

Orange County Power Authority (OCPA) Residential Battery Rebate Program Handbook

Introduction

This handbook provides a step-by-step guide to help residential customers apply for the Orange County Power Authority (OCPA) Residential Battery Rebate Program.

Background

The OCPA Residential Battery Rebate Program is designed to support the adoption of clean energy technologies and enhance grid reliability by encouraging residential customers to install battery energy storage systems either paired with solar photovoltaic (PV) systems or installed as stand-alone battery systems. Through this program, eligible customers can receive a one-time rebate of \$1,000 **per household** for each qualifying battery installation that meets the program's technical and documentation requirements.

High-Level Process

- There are three steps in the rebate application process:
 - Rebate Reservation Form - complete this form after you receive an installer quote and prior to purchasing your battery or battery and solar system.
 - Purchasing the battery storage system ahead of receiving confirmation of eligibility through a reservation is at the risk of the customer.
 - Rebate Claim Form - complete this form after your battery or battery and solar system have been installed.
 - Rebate will be processed once this is approved.
 - Permission to Operate (PTO) Submission - once you receive your PTO from SCE or from your contractor, submit proof of your permission to operate.

Eligibility Requirements

Participant Eligibility

- Must be an OCPA residential customer.
- Must install a battery storage system either paired with a solar PV system or as a standalone system.
- Must submit required documentation and photos for verification.
- Must acknowledge and agree to program Terms and Conditions.

Technology Eligibility

- The system's equipment must be listed on SGIP's verified Public Equipment List which can be found at <https://www.selfgenca.com/home/resources/> under the "Verified Equipment Lists" dropdown.
- The battery system must be at least 5 kWh.
- The battery system must be permanently installed (portable systems not eligible)
- The system must serve the OCPA customer address listed on the rebate application.
- While enrollment in demand response or time-of-use optimization programs is not required, OCPA encourages participants to explore these options to maximize system benefits.

Contractor Eligibility

- A contractor licensed under the Contractors State License Board will be needed to install your battery storage system, and you'll have to identify them in your Reservation Form. More details on this form are below.
- The Self-Generation Incentive Program has a list of approved contractors with experience installing battery storage and solar PV systems. The list can be found on <https://www.selfgenca.com/home/resources/> under the "SGIP Developer Eligibility Application" dropdown.

Rebate Application Window


- Rebate reservations will be reviewed on a first-come, first-serve basis.
- The system must be installed, and the rebate claim form submitted, within six (6) months of reservation approval or by May 15, 2026, whichever comes first.

Rebate Application Process

The rebate process is designed to be simple and streamlined. Participants first complete a short reservation form, then submit a claim form with basic information and supporting documents after installation.

Rebate Reservation Request

1. Provide participant identification information:
 - a. First and last name
 - b. Contact information
2. Enter the service address and service account. Information can be collected from a recent utility bill. An example of an SCE bill is provided below.
 - a. #1 identifies where your service address can be found.
 - b. #2 identifies where the service account information can be found.



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For billing and service inquiries
1-800-684-8123
www.sce.com

Your electricity bill

VALUED CUSTOMER / Page 1 of 6

1 Customer Account
700000000000

17 NINTH ST
ANY CITY, CA 90000-0000

Date bill prepared
11/07/22

Amount due \$000.00
Due by 11/28/22

Your account summary

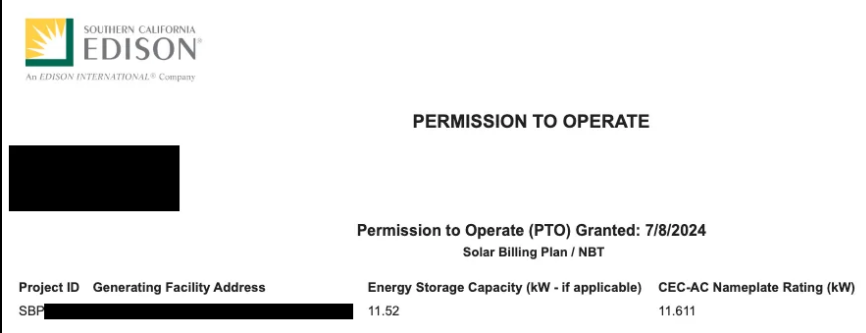
Previous Balance	\$ 0.00
Payment Received 10/24/22	-\$ 00.00
Balance forward	\$0.00
Your new charges	\$000.00
Total amount you owe by 11/28/22	\$000.00

