Charge Ready NY 2.0 Program

Program Opportunity Notice (PON) 5367

Implementation Manual

October 28, 2025

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Definitions

Applicant is the entity that submits an incentive application to NYSERDA. Applicants may be public or private, for-profit or not-for-profit entities. Applicants may be the Equipment Owner or may be the Installer of the Charging Equipment.

Assigned Parking Space is a space that is reserved for the exclusive use of an individual driver or reserved for vehicles that are part of a specific active vehicle fleet.

Charge Ready NY 2.0 Program (Program) is a program that provides incentives for the purchase and installation of eligible Level 2 electric vehicle charging equipment in New York State. It is run by NYSERDA and administered by Center for Sustainable Energy (CSE) and the Electrification Coalition.

Charging Equipment Vendor is a provider of eligible Charging Equipment. The Charging Equipment Vendor must determine eligibility of its Charging Equipment through RFQL (Request for Qualifications) 5312 to be eligible to participate in the Program.

Disadvantaged Community is one of the New York State communities identified by the Climate Leadership and Community Protection Act's Climate Justice Working. A searchable map of communities that meets this definition can be found at https://www.nyserda.ny.gov/ny/disadvantaged-communities.

Electric Vehicle (EV) is a four-wheel light duty vehicle capable of highway speeds that is powered fully or in part by an electric motor and is rechargeable from an external connection to an off-board electrical source.

Electric Vehicle Charging Equipment (Charging Equipment) is a Level 2 electric vehicle charging station that meets all requirements of RFQL 5312 (see also Eligible Charging Equipment).

Eligible Charging Equipment is Charging Equipment that has been approved for use in the Program. The offering Charging Equipment Vendor must apply for and receive approval through RFQL 5312 to be eligible to participate in the Program.

Eligible Network Services are network services that have been approved for use in the Program. The offering Network Services Vendor must apply for and receive approval through RFQL 5312 to be eligible to participate in the Program.

Equipment Owner is the entity that purchases the Charging Equipment. The Equipment Owner may be the recipient of the incentive payment and is responsible for providing charging data to NYSERDA for a period of five years (refer to section 8).

Facility is a project location where charging stations will be installed.

Fleet Vehicles are company cars provided for workplace or MUD employee use.

Installation Date is the date on which the Charging Equipment is affixed to its permanent location, connected to the electrical source, and ready for use (including connected to a network).

Installer is the entity that installs the Charging Equipment. The Installer may or may not be the same as the Equipment Owner.

Network Services Vendor is a provider of network services for eligible Charging Equipment. The Network Services Vendor must determine eligibility of its network through RFQL 5312 to be eligible to participate in the Program.

New York State Energy Research and Development Authority (NYSERDA) promotes energy efficiency and the use of renewable energy sources. NYSERDA advances innovative energy solutions in ways that improve New York State's economy and environment. NYSERDA is the State authority in charge of the Program.

Participation Agreement is an element of the application process that provides NYSERDA with contact and payment information for the Equipment Owner and Installer. This is different from the Project Application and must be completed by the Equipment Owner even if the application is submitted by the Installer.

Payee is the entity who will receive the incentive payment. The Payee may or may not be the Equipment Owner or Installer.

Port is the connection point between the charger and the vehicle where the charger is plugged in.

Pre-Approval Date is the date that NYSERDA approves the Applicant's pre-installation application for a Charge Ready NY 2.0 incentive.

Program Administrator is the Center for Sustainable Energy, Electrification Coalition, or other NYSERDA designee responsible for receiving and reviewing applications to the Program, responding to questions from Program participants, and conducting other administrative tasks related to the Program.

Program Effective Date is July 19, 2023. This is the date the Charge Ready NY 2.0 program launched.

Project Application is the application process in the Salesforce portal with the project-specific information for each individual location.

RFQL 5312 refers to NYSERDA's Charge Ready NY 2.0 Equipment and Network Qualification Process solicitation, through which NYSERDA approves charging equipment and network services for eligibility in the Program.

Site Owner is the owner of the site where the Charging Equipment is installed. The Site Owner may or may not be the same as the Equipment Owner.

White-Label Model or Network: EV chargers or networks that are manufactured/developed by one company and then rebranded and sold by another company. The original equipment manufacturer (OEM) or network developer must be approved through RFQL 5312 for their white-labeled product to be eligible for incentives.

1 Program Overview

The **Charge Ready NY 2.0 Program** (Program) is an incentive program designed to accelerate the deployment of Level 2 electric vehicle charging equipment at workplaces and multi-unit dwellings (MUDs)in New York State. Accelerated deployment of charging equipment will increase the adoption of electric vehicles by making charging more convenient. Increased use of electric vehicles and electric vehicle charging stations benefits New York State by reducing harmful emissions and the transportation sector's dependence on petroleum. The New York State Energy Research and Development Authority (NYSERDA) developed the Program to provide incentives that reduce the cost of purchasing and installing eligible Level 2 charging equipment for use in New York State.

The Program offers $12 million in funding for incentives and **will accept applications on an open-enrollment, first-come, first-served basis until December 31, 2026, or until the program runs out of funds, whichever comes first.** An additional $3 million is available for the bonus incentives described in Section 7.

The Program provides incentives that reduce the cost of purchasing and installing eligible Level 2 charging equipment installed at a workplaces or MUD locations, as defined below, within New York State. Public, private, and not-for-profit entities may participate in the Program. NYSERDA will provide a base incentive of $3,000 per charging port installed at a workplace or MUD location. If located in a New York State designated Disadvantaged Community (DAC), NYSERDA will provide $4,000 per charging port installed at a workplace or MUD.

To receive the full incentive, the charging station must be accessible to all persons with access to the workplace or MUD where they are installed. Charging stations in assigned parking spaces reserved for the exclusive use of an individual driver or reserved for fleet vehicles will receive a reduced incentive level. Incentives will be paid upon completion of the installation of the charging equipment and the provision of appropriate documentation. Minimum and maximum charging ports per site are described in section 3; the number of incentives awarded per site shall be at NYSERDA's discretion. Bonus incentives are also available, as discussed in section 7.

