

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 <u>ChargeReady@sce.com</u> to request access rights to the:

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



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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#/Sh ared%20Documents/Forms/AllItems.aspx?RootFolder=%2fteams%2fCharge%20Rea dy%2fShared%20Documents%2fTools&Folder

The Charge Ready Program SharePoint Document Tools screen displays.

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

← → S https://edisonintl.share	opint.com/teams/Charge%20Ready/Shared%20Documents/Forms/AllRer 🔎 = 🔒 🗘 🚯 Tools - All Documents 🛛 🗙		×■□ =
III Office 365	Sites		🗴 🌣 ? 🔎
BROWSE FILES LIBRARY			🗘 Share 🏠 Follow 🖂
s 🔉	Charge Ready External Party Data Exchange / EDIT LINKS Documents + Tools	Search this site	م •
Home	🕀 New 1 Upload 💋 Sync 🗘 Share More 🗸		
Notebook	All Documents ···· Find a file		
Documents	A D News	Medified	Medified Dr
Recent		Modified	Modified by
External Users	Charge_Ready_Program_Tracking_Database #	 A few seconds ago	Cassie Cuaresma
NDA Document Library	20151109AD Charge Ready Port Port Allowance Tool - With Disadvantaged Zips v2 11- 06-2015	 January 27	Gregory Cole
Site Contents	Charge Ready Program Rate Analysis Tool Job Aid 2016-01-14	 January 27	Gregory Cole
Recycle Bin	Dharge_Ready_Program_Rate Analysis Tool_01.01.16 Factors	 January 19	🖉 Cassie Cuaresma
	How to Download a File from SharePoint 2016-01-27	 January 27	Gregory Cole
/ EDIT LINKS	Port Allowance Tool Job Aid 2016-01-26	 January 27	Gregory Cole
	Drag files here to upload		



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

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

III Office 365	Sites
BROWSE FILES LIBRARY	
S >	Charge Ready External Party Data Exchange / EDIT LINKS Documents > Tools
Home	⊕ New ↑ Upload ♥ Sync ♥ Share More ♥
Notebook	All Documents ···· Find a file \mathcal{P}
Becent	✓ D Name Modified By
External Users	🕼 Charge_Ready_Program_Tracking_Database.ध A few seconds ago 🔳 Cassie Cu
NDA Document Library	🛱 Charg ogram_Rate Analy Open in Microsoft Access 🖬 6 hours ago 🔳 Cassie Cu
Audit Logs	Download unload
Site Contents	Share Loomood
Recycle Bin	Rename
EDIT LINKS	Deste
	Version History
	Properties
	Advanced

3. 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.

Organize • New folder					800 -
🚖 Favorites 🚔 Name	Size	Item type	Date modified		
E Desktop					
🙀 Downloads 🗉 🔀 Cassie Cuaresma					
📜 Recent Places 👘 Computer					
ConeDrive - Edisc 🙀 Network					
CRP Draft WBT		File folder	12/17/2015 4:51 PM		
词 Libraries 🔋 🔒 EAS Transition		File folder	1/13/2016 8:21 PM		
Documents Charge Ready		File folder	1/17/2016 11:58 AM		
Music Shortcut to SP&TS Engineering	1 KB	Shortcut	8/31/2010 7:59 AM		_
Pictures Shortcut to Engineering	1 KB	Shortcut	8/31/2010 8:00 AM		
File name: Charge_Ready_Program_Tracking_Database.accdb				4	
Save as type: Microsoft Access Database (*.accdb)					
				V	





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.

U SECURITY WARNING Some active content has been disabled. Click for more details. Enable Content

The Charge Ready Program Tracking Database displays.

SCE Charge Ready Program Tracking Database - Main Menu 🔀	TING
Hello Greg ! Application Upload Application Bearch	UTIONS
Reports TBD Administrator	
Version: 1.0	



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 <u>ChargeReady@sce.com</u> 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 <u>BCD.ChargeReady@sce.com</u> and <u>ChargeReady@sce.com</u>. 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:

📨 🗔 5 🖑 🏌 🦊 🥰 🛱 CRP-2016-8000 Action Required: New Charge Ready Program Application - Messa ? 📧 🗕 🗖 🗙										
FILE MESSA	GE									
ि Ignore X S Junk ▼ Delete	Reply Reply Forward III More *	CR Sharepoint To Manager Team Email Team Email	Move Actions •	😪 Mark Unread	Translate	Q Zoom				
Delete	Respond	Quick Steps	Move	Tags 🖓	Editing	Zoom	~			
To 'GREGORY.CO Cc BCD Charge R This message wa	Cassie Cuaresma CRP-2016-8000 Action Required: New Charge Ready Program Application To Gregory.cole@sce.com Cc BCD charge Ready This message was sent with High importance.									
Hello, SCE received a Manager. You subject. Please evaluat schedule a Cus Rejection Conv Customer Over Thank you, Charge Ready	new Charge Ready Program App can access the application detai e the Customer Participant's elig tomer meeting to communicate rersation Date" in the Charge Rea rview meeting.	olication today. You we Is in the Charge Ready ibility. If not eligible, o that their Application I ady Database. If eligibl	re identified as the o Database by referen confirm ineligibility v nas been rejected; Ro e, contact the Custon	Customer Partici ncing the applica vith Charge Reac emember to add mer Participant t	pant's Account tion ID in the e dy PMO and the the "Application is schedule the	email en on				
Cassie Cuaresma	Presidents' Day					D	^			



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 <u>BCD.ChargeReady@sce.com</u> and <u>ChargeReady@sce.com</u>. 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"



