



# Transportation Electrification Program

## Policies and Procedures

### *Residential Electric Vehicle Charger Rebate Program*

Launch date December 15, 2022



Public Service Company of New Mexico (“PNM”) offers the Residential Electric Vehicle Charger Rebate Program to facilitate the installation of electric vehicle charging infrastructure. PNM has contracted DNV Energy Services USA Inc. (“DNV”) to implement the Residential Electric Vehicle Charger Rebate Program. The Residential Electric Vehicle Charger Rebate Program provides rebates for residential customers who install qualifying electric vehicle chargers. This document is intended to convey the rules, policies and procedures that govern Residential Electric Vehicle Charger Rebate Program administration, including contractor and customer participation.

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## PROGRAM WELCOME & OVERVIEW

Welcome to the PNM Residential Electric Vehicle (“EV”) Charger Rebate Program. You are joining a growing number of New Mexicans committed to a sustainable and clean energy environment and for that we thank you!

This Program has you in mind as we work together to increase the adoption of EVs throughout our communities and provide financial support to PNM customers to offset the cost(s) of purchasing and installing an EV charger for their residence.

In this handbook, you will find helpful guidance and information about how to apply and qualify for program rebates.

The program offers a rebate up to \$500 toward the purchase of qualifying EV charging equipment. In addition, income qualified applicants may be eligible for make-ready rebates, up to an additional \$2,000, for the installation of electric facilities needed to serve their EV charging equipment. EV Charger Rebate Applications are reviewed and approved on a first- come, first-served basis until funds are exhausted.

Please feel free to contact us for more information or with any questions at phone # (505)355-6286, toll free at (888)-505-1873, or via email at [TEP@pnm.com](mailto:TEP@pnm.com).

Sincerely,

The PNM Transportation Electrification Program Team

## 1 DEFINITIONS

This section includes a list of commonly used acronyms and terms found throughout this handbook.

**Account holder:** The PNM customer of record for the proposed installation location is also known as the account holder. The customer's name must appear exactly as the name on the PNM account and billing information. The customer is responsible for making any changes to their PNM bill prior to application.

**Application:** The initial form to be completed by the customer or their hired contractor wherein the project information is provided. The Application is then reviewed, and the customer is notified if additional information is needed.

**Applicant:** The party responsible for preparing the Application and Final Application in the Online Application portal, typically the PNM account holder.

**Application Corrections:** Requested by the reviewer if the Application is missing documentation or information necessary for approval.

**Auto Dealer:** The company which sells and advertises the sale of new or used vehicles.

**Contractor:** Contracting company hired by the Applicant to conduct the installation of the charger(s).

**Connector:** The physical plug inserted into the vehicle receptacle.

**Electric Vehicle or EV:** Any vehicle powered by electricity from an external source and registered with the New Mexico Motor Vehicle Division for travel on public roads.

**EV Charger:** A device with one or more electrical outlets for recharging the batteries of electric vehicles.

**Final Application:** The final set of forms to be completed in the application process wherein final documentation is provided and project costs are established.

**Port:** A charging connection to the EV which is capable of independently charging an EV simultaneously with any other port.

**Project Coordinator:** The individual in charge of the application review and rebate payment process.

Public Service Company of New Mexico: Referred to as the Company or PNM.

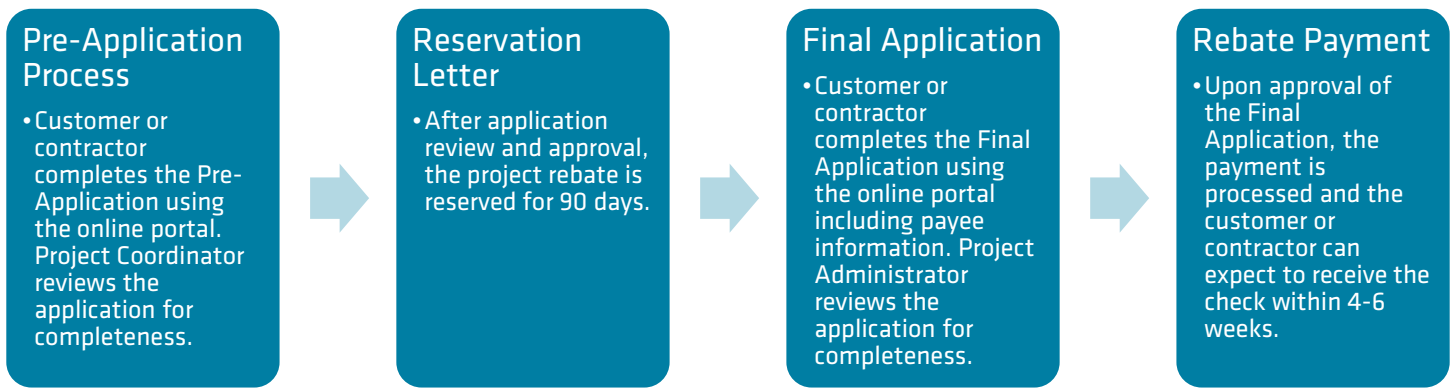
**Reservation Letter or Reservation:** The reservation letter is issued upon approval of the Pre-Application by the Program. It will confirm the amount of the rebate funds held for the customer, the project (application) number, application type, and equipment installation address. The reservation letter expires 90 days from the date of issuance.

