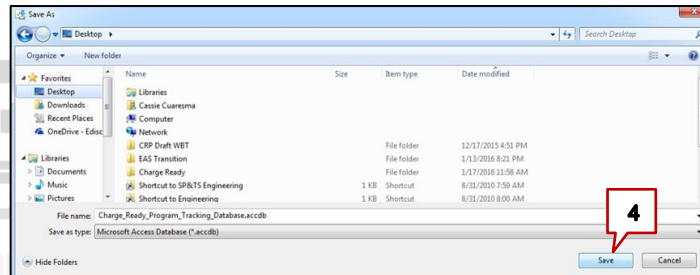
- Click the **Save** drop-down arrow and then click **Save As**.



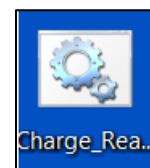
- Browse to the desired location (e.g., Desktop) to save the file to your computer and click **Save**.

Note: The download may take a few minutes.

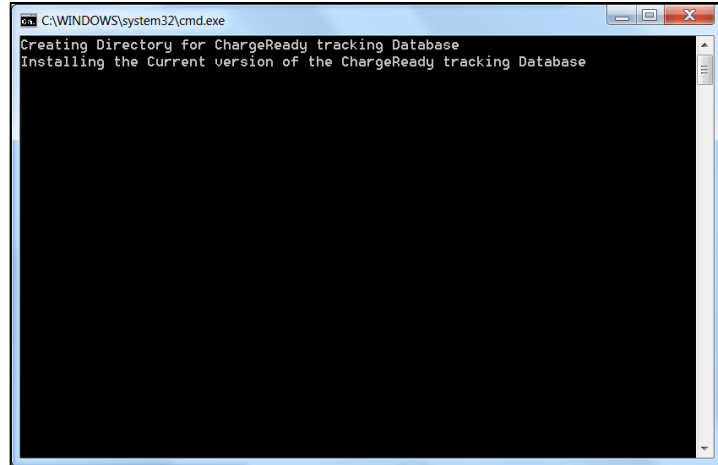
The Charge Ready Program Tracking Database file is saved to your computer.



- Double-click the new MS Access icon placed on your computer to launch the Charge Ready Program Tracking Database.

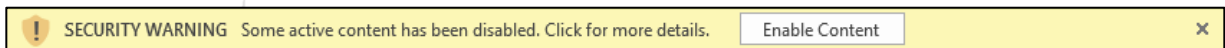


Note: The initial time you run the Charge Ready Tracking Database installs.

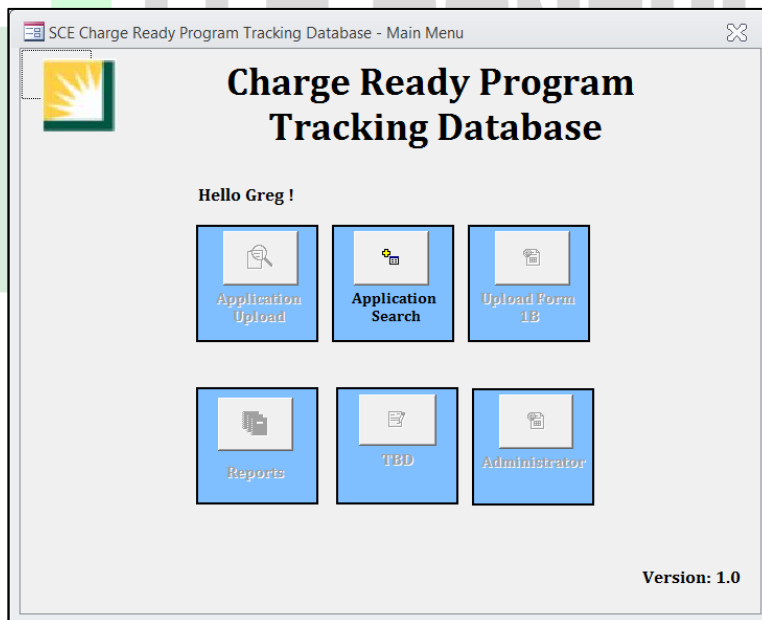


6. *If required, click **Enable Content**.*

Note: Failure to do so will cause the database to not work properly.



The Charge Ready Program Tracking Database displays.



NOTIFY BCD OF NEW CUSTOMER APPLICATION WITH ASSIGNED ACCOUNT MANAGER

The Charge Ready Program Tracking Database references the BCD Account Manager assignments that are used in CRM. Below is an example of the data used to confirm the Customer Participant’s assigned BCD Account Manager.

The Database does not upload this information real-time; rather, on a regular basis, the Database is updated with the latest BCD Account Manager assignments in CRM. If immediate updates are needed, please contact ChargeReady@sce.com and request for an ad hoc update to the BCD Account Manager assignments.

ID	SERV_ACCT_	CUST_ACCT_	CUSTOMER_	CUST_NUME_	SalesRepFir_	SalesRepLas_	SalesRepName_	SalesRepTitl_	SalesRepEmail	TERRTYPE
163712	43713093	377537071	OC BURGER BO	15572362	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163713	44329852	377537071	OC BURGER BO	15572362	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163714	43713193	377537071	OC BURGER BO	15572362	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163715	43935900	377957683	APPLE MIDCAL	15590041	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163716	43780592	377959820	APPLE SOCAL II	15590125	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163717	43780586	377959820	APPLE SOCAL II	15590125	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163718	43780580	377959820	APPLE SOCAL II	15590125	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163719	43780571	377959820	APPLE SOCAL II	15590125	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163720	43780570	377959820	APPLE SOCAL II	15590125	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch
163721	43780561	377959820	APPLE SOCAL II	15590125	CYNTHIA	MARTIN	CYNTHIA MARTIN	ZACM	CYNTHIA.MARTIN@SCE.COM	HighTouch

New customer applications are loaded on a daily basis to the Charge Ready Program Tracking Database from the Charge Ready Enrollment Portal. Using the Customer Account Number (CU), the Database will confirm the Account Manager assigned to the Customer Participant in the application.

If the Customer Participant is assigned to a BCD Account Manager, the Database will automatically send an email to the assigned BCD Account Manager, and copy BCD.ChargeReady@sce.com and ChargeReady@sce.com. The email details are as follows:

Email Subject: "CRP-2016-8000 Action Required: New Charge Ready Program Application"

Email Content: "Hello,

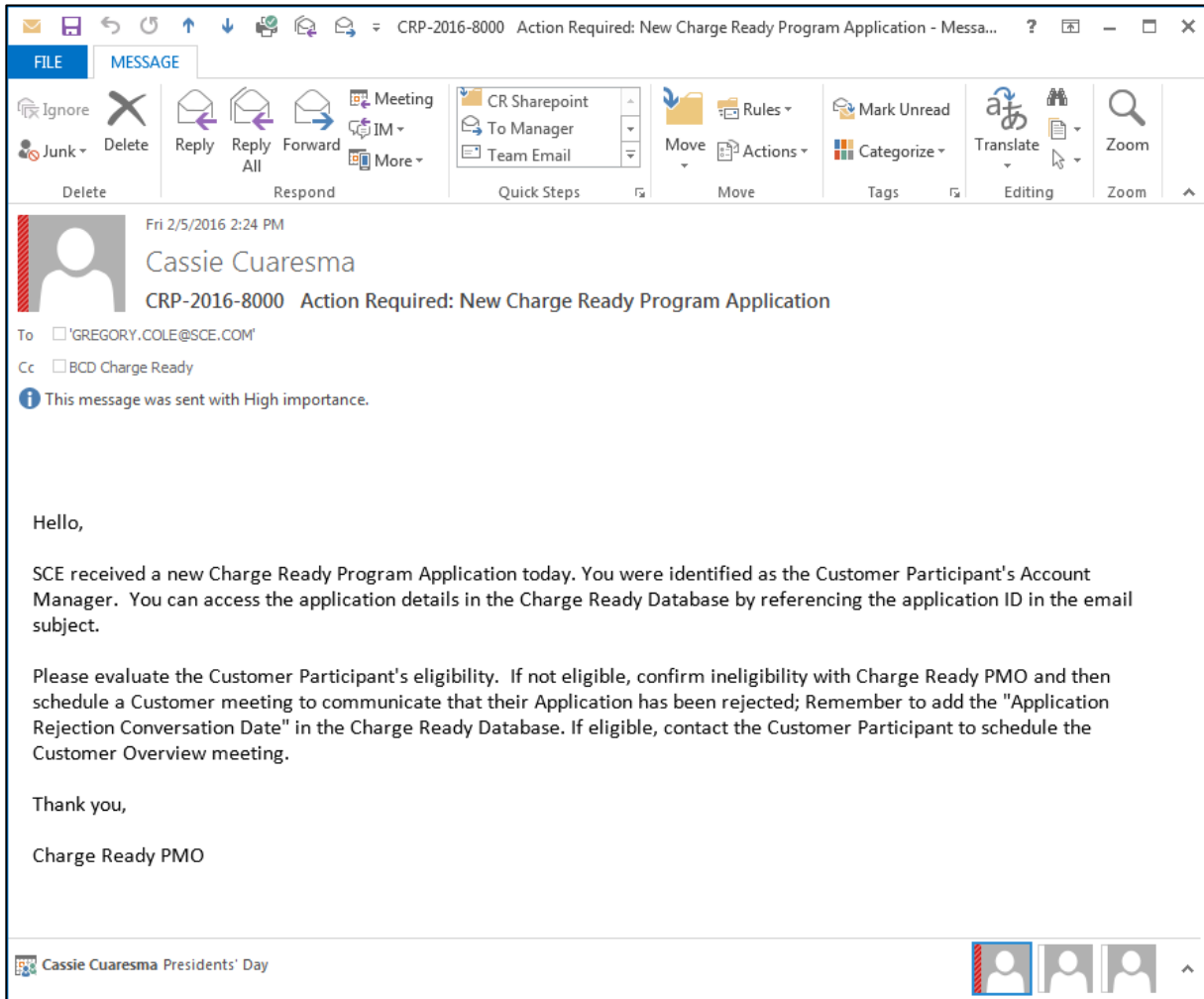
SCE received a new Charge Ready Program Application today. You were identified as the Customer Participant's Account Manager. You can access the application details in the Charge Ready Database.

Please evaluate the Customer Participant's eligibility. If not eligible, confirm ineligibility with Charge Ready PMO and then schedule a Customer meeting to communicate that their Application has been rejected; Remember to add the "Application Rejection Conversation Date" in the Charge Ready Database. If eligible, contact the Customer Participant to schedule the Customer Overview meeting.

Thank you,

Charge Ready PMO"

Below is an example of an Assigned Customer Participant email:



NOTIFY BCD OF NEW CUSTOMER APPLICATION WITH UNASSIGNED ACCOUNT MANAGER

In the event that the Charge Ready Program Tracking Database does not find an assigned BCD Account Manager for the Customer Participant listed in the application, the Database automatically sends an email to BCD.AcctMgt.Solutions@sce.com, and copies BCD.ChargeReady@sce.com and ChargeReady@sce.com. The email details are as follows:

Email Subject: "CRP-2016-8000 Action Required: New Charge Ready Program Application"

Email Content: "Hello,

SCE received a new Charge Ready Program Application. Application details are available in the Charge Ready Database.