MESSA	↑ ↓ 🦓 🛱 ലു ∓ GE	CRP-2016-8006 Action Req	uired: Assign BC	CD AM to New Charg	je ? 🛧	- 🗆 ×			
ि Ignore S Junk ▼ Delete	Reply Reply Forward All	CR Sharepoint	Move	😪 Mark Unread ₩ Categorize ד	aggar and a state of the state	Q Zoom			
Delete	Respond	Quick Steps 🕞	Move	Tags 🕞	Editing	Zoom 🔺			
Fri 2/5/2016 2:24 PM Cassie Cuaresma CRP-2016-8006 Action Required: Assign BCD AM to New Charge Ready Program Application To Bcd Acctmgt Solutions Cc BCD Charge Ready This message was sent with High importance.									
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 and then sched the "Applicatio Manager in the Manager so th	e the Customer Participant lule a Customer meeting to n Rejection Conversation I e Charge Ready Database, at they can contact the Cus	's eligibility. If not eligi communicate that the Date" in the Charge Rea and communicate the A stomer Participant to so	ble, confirm ir Application dy Database Application d hedule the C	ineligibility with n has been reject . If eligible, assig etails to the assig ustomer Overvie	Charge Ready ted; Remember n the Account gned Account w meeting.	PMO r to add			
Thank you,									
Charge Ready	РМО								
Cassie Cuaresma	Presidents' Day					0 ^			

Below is an example of an Unassigned Customer Participant email:



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
- 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.



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.



ſ	🗐 Project Search			4					0	٥	23
	Application ID	Company Name	Name Of Contact Person	Filter <u>R</u> emove Filter BCD Account Manager	Address	City	CA#	Application Status			
	CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received			

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

The filter criteria entered for the search is removed.

ſ	🔳 Project Search				1					83
				ilter <u>Remove</u> 5						
	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	 	

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.

📑 Project Search								-	۰	83
			Eilter Remove Filter							
Application ID	Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status			
CRP-2016-0999										
CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received			
1										

The Customer Participant Interest Section tab displays.



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





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Customer Participant Interest Section Depl	loyment Site Current Electric	cal Veł	icle Adoption On-Site	Charge Ready Progra	am Request	Deployment Location
6	Site Description:	Main S	ite			
	Site Address:	18 Che	rry Street			
	City:	Provid	ence			
	State:	CA	Zi	p+4: 867530900		
Existing SCE Service Acco	ount Numner at the Site*:					
Does Customer Participate have leg	al ownership of the Site:	Yes	-			
lf No, i	indicate Property Owner:					
	Phone Number:					
Pr	roperty Owner's Address:					
	Name of Contact Person:					
	Email:					
	Assessor Parcel Number:	123123	123412345			
Autho	ority Having Jurisdiction:	City of	Providence			
Total Nu	umber of Parking Spaces:	25				
Does the Site	have access restrictions	that re	equires scheduling v	isits by SCE or its c	ontractors	? Y/N : No 🔻
If the Site does not have access rest	trictions, would you like t	o be i	notified prior to SCE	or its contractors v	isiting the	Site?: No 🔻

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

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

C	stomer Participant Interest Section Deployment Site Current Electrical Vehicle Adoption On-Site Charge Ready Program Request Deployment Location	Ce					
	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?:						

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 Control Number of additional Charge Ports desired at Site*:

 What is the primary utilization for the requested Charge Ports?:
 Multi-Unit Dwelling

8

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 Progr	am Request	Deployment	Location Cer
Preferred Charging Station Location (e.g., East part	king Lot on Michigan St; 1	st Row)				
1st Choice (optional): Building Main Entrance						
2nd Choice (optional): SE Corner Employee Parki	ng Lot					
3rd Choice (optional): SW Corner Employee Park	ing Lot					
	Preferred	Charging Station	Location Type: Grad	de-Level parki	ng lot	-
Do you have plans to add a Solar PV system	or Energy Storage system	n to serve the Cha	arging Stations? No	•		
	Site plan showing	your preferred lo	ocation choices No	-		
Civil plan with existing	utilities for the site (aka, l	base map), if avai	lable (optional) <mark>No</mark>	•		

9



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

Customer Participant Interest Section	enloyment Site Current Flectrical Vehicle Adoption	On-Site Charge Read	Program Request	Deployment Location	ertification By Customer Pa	rticination BCD T and D CSOD PMC
customer rurdepart interest section b	enoyment one current meet raopaon	on one onange neur	riogram request 1	ocproyment bocution o		theipation beb I and b coob The
By signing, I represent that the info hereby indicate my consent to exec	rmation provided in this Reservation Request and sute and submit this document electronically.	I Contract Agreemen	t is true, accurate a	nd complete. I also	10	
Customer Participant Signature:	Cassie Contact Person					
Name Printed:	Cassie Contact Person					
Title:	Owner Representative					
Date:	4/4/2016					
Rejection Code Description:	ction:	Base Cost I 2495	Disadvantaged Community? 🗹	Multi-unit Dwelling?	Rebate Reservation	Rebate Reserved
Number of Authorized Ports 10		<u>C</u> ancel	Save	Attach Documents to	o Application	

- 11. Click the **BCD** tab to review the associated information.
- 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	Sul	bmit	
--	-----	-------	-----	------	--