Note to Applicants: This Implementation Manual (Manual), including the Equipment Owner Agreement, the Installer Agreement, and eligible charging equipment and network providers may be amended from time to time without notice, at NYSERDA's sole discretion. Pre-installation or post-installation applications must comply with the most current version of the Manual, including charging equipment and network providers eligibility, on the date the application is submitted to NYSERDA.

This document, including Appendix A, constitutes the Implementation Manual for the Program. Definitions of key program parameters are in the Definitions section of the Manual.

Additional information about the program, current lists of eligible charging equipment and networks, and the current amount of funding remaining in the program can be found on NYSERDA's website, Charge Ready NY 2.0 website. Charging equipment and network service eligibility rules are defined in section 2.1 of this Manual.

The Program allows Applicants to participate in one of two ways:

1. **Pre-Installation Approval:** Applicants can apply for pre-installation approval of an incentive payment. If the pre-installation approval application is granted, NYSERDA will reserve funds for the Applicant's incentive. However, the applicant must complete their installations and submit all required documentation to NYSERDA within one-hundred eighty (180) calendar days of the pre-installation approval date. Upon approval of all documentation (refer to section 6), NYSERDA will issue an incentive payment directly to the Payee in the form of a paper check or by electronic payment.
2. **Post Installation Approval:** Applicants can apply for an incentive payment after the installation is completed. The installation must be completed after the Program Effective Date. NYSERDA must receive the application within 90 days of the Installation Date. As part of their application, Applicants must submit all required documentation. Upon approval of all documentation, NYSERDA will issue an incentive payment directly to the Payee in the form of a paper check or by electronic payment.

Important: Program requirements are determined by NYSERDA which, in its sole discretion reserves the right to make changes to Program elements such as, but not limited to, eligible equipment and networks, incentive amounts, and Applicant requirements.

1.1 Program Contacts

All Program questions should be directed to the Program Administrator, Center for Sustainable Energy:

Center for Sustainable Energy
3980 Sherman St, Suite 170
San Diego, CA 92110
Phone: 866-595-7917
Email: ChargeReadyNY@energycenter.org

Questions regarding the Bonus Incentive application process described in section 7 should be directed to the Electrification Coalition:

Electrification Coalition
1111 19th Street NW, Suite 406
Washington, DC 20036
Phone: 202-964-7192
Email: ChargeReadyNY@electrificationcoalition.org

Questions regarding RFQL 5312: Charge Ready NY 2.0 Equipment and Network Qualification Process should be directed to the following:

Sophie Patka, Project Manager
New York State Energy Research and Development Authority
17 Columbia Circle
Albany, New York 12203
(518) 738-2812
Email: sophie.patka @nyserda.ny.gov
www.nyserda.ny.gov

Questions regarding the Charge Ready NY 2.0 Project Application process should be directed to the following:

David McCabe, Project Manager
New York State Energy Research and Development Authority
17 Columbia Circle
Albany, New York 12203
(518) 738-2874
Email: david.mccabe@nyserda.ny.gov
www.nyserda.ny.gov

2. Program Eligibility

2.1 Charging Equipment and Network Service Eligibility

To receive an incentive payment through the Program, Applicants must purchase and install the required minimum number of Eligible Charging Equipment charging ports as described in section 3. Only original equipment manufacturer (OEM), white-labeled models, and network service providers approved by NYSERDA through RFQL 5312: Charge Ready NY 2.0 Equipment and Network Qualification Process are eligible for incentives through the Program.

White-labeled models that have not been previously approved through RFQL-5312 are ineligible for Program funding. Eligible Charging Equipment will be listed on NYSERDA's Charge Ready NY 2.0 website and updated as needed. Charging Equipment Vendors and Network Services Vendors may submit new applications or update information about existing eligible equipment throughout the time that the Program is active, no more than once every month.

As part of the equipment and network qualification process, Charging Equipment Vendors and Network Services Vendors will provide technical information about the equipment and networks and a list of distributors and vendors who sell the equipment and networks in New York State. Applicants can contact these vendors to request quotes. Charging Equipment Vendors and Network Services Vendors must agree to the terms and conditions found in RFQL 5312 to participate in the Program.

Some requirements for RFQL-5312 will be modified at future dates and may affect charging equipment and network providers eligibility. You can review RFQL-5312 here: Charge Ready NY Charging Equipment and Network Qualification Process. Charging Equipment Vendors and Network Services Vendors are encouraged to attend an available training on how the Program works. A recording of the trainings will be posted on the Charge Ready NY 2.0 website.

2.2 Equipment Owner Eligibility

To be eligible for a Program incentive payment, an Equipment Owner must meet the following conditions:

1. Be licensed to do business in New York State, including not-for-profit corporations or be a State agency or political subdivision of the State, including municipalities, school districts, and other local government entities.
2. Be an organization with an Employer Identification Number (EIN).
3. Purchase and install new Eligible Charging Equipment at a site in New York State that meets site eligibility requirements (refer to section 2.4).
4. Charging stations reserved for fleet vehicles will be considered assigned parking and are eligible at a reduced incentive level (refer to section 3).
    - The maximum fleet charging eligibility is two (2) ports per location.

- Vehicles that use the charging stations must be part of an active fleet.
- Vehicles must be weight class 2 or lower.

2.3 Installer Eligibility

To be eligible for a Program incentive payment, an Installer must meet the following conditions:

1. Be registered to do business in the State of New York.
2. Possess and maintains all credentials, licenses, and certifications necessary to perform all jobs associated with the installation of electric vehicle charging stations in the location where the Installer performs work.

2.4 Site Eligibility Rules

General Site Requirements:

- Applicants must install a minimum of four (4) charging ports at each site.
- All locations must have a minimum of twenty (20) parking spaces.
- Applicants may apply for no more than 25% of the total assigned parking spaces, as well as 25% of the total unassigned parking spaces, up to a *maximum* of forty (40) charging ports per site.
- Any existing charging ports located at the site will be subtracted from the maximum amount allowed.
- All charging equipment must be networked charging equipment and maintain network service for the duration of the five (5)-year Program reporting requirement.
- Charging stations in assigned parking spaces reserved for the exclusive use of an individual or reserved for fleet vehicles are eligible at a reduced incentive level (refer to section 3).

Ineligible sites under Charge Ready 2.0

- Parking facilities intended for public parking.
- Restaurants and bars.
- Seasonal locations that operate less than 75% (nine months) of the calendar year.