The Customer Participant is unassigned.

Please evaluate the Customer Participant's eligibility. If not eligible, confirm ineligibility with Charge Ready PMO and then schedule a Customer meeting to communicate that their Application has been rejected; Remember to add the "Application Rejection Conversation Date" in the Charge Ready Database. If eligible, assign the Account Manager in the Charge Ready Database, and communicate the Application details to the assigned Account Manager so that they can contact the Customer Participant to schedule the Customer Overview meeting.

Thank you,

Charge Ready PMO"

Below is an example of an Unassigned Customer Participant email:

The screenshot shows an Outlook email window with the following details:

- Subject:** CRP-2016-8006 Action Required: Assign BCD AM to New Charge...
- Sender:** Cassie Cuaresma (Profile picture: a grey silhouette with a red and white striped vertical bar on the left)
- Received:** Fri 2/5/2016 2:24 PM
- Subject Line:** CRP-2016-8006 Action Required: Assign BCD AM to New Charge Ready Program Application
- To:** Bcd Acctmgt Solutions
- Cc:** BCD Charge Ready
- Importance:** **i** This message was sent with High importance.

Body Content:

Hello,

SCE received a new Charge Ready Program Application. You can access the application details in the Charge Ready Database by referencing the application ID in the email subject.

The Customer Participant is unassigned.

Please evaluate the Customer Participant's eligibility. If not eligible, confirm ineligibility with Charge Ready PMO and then schedule a Customer meeting to communicate that their Application has been rejected; Remember to add the "Application Rejection Conversation Date" in the Charge Ready Database. If eligible, assign the Account Manager in the Charge Ready Database, and communicate the Application details to the assigned Account Manager so that they can contact the Customer Participant to schedule the Customer Overview meeting.

Thank you,

Charge Ready PMO

Footer: Cassie Cuaresma Presidents' Day (with three profile picture icons)

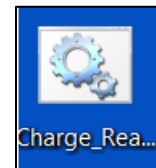
SEARCH FOR CUSTOMER APPLICATION USING FILTERS

After a BCD Account Manager is assigned a new application, they will need to access the Charge Ready Project Tracking Database to review the application details.

To search for a customer application in the Charge Ready Tracking Database use the following filter methods:

- Application ID
- Company Name
- Name of Contact Person
- BCD Account Manager
- Address
- City
- CA Number
- Application Status

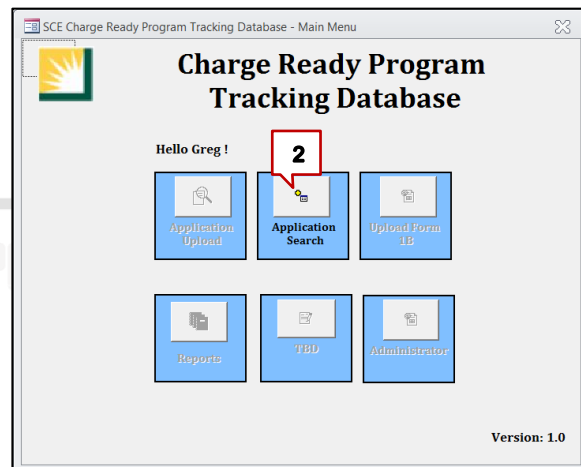
1. To open the Tracking Database, click to the MS Access file:
(e.g., **Charge_Ready_Program_Tracking_Database.bat**)
located on your computer Desktop.



The Charge Ready Program Tracking Database main menu displays.

2. Click Application Search.

The Project Search screen displays.



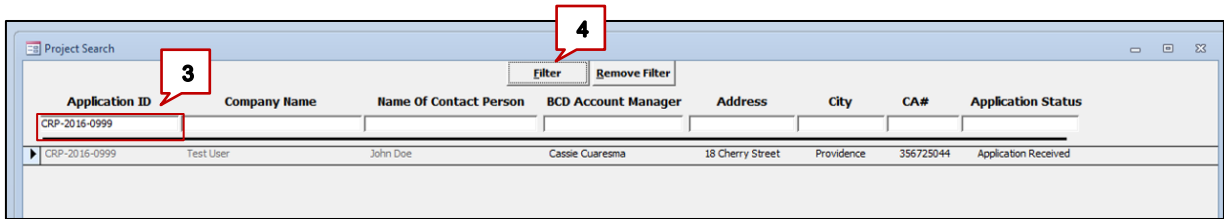
3. In the **Application ID** field, type the application number.

Note: The Application ID is sent to Account Managers in the Charge Ready Program automated email Subject heading. If you prefer to search for a customer by the other Project Search fields (e.g., Company Name, Name of Contact Person, and BCD Account Manager) simply enter that applicable date into the respective field.

Important: The customer application data is editable by anyone who has access/rights. Ensure you are reviewing/editing the correct application before doing so.

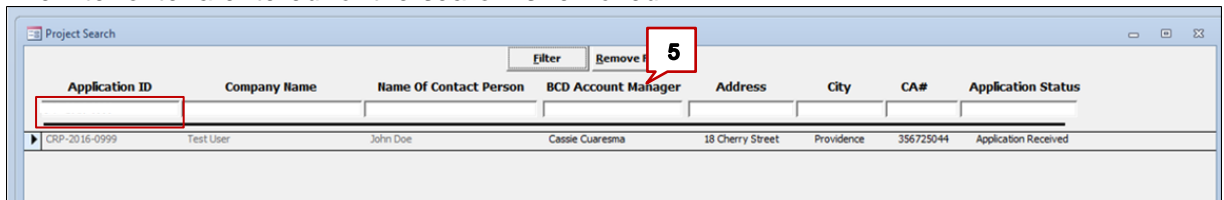
4. Click **Filter**.

The Project Search results display.



5. To remove the filter click **Remove Filter**.

The filter criteria entered for the search is removed.

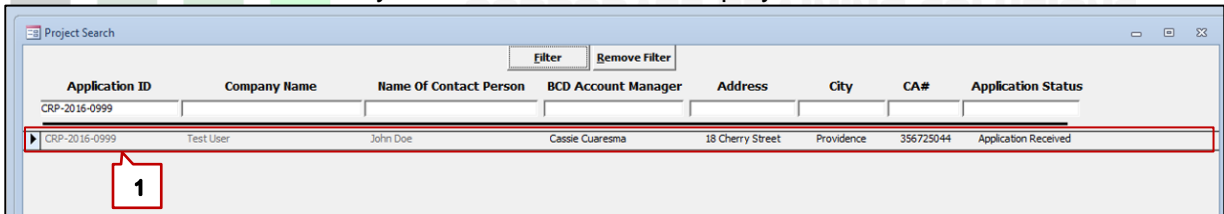


REVIEW CUSTOMER APPLICATION AND ATTACH FILES

Once a customer application has been located in the Charge Ready Program Tracking Database, an Account Manager can review the application and attached documents in greater detail to ensure the customer qualifies for the program.

1. From the search results, select the desired application by double-clicking the application in the Project Search window (grey area).

Note: The search results may take a few minutes to display.



The Customer Participant Interest Section tab displays.

2. In the **Customer Participant Interest Section** tab, review the associated information.

3. Next, review the **Customer Participant** field.
Note: If a Vendor's name is populated (e.g., Chargepoint) in the field, the AM must contact the site owners to verify they are interested in the Charge Ready Program.

4. Now, select the **Name of SCE Account Manager (Assigned)**. This is what the customer entered. It can be changed using the **drop-down** arrow to select desired AM name.

Important: Once a new SCE Account Manager (Assigned) is selected in this field, the database will automatically send an email to the SCE Account Manager informing them of their assigned Charge Ready Application.

5. Click **Save**.

Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0301

Application Status: Application Rec

Customer Participant Interest Section | Deployment Site | Electrical Vehicle | Adoption On-Site | Charge Ready Program

Customer Participant: Greg Cole Inc

SCE Account Number (optional): 2037619178

Federal Tax ID Number: 12-345678

Name of Contact Person: Greg Cole

Phone Number: 626302077020770

Name of SCE Account Manager (Assigned): Greg

Charging Station Vendor or Third Party Agent/Company Name (optional): Greg Cole

How did you hear about the Program?: Namrita

Name of Contact Person (optional): Megan

Email (optional): Ken

Phone Number (optional): Mike

USA	WOOD
	MERINO
	WALLENROD
	MAO
	REICHLAY
	GUERRA
	DAVIS
	HANNAMAN

Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0301

Application Status: Application Rejected

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request | De

Customer Participant: Greg Cole Inc

SCE Account Number (optional): 2037619178

Federal Tax ID Number: 12-345678

Name of Contact Person: Greg Cole

Phone Number: 626302077020770

Email: Cassie.Cuaresma@sce.com

Name of SCE Account Manager (Step 1): Cassie Cuaresma

Name of SCE Account Manager (Assigned): Namrita

Charging Station Vendor or Third Party Agent/Company Name (optional): Greenlots

How did you hear about the Program?: SCE Account Manager

Name of Contact Person (optional): Lin Greenlots

Email (optional): Lin@greenlots.com

Phone Number (optional): (626) 302-0770 x1234

Cancel Save

6. Next, click the **Deployment Site** tab to review the associated information.

Customer Participant Interest Section	Deployment Site	Current Electrical Vehicle Adoption On-Site	Charge Ready Program Request	Deployment Location
6				
Site Description: Main Site				
Site Address: 18 Cherry Street				
City: Providence				
State: CA Zip+4: 867530900				
Existing SCE Service Account Numner at the Site*:				
Does Customer Participate have legal ownership of the Site: Yes				
If No, indicate Property Owner:				
Phone Number:				
Property Owner's Address:				
Name of Contact Person:				
Email:				
Assessor Parcel Number: 123123123412345				
Authority Having Jurisdiction: City of Providence				
Total Number of Parking Spaces: 25				
Does the Site have access restrictions that requires scheduling visits by SCE or its contractors? Y/N: No				
If the Site does not have access restrictions, would you like to be notified prior to SCE or its contractors visiting the Site?: No				

7. Click the **Current Electrical Vehicle Adoption On-Site** tab to review the associated information.

Customer Participant Interest Section	Deployment Site	Current Electrical Vehicle Adoption On-Site	Charge Ready Program Request	Deployment Location
7				
Approximately how many Personal Electrical Vehicles park at the Site daily?: 20				
How many Fleet Electrical Vehicles currently park at the Site daily?: 25				
How many more Fleet Electric Vehicle, if any, are you planning to procure in the next 90 days?: 25				
How many, if any, Electrical Vehicle Charge Ports (individual connectors, typically one to four per charging station) do you currently have on-site?: 25				
Of these Electrical Vehicle Charge Ports, how many are used exclusively by Fleet Vehicles?: 25				

8. Click the **Charge Ready Program Request** tab to review the associated information.

Customer Participant Interest Section	Deployment Site	Current Electrical Vehicle Adoption On-Site	Charge Ready Program Request	Deployment Location
8				
Total Number of additional Charge Ports desired at Site*:				
What is the primary utilization for the requested Charge Ports?: Multi-Unit Dwelling				

9. Click the **Deployment Location** tab to review the associated information.

Customer Participant Interest Section	Deployment Site	Current Electrical Vehicle Adoption On-Site	Charge Ready Program Request	Deployment Location
9				
Preferred Charging Station Location (e.g., East parking Lot on Michigan St; 1st Row)				
1st Choice (optional): Building Main Entrance				
2nd Choice (optional): SE Corner Employee Parking Lot				
3rd Choice (optional): SW Corner Employee Parking Lot				
Preferred Charging Station Location Type: Grade-Level parking lot				
Do you have plans to add a Solar PV system or Energy Storage system to serve the Charging Stations? No				
Site plan showing your preferred location choices No				
Civil plan with existing utilities for the site (aka, base map), if available (optional) No				

10. Click the **Certification by Customer Participation** tab to review the associated information.

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request | Deployment Location | **Certification By Customer Participation** | BCD | T and D | CSOD | PMO

By signing, I represent that the information provided in this Reservation Request and Contract Agreement is true, accurate and complete. I also hereby indicate my consent to execute and submit this document electronically.

