

# **On-Bill Financing Application Submission for Customers in the Rebate Center – Product View User Guide**

**Southern California Edison (SCE)**



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## Overview

This document instructs Customers how to use the **Rebate Center – Product View** website to submit applications for **On-Bill Financing (OBF)** projects.


OBF allows you to procure a loan from SCE to cover the project costs. This loan will be repaid in installments on your utility bill.

If you are applying for OBF, you must submit the application before the equipment is installed. SCE will review and approve a reservation of funds.

After installation you will return and enter information about the installation and payment. SCE will review and approve the final loan calculation (or return the application for revisions.)

## About the Online Application

- Applications are divided into sections.
- Throughout the application, required fields are marked with asterisks.
- Greyed out fields are pre-populated and are read-only.


 Will Set Application Status to Draft Expiration Reminder 07/26/2020 01:27 PDT. time remaining : 10 days 4 hours 52 minutes 19 seconds

### Expiration

Once you start an application, you have 45 days to complete it. You will see an expiration countdown at the top of the application until it is submitted. If needed, you will receive a reminder email 15 days before the expiration.

### Application Header



Scroll down the page to see sections of the application. As you scroll, the header will stay at the top of the screen.

 Back To Applications

**Estimated Totals**  
Customer \$1,000.00

Project Submission  
00000756004

Add to Cart

 Calculate  Save

Click the **Calculate** button as directed throughout the application to populate fields and sections that depend on other entries.

### Tooltip/ Instructional Text

FNAICS Override

Enter correct FNAICS code here if defaulted value is incorrect or missing. (i.e. 311812 - Commercial Bakeries)

Many of the application fields display helpful or explanatory information below the field.

## Submitting On-Bill Financing Applications

SCE Customers can access the Rebate Center website to submit and manage On-Bill Financing applications by logging into My Account on sce.com.

The **Rebate Center – Product View** allows you to apply for On-Bill Financing on eligible equipment, or products. For each loan application, you will fill out a form with customer, and site details, then add the On-Bill Financing product to a shopping cart. A form can only include one installation site and one On-Bill Financing product.

1. On SCE.com, log into **My Account** and click **Apply Now**.

Let the Energy Savings Assistance Program help you conserve energy and save money. For income-qualified customers, we'll provide free appliances\* and installation of energy-efficient refrigerators, air conditioners and more, as well as [home efficiency solutions](#) like weatherization that will help you save energy and money every day.

\*In some instances you may be required to pay a co-payment

### Are You Eligible for Free Appliances?

If you qualify, we'll cover **1** s—including installation—of new energy-efficient appliances.

- [Apply Now](#)
- [Check Enrollment Status](#)

Does Your Household Qualify?

How Can I Verify If The Field Employee Is Approved By SCE?

How Does the Program Work?

What Appliances or Services Could You Get?

2. If you are not logged in, you will be prompted to log in when you click **Apply Now**. When login is completed, you will be automatically directed to the Rebate Center home page.

*The Rebate Center home page displays.*

Connecting to

Sign-in with your Southern California Edison - SYS-B account to access iEnergy

# WELCOME

To continue, log in with your SCE.com User ID.

User ID / Email

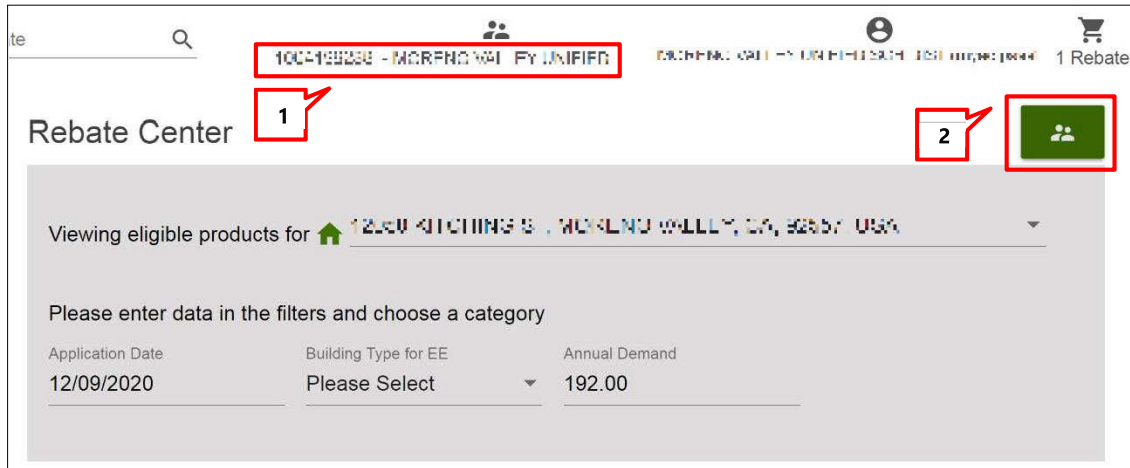
Password

[Log in](#)

[Need help signing in?](#)