2 Summary of your billing detail

Service account	Service address	Billing period	Your rate	New charges
8000000000	17 NINTH ST ANY CITY, CA	10/04/22 to 11/02/22	DOMESTIC (SCE)	\$000.00
8000000000	17 NINTH ST ANY CITY, CA	10/04/22 to 11/02/22	DOMESTIC	\$00.00
				\$000.00

3. Include the selected contractor's information:
 - a. Contractor company name
 - b. Contractor name
 - c. State License Board number
4. Provide the proposed battery system details to verify eligibility for the program:
 - a. Manufacturer
 - b. Model
 - c. Size (kWh)
 - d. Quantity
5. Customer Attestation:
 - a. As part of the reservation process, participants are required to complete a Customer Attestation. This is a mandatory acknowledgment confirming that:
 - i. The battery storage system has not been purchased or installed prior to submitting a reservation approval.
 1. Note: Purchasing the battery storage system ahead of receiving a reservation approval is at the risk of the customer.
 - ii. The system will be installed and interconnected only after the reservation is approved.
 - iii. The final installation and rebate claim will be submitted within six (6) months of reservation approval or by May 15, 2026, whichever comes first.
 - b. By checking the attestation box on the reservation form, the customer affirms their understanding and agreement to these terms. This ensures the system qualifies for the rebate and aligns with program rules.
6. Southern California Edison (SCE) Permission to Operate (PTO) Requirement Acknowledgement:
 - a. All participants must acknowledge the PTO submission requirement as part of the claim form process. This acknowledgment confirms that:

- i. Participants are required to submit their PTO letter from SCE (example included below), verifying successful interconnection of the battery system.
 - ii. The PTO letter must be submitted to batteryrebates@ocpower.org within six (6) months of rebate claim approval.
 - iii. Failure to submit the PTO letter within the required timeframe may result in OCPA reclaiming the rebate funds.
- b. This acknowledgement is completed via a checkbox in the claim form. It is essential for maintaining compliance with program terms and for confirming the project has been fully permitted and interconnected.



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PERMISSION TO OPERATE

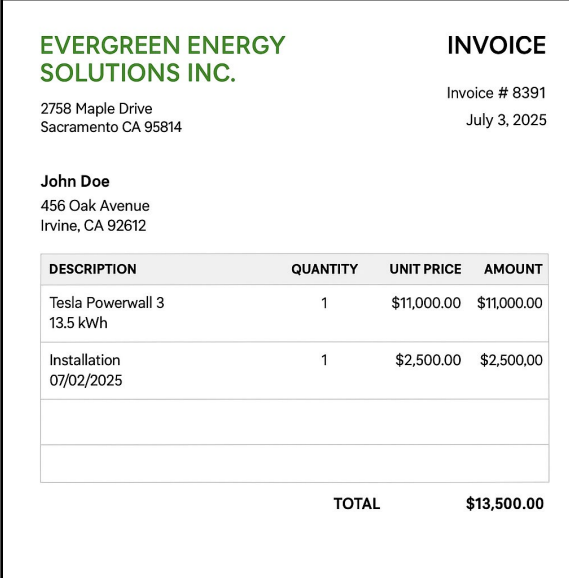
Permission to Operate (PTO) Granted: 7/8/2024
Solar Billing Plan / NBT

Project ID	Generating Facility Address	Energy Storage Capacity (kW - if applicable)	CEC-AC Nameplate Rating (kW)
SBF	[Redacted]	11.52	11.611

7. Agree to the Terms and Conditions.

Rebate Claim Form

1. Enter the service account number
2. Provide installation documentation including:
 - a. Either an installation invoice (for customer-owned systems) or a lease agreement from the leasing contractor (for third-party owned systems) (example below).