10

Customer Participant Signature: Cassie Contact Person
 Name Printed: Cassie Contact Person
 Title: Owner Representative
 Date: 4/4/2016

Rejection Code Description:
 Description For Application Rejection:

Base Cost I	Disadvantaged Community?	Multi-unit Dwelling?	Rebate Reservation	Rebate Reserved
2495	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2495	24950

Number of Authorized Ports:

Buttons: Cancel, Save, Attach Documents to Application

11. Click the **BCD** tab to review the associated information.

12. In the **Open Text** field, type notes regarding interactions with the customer.
[e.g., BCD AM 1st call attempt to Customer to schedule Customer Contact Meeting on (date)].

13. In the **Select Date When Customer First Contacted**, enter the date when customer first contacted.

14. Click **Submit**.

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer Participation | **BCD** | T and D | CSOD | PMO

Select Date When Customer Contacted First Time: **13**

Application Received on 4/4/2016-----cuarec
 BCD AM 1st call attempt to custoemr so we could schedule Customer Meeting. Called on 3/25/2016-----
 cuarec 4/20/2016 6:55:50 PM

11

Initial Qualification Check:
 Application Qualified
 Application Rejected
 Application Withdrawn

EV Survey Required? Date PMO sent Survey to BCD AM
 EV Survey ID Date EV Survey Due
 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date:
 Request Customized Rate Analysis:
 Defined Plan Proposal Meeting Completed Date:

12 Type Notes Below and Click Submit

14

Buttons: Cancel, Save, Attach Documents to Application

15. When BCD AM successfully makes contact with the Customer Participant, enter notes in the Open Text field.

16. Click **Submit**.

[e.g., BCD AM 2nd call to Customer on (date) – and was able to complete the Customer Contact Meeting on (date). Reviewed the Initial Customer Qualification Checklist and Customer’s application appears to be eligible for the Program.]

The confirmation screen displays.

Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0702 Application Status: Application Received

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer Participation | BCD | T and D | CSOD | PMG

Select Date When Customer Contacted First Time: 3/25/2016

Initial Qualification Check:

- Application Qualified
- Application Rejected
- Application Withdrawn

EV Survey Required?: 4/7/2016 Date PMO sent Survey to BCD AM: _____

EV Survey ID: _____ Date EV Survey Issued: 4/22/2016

_____ Date AM Issued Survey to Customer: 4/8/2016

Defined Plan Proposal Meeting Scheduled Date: _____

Request Customized Rate Analysis:

Defined Plan Proposal Meeting Completed Date: _____

Type Notes Below and Click Submit Print BCD Notes

Submit Cancel Save Attach Documents to Application

17. Use the *Initial Customer Qualification Checklist* ([Located on the Charge Ready Program SharePoint site](#)) to determine if the Customer Participant is eligible for the Program.

18. In the **Initial Qualification Check** section select the applicable application choice.

Important: The Customer Participant qualification must be completed **within two weeks** of submittal to determine:

- Application Qualified
- Application Rejected
- Application Withdrawn

19. Click **Ok**.

20. Enter the Initial Qualification Check date.

21. Click **Submit**.

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site

Select Date When Customer Contacted First Time: 3/25/2016

18

Initial Qualification Check

- Application Qualified
- Application Rejected
- Application Withdrawn

EV Survey Required? [No] EV Survey ID [] Date PMO sent Survey to BCD AM []

Microsoft Access

Enter Customer Overview Meeting Completion Date

19

OK

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge

Select Date When Customer Contacted First Time: 3/25/2016

20

Initial Qualification Check

- Application Qualified
- Application Rejected
- Application Withdrawn

EV Survey Required? [No] EV Survey ID [] Date PMO sent Survey to BCD AM [4/7/2016]

Date EV Survey Due [3/29/2016]

Date AM issued Survey to Customer [4/22/2016]

Date AM issued Survey to Customer [4/8/2016]

Defined Plan Proposal Meeting Scheduled Date []

Request Customized Rate Analysis

Defined Plan Proposal Meeting Completed Date []

21

Submit

Cancel

The Application Status is updated as **Customer Overview Meeting Completed**.

The screenshot shows a web application interface for the Charge Ready Program. At the top, the 'Application ID' is CRP-2016-0702 and the 'Application Status' is 'Customer Overview Meeting Completed'. Below this, there are several tabs: 'Customer Participant Interest Section', 'Deployment Site', 'Current Electrical Vehicle', 'Adoption On-Site', 'Charge Ready Program Request', 'Deployment Location', and 'Certification By Customer Participation'. The 'Charge Ready Program Request' tab is active. The form contains various fields for dates and surveys, such as 'Select Date When Customer Contacted First Time' (3/25/2016), 'Initial Qualification Check' (Application Qualified, Rejected, or Withdrawn), 'EV Survey Required?' (No), 'Date PMO sent Survey to BCD AM' (4/7/2016), 'Date EV Survey Due' (4/22/2016), and 'Date AM Issued Survey to Customer' (4/8/2016). There are also buttons for 'Submit', 'Cancel', 'Save', and 'Attach Documents to Application'. A red callout box with the number '22' points to the 'Cancel' button.

22. Click **Cancel** to exit Application.

Congratulations! You have successfully reviewed a Charge Ready Program customer application and updated the application status to Customer Overview Meeting Completed.



ATTACH A FILE TO AN APPLICATION

To attach a document or file to a customer's Charge Ready Program application follow the steps below.

1. Perform a search and from the search results, select the desired applicant.

The Charge Ready Program Application Search displays.

Application ID	Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status
CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received

2. Click any of the tabs of the Application (e.g., Customer Participant Interest Section)
Note: Files can be attached from any of the Application tabs.

3. Click the Attach Documents to Application.

The File Attachment screen displays.

Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0999 Application Status: Application Received

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer Participation | BCD

Customer Participant/Company Name: Test User

Customer Account Number: 356725044

Federal Tax ID Number: 123456789

Name of Contact: John Doe

Phone Number: 22763932

Email: john.doe@vendingcompany.com

Name of SCE Account Manager (if known): Cassie Cuaresma

How did you hear about the Program?: Other

Charging Station Vendor/Company Name*:

Name of Contact Person*:

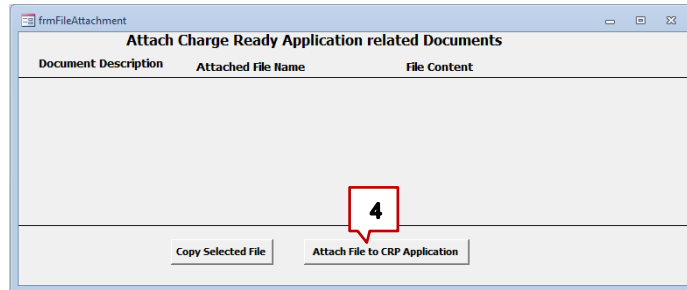
Email:

Phone Number:

Cancel Save **Attach Documents to Application**

- Click Attach File to CRP Application.

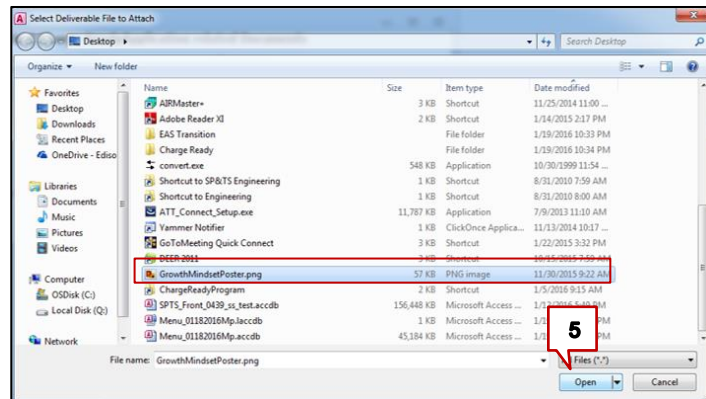
The attach files to Charge Ready Program Application screen displays.



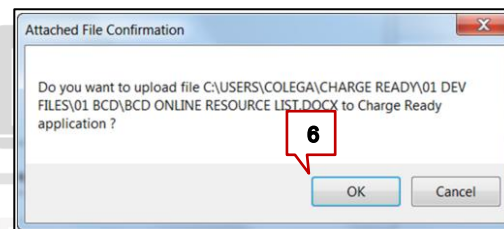
- Highlight the desired file to attach to the application and click **Open**.

Important: Ensure the file to be uploaded is not currently open in another program as it cause an error in the upload.

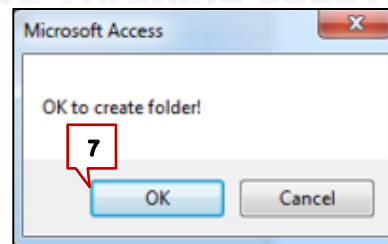
The Attach File Confirmation screen displays.



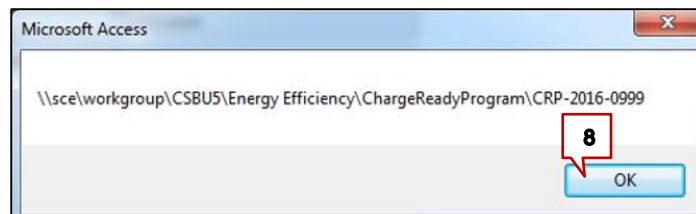
- Confirm the selected file and click **OK**.



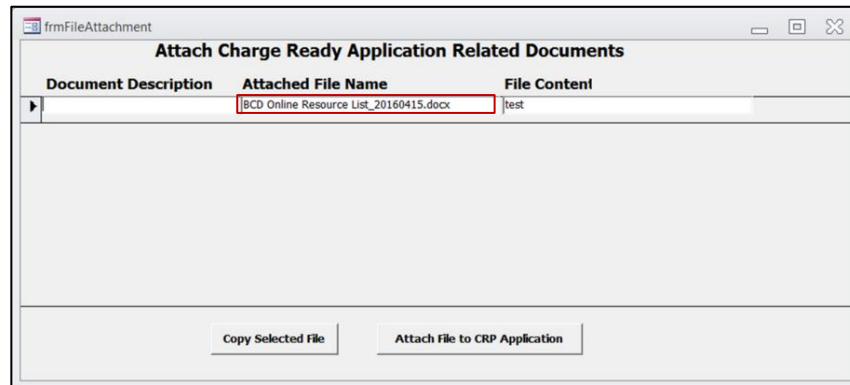
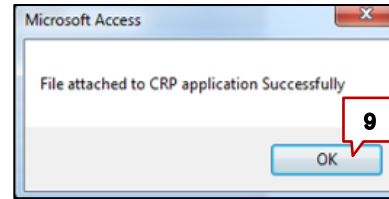
- If the file is the first attachment added to the application, click **OK** to create a new application folder in the Charge Ready shared folder.