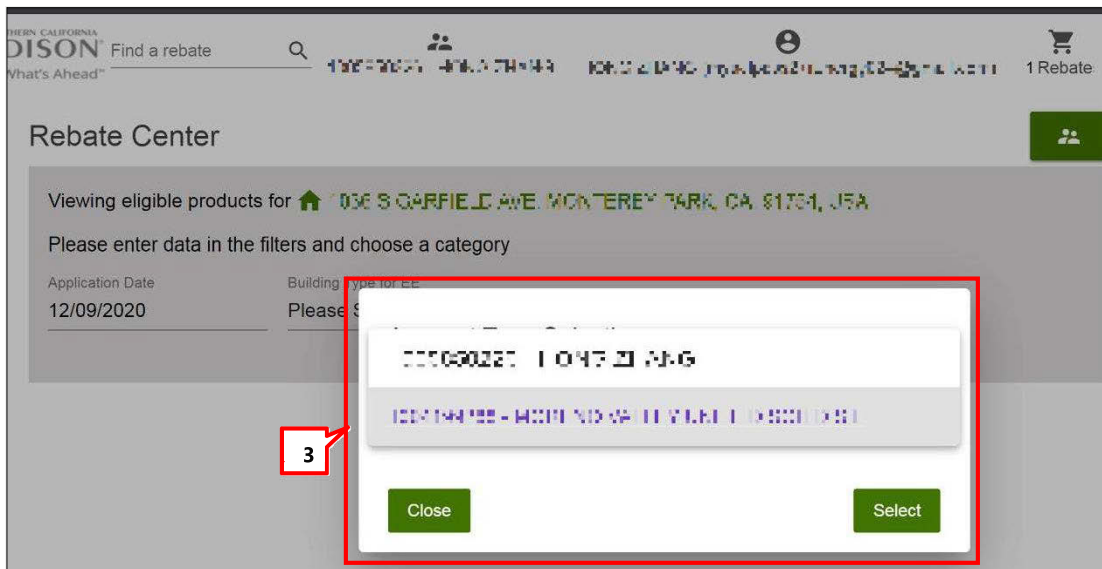
## Accessing Multiple Accounts

When there are multiple user accounts associated with a single SCE.com account, and a user logs into the Rebate Center via SSO, they can access any of those accounts with the following steps:

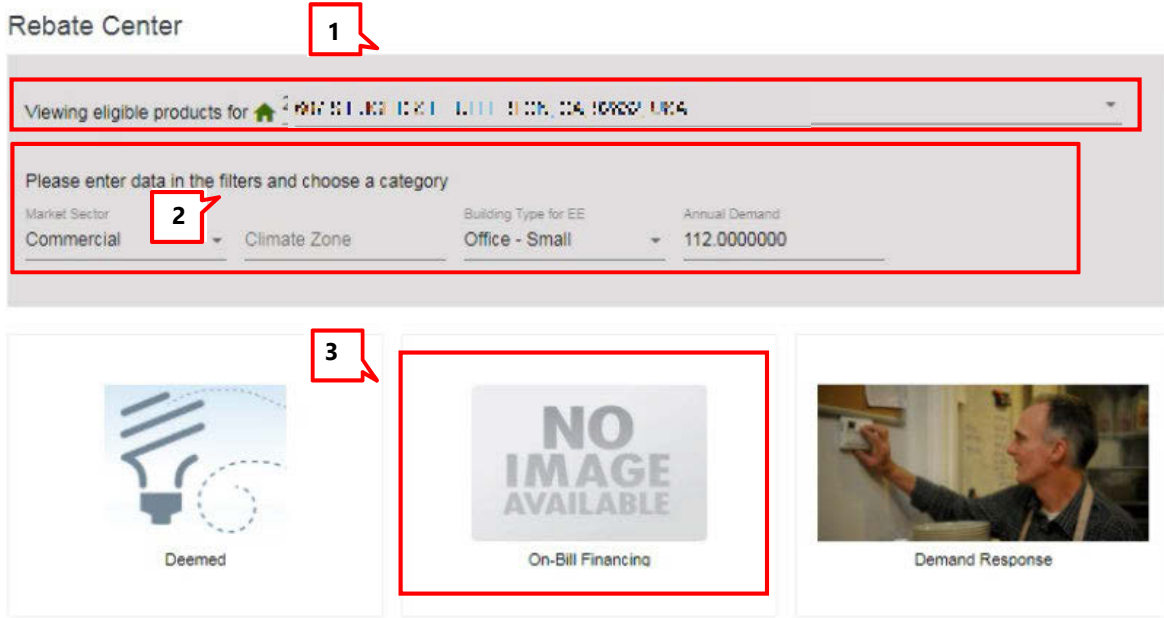


1. The current account is indicated at the top of the UI by the account number and name.
2. To switch accounts, click on the **Switch Accounts** icon.

*A pop-up selection window displays.*



3. In the pop-up window, click the desired account number then click **Select**.  
*The system will switch over to the selected account, which will display only projects associated with that account.*



The Rebate Center home page displays product categories for which the selected customer site is eligible. Available products may vary by site.

1. **Site selection** – If you have more than one site, select from the dropdown.
2. **Data filters** – Use the data filters to refine results. The following table details which filters are available for each program.
  - **Market Sector** – Defaults to Commercial. Can update if needed
  - **Application Date** – Auto-populates with current date
  - **Climate Zone** – Derived from customer site information
  - **Building Type for EE** – Derived from customer site information
3. **Product selection** – Click on **On-Bill Financing** for all OBF applications.

1. If more than one On-Bill Financing product is shown, select any the **On-Bill Financing** products.



2. After selecting the On-Bill Financing product, click **Apply for Rebate** to start the application.



On-Bill Financing

**Apply for Rebate**

Financing for net project cost after incentives

Rebate Description

## Reservation Request Application Sections

### Customer Information

Customer Information	
Customer Number *	Site Number *
0900293793	0900293793
Bill Account Number *	Your Site Number is the your 10 digit Service Account number on your SCE bill. Example of SCE Bill – Link.
0900293793	Customer Name *
Site Address 1 *	CA 0900293793
CA 0900293793	Site State *
Site City *	CA
PIRU	Rate Schedule
Site Zip *	TP2D49:TOU-PA-2-D 4pm to 9pm
93040	
Project Contact First Name *	Project Contact Last Name *
Janet	Weiss
Project Contact Title *	Project Contact Phone *
Test	(123) 456 - 7890
Project Contact Email *	<small>If you have an extension Enter 'x' after phone number if requires extension (i.e. (555) 555-1234x4321). Format for phone extension (i.e. (555) 555-1234x4321).</small>
janet.weiss@piru.com	
<small>This email address will be used to provide notifications for this project.</small>	

Read-only Customer and Site information auto-populates from iEnergy. Project contact information auto-populates based on the user logged in and can be edited.