Applicants must install charging equipment at one of the following types of sites:

Workplace Site: A workplace site is a commercial property owned or leased by an organization that provides EV charging to its employees on a preferential basis over contractors, customers or other visitors parking on-site. Chargers are intended for those directly employed by the organization but may be made available to visitors.

- Examples of workplace sites include office buildings, factories, universities, and inpatient hospitals. Municipal or state-owned workplace locations may apply (e.g. administration buildings, maintenance facilities, town halls, etc.).

- Charging stations at car dealerships must be installed in designated employee parking areas and clearly defined in the submitted site maps.
- Chargers installed at workplaces are required to install sign(s) that explicitly say that chargers are reserved for employees during business hours. Sign(s) can be installed at each charger location/parking stall or at a general location at the parking facility that is clearly visible to drivers.

Multi-Unit Dwelling (MUD) Site: A MUD site is a location where parking is primarily intended for tenants/residents of the location but may also serve visitors. More than 50 percent of vehicles regularly parked at a MUD site must be primarily driven by residents. Examples of MUD sites include apartment buildings, condominiums, co-ops, public housing, and motels and hotels.

- MUD locations must have a minimum of ten (10) dwelling units in total on-site. Individual buildings on a MUD location must have at least 5 dwelling units.
- Single-family dwellings (detached), duplexes, triplexes, fourplexes, individual townhomes, trailer parks, and individual mobile homes are not considered multi-unit dwellings. M**otels and hotels** shall be considered MUD sites under this Program.
- Only owners of the site location may apply as an Equipment Owner at a MUD site.
- MUD installations must be accompanied by signage that clearly indicates that EV charging is prioritized for tenants. Installations at motels and hotels are exempt from this signage requirement.

2.5 Stacking with Other Funding Sources

Projects that have or will receive funding for charging equipment from any of the below programs are ineligible for Charge Ready NY 2.0.

- NYSDEC's Municipal Zero-Emission Vehicle (ZEV) and ZEV Infrastructure Rebate Program.
- NYPA's ReCharge NY Workplace Charging Program.
- Federal programs that offer grant funding for EV charging stations, such as the National Electric Vehicle Infrastructure (NEVI) Formula Program and the Charging and Fueling Infrastructure (CFI) Discretionary Grant Program.
- Any other NYSERDA initiatives that provide incentives for installing charging equipment, such as the Clean Energy Communities or Clean Green Schools programs.
- Charging Equipment funded entirely (100%) by party(ies) other than the Equipment Owner. This includes Charging Equipment provided to the Equipment Owner by automakers, Electrify America, and other entities.

Projects participating in Charge Ready NY 2.0 may also claim the New York State tax credit for installing charging stations (more information at https://www.tax.ny.gov/pit/credits/alt_fuels_elec_vehicles.htm). The tax credit is applied after deducting the funding received from NYSERDA.

3 Incentive Amounts

NYSERDA may choose to limit rebates to applicants owned by or affiliated with the same entity to the limits stated below per calendar year. These limits will be tracked using the application approval date.

- *Equipment Owners* may not apply for more than $300,000 in Program incentives in a single calendar year.
- *Installers* may not apply for more than $1 million each in Program incentives in a single calendar year.

3.1 Workplace and Multi-Unit Dwelling Locations

Applicants installing charging stations in workplace or multi-unit dwelling (MUD) locations may receive an incentive payment of $3,000 per charging port installed, or $4,000 per charging port installed at workplace or MUD locations within a DAC. NYSERDA will determine whether an installation qualifies for this additional incentive as part of the application process. Charging stations in assigned parking spaces reserved for the exclusive use of an individual driver or reserved for fleet vehicles are eligible for an incentive of $1,000 per charging port installed. Charging stations installed in assigned parking spaces are ineligible for the $1,000 DAC bonus. **Applicants must install a minimum of four (4) charging ports at each site.**

3.2 Bonus Incentives for Workplace and MUD Locations

Workplace and MUD locations may choose to participate in a bonus program to receive additional incentives of either $4,000 (small installations that install between four (4) and nine (9) ports) or $10,000 (large installations that install ten (10) or more ports). To participate, Equipment Owners will be required to distribute NYSERDA developed marketing information and industry updates on a quarterly basis for a period of one year before being eligible to receive the additional incentive payment. In addition, Equipment Owners (i.e., incentive recipients) must also complete at least two of the following actions:

1. **Ride & Drive, Dealer Presentations**
   Participate in and/or host one ride-and-drive event or host at least two educational presentations from car dealers.
   - NYSERDA contractor will coordinate and facilitate ride-and-drives across multiple employers/MUDs in an area if they help promote them for employees/tenants.
2. **Electric Vehicle Purchase/Lease**
   Complete group purchase or 36-month minimum lease of multiple new electric vehicles for tenants or workplace fleets. Equipment Owners may be eligible for the Drive Clean Rebate of up to $2,000 per vehicle as well as the Federal Tax Credit of up to $7,500 per vehicle depending on the model.
   - This does not include “company cars” provided as benefits to individual employees.

- At least one (1) purchase for small installations and two (2) purchases for large installations must be made to be eligible for the Bonus Incentive.

3. **Free On-Site Charging (one year)**
   To encourage use of charging stations, offer free charging to employees or tenants for at least one year. Bonus Incentive payments will not be made for anything less than one year of free charging.

Refer to section 7 for Bonus Incentive application process requirements.

Base Incentive	
Base Incentive (per port)	$3,000
Located within a DAC	$4,000
Assigned Parking Spaces (All locations, regardless of DAC location)	$1,000
Bonus Incentive	
Locations installing 4-9 ports	$4,000
Locations installing 10 or more ports	$10,000

Note: Incentive amounts and the criteria used to determine them are subject to change at NYSERDA's sole discretion. NYSERDA will provide at least 10 days' notice to all program participants before new incentive amounts take effect.

4 Incentive Application Process

The incentive application process is described in a flow diagram in Appendix A. Refer to section 7 for the Bonus Incentive application process.

NYSERDA will pay the Incentive once the Applicant has met the requirements of the Program as described in this Manual. This includes but is not limited to (1) Agreeing to all Program requirements, (2) Installing all Eligible Charging Equipment in accordance with program rules and all applicable federal, state, and local rules and regulations, and (3) Providing accurate and complete documentation of the Eligible Charging Equipment purchase and installation to NYSERDA.