- The database creates the new folder name and location. Click **OK**.



9. The database also confirms that the attachment uploaded successfully. Click **OK**.



VIEW A FILE ATTACHED TO AN APPLICATION

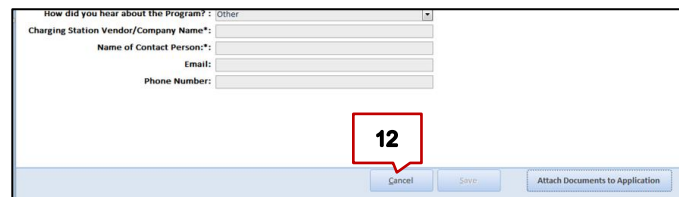
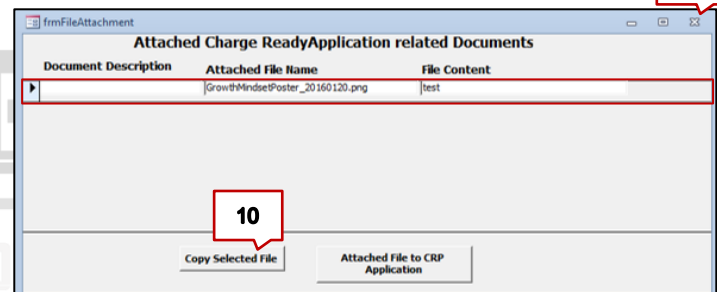
In the Attach Charge Ready Application Related Documents screen, the attached file(s) display.

10. Highlight the applicable file and click **Copy Selected File**.

Note: The file downloads to your C:\chargeready folder.

11. Click **Close**.

12. Click **Cancel** to exit Application.



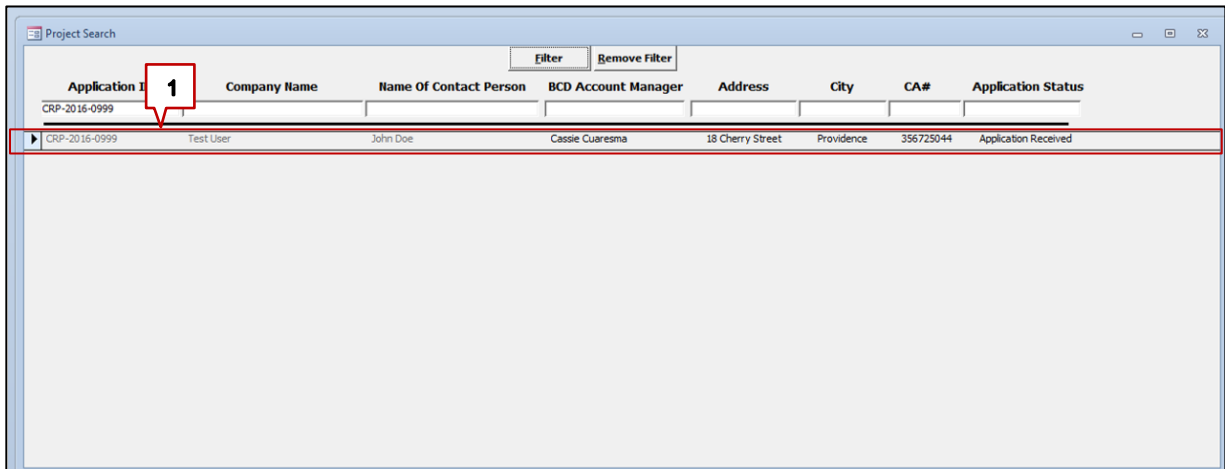
Congratulations! You have successfully downloaded a file from the Charge Ready Program customer application.

CHANGE THE APPLICATION STATUS TO WITHDRAWN

If a Customer Participant decides to withdraw from the Program, the Account Manager must upload written confirmation from the Customer and update the Charge Ready Program customer application status in the Charge Ready Program Tracking Database to “Application Withdrawn”.

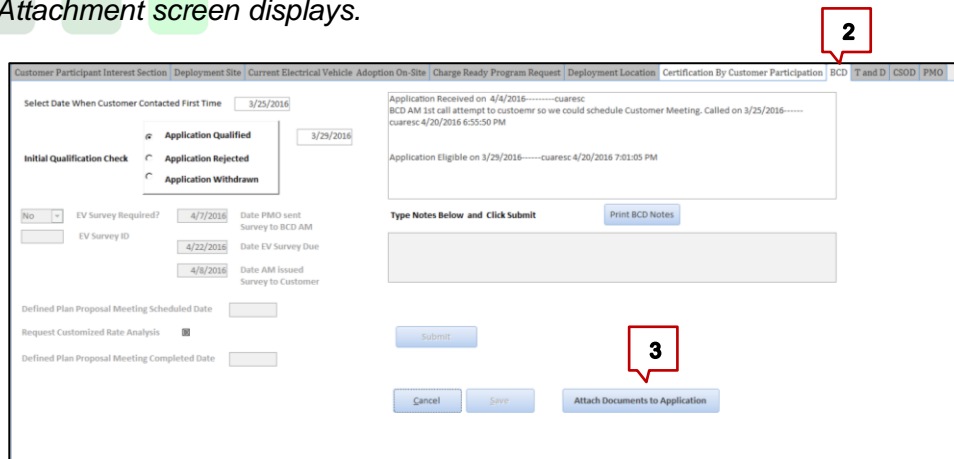
1. From the search results, select the desired applicant.

The Charge Ready Program Application Search displays.



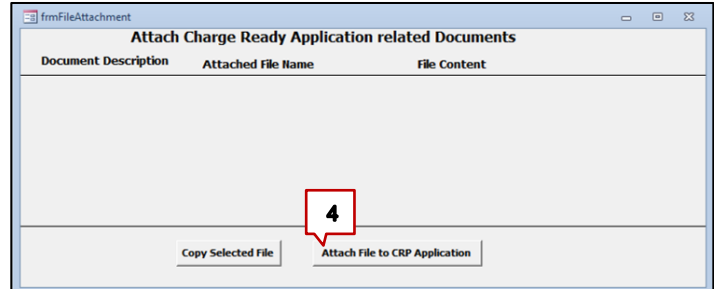
2. Click **BCD** tab.
3. Click Attach Documents to Application.

The File Attachment screen displays.



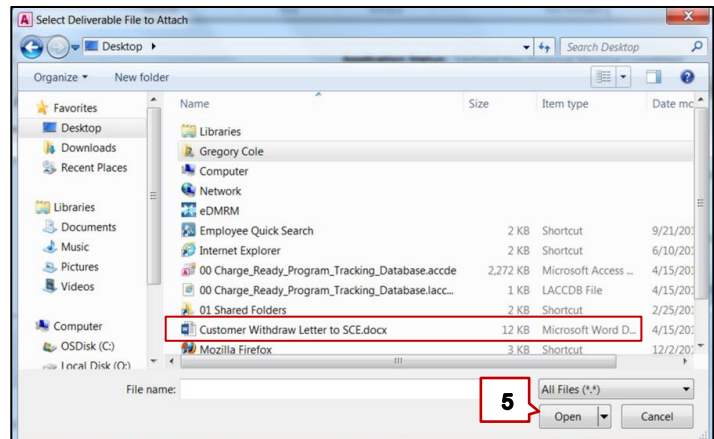
- Click Attach File to CRP Application.

The attach files to Charge Ready Program Application screen displays.

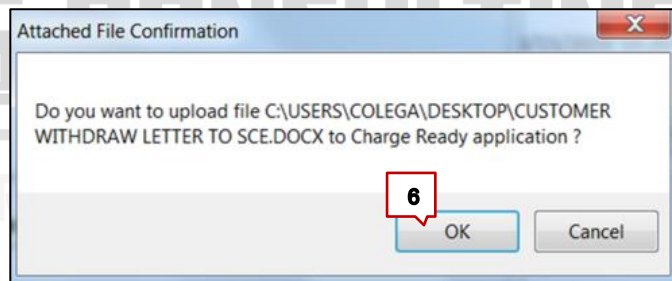


- Highlight** the desired file to attach to the application and click **Open**.

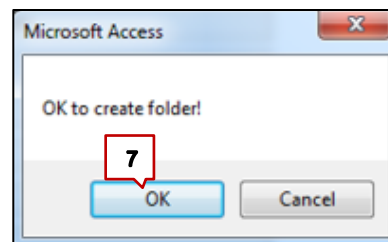
Important: Ensure the file to be uploaded is not currently open in another program as it cause an error in the upload.



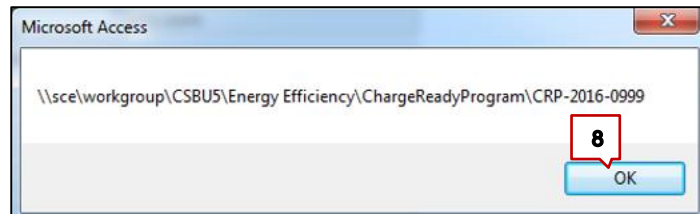
- Confirm the selected file and click **OK**.



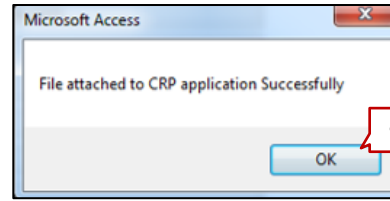
- If the file is the first attachment added to the application, click **OK** to create a new application folder in the Charge Ready shared folder.



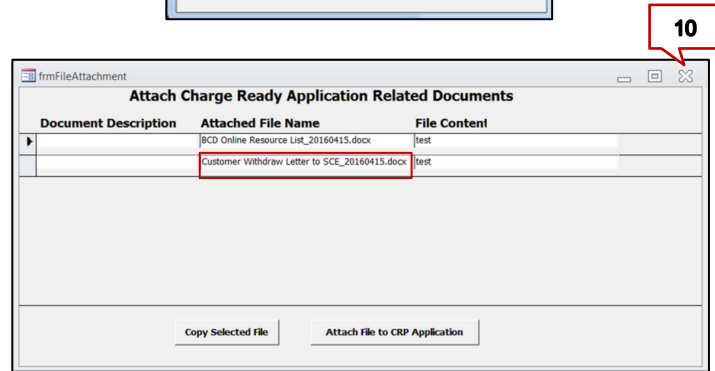
- The database creates the new folder name and location. Click **OK**.