**Additional Customer Information**

1. If the **Account Representative**, **FNAICS**, or **Building Type** values are missing or incorrect, update them here.
2. To see a list of FNAICS codes used by SCE, click the **FNAICS REFERENCEFILE** link to download the iEnergy NAICS Table to your computer. A detail of this table is shown below

**Additional Customer Information**  
 Search for the FNAICS classification  business from the file under the link below:  
[FNAICS REFERENCE FILE](#)  
 and enter the description to the FNAICS description field.

SCE Account Representative

FNAICS Code  
211111

FNAICS Description  
CRUDE PETROLEUM AND NATURAL GAS EXTRACTIO

Building Type Override

Market Sector  
Industrial

SCE Account Representative Override  
Enter the correct SCE Account Manager if incorrect or missing and you know who they are.

FNAICS Override  
Enter correct FNAICS code here if defaulted value is incorrect or missing, (i.e. 311512 - Commercial Bakeries)  
 Building Type  
 Manufacturing - Light Industrial

	A	B
1	FirstOfFNAICS	Naics_text
2	422410	GENERAL LINE GROCERY WHOLESALERS
3	327910	ABRASIVE PRODUCT MANUFACTURING
4	325520	ADHESIVE MANUFACTURING
5	924110	ADMINISTRATION OF AIR AND WATER RESOURCE AND SC
6	924120	ADMINISTRATION OF CONSERVATION PROGRAMS
7	923110	ADMINISTRATION OF EDUCATION PROGRAMS
8	926110	ADMINISTRATION OF GENERAL ECONOMIC PROGRAMS
9	925110	ADMINISTRATION OF HOUSING PROGRAMS



**Project Information**

1. On the "Are you applying for OBF?" field, select **YES**.
2. On the "Reservation or Incentive Request" field, select **Reservation Request**.

The screenshot shows a 'Project Information' form with the following fields and values:

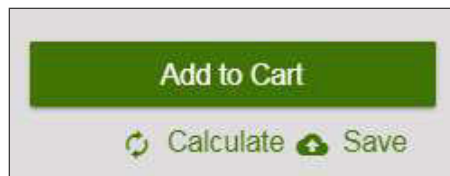
- Application Name \***: Field is required. Enter brief application name for your reference.
- Attribution ID \***: SCE-13-SW-002C
- Group ID**: UI038F6B6CVF1JGO
- Attribution ID Description**: Commercial Deemed Incentives Program
- Baseline Annual Operating Hours**: Enter facility's annual baseline operating hours.
- Total Sq. Ft. \***: 3,000
- Year Built**: 2015
- Installed Annual Operating Hours**: Enter year that facility was built.
- Application Submission Date**: 3/18/2022
- Are you applying for OBF? \***: Yes
- Program Manager \***: Christopher Scott
- Are you using a Trade Pro? \***: No
- Project Description**: Enter brief project description.
- Reservation or Incentive Request \***: Reservation Request
- Terms and Conditions Submission Method \***: Electronic Acceptance
- Public Sector Project \***: Yes
- Pricing Effective Date**: 3/18/2022
- Savings Effective Date (Submitted)**: 3/18/2022
- Hard To Reach Project \***: No

The following table describes key fields in the Project Information section. Complete all **Required** fields following these instructions:

Field	Required	Action Required
<b>Application Name</b>	Yes	Name the application
<b>Baseline Operating Hours</b>	No	Enter facility's annual baseline operating hours
<b>Total Sq. Ft.</b>	Yes	Enter the site total square footage
<b>Installed Annual Operating Hours</b>	No	Enter the installed annual operating hours
<b>Year Built</b>	No	Enter the construction year of the site

<b>Are you applying for OBF?</b>	Yes	Select <b>Yes</b> . An OBF provision is added to Terms and Conditions  On Bill Financing (OBF) allows you to procure a loan from SCE to cover the project costs. This loan will be repaid in installments on your utility bill
<b>Project Description</b>	No	Enter a brief project description
<b>Reservation or Incentive Request</b>	Yes	Select <b>Reservation Request</b>
<b>Terms and Conditions Submission Method</b>		N/A: In the Reservation request this is automatically set to <b>Electronic Submission</b> .
<b>Public Sector Project</b>	Yes	Specify whether the project is a public sector project
<b>Hard to Reach Project</b>	No	Specify whether the installation is in a hard to reach location
<b>Are you using a Trade Pro?</b>	Yes	Select <b>No</b> for all On-Bill Financing applications.

**Table of fields in the Project Information Section**



When you have entered all the required values, click the **Calculate** button to populate dependent sections and fields.

***Single Payment for Multiple Loans – Government and Institutional Customers Only***

If you want to receive a single payment for multiple loans, select the **OBF Loan Bundling** option while submitting your On-Bill Financing application. SCE will group OBF applications together for payment. In this case, payment will be sent only after all financed products in a group are installed, reviewed, and approved.

***Trade Professional Information***

If this section is displayed, the customer indicated that a Trade Pro is being used. In this case return to the previous section and change the Trade pro selection to **No**.

***Product Details***

In the iEnergy system, products are referred to as “measures”. There is a “measure container” section to which the **On-Bill Financing** product is added. This section of the application is named EE Deemed Container.

In this section, enter information about the product and project costs. For OBF applications complete only the Required fields.

Click **Calculate** to populate the **Total Project Cost** and **Measure Payment** fields.