Select Date When Customer Contacted First Time 3/25/2016 13 Application Received on 4/4/2016	stomer Participant Interest S	Section Deployment Site Current Electrical Vahiela	Adoption On-Site Charge Ready Program Request Deployment Location Certification By Customer Participation BCD T and D CSOD PM
initial Qualification Check Application Rejected Application Withdrawn EV Survey ID EV Survey ID 4/7/2016 Date PMO sent 12 Type Notes Below and Click Submit Print BCD Notes Survey to BCD AM 4/8/2016 Date PMO sent EV Survey ID Bate AM issued Survey to Customer Survey to Customer Survey to Customer Survey to Customer Submit Plan Phoposal Meeting Scheduled Date Submit Su	Select Date When Customer O	Contacted First Time 3/25/2016	Application Received on 4/4/2016 BCD AM 1st call attempt to custoemr so we could schedule Customer Meeting, Called on 3/25/2016 custore of 4/07/016 65:55:01 M
Initial Qualification Check Application Rejected Application Withdrawn Verse V Survey ID Af7/2016 Date PMO sent Survey to BCD AM Af7/2016 Date V Survey ID Af7/2016 Date V Survey		@ Application Qualified	cuares: 4/20/2010 0.55.00 PW
Image: Complexition Withdrawn Image: Complexition Withdrawn Image: Complexition Withdrawn Image: C	Initial Qualification Check	@ Application Rejected	
No CV Survey Required? 4/7/2016 Date PMO sent Survey to BCD AND Click Submit Print BCD Notes V Survey ID 4/22/2016 Date EV Survey Due 4/8/2016 Date Analysis Request Customized Rate Analysis Completed Date		Application Withdrawn	
4/8/2016 Date AM issued survey to Customer Defined Plan Proposal Meeting Completed Date Submit 14	EV Survey Requi	ired? 4/7/2016 Date PMO sent Survey to BCD AM 4/22/2016 Date EV Survey Due	Type Notes Below and Click Submit Print BCD Notes
Defined Plan Proposal Meeting Completed Date		4/8/2016 Date AM issued Survey to Customer	
tequest Customized Rate Analysis 🗉 Submit	efined Plan Proposal Meetin	ng Scheduled Date	
Defined Plan Proposal Meeting Completed Date	equest Customized Rate Ana	alysis 📾	Submit
	efined Plan Proposal Meetin	ng Completed Date	



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.

A	Charge Ready Program Tracking Database (a) ver 1,0000 12/25/2015	- 6 - X
File Home Create Extern	mail Data Database Tools	3 ۵
View Clipboard G		
	Chana Rash Dinoon San Listout	
	Application DC (RP-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 PMO	
	Select Date When Customer Contacted First Time 1/25/2016 Application Received on 4/4/2016	
	e Application Qualified Initial Qualification Check A population Rejected a Application Withdrawn	
	No EV Survey Required? 4/7/2016 Date PMO sent 15 EV Survey ID 4/22/2016 Date EV Survey Low Friet BCD Notes	
	4/A/2018 Date AM Insued Survey to Cottomer	
	Request Customized Rate Analysis 🗃 Submit	
	Defined Plan Proposal Meeting Completed Date	
	Sancel Save Attach Documents to Application	

15

17. Use the Initial Customer Qualification Checklist (Located on the Charge Ready Program SharePoint site) to determine if the Customer Participant is

EDISON

EPNATIONAL Com

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

eligible for the Program.

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 Vehic	le Adoption On-Sit
Select Date When Customer	Contacte	ed First Time	3/25/2016	
18	0	Application Qualifie	ed	Test BCD AI 04/13/
Initial Qualification Check	0	Application Rejecte	awn	Applica
No EV Survey Requ	uired?		Date PMO sent Survey to BCD AM	Type



11.0	Select Date When Customer Contacted First Time 3/25/2016	20 Application Receil BCD AM 1st call at
	c Application Qualified 3/29/2016 Initial Qualification Check C Application Rejected C Application Withdrawn	Application Eligib
	No EV Survey Required? 4/7/2016 Date PMO sent Survey to BCD AM EV Survey ID 4/22/2016 Date EV Survey Due 4/8/2016 Date AM issued Survey to Customer	Type Notes Below
	Defined Plan Proposal Meeting Scheduled Date Request Customized Rate Analysis	Submit
	Defined Plan Proposal Meeting Completed Date	
		<u>C</u> ancel



The Application Status is updated as Customer Overview Meeting Completed.

Application ID CRP-2016-0702	Aş	pplication Status: Customer Overview Meeting Completed	
Customer Participant Interest Section	Deployment Site Current Electrical Vehicle Adopti	ion On-Site Charge Ready Program Request Deployment Location Certification By Customer Participation BCD	T and D CSOD PMO
Select Date When Customer Contacte	ed First Time 3/25/2016	Application Received on 4/4/2015cuaresc BCD AM 1st call attempt to custoemr so we could schedule Customer Meeting. Called on 3/25/2016 cuaresc 4/20/2018 65:55:0 PM	
G A Initial Qualification Check C A C A	pplication Qualified 3/29/2016 pplication Rejected pplication Withdrawn	Application Eligible on 3/28/2016cuaresc 4/20/2016 7:01:05 PM	
No v EV Survey Required? EV Survey ID	4/7/2016 Date PMO sent Survey to BCD AM 4/22/2016 Date EV Survey Due	Type Notes Below and Click Submit Print BCD Notes	
	4/8/2016 Date AM issued Survey to Customer		
Defined Plan Proposal Meeting Sched	uled Date		
Request Customized Rate Analysis		Submit	
Defined Plan Proposal Meeting Comp	leted Date 22		
		Cancel Save Attach Documents to Application	

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.