EVERGREEN ENERGY SOLUTIONS INC.

2758 Maple Drive
Sacramento CA 95814

INVOICE

Invoice # 8391
July 3, 2025

John Doe
456 Oak Avenue
Irvine, CA 92612

DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
Tesla Powerwall 3 13.5 kWh	1	\$11,000.00	\$11,000.00
Installation 07/02/2025	1	\$2,500.00	\$2,500.00
TOTAL			\$13,500.00

- b. A clear, well-lit photo showing the fully installed battery storage system, including the unit and any visible manufacturer labels. (See example below for reference.)



- c. A clear photo of the battery's nameplate showing model number and nominal battery energy (kWh) for equipment verification (example below marked with the information that must be visible in the submitted photo).



3. Complete the Grid Services Interest Survey (details included in section below).
4. Agree to the PTO Requirement Acknowledgement and Terms and Conditions.

Permission to Operate Submission

1. Enter the service account number
2. Provide permission to operate documentation:
 - a. This will be emailed to you, the customer and the contractor from Southern California Edison (SCE). It may be called “PTO”.

Grid Services Interest Survey

As part of the application, participants will complete a brief, four-question multiple-choice survey designed to gauge interest in future grid services programs, such as a demand response program. The survey focuses on participant preferences regarding battery usage during periods of high electricity demand, openness to different types of compensation, and any potential concerns (such as privacy, system control, or equipment wear).

The survey is built directly into the application and must be completed in order to submit the application and receive the rebate. Responses are non-binding but provide valuable insights that will help shape the design of future customer-focused energy programs.

Review Timelines and Rebate Disbursements

The OCPA Residential Battery Rebate Program follows a structured process to ensure fair and timely review of all applications and disbursement of incentives:

Reservation Review Timeline

- Once a reservation request is submitted, the program team will review the submission and issue a decision within 10 business days.
- Applicants will be notified by email whether their reservation has been approved, requires revision, or has been denied.

Claim Review Timeline

- After installation is complete, participants must submit a Rebate Claim Form along with all required documentation.
- Submitted claims will be reviewed and a decision issued within 10 business days of receipt.
- If additional information is required, participants will be contacted to revise and resubmit.

Rebate Disbursement

- Upon claim approval, a \$1,000 rebate will be issued by check to the participant or their contractor, as specified in the claim form.
- Rebate checks will be mailed within 30 business days of claim approval.