The following table describes key fields in the EE Deemed Measure Container section. Complete all **Required** fields following these instructions:

Measure Details Field	Required	Action Required
<b>Equipment Model ID#</b>	No	Enter the manufacturer’s product model number
<b>Equipment Serial ID #</b>	No	Enter the manufacturer’s model serial number or UPN
<b>Equipment Description</b>	No	Enter a brief description of the measure/equipment being installed
<b>Equipment Location</b>	No	Enter a brief description of where the equipment is being installed
<b>Number of Measures</b>	Yes	All OBF applications should have only <b>one</b> measure, and number of measures should equal <b>1</b> .
<b>Estimated Installation Date</b>	Yes	If the equipment has <b>not</b> yet been installed enter the date that the financed equipment is estimated to be installed and functional.  If the equipment has been installed, enter the actual date that the financed equipment was installed and functional.
<b>Equipment Cost</b>	Yes	If the equipment has <b>not</b> yet been installed Enter the estimated Cost of Installation for the entire project.  If the equipment has been installed, enter the Actual Cost of Installation for the entire project.
<b>Labor Cost</b>	Yes	If the equipment has <b>not</b> yet been installed enter the estimated labor cost for the entire project.  If the equipment has been installed, please provide the actual labor cost for the entire project.
<b>Purchase Date</b>	Yes	If the equipment has <b>not</b> yet been purchased, enter the date the financed equipment is estimated to be purchased.  If the equipment has been purchased, enter the date the financed equipment was purchased.

**Table of fields in the EE Deemed Container measure details section**

**On-Bill Financing**

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**Core Measure Information**

<p>Measure Display Status Core Measure Information</p> <p>Measure Name On-Bill Financing</p> <p>Measure Type On-Bill Financing</p> <p>Equipment Serial ID Enter manufacturer's model serial number or LPN</p> <p>Equipment Location Enter a brief description of where the measure/equipment being replaced is located.</p> <p>Units per Measure <b>1</b> Select the unit quantity per product/measure (i.e. fixtures, HP, Tons, etc.)</p> <p>Estimated Installation Date * <small>Estimated Installation Date is a conditionally required field. Enter the date you think the measure/equipment will be installed.</small></p> <p>Dollar Per Unit Definition /</p> <p><b>\$ Equipment Cost *</b> <small>This field is required. If measure/equipment has been installed Enter the Actual Cost of installation. If the measure/equipment has not yet been installed Enter the Estimated Cost of installation.</small></p> <p>Total Project Cost * \$0 Total Project Cost is equal Equipment cost + Labor Cost</p> <p>Eligible Cost Percentage 100%</p> <p>Measure Status Eligible</p> <p>Site Specific Savings (kWh)</p>	<p>Library Measure Ref# * OBF-NR-OFS-w16-Comm-EEDC</p> <p>Measure Code</p> <p>Equipment Model ID Enter manufacturer's product model number</p> <p>Equipment Description Enter brief description of measure/equipment being installed</p> <p><b>Number of Measures *</b> <small>This field is required. Enter quantity of products/measures being installed.</small></p> <p>Total Quantity 0.0</p> <p>OBF Measure * Yes</p> <p><b>\$ Labor Cost *</b> <small>This field is required. If measure/equipment has been installed please provide the actual labor cost. If the measure/equipment has not yet been installed Enter the Estimated labor cost.</small></p> <p>Eligible Cost Type Equipment Cost</p> <p>Eligible Costs \$0</p> <p>Measure Payment * \$0</p>
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**\*Note:** Always complete the **“Site Specific Savings (kWh)”** field with the total energy savings for the project.

**Project Totals**

Project Totals	
Total Measure Code Payment \$0	Total Base Incentive \$0
Total Net Incentive/Payment \$0	Total Equipment Cost \$0
Total Labor Cost \$0	Total kWh Savings 0.0
Total kWh Savings 0.0	Total THM Savings 0.0
Estimated OBF Loan Amount \$0	OBF Loan Amount Validation Message Minimum Loan for this account is \$5,000.

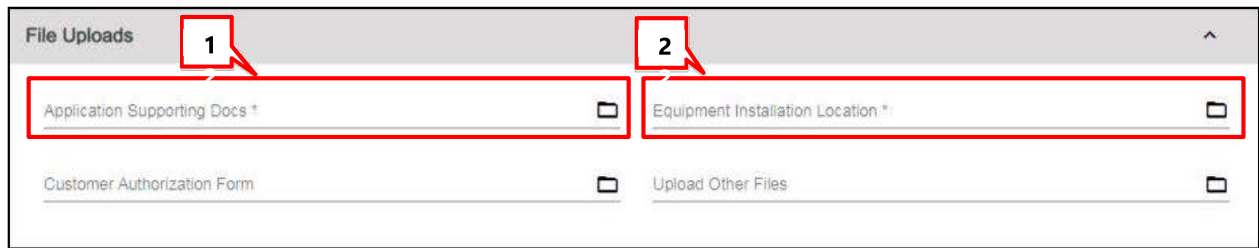
Project Totals is a read-only section that displays calculated values based on the project information entered.

**Confirm Terms and Conditions Provisions**

1. Click the **Electronic Signature** checkbox to sign the application.
2. Click the **OBF Loan Amount Over \$250,000** regardless of loan amount.
3. Click the **OBF Verification and Certification** checkbox to apply for OBF.
4. Click the **Acceptance of Terms and Conditions** checkbox.