Project Search								 ۰	83
Application I	1 Company Name	Name Of Contact Person	Eilter <u>R</u> emove Filter BCD Account Manager	Address	City	CA#	Application Status		
▶ CRP-2016-0999	TestUser	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.

inarge nearly Program Step 1 Interest						_		
Application ID CRP-2016-0999		Application SI	atus: A	pplication Received				
Customer Participant Interest Section	Deployment Sit	e Current Electrical Vehicle Adoption On-Site	Charge	Ready Program Request	Deployment Location	Certification By Customer Participatio	n BC	
Customer Participant/Comp	any Name: T	est User						
Customer Accou	nt Number: 35	6725044						
Federal Tax	D Number: 12	3456789						
Name	of Contact: Jo	hn Doe						
Phor	e Number: 22	763932						
	Email: jo	hn.doe@vendingcompany.com						
Name of SCE Account Manager	(if known): Ca	issie Cuaresma						
How did you hear about the	Program? : 0	ther	•					
Charging Station Vendor/Compa	any Name*:							
Name of Contac	t Person:*:							
	Email:							
Phor	Number:							



Date m

2 88

1 KB Shortcut

1 KB Shortcut

1 KB 3 KB

57 KB PNG im

45.184 KB Microsoft Acce

156,448 KB Micros

1 KB Microsoft Acc

6

OK

Cancel

11/25/2014 11:00

1/14/2015 2:17 PM

1/19/2016 10-33 PM

/19/2016 10:34 Ph

10/30/1999 11:54

8/31/2010 7:59 AM

8/31/2010 8:00 AM

/9/2013 11:10 AM

11/13/2014 10:17 . 1/22/2015 3:32 PM

5

X

Cancel

x

Files (*.*)
Open

III • 🔟 🔞

4. Click Attach File to CRP Application.

The attach files to Charge Ready Program Application screen displays.

5. 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.



Do you want to upload file C:\USERS\COLEGA\CHARGE READY\01 DEV FILES\01 BCD\BCD ONLINE RESOURCE LIST.DOCX to Charge Ready



1

Name AIRMaster+ Adobe Reader XI

EAS Transition

Charge Ready

Shortcut to Engin

convert.exe
 Shortcut to SP&TS Eng

ATT_Connect_Setup.exe
 Yammer Notifier
 GoToMeeting Quick Con

B. GrowthMindsetPoster.pn

ChargeReadyProgram
 SPTS_Front_0439_ss_test.accdl
 Menu_01182016Mp.laccdb

(I) Menu 01182016Mp.accdb

Attached File Confirmation

Microsoft Access

7

OK to create folder!

OK

application ?

÷ Faur

词 Libra

Docume

Pictures
Videos

Computer

SDisk (C:)

Local Disk (Q:)

E Desktop

Download

SE Recent Place

G OneDrive - Ed



11

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

Microsoft Access
File attached to CRP application Successfully
ОК

Attach C	harge Ready Application	Related Documents		2~5
Document Description	Attached File Name	File Content		
	BCD Online Resource List_20160415.docx	test		
1				
	'onu Salartad Filo Attach filo	to CRD Application		

VIEW A FILE ATTACHED TO AN APPLICATION

In the Attach Charge Ready	s frmFileAttachment			- • ×
Application Deleted Desumerate	Attache	ed Charge ReadyApplication r	elated Documents	
Application Related Documents	Document Description	Attached File Name	File Content	
screen, the attached file(s) display.		GrowthMindsetPoster_20160120.png	Itest	
10. Highlight the applicable file and				
click Copy Selected File.		10		
Note: The file downloads to your	-	Copy Selected File Attached Fil Applica	le to CRP ition	
C:\chargeready folder.				
11. Click Close.				

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

How did you hear about the Program? :	Other	•	
Charging Station Vendor/Company Name*:			
Name of Contact Person:*:			
Email:			
Phone Number:			
		12	
		12	

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.

ſ	📑 Project Search								• 53
	Application I	Company Name	Name Of Contact Person	Eilter <u>B</u> emove Filter BCD Account Manager	Address	City	CA#	Application Status	
C	CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received	

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

The File Attachment screen displays.

	\
Customer Participant Interest Section Deployment Site Current Electrical Vehicle Adopt	tion 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 1/25/2016 a Application Qualified 3/25/2016 Initial Qualification Check C Application Rejected C Application Withdrawn	Application Received on 4/4/2016cuaresc BCD AM 1st call attempt to custoemr so we could schedule Customer Meeting, Called on 3/25/2016-53:50 PM Application Eligible on 3/29/2016cuaresc 4/20/2016 7:01:05 PM
No v EV Survey Required? 4/7/2016 Date PMO sent EV Survey ID Survey to BCD AM	Type Notes Below and Click Submit Print BCD Notes
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	Submit
Defined Plan Proposal Meeting Completed Date	
	Cancel Save Attach Documents to Application

2



4. Click Attach File to CRP Attach Charge Ready Application related Documents Application. cription Attached File Name **File Content** The attach files to Charge Ready Program Application screen displays. 4 Attach File to CRP Application Copy Selected File 5. Highlight the desired file to A Select Deliverable File to Atta 🕒 🔵 🖉 🔳 Desktop 🕨 attach to the application and click New folder 0 Organize * Open. Favorites Name Size Item type Date m E Desktop Libraries b Downloads R Gregory Cole Important: Ensure the file to be Skecent Places Scomputer Setwork uploaded is not currently open in 🛄 Libraries eDMRM Bocuments Employee Quick Search 2 KB Shortcut 9/21/20 another program as it cause an error A Music 2 KB Shortcut Dinternet Explorer 6/10/20 Pictures O0 Charge_Ready_Program_Tracking_Database.accde 2,272 KB Microsoft Access in the upload. 4/15/20 E Videos 00 Charge_Ready_Program_Tracking_Database.lacc... 1 KB LACCDB File 4/15/20 01 Shared Folders 2 KB Shortcut Scompute Customer Withdraw Letter to SCE.docx 12 KB Microsoft Word D... 4/15/20 CSDisk (C:) 😥 Mozilla Firefox 12/2/20 Incal Disk (O:) File name All Files (*.*) -5 Open -Cancel 6. Confirm the selected file and click Attached File Confirmation X OK. Do you want to upload file C:\USERS\COLEGA\DESKTOP\CUSTOMER WITHDRAW LETTER TO SCE.DOCX to Charge Ready application ? 6 OK Cancel 7. If the file is the first attachment Microsoft Access X added to the application, click OK to create a new application folder OK to create folder! in the Charge Ready shared 7 folder. OK Cancel 8. The database creates the new X Microsoft Access folder name and location. Click \\sce\workgroup\CSBU5\Energy Efficiency\ChargeReadyProgram\CRP-2016-0999 OK. 8 OK