4.1 Ways to Apply

Equipment Owners may complete and submit their own pre-installation or post-installation rebate applications or allow their Installer to complete the applications on their behalf. If the Installer applies, rebates can be paid directly to them or the Equipment Owner. However, if the Installer receives the rebate incentive from NYSERDA, they must pass the entire rebate onto the Equipment Owner, and it must be clearly noted in the invoice to the Equipment Owner.

In all cases, the Equipment Owner must complete a Participation Agreement. In no case may an applicant create a NYSERDA portal account or submit a Participation Agreement representing themselves as another entity.

APPLICANT TYPE	APPLICATION PROCESS
Equipment Owner - Payee	The Equipment Owner submits its own application, and the Incentive is paid to the Equipment Owner. The Equipment Owner must complete the Participation Agreement.
Equipment Owner – Non-Payee	The Equipment Owner submits its own application, and the Incentive is paid to the Installer. The Equipment Owner and the Installer must complete Participation Agreements.
Installer - Payee	The Installer submits an application on the Equipment Owner’s behalf, and the Incentive is paid to the Installer. The Equipment Owner and the Installer must complete Participation Agreements.
Installer – Non-Payee	The Installer submits an application on the Equipment Owner’s behalf, and the Incentive is paid to the Equipment Owner. The Equipment owner must complete the Participation Agreement.

If an Installer applies, the Equipment Owner may not apply for the same Charging Equipment. However, the Equipment Owner may apply for additional Charging Equipment at the same location so long as that Charging Equipment has not received a Program incentive. In no cases may either an Equipment Owner or Installer receive an incentive payment for Charging Equipment that has already received an incentive payment from NYSERDA.

Applicants shall submit incentive applications through NYSERDA's web portal. Register for an account.

4.2 Pre-Installation Process

Pre-installation approval does not guarantee that an Applicant will receive any funds from the Program. Pre-installation approval only reserves funds in the Program budget for the Applicant. The Applicant must satisfactorily complete all the Program requirements and submit all required documentation before receiving a rebate.

If Applicants apply for pre-installation incentive approval, NYSERDA will reserve program funds for the Applicant upon successful review by the Program Administrator and NYSERDA of the Applicant's pre-installation application. The Applicant shall have one-hundred eighty (180) calendar days from the Pre-Approval Date to submit final documentation for their incentive. If final documentation is not received within one-hundred eighty (180) calendar days after the Pre-Approval Date, the pre-installation approval will be cancelled, the reserved funds will be released, and the Applicant must reapply. The Applicant will be notified of the cancellation via email.

Applicants who initially receive a pre-approval that is cancelled may apply again for pre-approval if their Charging Equipment is not yet installed or may apply for incentive approval after completion of their installation, if they meet the requirements for post-installation applications. If an Applicant reaches the end of its 180-day installation window twice for the same installation site without completing the installation, it may not reapply for that site but may still apply for other sites.

4.2.1 Changing Approved Equipment

If an Equipment Owner decides to purchase different eligible charging equipment from the make and model initially selected in the pre-installation application, you must notify NYSERDA by contacting ChargeReadyNY@energycenter.org for assistance with updating the application.

White-labeled models that have not been previously approved through RFQL-5312 are ineligible for Program funding. The Equipment Owner may change Installers after applying for pre-approval without having to reapply. If an Equipment Owner decides to install charging equipment at a location other than the one listed in their pre-installation application, the application will be cancelled, and the Applicant must reapply.

4.3 Post-Installation Process

Applicants who choose to apply for incentive approval after completing their installations shall have ninety (90) calendar days from the Installation Date to submit final documentation for their incentive. Charging Equipment with an Installation Date prior to the Program Effective Date are not eligible for an incentive.

Applicants shall submit incentive applications through NYSERDA's web portal. Register for an account.

The Program Administrator shall have ten (10) calendar days to review submitted incentive applications. Submitted applications that are complete and accurate and include all required documents will be approved.

4.3.1 Cancellation and Incomplete Document Submission

If an application or its required documents are determined to be incomplete, illegible, or missing required information, the Applicant will be notified of the error via email and shall have fifteen (15) calendar days from the date of notification to correct any errors. If the errors are not corrected within fifteen (15) calendar days, the application will be cancelled, and any reserved funds will be released. If an application is submitted but determined to be ineligible, it will be cancelled, any reserved funds will be released, and the Applicant will be notified via email.

If an incentive application is cancelled, Applicants can reapply for an incentive for that Charging Equipment as long as it is still within ninety (90) calendar days of the Installation Date.

Participation in the Program does NOT constitute a competitive bid process in place of an Equipment Owner's required competitive bid processes. Equipment Owners must follow their own procurement rules for selecting a vendor for charging equipment, if applicable. Other competitive bid processes, such as State procurement contracts, may be available for Equipment Owners to use. Contact the Program Administrator for more information.

5 Equipment Owner Program Requirements

To participate in the Program, Equipment Owners must meet or agree to the following conditions:

5.1 General Requirements

1. Sign and agree to the Equipment Owner Agreement.
   - If an Installer is submitting the application on behalf of the Equipment Owner, the Equipment Owner must sign the Installer Agreement and the Equipment Owner Agreement.
2. Operate the charging equipment for at least five (5) years from the Installation Date. Charging equipment must remain at the location listed in the application and maintain network service for the entire five (5) year Program reporting requirement period.
3. Equipment Owners are required to deliver informational materials about charging and EVs to their employees and tenants. The NYSERDA contractor will develop the informational materials to be delivered to the workplace and MUD Equipment Owners. The Equipment Owners must share these materials with their employees and tenants once within the first quarter of project completion and must include the NYSERDA contractor as a BCC to show proof of delivery.
4. **Recoupment:** Funded Charging Equipment taken out-of-service, relocated, determined to be inoperable, or having network service cancelled prior to completing the minimum 5-year in-service requirement are subject to prorated reimbursement penalty of 1.667% per month. For example, Charging Equipment retired or relocated after 30 months would have 30 months remaining. The early retirement penalty would equal 50% of the Charge Ready NY 2.0 incentive. The Equipment Owner must repay this early retirement penalty to NYSERDA within 60 days of the retirement or relocation of the Charging Equipment unless it has submitted documentation that new eligible Charging Equipment has been installed. Charging Equipment not in-service for 90 consecutive days due to a malfunction or other operational issues may be deemed inoperable and potentially in violation of the 5-year in-service requirement. If NYSERDA finds that there has been no usage on Charging Equipment for 60 days, it may request information from the Equipment Owner regarding the Charging Equipment's maintenance status to determine if the Equipment Owner is subject to repayment of funds.