Confirm Terms and Condition Provisions
<p><input checked="" type="checkbox"/> <b>Electronic Signature</b> When using the electronic signature feature, Customer, or if Customer is not an individual, an authorized representative of the Customer, must complete all of the required check boxes and affirm that they have read, understand, and agree to the Terms and Conditions for participating in SCE's Incentive Program</p>
<p><input checked="" type="checkbox"/> <b>OBF Loan Amount Over \$250,000</b> By checking this box, Customer, or if Customer is not an individual, an authorized representative of the Customer, understands that incentive are not available if the customer receives a loan amount of \$250,000 per service account. In cases where the loan amount exceeds \$250,000, the loan amount will be adjusted to cover up to one hundred percent (100%) of the actual installed cost, subject to OBF Program rules.</p>
<p><input checked="" type="checkbox"/> <b>OBF Verification and Certification</b> By checking this box, Customer, or if Customer is not an individual, an authorized representative of the Customer, affirm I have read, understand, and agree to all of the specific OBF terms, conditions, and other requirements and restrictions set forth in this OBF Application. I certify that this project would not have been undertaken in the same capacity if it was not for the availability of the OBF loan and that all of the information I have provided in this OBF Application is true, correct, and complete. I understand I must meet all eligibility criteria and requirements of both the OBF program and my selected Eligible Program(s) in order to participate in OBF. I understand SCE reserves the right to request additional information to verify my eligibility for OBF.</p>
<p><input checked="" type="checkbox"/> <b>Acceptance of Terms and Conditions</b> By checking this box, Customer, or authorized representative of Customer, affirms that it is authorized to submit this Application and that it has read, understands, and agrees to all of the Terms and Conditions and all other requirements and restrictions for Customer's participation in the Program set forth in these Terms and Conditions and Express Solutions Statewide EE Business Incentives Manual. Customer certifies that the information provided in the Application is true and correct, and the project(s) for which Customer is requesting Program funding meet(s) all applicable requirements. Customer understands, agrees to, and represents that it meets, all eligibility requirements for participation in the Program. Customer also understands that SCE reserves the right to request additional information to verify Customer's eligibility to participate in the Program, and agrees to provide any such requested information.</p>

### File Uploads

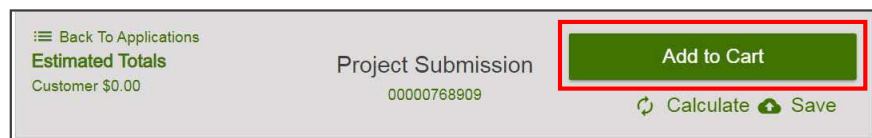


1. Upload the **OBF Project Matrix** document.
2. Upload **proof of participation** in an eligible Energy Efficiency program.

### Add to Cart

Click the **Add to Cart** button in the header.

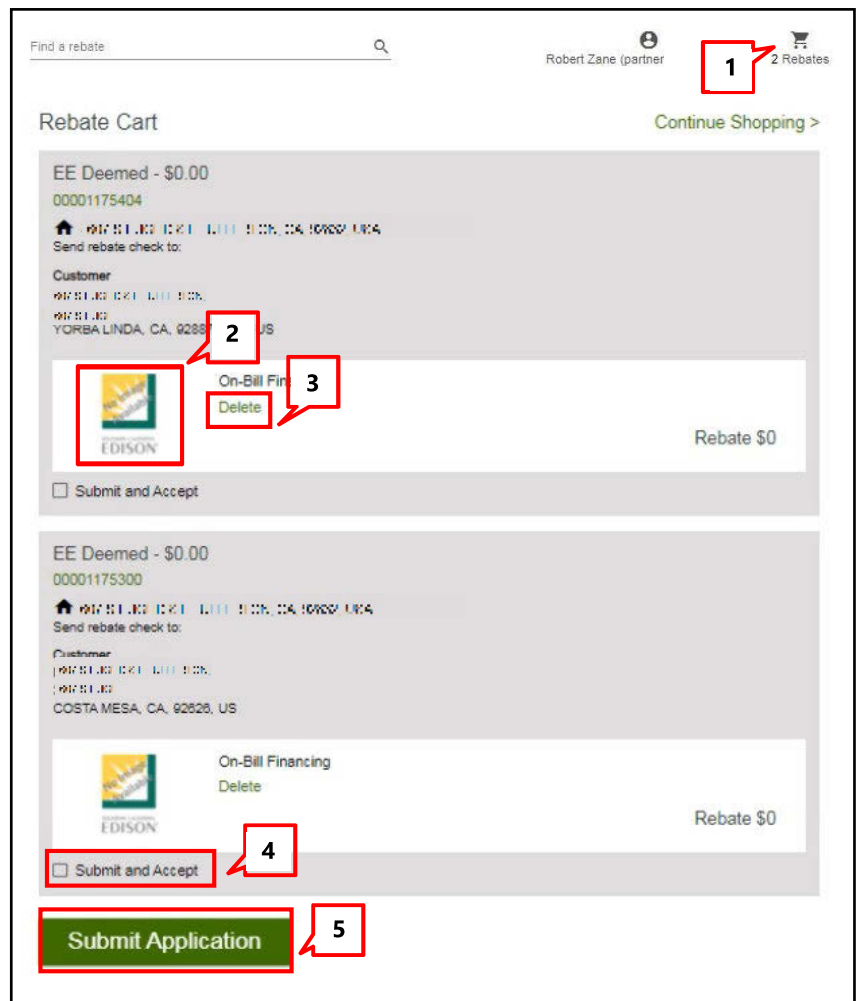
The Rebate Cart screen displays.

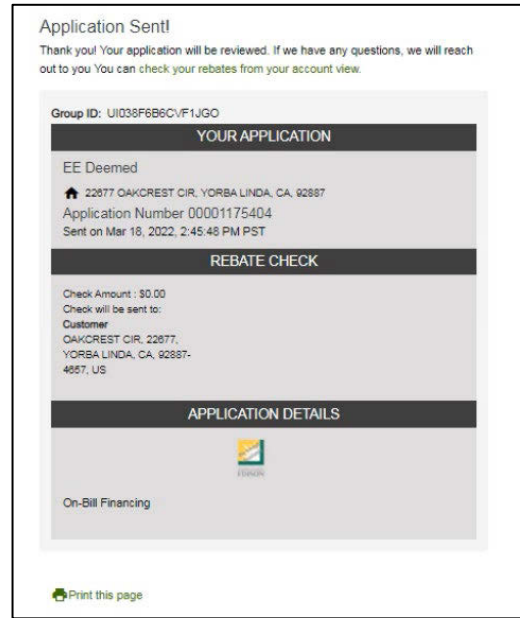


### Submit and Manage Applications

1. At any point you can click the shopping cart icon to see all your unsubmitted applications.
- 2.
3. To edit an application before it is submitted, click the image.
4. To delete an application, click **Delete**.
5. Click the **Submit and Accept** checkbox for any application you are ready to submit.
- 6.
7. Click **Submit Application**.