## 2 APPLICATION PERIOD AND SELECTION DATES

EV Charger Rebate Applications are accepted through the online application portal:

<https://evready.pnm.com/apply/pnm>. The customer may submit a Final Application without prior reservation of rebate funds. The Final Application is required to be submitted within 20 days of project completion, but no later than the expiration date of the Pre-Application reservation letter issued. If the applicant fails to submit a complete Final Application by the expiration date listed on the reservation, the reservation is forfeited and ineligible for the rebate payment. In the event a reservation is forfeited, a customer may reapply, pending eligibility of funds.

Figure 1. Rebate Application Process



Residential customers may use their discretion when applying for a rebate to submit a Final Application without first reserving rebate funds through submission of a Pre-Application. A Pre-Application is not required but is the only method to reserve funds for their project. A Pre-Applications is suggested where completed installation of equipment may take more than 30 days, or if Program budget is nearing exhaustion.

### 3 ELIGIBILITY

#### 3.1 Customer and equipment eligibility

Customers on residential power rates 1A or 1B are eligible to apply. No single service address shall qualify for more than one rebate. To qualify, the customer must provide proof of purchase and a charger data sheet showing that the charger meets all of the following criteria:

- Level 2 charger from the Qualified Product List.
- UL 2594 Listed.
- ENERGY STAR<sup>®</sup> certified.
- Smart charging capabilities to program charging windows and respond to external signals through Open ADR or OCPP communications protocol.
- WIFI or cellular connection.
- Low-to-moderate income customers who do not have WIFI already available at their home are not required to obtain WIFI to qualify for the rebate.
- Applicant must consent to sharing EV charging data with PNM.
- Low-to-moderate income customers who do not have WIFI already available at their home are not required to obtain WIFI to qualify for the rebate and will not be required to share data with the utility.
- Charger was purchased after the implementation date of the Transportation Electrification Program.
- Proof of completed installation is required.
- Customer agrees to enrollment in the Whole-Home EV rate.
- At final rebate application, the customer will need to submit proof of EV ownership via vehicle registration at their PNM service address.

#### 3.2 Low-to-moderate income customer eligibility

Customers who fall at or below 200% of the federal poverty level can qualify for additional rebates for residential charging installation. Applicants can easily self-identify for the residential charger and installation funds by

comparing their household occupancy and income in the table below.

Table 1. 2023 Poverty Guidelines: 48 Contiguous States (all states except Alaska and Hawaii) – Effective Jan. 19, 2023

Household / Family Size	100% of Poverty Guideline	200% of Poverty Guideline
1	\$14,580.00	\$29,160.00
2	\$19,720.00	\$39,440.00
3	\$24,860.00	\$49,720.00
4	\$30,000.00	\$60,000.00
5	\$35,140.00	\$70,280.00
6	\$40,280.00	\$80,560.00
7	\$45,420.00	\$90,840.00
8	\$50,560.00	\$101,120.00
9	\$55,700.00	\$111,400.00
10	\$60,840.00	\$121,680.00
11	\$65,980.00	\$131,960.00
12	\$71,120.00	\$142,240.00
13	\$76,260.00	\$152,520.00
14	\$81,400.00	\$162,800.00

Reference: <https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>

They must also meet the following criteria:

- Install a Level 2 residential charger rebate described above.
- Self-identify as meeting the low-to-moderate income qualifications.
- Provide proof that installation was completed after the implementation date of the Transportation Electrification Program.
- Proof of completed installation (such as a signed statement or post installation photos) is required.