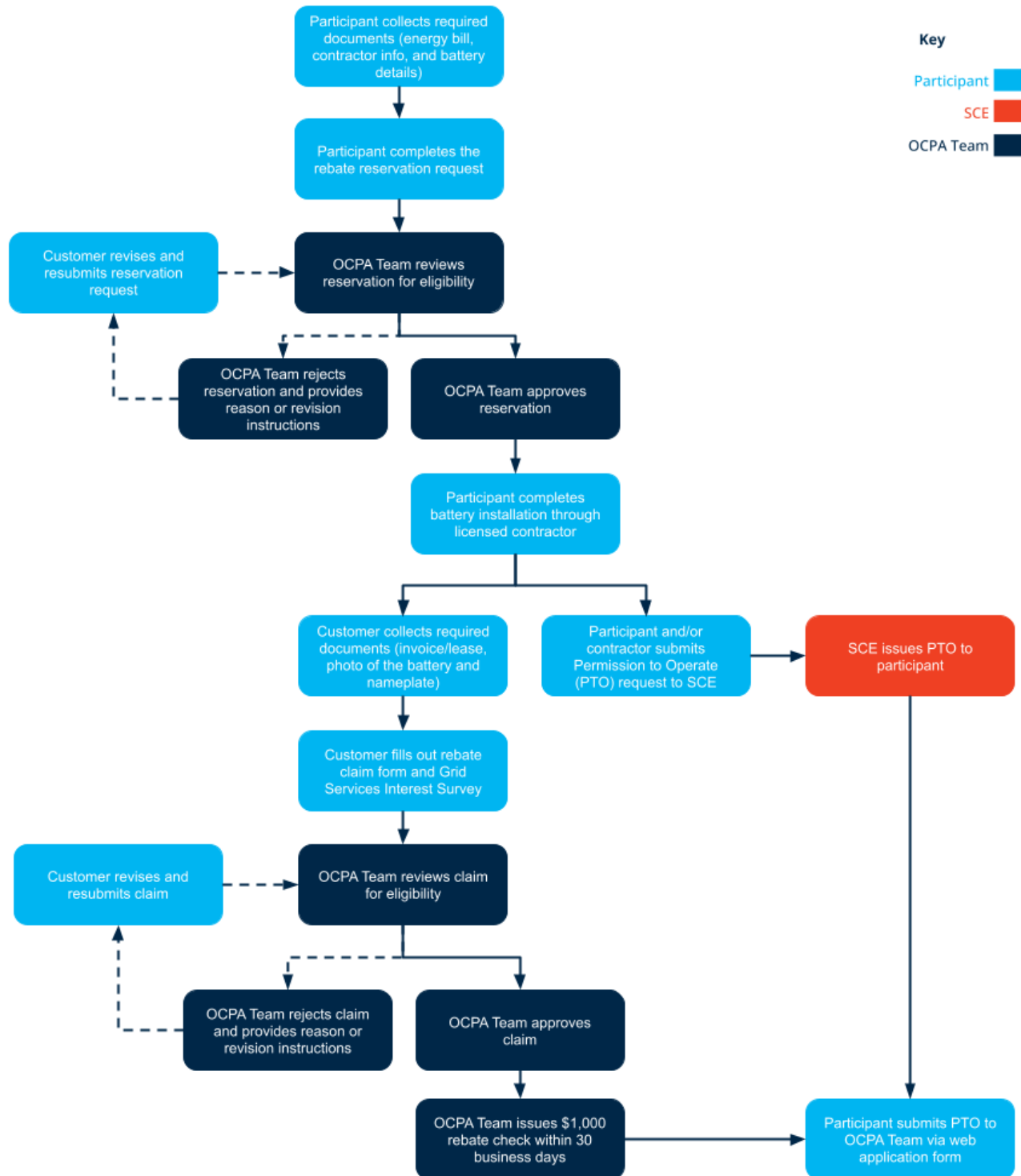
Important Notes

- Participants are responsible for ensuring that all submitted information is accurate and complete.
- The final rebate is contingent on verification of installation, documentation accuracy, and submission of the SCE Permission to Operate (PTO) letter within six (6) months of claim approval via the web application form.
- Failure to comply with program requirements may result in cancellation of the rebate or reimbursement recovery by OCPA.
- Additionally, claims may be denied if program requirements are not met, including but not limited to:
 - Use of ineligible or unverified technology
 - Installation completed before Rebate Reservation Form submittal
 - Missing or incorrect documentation

Program Participant Process Flowchart

(next page)

Program Participant Process Flowchart



Terms & Conditions Acknowledgment

As part of the application, participants will be required to review and acknowledge the Terms and Conditions of the OCPA Residential Battery Rebate Program. This acknowledgment is included directly in the online application webform and must be completed in order to submit the application and qualify for the rebate.

The Terms and Conditions outline key program requirements, including applicant eligibility, documentation standards, contractor expectations, and the process for rebate disbursement. By providing this acknowledgment, participants confirm that all submitted information is accurate to the best of their knowledge and that they agree to comply with the program's rules and requirements.