5.2 Data & Information Sharing

1. **Department of Agriculture and Markets Notification:** New York State Agriculture and Markets Law Section 182 requires Equipment Owners to notify the Department of Agriculture and Markets when new public electric vehicle charging stations are installed. An Agriculture & Markets EVSE Notification Report must be filled out and submitted by email or fax. Serial numbers for additional chargers should be entered in the Comments/Remarks box at the bottom of the form. Information is included on the Agriculture and Markets EVSE Notification Form. A copy of this form must be submitted with final documentation.

2. **Charging Equipment Information:** The Equipment Owner must allow NYSERDA to share the charging equipment information, Equipment Owner contact information, and the installation address with the electric distribution utility serving that location, for the purpose of informing the utilities' system planning efforts, and with the U.S. Department of Energy, which compiles information about charging equipment to share with EV drivers through the Alternative Fuels Data Center (AFDC).
3. **Surveys:** The Equipment Owner must agree to participate in online surveys and other research efforts that support Program goals.

5.3 Charger & Networking Requirements

1. Each port of charging equipment must be able to simultaneously charge vehicles at a minimum of 6.2 kW across all ports.
2. Equipment Owners/operators may conduct power sharing and/or participate in smart charge management programs so long as each charging port continues to meet an EV's demand for power of at least 6.2 kW unless the EV charging customer consents to accepting a lower power level.
3. Networking: The Equipment Owner must purchase at least one (1) year of network service from a pre-approved network provider at the time of installation. The Equipment Owner can change to a different pre-approved network provider at a later date but must provide NYSERDA access to charging data through a Network Services Vendor for the entire five (5) year Program reporting requirement. The Equipment Owner must add NYSERDA to its network account as an administrator with limited rights to access charging data for the duration of the five (5) years, as described in section 8: Operation of Equipment and Data Provision.
    - If the Equipment Owner changes Network Services Vendors or replaces the equipment within the required five (5) year period of operation, the Equipment Owner is responsible for notifying the Program administrator and for providing new supporting documentation as described in section 6: Required Documents, within 30 days of the change. If changing Network Services Vendors, the Equipment Owner must share the application number, site address, equipment serial number, old network service vendor, and new network service vendor with the Program administrator. If the equipment has been replaced, the Equipment Owner must share the application number, site address, network service vendor, old equipment serial number, new equipment serial number, new equipment manufacturer, new equipment model, and new number of charging ports with the Program administrator.
4. **Charging Equipment Repairs:** During the entire five (5) year operating period, the Equipment Owner must make any needed repairs to the Charging Equipment. The Equipment owner must begin the repair process within 24 hours of notice of a malfunction or other operational issue.
5. **Pricing Display:** Charging Equipment must display kW pricing information through a digital display on the Charging Equipment or associated kiosk. For Charging Equipment that require payment in addition to kW fees, the Equipment Owner must make any additional pricing information (dwell time surcharges, extended EV parking fees, fees per charging session, etc.) available to drivers in advance of each charging session. The additional pricing information must be clearly indicated on

the digital display screen that is legible both at night and in direct sunlight, or on parking space signage.

5.4 Site Requirements

1. **Parking Space Signage:**

    - The Equipment Owner must provide onsite signage or pavement markings that clearly indicate that the adjacent parking space(s) is reserved for electric vehicles while charging only. Signage must be permanently installed and weather-proof to last the entire 5-year reporting period for the program. Stenciled graphics on the parking pad indicating parking only for electric vehicle parking are recommended.

    - Signage must clearly indicate that non-EVs parking in spaces designated as EV parking only may be towed at vehicle owner's expense.

    - Signage must clearly indicate that EV parking is reserved or prioritized for employees or tenants, as described in Section 2.4.

    - It is required that the Equipment Owner protect the Charging Equipment from vehicles by installing bollards with a minimum height of 36" or permanent wheel stops placed at least 36" from the Charging Equipment. The parking spaces must be well-lit during the hours between dusk and dawn.

2. **Customer Service Requirements:**
    - The Equipment Owner must provide a toll-free, 24-hour customer support service number that is clearly visible and posted on or near the charging equipment to assist customers with difficulties accessing or operating the Charging Equipment.

    - The serial number must be visible on the outside of the charging equipment, not on the display screen, for customers to report to customer service. The customer support center must be accessible 24 hours a day, seven days a week.

6 Required Documents

Applicants must submit required documents for each incentive application. The Equipment Owner Agreement requires a wet signature. All other documents may be signed electronically.

To receive Pre-installation approval for an incentive, Applicants must submit:

- **Completed application form (completed online).**
- **Copy of Permit:** Scan of building permit to install charging equipment or note from the authority having jurisdiction (AHJ) that no building permit is required. Permit must be active from the pre-installation application date and cover the dates from the beginning of the construction through the Installation Activation Date.
- **Site Host Agreement:** Scan of signed Site Host Agreement. If the Equipment Owner is also the property owner of the installation site, the Equipment Owner must still complete this form.
- **Equipment Owner Agreement:** Scan of signed Equipment Owner Agreement. This document requires a wet signature.
- **Installer Agreement:** Scan of signed Installer Agreement, if applicable.
- **Scan of quote(s) from installers** for the installation of Charging Equipment. The quote shall be itemized and clearly break out the following:

  1. Make and model name of the specific charging equipment with per-unit costs.
  2. Networking fees annually.
  3. Minimum three-year warranty, items covered and cost.
  4. Estimated networking fees that the Equipment Owner will be responsible for the duration of the five-year Program reporting requirement (for Equipment Owner informational purposes).
- **Site Map:** Aerial view of the site showing all parking spaces and indicating where Charging Equipment will be installed. Site Maps must include the location(s) of any existing Charging Equipment.