9. The database also confirms that the attachment uploaded successfully. Click **OK**.



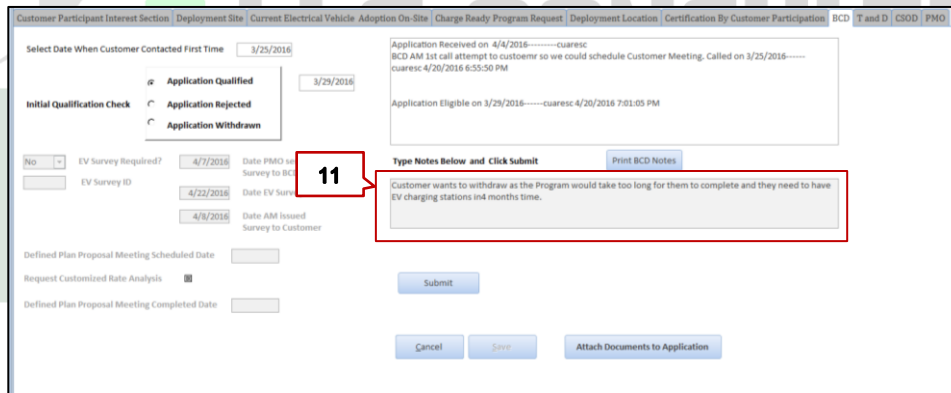
In the Attach Charge Ready Application Related Documents, the attached file displays.



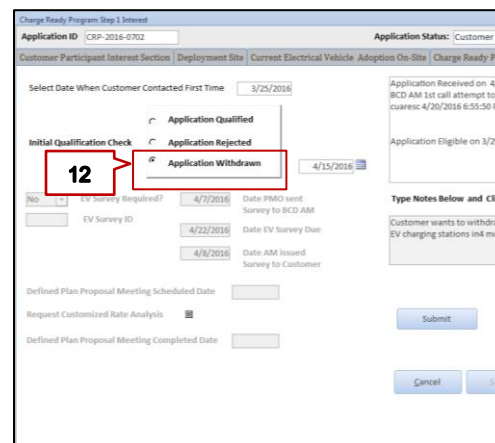
10. Click **Close**  .

11. In the **Open Text** field, type any notes regarding interactions with the customer and click **Submit**.

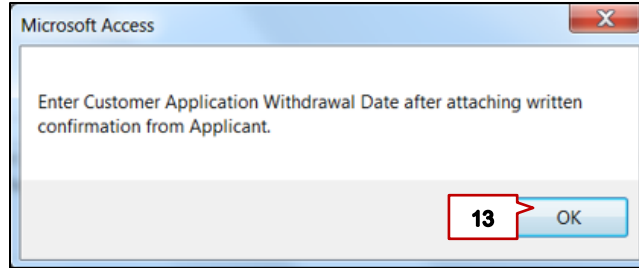
(e.g., BCD AM 2nd call to Customer on 02/16/2016. Customer needs to have EV charges installed in next 4-5 months. Customer decided they want to withdraw from the Program as SCE could not deliver in that timeframe).



12. Click **Application Withdrawn**.

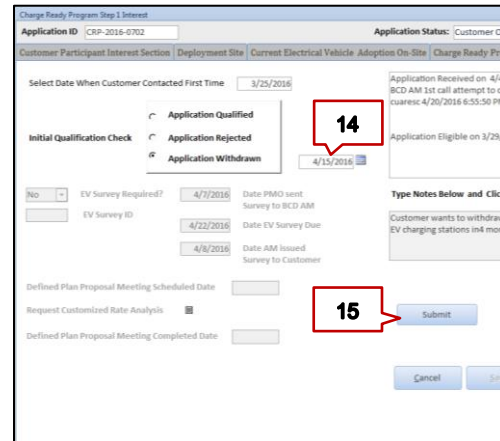


13. To confirm that you've uploaded written confirmation from the Applicant, Click **OK**.



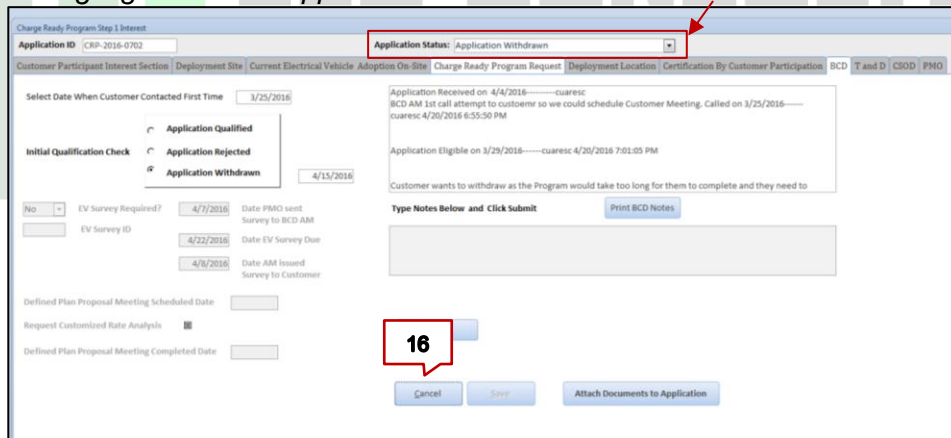
14. Add Application Withdrawn date.

15. Click **Submit**.



After clicking Submit, the Application Status changes to **Application Withdrawn**.

The status is highlighted in the Application Status field.



16. Click **Cancel** to exit Application.

Congratulations! You have successfully updated the status to Application Withdrawn.

REJECT A CUSTOMER APPLICATION

If a BCD Account Manager completes the customer application review and needs to reject the customer application, follow the steps below.

1. From the search results, select the desired applicant.

The Charge Ready Program Application Search displays.

Applic	Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status
CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received

2. Click the **BCD** tab to review the associated information.
3. In the **Open Text** field, type any notes regarding interactions with the customer to communicate reason for rejection. The rationale for rejection must be stated in the notes.
4. Click **Submit** to record notes to the application.

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle Adoption On Site | **Charge Ready Program Request** | Deployment Location | Certification By Customer Partic... | T and D | CSOD | PMD

Select Date When Customer Contacted First Time: 3/25/2016

Initial Qualification Check:

- Application Qualified (3/25/2016)
- Application Rejected
- Application Withdrawn

EV Survey Required? [No] 4/7/2016 Date PMG sent Survey to BCD AM

EV Survey ID: 4/22/2016 Date EV Survey Due

4/8/2016 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: []

Request Customized Rate Analysis:

Defined Plan Proposal Meeting Completed Date: []

Application Received on 4/4/2016-----cuaresc
BCD AM 1st call attempt to custoemr so we could schedule Customer Meeting, Called on 3/25/2016-----
cuaresc 4/20/2016 6:55:50 PM

Application Eligible on 3/29/2016-----cuaresc 4/20/2016 7:01:05 PM

Customer wants to withdraw as the Program would take too long for them to complete and they need to

3 Type Notes Below and Click Submit [Print BCD Notes](#)

Application reject since parking lot does not have enough parking spaces to meet minimum Program requirements

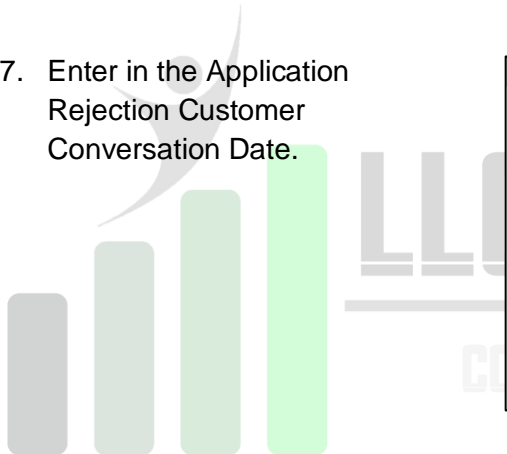
4

5. Click Application Rejected.

The Application Rejection Customer Conversation Date prompt displays.

6. Click **OK**.

7. Enter in the Application Rejection Customer Conversation Date.



Note: PMO will proceed with the following steps after BCD confirms reason for rejection in the notes and the Application Rejection Customer Conversation Date.

8. In the Application Status dropdown menu, select **Application Rejected**.

The Reason Code screen displays.

9. Select the appropriate **Reason Code** for rejection.

FmReasonCode

Reason Code: [Dropdown menu]

Describe Reject Reason: [Text field]

Submit

9

Note: if **Other, please describe:** is selected, type the rejection description in the Describe Reject Reason field.

10. Click **Submit**.

FmReasonCode

Reason Code: Other, please describe:

Describe Reject Reason: Customer does not have enough parking spaces to meet the minium criteria for the Charge Ready Program.

Submit

10

11. Click **Save**.



Charge Ready Program Step 3 Screen

Application ID: CCRP-2016-0702

Application Status: Application Rejected

Select Date When Customer Contacted First Time: 3/29/2016

Initial Qualification Check: Application Qualified (4/12/2016), Application Rejected (4/12/2016), Application Withdrawn

Application Notes: Application Rejected on 4/6/2016... BCD AM 1st call attempt to customer so we could schedule Customer Meeting. Called on 3/29/2016... Application Eligible on 3/29/2016... Customer wants to withdraw as the Program would take too long for them to complete and they need to...

Type Notes Below and Click Submit

Submit, Cancel, Save, Attach Documents to Application

11

12. Click **Cancel** to exit the application.

Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: 4/7/2016

Defined Plan Proposal Meeting Completed Date: 4/7/2016

Submit, Cancel, Save

12

Congratulations! You have successfully updated the status to Application Rejected.

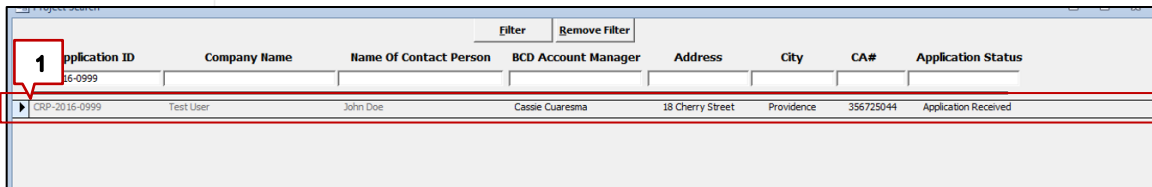
ISSUE AND EV SURVEY TO WORKPLACES AND MULTI-UNIT DWELLINGS

Background

SCE is requesting that all workplace and multi-unit dwelling applications requesting participation in the Charge Ready Program invite their employees or tenants to participate in a Parking Survey administered in partnership with SCE. The survey will help SCE understand how many potential electric vehicle (EV) drivers park at each site and how many more drivers would acquire an EV if there were charging stations available at their workplace.

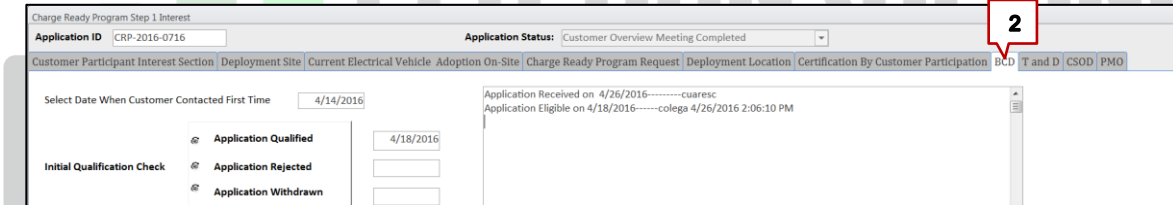
The EV Survey is issued to applicable applications after the Customer Overview Meeting is completed between the BCD Account Manager and Customer Participant. The BCD Account Manager will be notified by the Charge Ready PMO when to issue the EV Survey to the Customer Participant.