## 4 CONTRACTOR REQUIREMENTS

To create a positive customer experience and to ensure that program funds are being administered correctly and accurately, a participating contractor or an authorized TEP Trade Ally must adhere to standards of acceptable behavior and performance. This includes, but is not limited to:

- Complete and accurate program Applications.
- Accurate representations of the program to customers.
- Submission of original customer signatures on Final Applications.
- Submission of valid product invoices that accurately match the chargers submitted for rebates.
- Submission of valid supporting documentation.
- The complete and accurate installation of a new (not used) charger represented in an Application.
- Adherence to other provisions of this handbook.

### 4.1 PNM Program Authorized Contractor Network

The PNM Authorized Contractor Network members in the Transportation Electrification Program (“TEP”) are called TEP Trade Allies. Contractors who meet certain training and program participation standards are given the TEP Trade Ally status and appear on the contractor search tool. Inclusion in this network is designed to provide the customer a turnkey solution to purchasing and installing qualified equipment and apply for rebates. This simplified path

increases customer satisfaction and provides the Program Team with a better understanding of how to interact with and support contractors in the marketplace.

To become a TEP Trade Ally, all the following requirements must be met:

- Submit a signed PNM Transportation Electrification Program Trade Ally Application and a signed copy of the company's W-9 (W-9 must have a physical address of business; a P.O. Box will not be accepted).
- Possess a current New Mexico EE98 license.
- Provide a certificate of insurance with the required policy limits, additional insured, and waiver of subrogation per the contractor agreement.
- Attend an initial program orientation & training and annual program training session.
- Submit at least one paid Application per program year.

Once a contractor completes these requirements, they will be granted authorized contractor ("PNM TEP Trade Ally") status. PNM reserves the right to remove contractors from PNM Authorized Contractor Network should any issues arise with their company.

A contractor who becomes a PNM TEP Trade Ally has access to certain aspects of the program that are not available to all contractors, such as:

- Listing in our online TEP Trade Ally directory at <https://ev.pnm.com/easy-install/>
- Opportunity to participate in advisory and focus groups.
- Presentations at events with multiple customers.
- Large-customer visits with program team members.
- Supplies of printed PNM branded program marketing materials.
- Ability to identify their business as designated PNM TEP Trade Ally.

## 5 THIRD PARTY PAYMENT AUTHORIZATION

Rebate application rebate payments are issued to the PNM account holder/customer, however, there are two instances in which the customer may assign payment of the rebate to another party as described below.

### 5.1 Assignment of rebate payment to hired Contractor or TEP Trade Ally

Customers may assign payment of Application rebates directly to the contractor they hired to perform work included in that Application, but only if the following eligibility requirements and procedures are met:

- To receive third-party payment, the contractor must provide the customer with a third-party payment authorization form that must be completed and signed by the customer and submitted with the Final Application.
  - This form is available to contractor via the Online Application.
- A contractor that violates any of the standards listed above may be removed from third-party payment eligibility.
  - This removal includes any and all other contractor affiliations, DBAs and other employment relationships.
  - If the contractor has been removed from the PNM TEP Trade Ally program, any assigned rebate payments will be made payable to the customer.

## 5.2 Assignment of rebate payment to Landlord/tenant

Customers may assign payment of Application rebates directly to a landlord or tenant, but only if the following eligibility requirements and procedures are met:

- The tenant must be located within the landlord's facility identified in the project Application.
  - An inspection may be required to confirm eligibility.
  - Failure to prove eligibility will result in any rebates being made payable to the PNM account holder (customer).
- To receive third-party payment, the landlord/tenant must provide the customer with a landlord/tenant payment authorization form that must be completed and signed by the customer and submitted with the Final Application.
  - This form is available to qualified landlords and tenants provided by the program team and is required to be submitted with the Final Application.
  - The landlord/tenant's W-9 must be attached to the form; failure to provide the W-9 will result in any rebates being made payable to the PNM account holder.

## 6 REBATES

The Program offers a rebate of up to \$500 toward the purchase of qualifying EV charging equipment. The rebate is capped at the cost of the EV charger or \$500, whichever is less.

Qualifying Low-to-Moderate Income applicants can receive up to \$500 for the cost of the EV charger plus up to an additional \$2,000 toward the installation cost of the EV charging equipment. Applications are reviewed and approved on a first-come, first-served basis until funds are exhausted.

## 7 RATES

See the table below for a description of the Whole Home Electric Vehicle (WHEV) rate as it would apply to customers.

Table 2. WHEV Rate

Time period		Proposed WHEV \$/kWh Rate
5:00 am-10:00 pm electricity usage	Block 1	\$0.0779432/kWh
	Block 2	\$0.1240339/kWh
	Block 3	\$0.1495326/kWh
WHEV electricity usage (10:00 pm- 5:00 am)		\$0.0304438/kWh

In exchange for receiving the rebate, participating customers consent to enrollment in the WHEV.