Following charging equipment installation, all Applicants must submit the following required documents, at a minimum, to receive their incentive payment:

- **Completed application form** (completed online).
- **Serial numbers, network ID, and GPS coordinates** to six decimal places for all charging equipment (submitted as part of completed application).
- **Copy of Permit:** Scan of building permit to install charging equipment or note from the authority having jurisdiction (AHJ) that no building permit is required. Permit must be active from the beginning of the construction through the Installation Activation Date.

- **Site Host Agreement:** Scan of signed Site Host Agreement. If the Equipment Owner is also the property owner of the installation site, the Owner must still complete this form.
- **Equipment Owner Agreement:** Scan of signed Equipment Owner Agreement. This document requires a wet signature.
- **Installer Agreement:** Scan of signed Installer Agreement if Installer is the applicant.
- **Site Map:** Aerial view of the site showing all parking spaces and indicating where Charging Equipment will be installed. Site Maps must include the location(s) of any existing Charging Equipment.
- **Installed Site Photo:** Photo of the charging equipment installed so the equipment is visible at its site. Onsite signage or pavement markings and bollards with a minimum height of 36” or permanent wheel stops at least 36” from the Charging Equipment must also be visible in the photo.
- **Serial Number Photo:** Photo of the serial number visible on the outside of each piece of charging equipment.
- **Customer Support Number Photo:** Photo of toll-free, 24-hour customer support service number posted on or near the charging equipment.
- **Charging Equipment Pricing Photo:** Photo of kW pricing on the display screen of the charging equipment or associated kiosk.
- **Charging Equipment Installer Certification:** Scan of signed Charging Equipment Installer Certification. If the Equipment Owner self-installed the Charging Equipment, the Equipment Owner must still complete this form.
- **Department of Agriculture and Markets EVSE Notification Report:** Scan of Department of Agriculture and Markets EVSE Notification Report filled out in its entirety and submitted to New York State Department of Agriculture and Markets.
- **Network Service Agreement:** Scan of proof of payment for one (1) year of network services. (EVSE must remain networked for the entire 5-year Program reporting period).
- **Proof of payment for equipment:** Scan of proof of payment for Eligible Charging Equipment. The proof of payment for the equipment should list information about the vendor (name, company, contact information), and include an itemized invoice that clearly breaks out the following:

    1. Make and model name of the specific equipment purchased with per-unit costs.
    2. Networking fees annually.
    3. Minimum three-year warranty duration, items covered and cost.
    4. Other fees, such as provisioning fees (if applicable).
    5. Estimated networking fees that the Equipment Owner will be responsible for the duration of the five-year Program reporting requirement (for Equipment Owner informational purposes).

- **Proof of payment for installation services:** Scan of proof of payment from installer for the installation of eligible Charging Equipment. The proof of payment should include information about the installer (name, company, contact information), and include an itemized invoice that clearly breaks out the following (if applicable):

    1. If the Installer is receiving the rebate incentive from NYSERDA, they must pass the entire rebate incentive through to the Equipment Owner. This must be clearly noted in the invoice from the Installer to the Equipment Owner.
    2. Utility Make-Ready funding or any other third-party incentive (if applicable) must be clearly noted in the invoice.
    3. Labor associated with the installation of EVSE (hourly rates and number of hours at each rate). Labor associated with electric service upgrades listed separately.
    4. Materials and hardware other than the EVSE, such as electrical conduit (linear feet), wiring, post, or bollards for EVSE protection, etc. (Please list out.)
    5. Electric service upgrades.
    6. Directly related site work (e.g., patching pavement that had to be torn up to install conduit; concrete slabs for EVSE installation; etc.).
    7. Permitting fees.
    8. Other project management costs.

Applicants must submit scanned versions of the documents through the NYSERDA web portal, which can be found at nyserda-portal.force.com. NYSERDA reserves the right to require additional documentation if needed for verification of any element of incentive eligibility.

7 Bonus Incentive Application Process

Workplace and MUD locations are eligible to apply for bonus incentives (refer to section 3). Upon approval of a pre-installation application or receipt of a post-installation application, a NYSERDA contractor will contact the Equipment Owner with information regarding the bonus incentive application process. The Equipment Owner will have eighteen (18) months from the date that the rebate is approved to complete the minimum requirements necessary to receive the bonus incentive. The bonus incentive payment will be paid to the Equipment Owner after review and approval of these requirements.

The NYSERDA contractor will develop the informational materials to be delivered to Equipment Owners within the first fifteen days of each quarter (January 15; April 15; July 15; and October 15). All Equipment Owners who express interest in participating in the Bonus Incentive application within the previous quarter will receive the marketing packet from the NYSERDA contractor to be delivered to their employees or tenants on the dates mentioned above. This will be recorded as their first of four required quarterly updates. The Equipment Owners must include the NYSERDA contractor as a BCC on the delivery of these quarterly updates to show proof of delivery.

The Equipment Owner must complete two of the following three activities in addition to distributing the four quarterly updates described above to be eligible for the bonus incentive.

1. **Participate in and/or host one ride-and-drive event or host at least two presentations from car dealers**.

   NYSERDA contractor will coordinate and facilitate ride-and-drives across multiple employers in an area if they help promote them for employees/tenants. The NYSERDA contractor will record the number of employees or tenants from each Equipment Owner who participates in the ride-and-drive events or smaller presentations. To receive credit for this option, each Equipment Owner will need to meet the minimum number of attendees listed below:

   - Small Installations: 5 employee/tenant attendees
   - Large Installations: 10 employee/tenant attendees
   - Ride and Drive Toolkit [PDF]

2. **Purchase or 36-month minimum lease of new electric vehicles for tenants, or workplace fleet.**

   - This does not include “company cars” provided as benefits to individual employees.
   - At least one (1) purchase/lease for small installations and two (2) purchases/leases for large installations must be made to be eligible for the Bonus Incentive. Purchases/leases of fewer than one (1) vehicle for small installations or two (2) vehicles for large installations will not qualify for the Bonus Incentive.

   The Equipment Owners will be required to submit copies of the buyer’s orders or purchase order for these vehicles to the NYSERDA Contractor. Copies of the registrations must be submitted to show proof the vehicle was registered in New York State. The Equipment Owners must commit to domiciling the vehicles within New York State for a period of three years (Terms and Conditions Form).