1. From the search results, select the desired applicant.
The Charge Ready Program Application Search displays.



Application ID	Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status
CRP-2016-0999	Test User	John Doe	Cassie Cuarema	18 Cherry Street	Providence	356725044	Application Received

2. Click the **BCD** tab.



Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0716 Application Status: Customer Overview Meeting Completed

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer Participation | **BCD** | T and D | CSOD | PMO

Select Date When Customer Contacted First Time: 4/14/2016

Application Received on 4/26/2016 -----cuarec
Application Eligible on 4/18/2016 -----colega 4/26/2016 2:06:10 PM

Initial Qualification Check:

- Application Qualified: 4/18/2016
- Application Rejected
- Application Withdrawn

3. Confirm the response in the **EV Survey Required** field.
 - If **No**, the project is either a **Destination Center** or **Fleet**. Therefore, no further action is required from the Account Manager regarding the EV Survey. **Note:** All EV Survey fields are disabled in this application.
 - If **Yes**, the project is either a **Muti-Unit Dwelling** or **Workplace**. Therefore, an EV Survey should be issued to the applicant.

4. The **EV Survey ID**, **Date EV Survey Due**, **Date PMO sent Survey to BCD AM** are disabled.

5. The **Date AM issued Survey to Customer** is enabled.

Important: Prior to entering the Date AM issued Survey to Customer, the Account manager must wait for email instructions from the PMO. The Account Manager must wait for the PMO to prepare the application. *(This should take approximately 2 business days.)* The PMO will then email the EV Survey materials to the Account Manager.

6. PMO enters the **Date PMO Sent Survey to BCD AM** and **Date EV Survey Due**.

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle Adopted

Select Date When Customer Contacted First Time: 4/20/2016

Initial Qualification Check:

- Application Qualified: 4/29/2016
- Application Rejected: []
- Application Withdrawn: []

EV Survey Required? [No] EV Survey ID: 6

Date PMO sent Survey to BCD AM: 4/29/2016

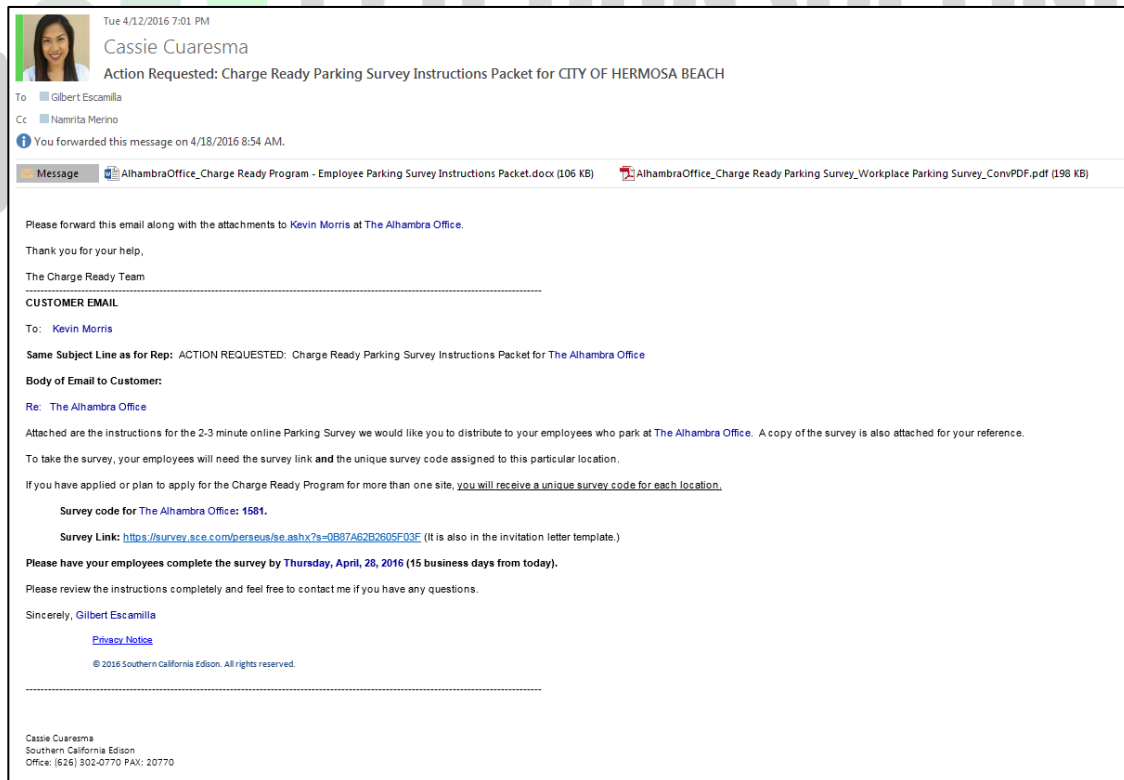
Date EV Survey Due: 5/14/2016

Date AM issued Survey to Customer: 5/6/2016

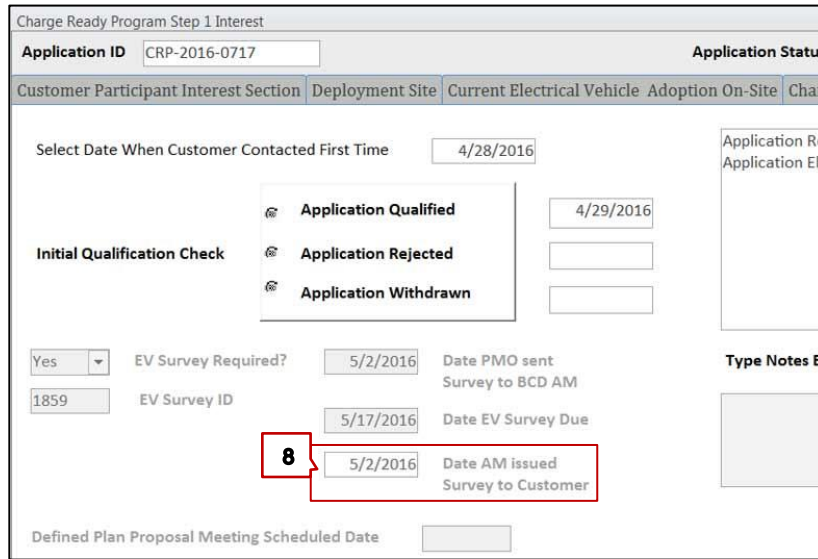
7. PMO sends email to assigned Account Manager with the following instructions and attachments:

- Email Template that Account Manager can send to Customer Participant
- Parking Survey Instructions Packet
- PDF Attachment of Survey Questions

The image below a sample of the email from the Charge Ready PMO with EV Survey instructions and attachment.



- After the Account Manager follows PMO’s instructions and sends EV Survey to Customer Participant, the Account Manager enters the **Date AM issued Survey to Customer**.



Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0717

Application Status: [Dropdown]

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request

Select Date When Customer Contacted First Time: 4/28/2016

Initial Qualification Check:

- Application Qualified: 4/29/2016
- Application Rejected: [Empty]
- Application Withdrawn: [Empty]

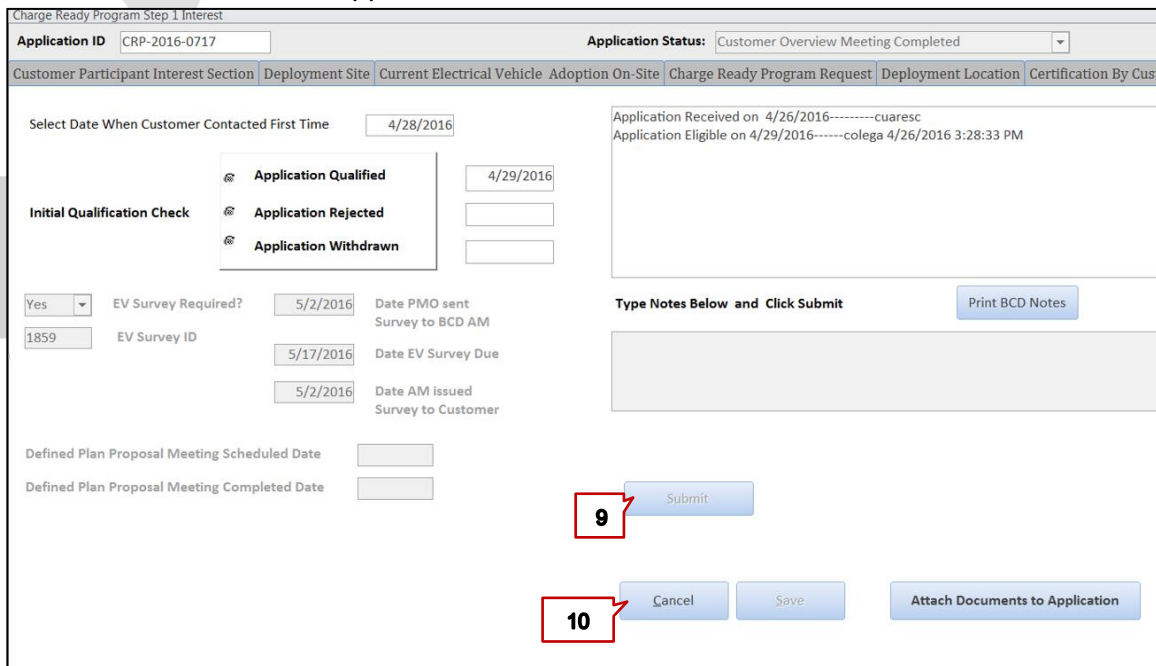
EV Survey Required? Yes [Dropdown] 5/2/2016 Date PMO sent Survey to BCD AM

EV Survey ID: 1859 5/17/2016 Date EV Survey Due

8 5/2/2016 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: [Empty]

- Click **Submit**.
- Click **Cancel** to exit the application.



Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0717

Application Status: Customer Overview Meeting Completed

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer

Select Date When Customer Contacted First Time: 4/28/2016

Application Received on 4/26/2016-----cuaresc
Application Eligible on 4/29/2016-----colega 4/26/2016 3:28:33 PM

Initial Qualification Check:

- Application Qualified: 4/29/2016
- Application Rejected: [Empty]
- Application Withdrawn: [Empty]

EV Survey Required? Yes [Dropdown] 5/2/2016 Date PMO sent Survey to BCD AM

EV Survey ID: 1859 5/17/2016 Date EV Survey Due

5/2/2016 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: [Empty]

Defined Plan Proposal Meeting Completed Date: [Empty]

Type Notes Below and Click Submit [Print BCD Notes]

9 Submit

10 Cancel Save Attach Documents to Application

Congratulations! You have successfully issued and EV Survey to a Workplace or Multi-Unit dwelling.

OPT A CUSTOMER PARTICIPANT OUT OF THE EV SURVEY

If a BCD Account Manager needs to opt out a Customer Participant from completing the EV Survey, the Account Manager can communicate this to the PMO in the Charge Ready Program Tracking Database.