*A printable confirmation page displays. (See below.)*





The system sends an email with the project details.

Hello Igor Moris,

Thank you for submitting your Project 0000757109 installed at 22877 OAKCREST CIR, YORBA LINDA, CA, 92887. We are currently reviewing your application and will contact you if additional information is required.

Project Summary							
Application ID:	0000757109						
Group ID:	BRFIU8SEUBD89DI5						
Application Name:	Test						
Customer Name:	[REDACTED]						
Customer Number:	[REDACTED]						
Contract Number:	8004863870						
Site Address:	[REDACTED]						
	STE A						
	FULLERTON, CA, 92833						
SCE Estimated Reservation Summary							
Measure Name	Number of Measures	Unit of Measure	Quantity	Base Price Per Unit	Base Incentive	Max Incentive	**Estimated Incentive Amount
Evaporator Coil Cleaning on Small Pkg AC system with No TXV DX Equipment replacing and a functional, uncleaned evaporator coil - (AC-20781-BRO-RCx-Ofs-w08-Comm-DwSD-EE Deemed Customer_Guest_Trade Pro)	10	1	10		0.00	7000.00	0.00
<b>Total Estimated Reservation Amount</b>							\$0.00
*Measures cannot be paid at more than 100% of Equipment/Incremental Cost							
**Incentive amount is determined between the lowest of base incentive and max incentive							

If you have any questions, please contact us at (626) 635-6015 Monday through Friday, from 8:00 a.m. to 5:00 p.m., or send an e-mail to [BusinessIncentives@scg.com](mailto:BusinessIncentives@scg.com). Please have your Application Number available for reference when you call and include it in any e-mail correspondence.

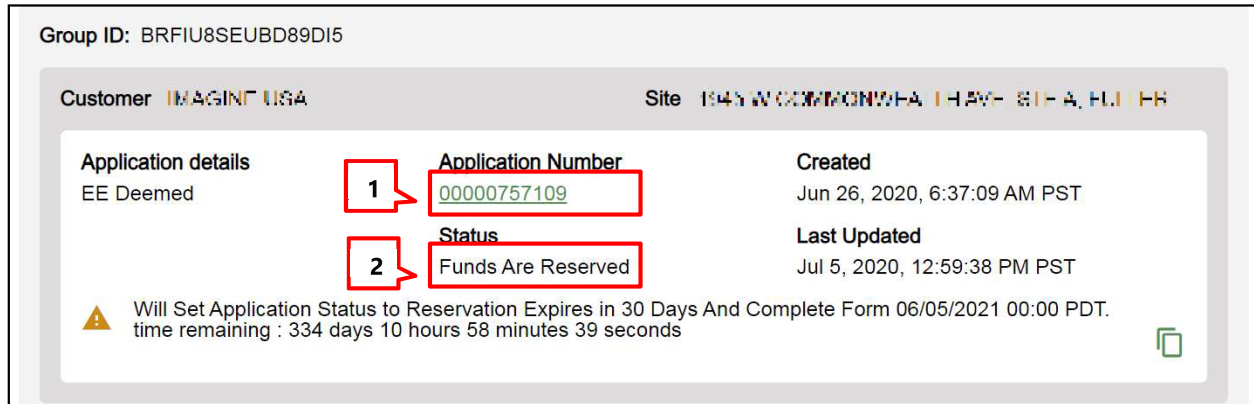
## Update On-Bill Financing Application After Reservation Is Approved

After the reservation is approved, the Applicant has the following options, which are covered in detail in this section. These are done by updating the Pending Installation and Incentive Request form.

- ◆ **Incentive Request** – This is the **Loan Funding Request**. Once the products being financed with OBF are installed under the Energy Efficiency Program, update the application with installation information and request loan payment. You will need to upload a **final OBF Project Matrix** form, a **project invoice** signed by the customer, and **proof of final project approval** from eligible energy efficiency incentive program.
- ◆ **Withdrawal** – If the applicant decides to not pursue the project, they should withdraw the project at this point
- ◆ **Reservation Extension** – To avoid cancelling the project when the reservation expires, the customer can request an extension to the reservation expiration date at this point. This routes the project back to SCE, where an Approver can:
  - Accept the reservation extension
  - Modify the reservation extension to a different expiration date
  - Reject the reservation extension and enforce the current expiration date
  - Reject the reservation extension and cancel the project

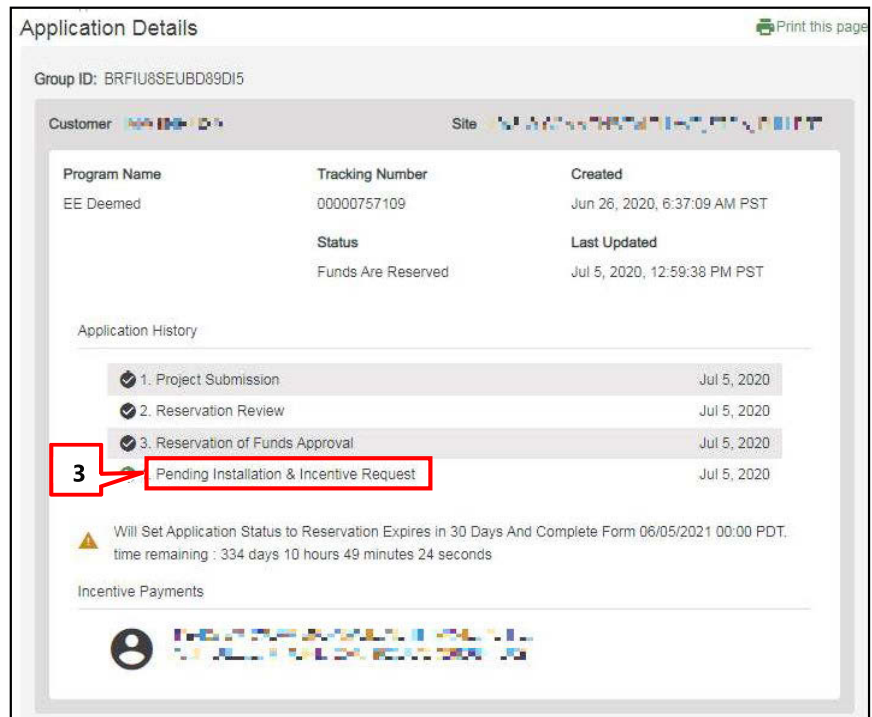


*Open the Application*



1. The Application should have the **Status: Funds Are Reserved**.
2. Click the **Application Number** to open the application.  
The Application Details screen displays.