- Buyer's Orders
- Copies of registrations
- Terms and Conditions Form

Equipment Owners may be eligible for the Drive Clean Rebate of up to $2,000 per vehicle as well as the Federal Tax Credit of up to $7,500 per vehicle depending on the model.

- Vehicle Purchasing Toolkit [PDF]

3. **Offer free charging to employees or tenants for at least one year.**
   As part of the Data Provisioning (see section 8), the NYSERDA contractor will be able to verify whether the charging stations are free to use for the one-year period. The one-year period will begin when the Equipment Owners agree to participate in the Bonus Incentive structure or from the date of installation, whichever comes latest. Bonus Incentive payments will not be made for anything less than one year of free charging.

   - Free Charging Toolkit [PDF]

7.1 Bonus Incentive Amounts

Upon completion of the four quarterly updates and two of the three options mentioned above, Equipment Owners will be eligible to receive the Bonus Incentive. Small installations are workplaces and MUDs that have installed between four (4) and nine (9) ports. Large installations are workplaces and MUDs that have installed ten (10) or more ports.

- Small installations: $4,000
- Large installations: $10,000

8 Operation of Equipment and Data Provision

Equipment Owners must continue to own and operate the Charging Equipment at the same location listed on the application and maintain network service for a period of no less than five (5) years from the date of installation. If the Equipment Owner ceases to operate the charging equipment before the end of this term, NYSERDA may require repayment of a portion of the incentive payment proportional to the amount of time the equipment was not in operation compared to the required period of operation unless the equipment is sold to a buyer who commits to operating the equipment at the same location for the full five-year term and maintaining reporting requirements. For instance, if the equipment was in operation for only thirty months, NYSERDA may require repayment of fifty percent (50%) of the incentive payment.

As part of the operation of equipment, NYSERDA requires that all participating networks be able to provide charging session data in the required format below via an online portal. This is so the required information can be collected at any time. Equipment Owners must be able to provide this information directly to NYSERDA through their network service provider. This is obtained using password-protected access to a station management software that allows NYSERDA limited administrative access to energy use and status reports at any time of the day. All EVSE must be available through one login to one platform. Minimum requirements are listed below.

8.1 General Requirements:

Session data must be available via online portal and required fields must be exportable by a reporting entity with access to the portal. Data from funded stations must be able to be downloaded as a CSV or Excel file in bulk.

8.2 Energy use reports

1. Session data should conform to NYSERDA's data specification requirements and include, at a minimum:

    - EVSE serial number (symbols such as dashes should be removed)
    - Session start date (mm/dd/yyyy)
    - Session start time (hh:mm:ss)
    - Session end date (mm/dd/yyyy)
    - Session end time (hh:mm:ss)
    - Charging start date (mm/dd/yyyy)
    - Charging start time (hh:mm:ss)
    - Charging end date (mm/dd/yyyy)
    - Charging end time (hh:mm:ss)

- Session duration (i.e., total time vehicle is plugged in; hh:mm:ss)
- Charging duration (i.e., total time vehicle is charging; hh:mm:ss)
- Total energy provided (kWh)
- Peak power (kW)

2. Reports would ideally also include:
   - Port identifier, if applicable (dual port chargers)

8.3 Status reports

1. Ability to view EVSE status via online portal.
2. Charging networks must provide the ability for NYSERDA to download station status reports directly from the online portal.
3. Networks will be required to provide a glossary of status terms and their definitions.
4. EVSE status data downloads should be machine-readable and include, at a minimum:
   - EVSE serial number (symbols such as dashes should be removed)
   - Status (e.g., available, offline, in maintenance, etc.)
   - Effective status date (e.g., date station went offline, became available again, etc.; mm/dd/yyyy)
   - Effective status time (e.g., time station went offline, became available again, etc.; hh:mm:ss)

The Equipment Owner must set up access to usage data through a Network Services Vendor for the duration of the five (5) years. All charging station data provided to NYSERDA through these charging stations can be disseminated and utilized by NYSERDA at its own discretion. NYSERDA shall have the right to use, duplicate, or disclose the charging station data, in whole or in part, for any purpose other than resale or commercialization of the data, and permit others to do so. Network Service Vendors, NYSERDA, or the Program Administrator will be able to provide instructions for establishing NYSERDA as an administrator with data access. NYSERDA may, on an annual basis, survey Equipment Owners to obtain information about operating Charging Equipment and any problems encountered including, but not limited to, parts availability, warranty service, maintenance, and repair issues.

9 Incentive Distribution Process

Incentives will be issued to Applicants via electronic payment. Applicants may select the payment option they prefer in the NYSERDA web portal. Per New York State's prompt payment policy, payments to Applicants can be expected within 30 days of application approval.

10 Termination

An Applicant/Equipment Owner may be terminated from the Program for reasons including, but not limited to, if they:

- Submit falsified documents or unauthorized signatures to the Program.
- Repeatedly invoice for uninstalled measures.
- Are in violation of Program rules, the Equipment Owner Agreement, or the Installer Agreement.
- Commit illegal actions, or has principal who commits illegal actions, while participating in the Program.

Applicants/Equipment Owners in terminated status are prohibited from participation in this or other NYSERDA programs. Applicants/Equipment Owners with incomplete projects will be notified of the termination and may be offered such remedies as NYSERDA deems appropriate. NYSERDA may, if appropriate, notify the New York State Attorney General, the New York State Department of Labor, the Better Business Bureau, or others, of the decision to terminate the Applicant/Equipment Owner from the program. Nothing in this process relieves the Applicant/Equipment Owner of the responsibility to fulfill any remaining obligation to the Program or its customers.

11 Appeals Process

NYSERDA will consider appeals to the denial of an incentive application or to a termination decision, which will be decided on a case-by-case basis. To submit an appeal, contact the Program Administrator.

12 Research Participation

NYSERDA may require Equipment Owners to participate in surveys and may request participation from Equipment Owners in other research efforts that support Program goals.