## 8 PRE-APPLICATION PROCESS

Applications can be emailed or submitted online through the PNM online application portal which can be accessed at <https://evready.pnm.com/apply/pnm>. If a customer purchases or installs the charger prior to obtaining a notice of reservation, this is acceptable if purchased after the launch date of December 15, 2022.



## 8.1 Online Pre-Application Submittal

Pre-Applications can be submitted directly through the online application portal. To begin the online application the customer must register for an online account. When the account has been confirmed, the application process may begin. Duplicate applications or multiple submissions for the same project will be rejected. The TEP Project Coordinators review applications based on a first-come first-serve basis in the order submitted. Upon Pre-Application approval, a Reservation Letter will be issued to the customer. Applications are reviewed within 10 business days, excluding holidays, to confirm customer program eligibility and that the required documents are provided. Communications are sent by email to program participants. Accurate email addresses and phone numbers are required for ALL program participants.

## 8.2 Required Pre-Application Documentation

The Pre-Application must include the following:

- Completed and signed Terms and Conditions.

## 8.3 Rebate Reservation

Correct and complete Pre-Applications that are approved will receive an Rebate Reservation Letter and will include the following information: application number, application type, residence address, date of reservation, expiration date of reservation, and maximum eligible rebate payment. The reservation of funds does not represent a guarantee of payment. Applicants may change their residence address on an active reservation to another address within the PNM service territory if the information provided is for the same customer. The new residence location will be recorded in the online application, but the Reservation Letter will not be revised. The terms of the original Reservation Letter would apply to the new residence location. A customer may withdraw a Reservation at any time by submitting a written request to PNM. A Reservation extension may be requested via email stating the reason(s) for extension needed. PNM has the right to deny or grant any extension request.

## 8.4 Pre-Application Changes

If the Application is deemed incomplete or lacking documentation, the reviewer will request application corrections to be submitted by the customer. The customer must resubmit the documentation or Application with corrections within 20 business days for re-review. Deficient Applications that are not corrected within 20 business days of the Applicant being notified of the deficiency are canceled and the rebate is forfeited.

Account holder changes: The account holder name for an application may be changed before project completion by the original account holder with written request to PNM. The new utility account number in the name of the new account holder must be provided with the change request.

# 9 FINAL APPLICATION PROCESS

## 9.1 Online Final Application Submittal

A Final Application can be submitted without prior Pre-Application reservation of funds and can be submitted through the online application portal after installation is complete. Final Applications are to be submitted within 20 days of project completion. To begin the Application, the customer must register for an online account. When the account has been confirmed, the application process may begin. Duplicate applications or multiple submissions for the same project will be rejected. Project Coordinators review applications based on a first-come first-served basis in the order submitted. Applications are reviewed within 10 business days, excluding holidays, to confirm customer program eligibility and that the required documents are provided. Communications are sent by email to program participants. Accurate email addresses and phone numbers are required for ALL program participants.

## 9.2 Required Documentation

The Final Application must include the following:

- Charger Purchase Receipt.
- Data/specification sheet of the EV charger.
- Current registration for an electric vehicle matching service address within PNM service territory.
- Post installation photos of equipment.
  - Equipment make/model in place
  - Serial Number of equipment
- Completed and signed Application Agreement – all pages.
- Itemized Installation Invoice including description of work performed, labor, and material costs (LMI applications).

## 9.3 Final Application Changes

If the Application is incomplete or lacking documentation, the reviewer will request Application corrections to be submitted by the customer. The customer must resubmit the application with corrections within 20 business days for re-review. Deficient Applications that are not corrected within 20 business days of the applicant being notified of the deficiency are canceled and rebates forfeited.

## 10 REBATE PAYMENT

Once the reviewer processes and accepts the Final Application, the project will be engineer reviewed and may be inspected. After Final Application Approval, the rebate payment in the form of a check will be issued within 4-6 weeks and mailed to the designated payee mailing address.

## 11 CANCELLATION, WITHDRAWAL AND FORFEITURE

Upon customer written request to PNM, an Application may be cancelled or withdrawn.

A Final Application is forfeited if it is not submitted within 20 days of project completion but no later than by the expiration date listed on the Reservation Letter or the date granted for the extension.

Reserved funds for withdrawn, cancelled, and forfeited applications are returned as available to the Program. Account holders may reapply to the program, but subsequent applications are subject to the Program rules in place at the time of the new application.

Program funds are available until exhausted.

## 12 CONTACT INFORMATION

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