 The database also confirms that the attachment uploaded successfully. Click OK. 	Microsoft Access
In the Attach Charge Ready Application Related Documents, the attached file displays.	10 TimFileAttachment The Charge Ready Application Related Documents Document Description Attached File Name File Content F
10. Click Close 🔯 .	Copy Selected File Attach File to CRP Application

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).

Customer Participant Interest Section Deployment Site Current Electrical Vehicle Adoptic	n 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 3/25/2016	Application Received on 4/4/2016 BCD AM Sts call attempt to customer so we could schedule Customer Meeting. Called on 3/25/2016 namere 4/20/2016-6-54-50 AM	
Application Qualified 3/29/2016	ones die Africa and and an an	
Initial Qualification Check C Application Rejected	Application Eligible on 3/29/2016cuaresc 4/20/2016 7:01:05 PM	
C Application Withdrawn		
No v EV Survey Required? 4/7/2016 Date PMO se Survey to BCI	Type Notes Below and Click Submit Print BCD Notes	
EV Survey ID 4/22/2016 Date EV Surve	Customer wants to withdraw as the Program would take too long for them to complete and they need to have EV charging stations in4 months time.	
4/8/2016 Date AM issued Survey to Customer		N.S
Defined Plan Proposal Meeting Scheduled Date		
Request Customized Rate Analysis	Submit	
Defined Plan Proposal Meeting Completed Date		
	Cancel Sove Attach Documents to Application	
]

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.

Customer Participant Interest Section Deployment Site Current Electrical Vehicle Ado	ption On-Site Charge Ready Program Request Deployment Location Certification By Customer Participation 8CD T and D CSOD PMO
Select Date When Customer Contacted First Time 3/25/2016	Application Received on 4/4/2016cuaresc IRCO AM 1st call attempt to custoemr so we could schedule Customer Meeting. Called on 1/25/2016 cuaresc-4/20/2016 6:55:50 PM
Initial Qualification Check C Application Rejected	Application Eligible on 3/29/2016cuaresc 4/20/2016 7:01:05 PM
Application Withdrawn 4/15/2016	Customer wants to withdraw as the Program would take too long for them to complete and they need to
No CV Sorvey Required? 4/17/2018 Date PMO sort EV Sorvey ID 4/27/2018 Date I/V Sorvey Dow 4/22/2018 Date I/V Sorvey Dow 4/17/2018 Date AM isseed	Type Notes Below and Click Submit Print BCD Notes
Defined Plan Proposal Meeting Scheduled Date	
Request Customized Rate Analysis 🛛 🗮 Defined Plan Proposal Meeting Completed Date	16

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.

Project Search								-	B X
Applic 1	Company Name	Name Of Contact Person	Filter <u>R</u> emove Filter 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.
	Select Date When Customer Contacted First Time 3/25/2016 Application Received on 4/4/2016cuaresc BCD AM 1st call attempt to customer so we could schedule Customer Meeting. Called on 3/25/2016 cuaresc 4/20/2016 SS-SD PM
	Initial Qualification Check C Application Rejected Application Eligible on 3/29/2016
	No EV Survey Required? 4/7/2018 Date PMO sent Survey to BCD AM Type Notes Below and Click Submit Print BCD Notes EV Survey 10 4/22/2018 Date EV Survey Due 4/0/2018 Date EV Survey To BCD AM Application reject since parking fold does not have enough parking spaces to meet minimum Program
	Defined Plan Proposal Meeting Scheduled Date Request Customized Rate Analysis Defined Plan Proposal Meeting Completed Date
	Gancel Seven Attach Documents to Application



5.	Click Application Rejected.	Customer Participant Interest Section Deployment Site Current Electrical Vehicle Adoption On-Site Ch	
Th Cc	e Application Rejection Customer nversion Date prompt displays.	Select Date When Customer Contacted First Time 3/25/2016 Initial Qualification Check C Application Rejected Application Withdrawn No EV Survey Required? Date PMO sent Type Notes Survey to BCD AM BCD AM EV Survey ID Date EV Survey Due	
6.	Click OK .	Date AM issued Survey to Customer	
		Enter Application Rejection Customer Conversation Date 6 OK	
7.	Enter in the Application Rejection Customer Conversation Date.	Select Date When Customer Contacted First Time 3/25/2016	On-S
		Application Qualified Application Rejected Application Withdrawn 4/15/2016	Appl
	CI	No ▼ EV Survey Required? Date PMO sent Survey to BCD AM EV Survey ID Date EV Survey Due	Typ BCD

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.