3. Click the form name **Pending Installation & Incentive Request** to open the application at the current form.



*Project Information*

In the Project Information section, you must update information about the site installation and the terms and conditions submission method. You can also update other information if needed.

As described above, the three options are to withdraw a project, request a reservation extension, or submit a loan funding request. These are determined by selections in the Project Information section and are detailed below.

## To Withdraw a Project (Loan Application)

Make the following selections. Some fields only display when the previous field is completed.

1. **Is Site Installation Complete:** Select **No**.
2. **Do You Require Funds Extension?:** Select **No**.
3. **Application Withdrawal:** Select **Yes**.

The screenshot shows a form with the following fields and values:

- Is Site Installation Complete? \***: No (Callout 1)
- Do You Require Funds Extension? \***: No (Callout 2)
- Application Withdrawal \***: Yes (Callout 3)
- Reservation of Funds Date**: [Date] 020

## To Request Reservation of Funds Extension

Make the following selections. Some fields only display when the previous field is completed.

1. **Is Site Installation Complete:** Select **No**.
2. **Do You Require Funds Extension?:** Select **Yes**.
3. **Funds Extension Days:** Select the extension length from the dropdown.
4. **Estimated Incentive Request Date:** Use the calendar dropdown (not shown) to select the date that you think you will enter the post-installation information.

The screenshot shows a form with the following fields and values:

- Is Site Installation Complete? \***: No (Callout 1)
- Do You Require Funds Extension? \***: Yes (Callout 2)
- Funds Extension Days Requested? \***: 15 Days (Callout 3)
- Project Reservation of Funds Date**: [Date] /3/2020

# Loan Funding Request

To proceed with the Loan Funding Request, you will update information in different sections of the form, as explained below.

## Project Information

1. Select **Yes** from the **Is Site Installation Complete?** dropdown.

2. Enter the **Estimated Incentive Request Date.**

3. Use the **Terms and Conditions Submission Method** dropdown to select:

- ◆ **Print and Upload** – You must upload a copy of the signed terms and conditions
- ◆ **Electronic Acceptance** – You will accept terms and conditions in the form

## Product/Measure

In the On-Bill Financing Container section update the following fields:

1. Enter the **Actual Installation Date** (required).
2. Enter the equipment **Purchase Date** (required).

Other product details can be updated if needed.

### Payment Details

1. Do you want to apply for Single Payment?

- Select **No** – The payment for this project will be sent separately. Government and Institutional customers that selected the Loan Bundling option will receive combined loan proceeds for all projects with the same Group ID. Group ID is managed by SCE

The screenshot shows a form titled "Payment Details". The first dropdown menu is labeled "Do you want to apply for Single Payment? \*" and has a red box around it with a callout labeled "1". Below it is a smaller text instruction: "Select 'Yes' if you would like to receive one payment for all projects submitted today." The second dropdown menu is labeled "Payee Selection \*" and has a red box around it with a callout labeled "2".

2. **Payee Selection**

- The only loan payee option approved for OBF is **Customer**. After selecting this option, **Payment Type** and **Tax Classification** fields display.

◆ **About Payment Type**

**Currently the only Payment Type available for OBF is Check:** An additional **Payee Information** section displays. The Customer will enter appropriate address where the check will be mailed. Payee Address is defaulted to billing address, but the Customer can enter or update it.

In the **Payee Information** section, the customer information is auto-populated and can be edited if needed.

**Note: Country Code** must be two digits. Enter "US" for United States or "CA" for Canada.

The screenshot shows a form titled "Payee Information". It contains several fields: "Attention To", "Company Name", "Customer Number" (with value 1000476054), "Address1" (with value 5104 1/2 Ave Blvd), "Address2", "City" (with value BAKERSFIELD), "State" (with value CA), "Zip Code" (with value 93390-2830), and "Country" (with value US). A red box highlights the Address1, Address2, State, Zip Code, and Country fields.

◆ **About Tax Classification Fields**

All OBF loan disbursements are tax exempt. Regardless of payment type or ownership, OBF customers must select the **Tax Exempt** Tax Classification. If a **Tax ID** drop down section displays, you accidentally selected a Tax Classification other than **Tax Exempt**. In this case, go back and make sure to select the Tax Exempt option. An additional Tax Exemption Code subsection displays.

Tax Classification \*  
Tax Exempt

Select the appropriate U.S. federal tax classification for the Payee identified. (i.e. Individual/Sole Proprietor, C Corporation, Partnership)

**Tax Exemption Code**

Please select below code for Tax Exemption Reason:

- Code Number 1 - An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).
- Code Number 2 - The United States or any of its agencies or instrumentalities.
- Code Number 3 - A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities.
- Code Number 4 - A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- Code Number 5 - A corporation.
- Code Number 6 - A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession.
- Code Number 7 - A futures commission merchant registered with the Commodity Futures Trading Commission.
- Code Number 8 - A real estate investment trust.
- Code Number 9 - An entity registered at all times during the tax year under the Investment Company Act of 1940.
- Code Number 10 - A common trust fund operated by a bank under section 584(a).
- Code Number 11 - A financial institution.
- Code Number 12 - A middleman known in the investment community.
- Code Number 13 - A trust exempt from tax under section 664 or a trust described in section 4947.