1. From the search results, select the desired applicant.
The Charge Ready Program Application Search displays.

Application ID	Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status
CRP-2016-0999	Test User	John Doe	Cassie Cuarema	18 Cherry Street	Providence	356725044	Application Received

2. Click the **BCD** tab.

Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0716 Application Status: Customer Overview Meeting Completed

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer Participation | **BCD** | T and D | CSOD | PMO

Select Date When Customer Contacted First Time: 4/14/2016

Application Received on 4/26/2016 -----cuarec
Application Eligible on 4/18/2016 -----colega 4/26/2016 2:06:10 PM

Application Qualified: 4/18/2016

3. Click the **EV Survey Required?** drop-down and select **No**.
4. Click **Submit**.

Initial Qualification Check

Application Qualified: 4/29/2016

Application Rejected

Application Withdrawn

No EV Survey Required? Date PMO sent Survey to BCD AM

7357 EV Survey ID Date EV Survey Due

Date AM issued Survey to Customer

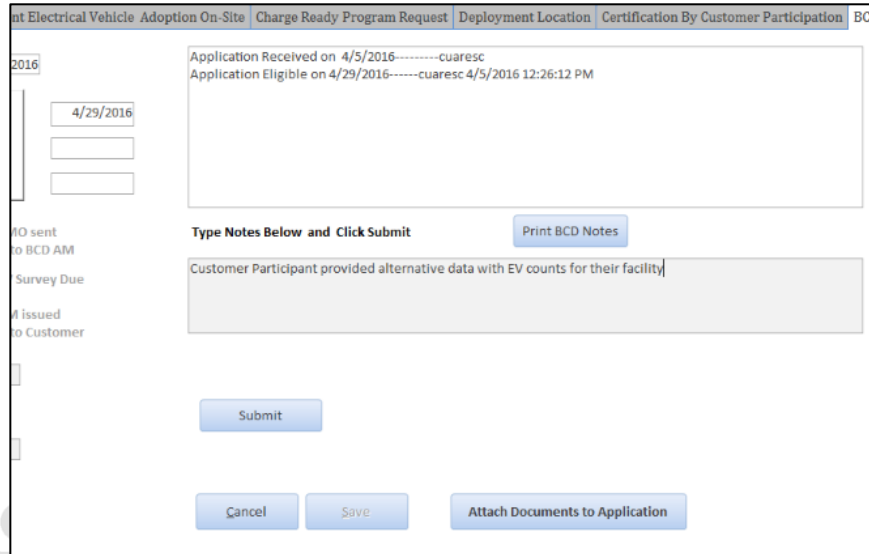
Defined Plan Proposal Meeting Scheduled Date

Defined Plan Proposal Meeting Completed Date

Type Notes Below and Click Submit

Submit

- In the Open Text field, type any notes describing why the Customer Participant decided to opt out of the EV Survey, and click Submit.
(e.g., Customer Participant provided alternative data with EV counts for their facility).



Application Received on 4/5/2016-----cuaresc
 Application Eligible on 4/29/2016-----cuaresc 4/5/2016 12:26:12 PM

4/29/2016

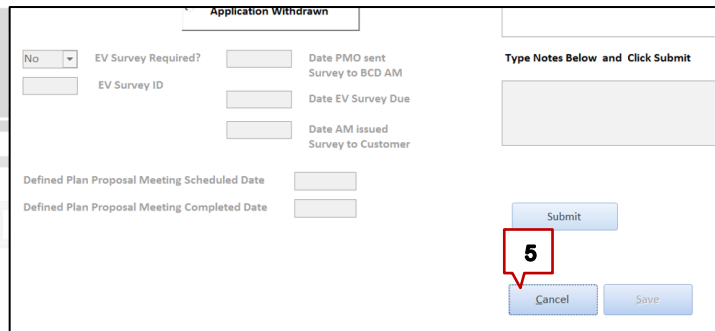
Type Notes Below and Click Submit Print BCD Notes

Customer Participant provided alternative data with EV counts for their facility

Submit

Cancel Save Attach Documents to Application

- Click **Cancel** to exit the application.



Application Withdrawn

No EV Survey Required? Date PMO sent Survey to BCD AM

EV Survey ID Date EV Survey Due

Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date

Defined Plan Proposal Meeting Completed Date

5

Submit

Cancel Save

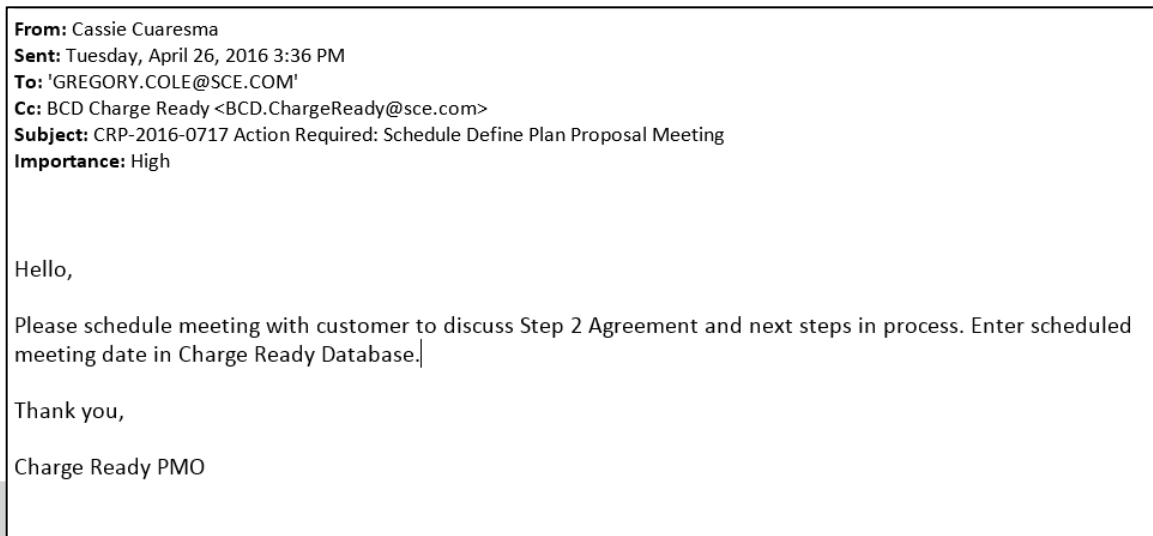
Congratulations! You have successfully opted a Customer Participant out from completing the EV Survey.

COMPLETE STEP TWO AGREEMENT

If the PMO notifies a BCD Account Manager that an application is approved to move forward with Step 2 Agreement, the Account Manager must schedule and hold a meeting the Customer Participant to review:

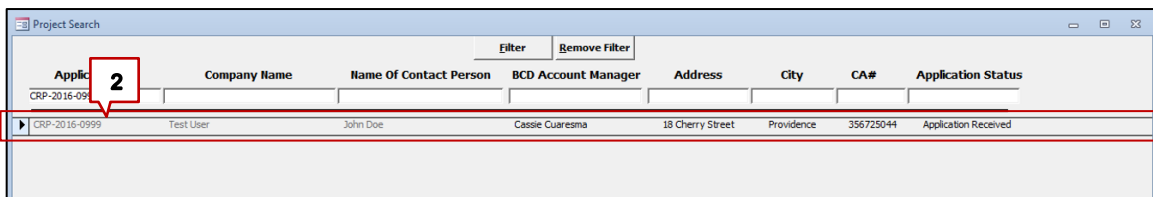
- Approved Number of Charge Ports
- Defined Plan
- Customized Rate Analysis (if applicable)

1. Open **Microsoft Outlook** and search for email from the PMO regarding the Application ID.

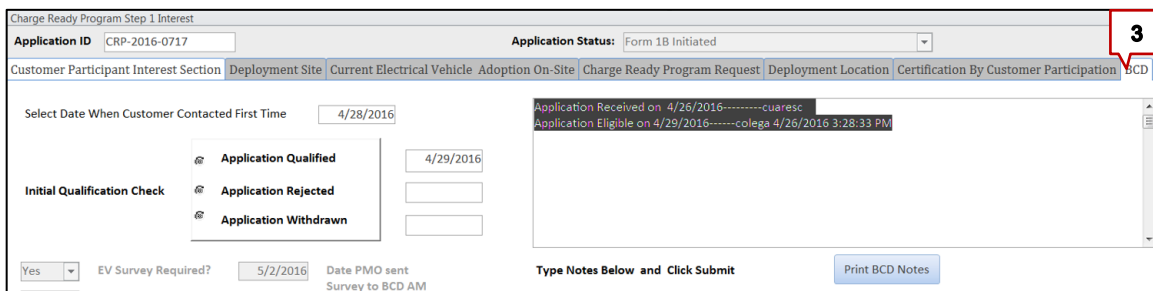


2. Open the Charge Ready Database and search for the desired Application ID.

The Charge Ready Program Application Search displays.



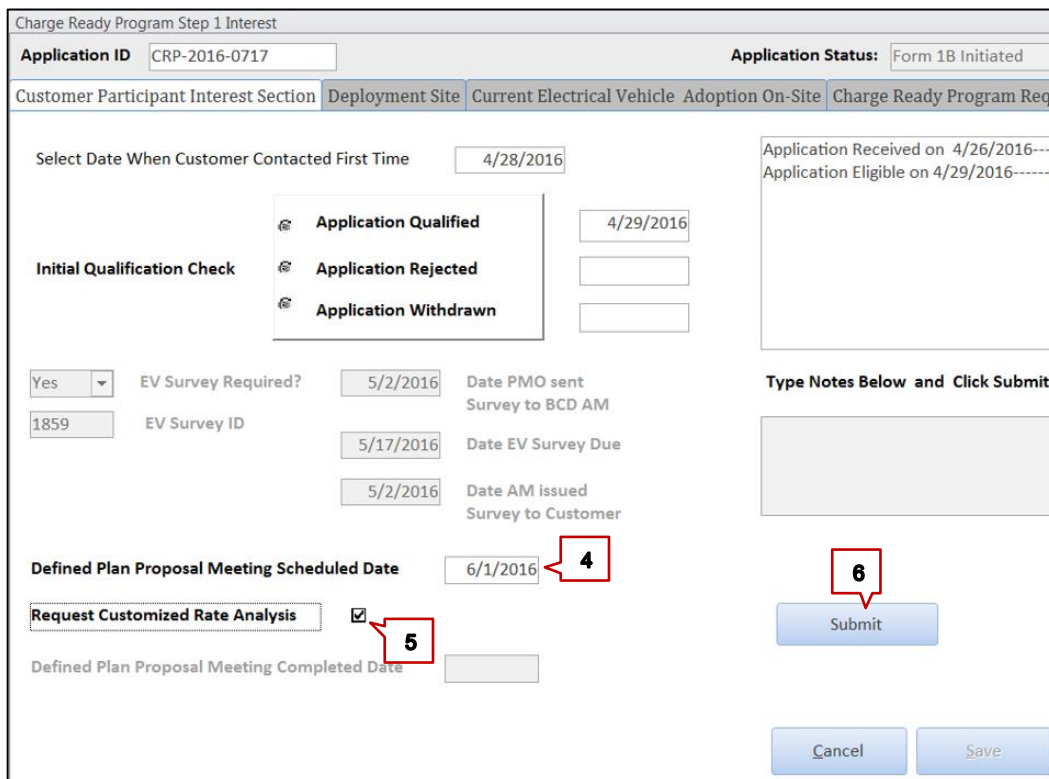
3. Click the **BCD** tab.