Charge Ready Prog	ram Step 1 Interest				
Application ID	CRP-2016-0301		Appli	cation Status: Appli	cation Rejected
Customer Partic	ipant Interest Section	Deployment Site	Current Electrical Vehicle Adoption	On-Site Charge Rea	ady Program Reques
By signing, complete. I Customer F	I represent that the also hereby indicat Participant Signatur	e information protection of the my consent to	ovided in this Reservation Reque o execute and submit this docume Person	st and Contract Ap ent electronically.	greement is true,
	Name Printe	d: Cassie Contact I	Person		
	Titl	e: Owner Represe	ntative		
	Dat	e: 4/4/2016			
Rejection Co	ode Description:	other, please descr	ibe:	Base Cost	Disadvantaged



9.	Select the appropriate Reason	FrmReasonCode 83					
	Code for rejection.	Reason Code Decribe Reject Reason	9 Credit Deposit Easement Requirement Financial Limitations Lack of Property Owner Approval Site Location Timing Other, please describe:				
No sel	te: if Other, please describe: is ected, type the rejection	FrmReasonCode	×				
de: Re	scription in the Describe Reject ason field.	Reason Code	Other, please describe:				
10.	Click Submit.	Decribe Reject Reason	Customer does not have enough parking spaces to meet the minium criteria for the Charge Ready Program.				
			10 Submit				
11.	Click Save.	Darge finely, Program (ling), Normal Application (IV) (1/2) - 23 - 23 - 23 - 23 - 23 - 23 - 23 -	Application Materic / Application Rayeled 				
		Report Castonical Rate Analysis 📕 Defined Plan Proposal Meeting Completed Date	Cancel Serve Attach Desamants to Application 11				
12.	Click Cancel to exit the application.	Defined Plan Proposal Meeting Schec Defined Plan Proposal Meeting Comp	Date AM issued Survey to Customer Iuled Date 4/7/2016 Isleted Date 4/7/2016 Lancel Sove				

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.

-a rojectocaren								
			<u>Filter</u> <u>R</u> emove Filter					
pplication ID	Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status	
16-0999								
CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received	
Click the B	CD tab							
Charge Ready Program Step 1 Intere	est						2	
Application ID CRP-2016-0716	5	Applicatio	n Status: Customer Overview Me	eting Completed	¥		ιſ	
Customer Participant Interest S	Section Deployment Site Current	Electrical Vehicle Adoption On-Sit	e Charge Ready Program Reque	st Deployment Loca	tion Certification	By Customer	Participation BCD T and D CSOD F	PMO
Select Date When Customer C	ontacted First Time 4/14/2	016 Applic	ation Received on 4/26/2016	cuaresc laga 4/26/2016 2:06:10	0 PM		*	
		Applica	ation Englore on 4/16/2010C0	10 B0 -1 201 2010 2:00:10				
	Application Qualified	4/18/2016						
Initial Qualification Check	Application Rejected							
	0							
	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.



								_			
Application ID	Application ID CRP-2016-0716						lication	Status:	Customer Over	view Meeti	ng Comp
Customer Partic	cipant Interest Se	ection	Deployment Site	Current Ele	ectrical Vehicle	Adoption	On-Site	Charge	Ready Program	n Request	Deploy
Select Date W	'hen Customer Co	ntacteo	l First Time	4/14/2016	b		Applicat Applicat	on Rece on Eligil	vived on 4/26/20	016 5coleg	cuaresc a 4/26/2
Initial Qualific	ation Check	66 A 66 A 66 A	pplication Qualifie pplication Rejecter pplication Withdra	d d wn	4/18/201	6					
Yes 🔻	EV Survey Requir	ed?		Date PMO s Survey to B	ent CD AM		Type No	otes Bel	ow and Click Su	ubmit	
/682	EV Survey ID			Date EV Sur	vey Due						
				Date AM iss Survey to Ci	ued ustomer						
D-ft d Di D		Colored	de d De te								

- 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.

Charge Ready Program Step 1 Interest	4	
Application ID CRP-2016-0717		Application Status: Custome
Customer Participant Interest Section	Deployment Site Current Electrical Vehicle Adop	otion On-Site Charge Ready F
Select Date When Customer Contacted	First Time 4/28/2016	Application Received on Application Eligible on 4/2
د ۹۵ Initial Qualification Check ۹۵ مع	oplication Qualified 4/29/2016 oplication Rejected oplication Withdrawn	
Yes V EV Survey Requir	Date PMO sent Survey to BCD AM Date EV Survey Due	Type Notes Below and
Defined Plan Proposal Meeting Schedu	Date AM issued Survey to Customer	



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

Customer Participant Interest S	ection	Deployment Site	Current Elec	ctrical Vehicle Ado	pti
Select Date When Customer	Contact	ed First Time	4/20/2016		
Initial Qualification Check	4/29/2016				
No 🝷 EV Survey Requi	fred?	4/29/2016 5/14/2016 5/6/2016	Date PMO sen Survey to BCD Date EV Surve Date AM issue Survey to Cust	t AM y Due d	

- 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.

	Tue 4/12/2016 7:01 PM
25	Cassie Cuaresma
	Action Requested: Charge Ready Parking Survey Instructions Packet for CITY OF HERMOSA BEACH
Gilbert Est	zanila
Namrita M	erno
You forward	ed this message on 4/18/2016 8:54 AM.
Message	AlhambraOffice_Charge Ready Program - Employee Parking Survey Instructions Packet.docx (106 KB) 📆 AlhambraOffice_Charge Ready Parking Survey_Workplace Parking Survey_ConvPDF.pdf (198 KB)
Please forward	this email along with the attachments to Kevin Morris at The Alhambra Office.
Thank you for	your help,
The Charge Re	ady Team
CUSTOMER E	MAIL
To: Kevin Mo	rris
Same Subject	Line as for Rep: ACTION REQUESTED: Charge Ready Parking Survey Instructions Packet for The Alhambra Office
Body of Email	to Customer:
Re: The Alhar	nbra Office
Attached are th	e instructions for the 2-3 minute online Parking Survey we would like you to distribute to your employees who park at The Alhambra Office. A copy of the survey is also attached for your reference.
To take the sur	vey, your employees will need the survey link and the unique survey code assigned to this particular location.
lf you have app	slied or plan to apply for the Charge Ready Program for more than one site, <u>you will receive a unique survey code for each location.</u>
Survey	code for The Alhambra Office: 1581.
Survey	Link: https://survey.sce.com/perseus/se.ashx7s=089746282805F03F (It is also in the invitation letter template.)
Please have yo	sur employees complete the survey by Thursday, April, 28, 2016 (15 business days from today).
Please review t	the instructions completely and feel free to contact me if you have any questions.
Sincerely, Gilb	ert Escamilia
6	2nacy Notes
	D 2016 Southern California Edison. All rights reserved.
Cassie Cuaresma	
Southern Californ Office: (626) 302	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1