13 Publicity

1. The Equipment Owner/Applicant shall collaborate with NYSERDA's Communications Department to prepare any press release and to plan for any news conference concerning any work under this Program. In addition, the Equipment Owner/Applicant shall notify NYSERDA's Communications Department regarding any media interview in which any work under this Program is referred to or discussed.
2. It is recognized that during the course of the Work under this Program, the Equipment Owner, Installer, or its employees may from time-to-time desire to publish information regarding scientific or technical developments made or conceived in the course of or under this Program. In any such information, the Equipment Owner, Installer, or its employees shall credit NYSERDA's funding participation in the Project and shall state that "NYSERDA has not reviewed the information contained herein, and the opinions expressed in this report do not necessarily reflect those of NYSERDA or the State of New York." The Equipment Owner, Installer, or its employees shall have the right to use and freely disseminate project results for educational purposes, if applicable.
3. Commercial promotional materials or advertisements produced by the Equipment Owner/Applicant shall credit NYSERDA's funding participation and shall be submitted to NYSERDA for review and recommendations to improve their effectiveness prior to use. The wording of such credit can be approved in advance by NYSERDA, and, after initial approval, such credit may be used in subsequent promotional materials or advertisements without additional approvals for the credit, provided, however, that all such promotional materials or advertisements shall be submitted to NYSERDA prior to use for review, as stated above. Such approvals shall not be unreasonably withheld, and, in the event that notice of approval or disapproval is not received by the Equipment Owner/Applicant within thirty days after receipt of request for approval, the promotional materials or advertisement shall be considered approved. In the event that NYSERDA requires additional time for considering approval, NYSERDA shall notify the Equipment Owner/Applicant within thirty days of receipt of the request for approval that additional time is required and shall specify the additional amount of time necessary up to 180 days. If NYSERDA and the Contractor do not agree on the wording of such credit in connection with such materials, the Contractor may use such materials but agrees not to include such credit.

14 Quality Assurance and Compliance

NYSERDA maintains the integrity of its program through an independent Standards and Quality Assurance team, which manages the Quality Assurance (QA) system for the Program.

The QA program has several components, including a review of qualifications and credentials, paperwork audits, establishment of program standards, and comprehensive field inspections. Field inspections include verification of the application scope of work, accuracy of the site conditions, comparison of installation to submitted design, installation meets applicable electrical code, and the overall delivered quality of the electric vehicle charging equipment.

15 Inspection of Completed Projects

NYSERDA selects specific completed projects for QA inspections following a rational sampling protocol. The protocol utilizes a strategic sampling of completed projects with rates primarily based on field inspection scores.

The purpose of the QA inspection is to provide NYSERDA with an opportunity to evaluate the accuracy of the site analysis and design paperwork and verify the system was installed according to all program requirements. The QA inspection also includes selected health, safety, and performance items, and specific compliance items per applicable code.

NYSERDA may select any completed project at any point in the future for a field inspection based on customer complaints, warranty-related issues, or otherwise. All equipment owners and installers are encouraged to perform in-house quality control of their projects. Should NYSERDA decide to inspect an installation, NYSERDA, its technical contractor, or Data Agent may or may not contact the Installer or Equipment Owner to schedule the inspection; inspections may occur without advance notice. If the inspection reveals activities different from those represented in any of the required documentation, NYSERDA may refuse to make any payment. NYSERDA may independently communicate with any Customer, without prior notice to the Installer or Equipment Owner, with respect to any Program installation.

16 Appendix

Figure 1: Pre-Approval Application Flow

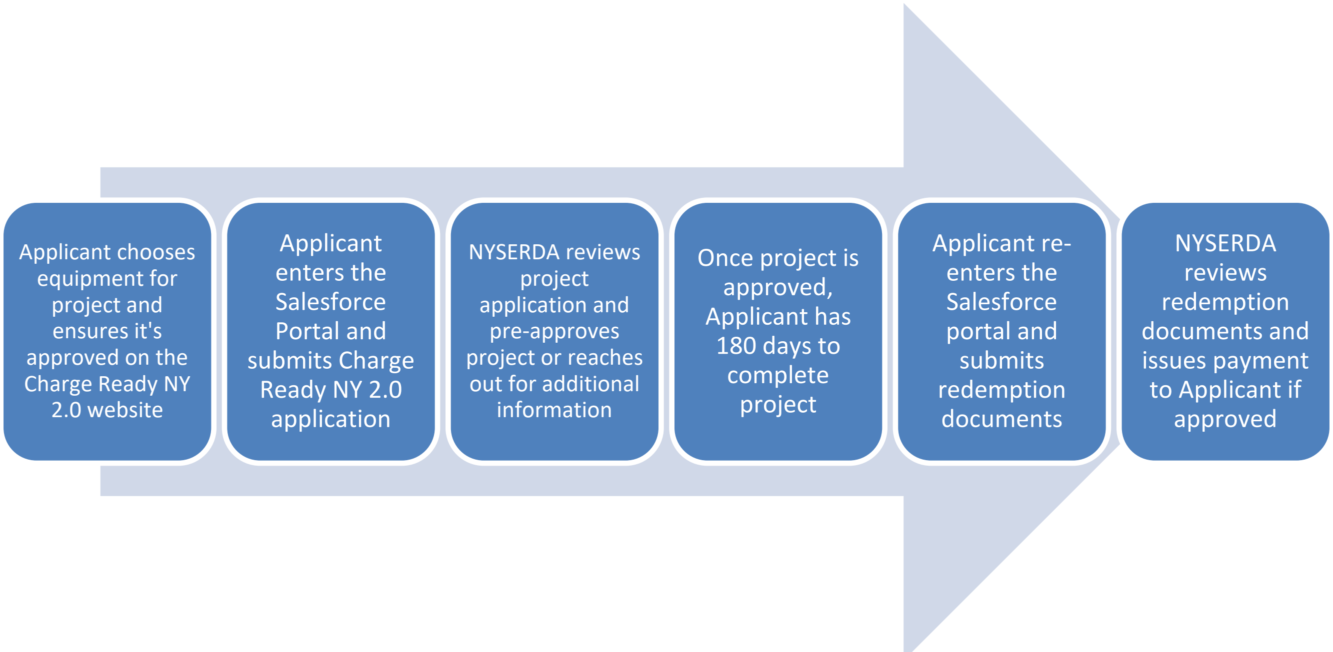

Figure 2: Post-Approval Application Flow