4. Enter the Defined Plan Proposal Meeting Scheduled Date.
 Note: When contacting the Customer Participant to schedule the Defined Plan Proposal Meeting, the Account Manager should also ask if the Customer Participant if they would like a Customized Rate Analysis.

5. Add a checkmark to **Request Customized Rate Analysis**, if requested by the Customer Participant. Note: If a customized rate analysis is requested, allow approximately 3 days to hold Defined Plan Proposal meeting.
 Do not add checkmark if Customer Participant does not require a customized rate analysis.

6. Click **Submit**.



Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0717 Application Status: Form 1B Initiated

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle | Adoption On-Site | Charge Ready Program Request

Select Date When Customer Contacted First Time: 4/28/2016

Application Received on 4/26/2016-----
 Application Eligible on 4/29/2016-----c

Initial Qualification Check

- Application Qualified 4/29/2016
- Application Rejected []
- Application Withdrawn []

Yes [v] EV Survey Required? 5/2/2016 Date PMO sent Survey to BCD AM

1859 EV Survey ID 5/17/2016 Date EV Survey Due

5/2/2016 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: 6/1/2016 **4**

Request Customized Rate Analysis: **5**

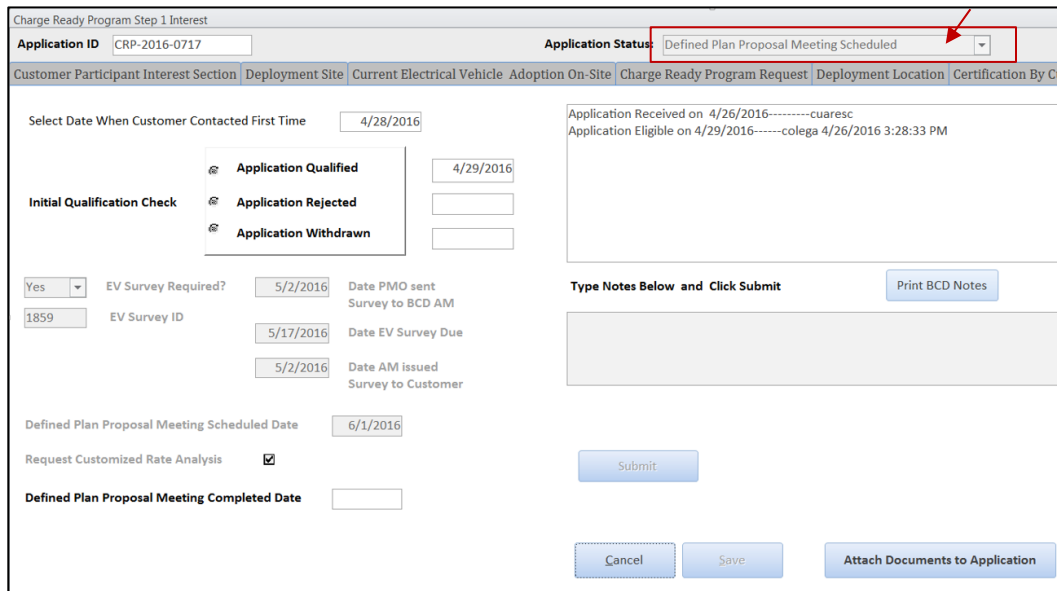
Defined Plan Proposal Meeting Completed Date: []

Type Notes Below and Click Submit

6 Submit

Cancel Save

After clicking Submit, the Application Status changes to **Defined Plan Proposal Meeting Scheduled**.



Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0717 Application Status: Defined Plan Proposal Meeting Scheduled

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer

Select Date When Customer Contacted First Time: 4/28/2016

Application Received on 4/26/2016-----cuaresc
Application Eligible on 4/29/2016-----colega 4/26/2016 3:28:33 PM

Initial Qualification Check:

- Application Qualified (4/29/2016)
- Application Rejected
- Application Withdrawn

EV Survey Required? 5/2/2016 Date PMO sent Survey to BCD AM

EV Survey ID 1859 Date EV Survey Due 5/17/2016

5/2/2016 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: 6/1/2016

Request Customized Rate Analysis:

Defined Plan Proposal Meeting Completed Date: []

Type Notes Below and Click Submit Print BCD Notes

Submit Cancel Save Attach Documents to Application

- Open **Microsoft Outlook** and search for email in your **Sent** folder regarding the Application ID. BCD Rate Analysis will provide you with a customized rate analysis in approximately 3 days. The Account Manager should

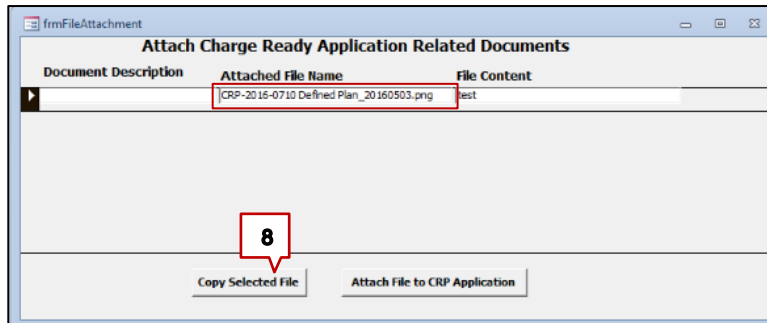
From: Gregory Cole
Sent: Tuesday, April 26, 2016 3:45 PM
To: BCDRateAnalysis@sce.com
Cc: Charge Ready <ChargeReady@sce.com>
Subject: CRP-2016-0717 Charge Ready Program Customized Rate Analysis Request
Importance: High

Hello,
The Assigned Account Manager, listed below, is requesting a Customized Rate Analysis for a Customer Participant in the Charge Ready Program.

Assigned Account Manager: Greg Cole
 Name of the Requestor: Greg Cole
 Customer Participant: HI-DESERT MEMORIAL HOSPITAL

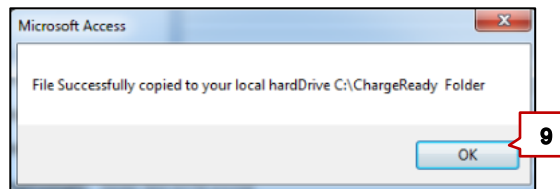
Thank you,
Charge Ready PMO |

- Return to the Charge Ready Tracking Database and download the **Defined Plan attachment**.

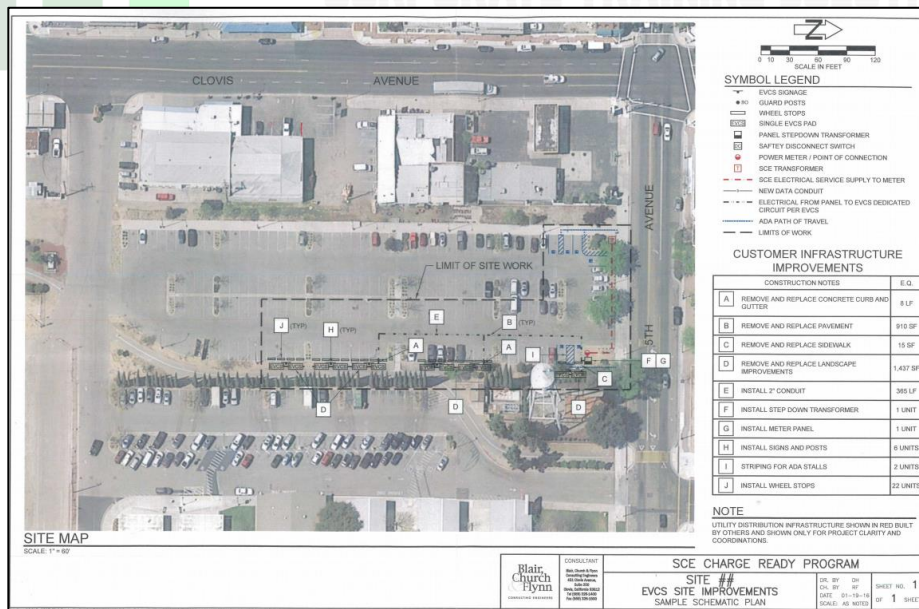
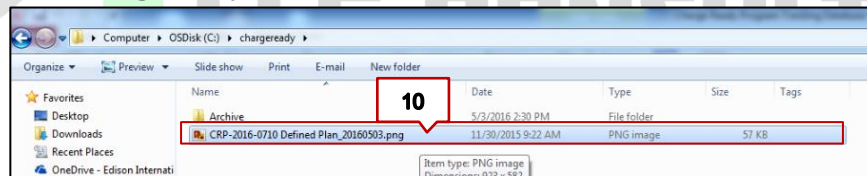


The file successfully copied to your local hard drive.

- Click **OK**.



- Browse to the **chargeready** folder to view the file.



11. Account Manager holds meeting with Customer Participant to review the following:

- Approved Number of Charge Ports
- Defined Plan
- Customized Rate Analysis (if applicable)

12. Return to the Charge Ready Tracking Database and enter the **Defined Plan Proposal Meeting Completion Date**. The Defined Plan Proposal Meeting Date is the date the Account Manager holds meeting with Customer Participant to review the following:

- Approved Number of Charge Ports
- Defined Plan
- Customized Rate Analysis (if applicable)

13. Click **Submit**.

Application Withdrawn

Yes EV Survey Required? 5/2/2016 Date PMO sent Survey to BCD AM

1859 EV Survey ID 5/17/2016 Date EV Survey Due

5/2/2016 Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date 6/1/2016

Request Customized Rate Analysis

Defined Plan Proposal Meeting Completed Date 6/3/2016

Type Notes Below and Click

Submit

Cancel Save

After clicking **Submit**, the Application Status changes to **Defined Plan Proposal Meeting Completed**.

Charge Ready Program Step 1 Interest

Application ID: CRP-2016-0717 Application Status: **Defined Plan Proposal Meeting Completed**

Customer Participant Interest Section | Deployment Site | Current Electrical Vehicle Adoption On-Site | Charge Ready Program Request | Deployment Location | Certification By Customer

Select Date When Customer Contacted First Time: 4/28/2016

Application Received on 4/26/2016-----cuaresc
Application Eligible on 4/29/2016-----colega 4/26/2016 3:28:33 PM

Initial Qualification Check:

- Application Qualified (4/29/2016)
- Application Rejected
- Application Withdrawn

EV Survey Required? Yes (5/2/2016) Date PMO sent Survey to BCD AM

EV Survey ID: 1859 (5/17/2016) Date EV Survey Due

(5/2/2016) Date AM issued Survey to Customer

Defined Plan Proposal Meeting Scheduled Date: 6/1/2016

Request Customized Rate Analysis:

Defined Plan Proposal Meeting Completed Date: 6/3/2016

Type Notes Below and Click Submit Print BCD Notes

Submit

12

Cancel Save Attach Documents to Application

14. Click **Cancel** to exit the application.

Congratulations! You have successfully completed the Step Two Agreement.