8. 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 Pro	gram Step 1 Interest						
Application ID	CRP-2016-0717			Application Status			
Customer Partie	cipant Interest Se	ction	Deployment Site	Current Elect	rical Vehicle Ador	otion On-Site	Char
Select Date W	/hen Customer Cor	ntacte	d First Time	4/28/2016		Applicat Applicat	ion Re ion Eli
Initial Qualification Check ම ම			Application Qualifi Application Rejecto Application Withdr	ed ed awn	4/29/2016		
Yes 💌 EV Survey Requi		ed?	5/2/2016 5/17/2016	Date PMO sen Survey to BCD Date EV Surve	t AM y Due	Type No	otes B
		8	5/2/2016	Date AM issue Survey to Cust	d omer		
Defined Plan I	Proposal Meeting	Sched	uled Date				

9. Click Submit.

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

Application ID	CRP-2016-0717			Application	Status: Custome	er Overview Meeting	Completed	*
ustomer Partic	ipant Interest Section	Deployment Site Cu	rrent Electrical Vehi	icle Adoption On-Site	Charge Ready P	rogram Request D	eployment Locatio	on Certification By Cu
Select Date Wi	hen Customer Contacte	d First Time 4 Application Qualified Application Rejected Application Withdrawn	/28/2016 4/29/	Applicat Applicat	ion Received on 4 ion Eligible on 4/2	4/26/2016cua 99/2016colega 4	aresc 4/26/2016 3:28:33 F	M
Yes v E 1859	EV Survey Required? EV Survey ID	5/2/2016 Dat Sun 5/17/2016 Dat 5/2/2016 Dat	e PMO sent vey to BCD AM te EV Survey Due te AM issued rvey to Customer	Type N	otes Below and C	Click Submit	Print B	CD Notes
Defined Plan P Defined Plan P	Proposal Meeting Scheo Proposal Meeting Comp	leted Date		9	Submit			
				10	ancel	Save	Attach Docume	nts 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.



narge neady Prog	gram Step 1 Interest							2
Application ID	CRP-2016-0716		Appl	ication Status:	Customer Overview Meet	ing Completed	Ŧ	ل ڈے
ustomer Partic	cipant Interest Section	Deployment Site Current	Electrical Vehicle Adoption C	On-Site Charge	e Ready Program Request	Deployment Location	Certification By Customer Parti	cipation BCD T and D CSOD PMO
Select Date W	/hen Customer Contacted	First Time 4/14/2	2016	Application Rece Application Eligib	eived on 4/26/2016 ble on 4/18/2016cole	-cuaresc ga 4/26/2016 2:06:10 PM		•

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

+. CIICK Subin	п.				
	Initial Qualification Check	Application Qualified Application Rejected Application Withdrawn	4/29/2016		
	EV Survey Requ	ired? Date PM Survey t Date EV	O sent o BCD AM Survey Due issued	Type Notes Below and Click Sub	ZNOIT
		Survey to	o Customer		
	Defined Plan Proposal Meetin Defined Plan Proposal Meetin	g Scheduled Date]	4 Submit	



5. 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).

nt Electrical Vehicle Adoptio	n On-Site Charge Ready Program Request Deployment Location Certification By Customer Participation BC	
2016	Application Received on 4/5/2016cuaresc Application Eligible on 4/29/2016cuaresc 4/5/2016 12:26:12 PM	
4/29/2016		
10 sent	Type Notes Below and Click Submit Print BCD Notes	
Survey Due A issued to Customer	Customer Participant provided alternative data with EV counts for their facility	
	Submit	
	Cancel Save Attach Documents to Application	
6 Click Cancel to exit the	Application Withdrawn	
application.	No v EV Survey Required? Date PMO sent Type Not Survey to BCD AM	es Below and Click Submit
	Date EV Survey Due Date AM Issued Survey to Customer	
	Defined Plan Proposal Meeting Scheduled Date	
	Defined Plan Proposal Meeting Completed Date	ubmit
	Can	cel <u>S</u> ave

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.

From: Cassie Cuaresma Sent: Tuesday, April 26, 2016 3:36 PM To: 'GREGORY.COLE@SCE.COM' Cc: BCD Charge Ready BCD Charge Ready@sce.com Cc: BCD Charge Ready BCD Charge Ready@sce.com	
Importance: High	
Hello,	
Please schedule meeting with customer to discuss Step 2 Agreement and next steps in process. Enter scheduled meeting date in Charge Ready Database.	
Thank you,	
Charge Ready PMO	

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

The Charge Ready Program Application Search displays.