Exempt Code \*  
2

Tax Exempt Reason  
The United States or any of its agencies or instrumentalities

1. The customer selects reason **Code Number 14. Disbursement is an OBF loan subject to repayment.** (Codes are explained in the text above the dropdown.)
2. After the code is added and the form is calculated, the reason code will display in the **TaxExempt Reason** field.

### Terms and Conditions – Electronic Submission

This section displays when the Terms and Conditions Submission Method is Electronic Acceptance. Click all applicable checkboxes:

- ◆ **Electronic Signature**
- ◆ **TC No Changes Provision** – If no changes have been made since the Reservation Request
- ◆ **TC Changes Provision** – If changes have been made since the Reservation Request
- ◆ **TC Solution Completely Installed Provision**
- ◆ **Acknowledgement of Tax Implications** – If W9 information required.
- ◆ **Acceptance of Terms and Conditions**

**Confirm Terms and Condition Provisions**

**Electronic Signature**  
When using the electronic signature feature, Customer, or if Customer is not an authorized representative, must read, understand, and agree to the Terms and Conditions.

**TC No Changes Provision**  
No changes to the proposed solutions have been made since the Project Application was submitted. All approved savings calculations are correct.

**TC Changes Provision**  
Due to changes to the proposed measures, appropriate adjustments in the saving calculations, and Sections 4 on page 2, to calculate the revised installed energy usage and savings, the output from the Estimation Software, Calculated Energy Savings Tool, and the Savings Schedule, are also certified.

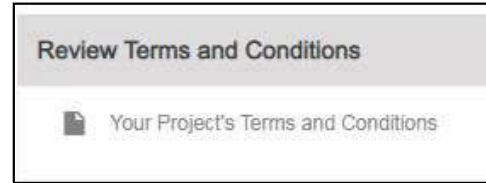
**TC Solution Completely Installed Provision**  
Customer or Customer's Trade Professional, if applicable certify that (i) the Energy Efficient Solution is operating and being maintained to perform in conformity with their design intent, and (ii) the installation date of operation, are also certified.

**Acknowledgement of Tax Implications**  
*Checkbox is required*  
Customer understands that incentives may be subject to income tax, and if greater than \$600 as income on IRS form 1099 based on tax status reflected on the W-9, the payee, which may be the Customer or the payee, is responsible for any taxes that may be imposed due to Program incentives.

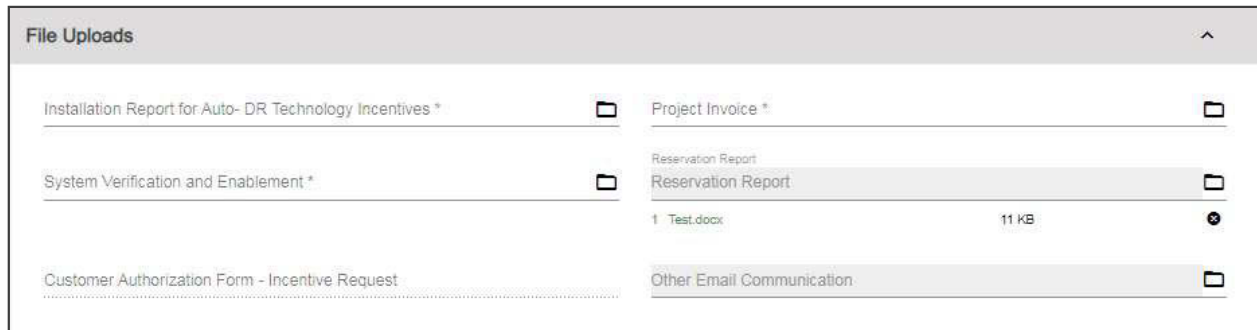
**Acceptance of Terms and Conditions**  
*Checkbox is required*  
By checking this box, Customer, or authorized representative of Customer, affirm that they have read, understood, and agreed to the Terms and Conditions and all other requirements and restrictions for Customer's participation in the Statewide EE Business Incentives Manual. Customer certifies that the information provided in the application meets all applicable requirements. Customer understands, and agrees, that SCE reserves the right to request additional information.

### Terms and Conditions – Print and Upload

This section will be displayed when the **Terms and Conditions Submission Method** is **Print and Upload**. Click on the file to open the terms and conditions in a new browser tab.



### File Uploads



- ◆ Required file uploads are:
  - Final OBF Project Matrix
  - Project Invoice Signed by Customer
  - Proof of final approval from eligible energy efficiency incentive program
  
- ◆ If the **Terms and Conditions Submission Method** is **Print and Upload**, the **Customer Authorization Form – Incentive Request** is required

### Review Comments

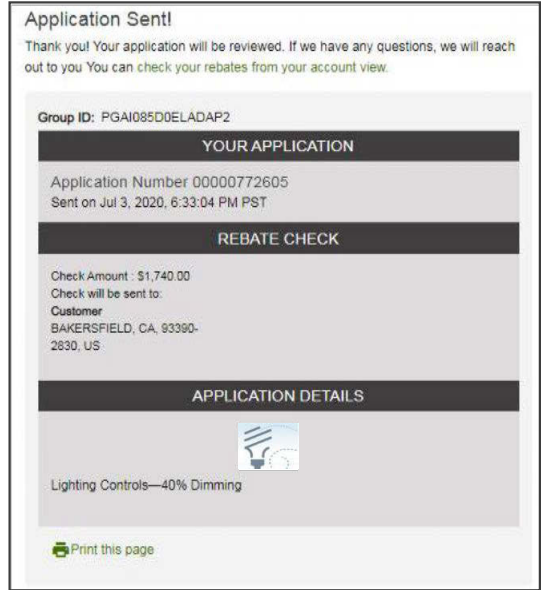


Any comments from the SCE team will appear in the External Comments field.

Click **Submit** in the header.



The confirmation screen displays.



This concludes the User Guide on applying for On-Bill Financing.