Project Search								0	۰	23
_			ilter <u>R</u> emove Filter							
Applic	2 Company Name	Name Of Contact Person	BCD Account Manager	Address	City	CA#	Application Status			
CRP-2016-09										
CRP-2016-0999	Test User	John Doe	Cassie Cuaresma	18 Cherry Street	Providence	356725044	Application Received			

3. Click the **BCD** tab.

Charge Ready Program Step 1 Interest									
Application ID CRP-2016-0	717		Application Status: Form 1B Initiated	- 3					
Customer Participant Intere	st Section Deployment S	te Current Electrical Vehicle Adopt	ion On-Site Charge Ready Program Request 1	Deployment Location Certification By Customer Participation BCD 7					
Select Date When Custome	r Contacted First Time	4/28/2016	Application Received on 4/26/2016cu Application Eligible on 4/29/2016colega	aresc 4/26/2016 3:28:33 PM					
Initial Qualification Check	 Application Qua Application Reje Application With 	lified 4/29/2016 cted drawn							
Yes 💌 EV Survey Re	equired? 5/2/2016	Date PMO sent Survey to BCD AM	Type Notes Below and Click Submit	Print BCD Notes					



- 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.
- Add a checkmark
 ^I 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
- 6. Click **Submit**.

analysis.

CRP-2016-07	7	Application Status: Form 1B Initiate					
ustomer Participant Interest	Section	Deployment Site	Current Electric	cal Vehicle Adopt	tion On-Site	Charge H	Ready Program Requ
Select Date When Customer Initial Qualification Check Yes EV Survey Req 1859 EV Survey ID Defined Plan Proposal Meeti Request Customized Rate An Defined Plan Proposal Meeti	Contacte د ا د ا د ا د ا د ا د ا د ا د ا د ا د ا	ed First Time	4/28/2016 ed ed rawn Date PMO sent Survey to BCD A Date EV Survey Date AM issued Survey to Custor 6/1/2016	4/29/2016 M Due mer	Applicati Applicati	on Receiv ion Eligible otes Belov	ved on 4/26/2016 e on 4/29/2016c w and Click Submit



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

Charge Ready Prog	gram Step 1 Interes	st						
Application ID	CRP-2016-0717			Application Status	Defined Plan Proposal Meet	ting Scheduled	•	
Customer Partic	cipant Interest Se	ection Deployment Si	te Current Electrical Vehicle A	doption On-Site Charg	ge Ready Program Request	Deployment Location	Certification	n By Cu
Select Date W Initial Qualific	Then Customer Co eation Check	entacted First Time 중 Application Qual 중 Application Reje 중 Application With	4/28/2016 ified 4/29/2016 cted drawn	Application Red Application Elig	reived on 4/26/2016colega	Jaresc 4/26/2016 3:28:33 PM		
Yes 💌 1859	EV Survey Requi	red? 5/2/2016 5/17/2016 5/2/2016	Date PMO sent Survey to BCD AM Date EV Survey Due Date AM issued Survey to Customer	Type Notes Be	low and Click Submit	Print BCD	Notes	
Defined Plan F	Proposal Meeting	Scheduled Date	6/1/2016					
Request Custo	mized Rate Anal	ysis 🗹		Submi	t			
Defined Plan F	Proposal Meeting	completed Date						
				Cancel	Save	Attach Documents	to Applicatio	on

7. 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></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: HEDESERT MEMORIAL HOSPITAL
Thank you
Charge Ready Pivio



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

frmFileAttachment				۵	23				
Attach C	Attach Charge Ready Application Related Documents								
Document Description	Attached File Name	File Content							
	CRP-2016-0710 Defined Plan_20160503.png	test							
	8								
6	py Selected File Attach File to CRI	Application							
-									

The file successfully copied to your local hard drive.

9. Click OK.

<complex-block></complex-block>	9.	Click OK.		Microsoft A	ccess				×	
<complex-block></complex-block>				File Successfully copied to your local hardDrive C:\ChargeReady Folder						
								OK	~ 9	
	10.	Browse to the chargere	ady folder to	view t	ne file.		nap fing the	per "10% y 76%		
<complex-block></complex-block>			lide chow Print E-mail	New folder						
		Favorites N Desitop	ame Archive	10	Date 5/3/2016 2:30 PM	Type File folder	Size	Tags		
		Downloads Market Recent Places	CRP-2016-0710 Defined Plan_2016	0503.png	11/30/2015 9:22 AM	PNG image	57	<b< th=""><th></th></b<>		
<image/>		🝊 OneDrive - Edison Internati		Item	type: PNG image insions: 923 x 582					
Church CITE ##		CLOV				SCE		GEND GEND STORE STOR	4 HETER HEA	



- 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.

Yes Ves 1859 EV Survey Required?	5/2/2016 Date PMO sent Survey to BCD AM 5/17/2016 Date EV Survey Due	Type Notes Below and Click
	5/2/2016 Date AM issued Survey to Customer	
Defined Plan Proposal Meeting Schee	luled Date 6/1/2016	11
Request Customized Rate Analysis		Submit
Defined Plan Proposal Meeting Comp	leted Date 6/3/2016 50 10	
		<u>Cancel</u> Sa

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 Mee	eting Completed	•	
Customer Partic	cipant Interest S	ection l	Deployment Site	Current Elec	rical Vehicle Ado	option On-Site Charge	e Ready Program Request	Deployment Location	Certifica	ition By Customer
Select Date W Initial Qualific	/hen Customer Co sation Check	ontacted ह Aj ि Aj ि Aj	First Time	4/28/2016 d awn	4/29/2016	Application Reco Application Eligi	eived on 4/26/2016	cuaresc a 4/26/2016 3:28:33 PN	1	
Yes 💌 1859	EV Survey Requi	red?	5/2/2016 5/17/2016 5/2/2016	Date PMO ser Survey to BCI Date EV Surve Date AM issue Survey to Cus	it 9 AM 19 Due 19 d tomer	Type Notes Bel	ow and Click Submit	Print BC	D Notes	
Defined Plan F Request Custo	Proposal Meeting omized Rate Anal	; Schedu ysis	iled Date	6/1/2016		Submit				
Defined Plan F	Proposal Meeting	; Comple	eted Date	6/3/2016		12 <u>Cancel</u>	Save	Attach Documen	ts to Appli	cation

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

