

Connecticut Electric Vehicle (EV) Charging Program 2023 Participant Guide for Residential EV Drivers

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Section 1: Introduction

Welcome to the Connecticut Electric Vehicle Charging Program

New technology like electric vehicles (“EVs”) raise many questions and your utilities know informed consumers drive great partnerships. In this guide, United Illuminating and Eversource explain a unique new EV charging program and help you understand just how easy EV charging can be, how you will save money through EV charging programs, pay less for your usage during designated charging times, get faster charging options to simplify your life, and understand how smart choices can protect the future of our environment. EVs produce less lifetime pollution than gas-powered vehicles, and, as sources of electricity become cleaner, these emissions will continue to decline. The EV community and public charging network are quickly growing around you. Let’s find out just how you can become part of this new technology revolution!

The Connecticut EV Charging Program (“the Program”) offers eligible residential EV drivers the opportunity to earn rebates and incentives to charge their EV smarter, avoid costly peak time energy use, and help your utility, either United Illuminating (“UI”) or Eversource, collectively (“utilities”), manage the additional electricity demand from EV’s now and into the future. Charging an EV at your home can offer many benefits, from convenience to cost savings and vehicle emission reductions. Whatever your motivation, we welcome your participation and look forward to supporting you.

So, how does it work? This guide will provide all the information you need to participate successfully and receive the Program incentives that are applicable to you. Overall, customers interested in the Program will follow these general steps to be explained in more detail below.



STEP 1: DECIDE HOW TO PARTICIPATE



STEP 2: INSTALL & SETUP YOUR SOLUTION



STEP 3: APPLY FOR YOUR REBATES*



STEP 4: ENROLL IN THE PROGRAM



STEP 5: PARTICIPATE & RECEIVE INCENTIVES

***Eligibility requirements apply**

Section 2: Definitions

The definitions in this section will help new and existing EV drivers understand some of the terms used throughout this guide.

Advanced Metering Infrastructure (“AMI”) Disaggregation: AMI Disaggregation is available to UI customers only and refers to the ability of UI’s technology partners to perform sophisticated analysis of electricity usage to determine how and when EV charging is occurring. AMI Disaggregation provides customers with an opportunity to participate in the Program even if they don’t have a Smart Charger or a Connect Vehicle (Telematics).

Direct Load Control: The capability of the utility has to manage the participant’s electrical load through the utility’s Technology Partner. There are two forms of Direct Load Control that the utilities have the ability to use within the program:

Emergency Demand Response: refers to actions taken by utilities if the utility determines action is required to maintain the safety and reliability of the grid. Critical system events that impact system voltage levels, system stability and safety, or distribution system events that are considered emergencies by utilities may require override of a customer’s EV charger. While such conditions are rare, utilities will attempt to provide advance notification whenever possible, dependent on the nature of the event. Customers will still have the ability to opt out during an Emergency Demand Response event.

Demand Response: refers to actions taken by utilities during times when the electric system is strained. This system strain typically occurs on the hottest days of the summer but can also happen any time of the year such as in emergency situations or when electricity supply is limited. By initiating Demand Response “Events,” utilities act with their customers and through their Technology Partners to reduce electric usage for short periods of time. When customers respond to an Event it helps maintain a stable electric system. In most cases advanced notification up to 24 hours can be provided.

Electric Vehicle Supply Equipment (“EVSE”): refers to devices used to supply EVs with electricity. These devices generally fall into two categories – we’ll cover those that are commonly used in your home:

Level 1 (“L1”): The lowest speed charger, these chargers plug into the average 3-prong, 120 volt (“V”) plug in most homes. These plugs charge a vehicle very slowly, and the time required varies greatly depending on the size of your vehicle battery. An L1 charging plug may have been included in your EV purchase. ***These chargers are not eligible to participate in the Program.***

Level 2 (“L2”): Generally, the most powerful chargers for the home. These chargers connect to a 240V outlet and usually require an electrician to install a new outlet where you charge your EV. L2 chargers are most often purchased separately from your EV, although more EV’s are beginning to come with an L2 charger as standard equipment as an option when you purchase your EV. An L2 charger can have “smart” features that can be accessed through a mobile

app and are available in several power levels. L2 chargers can fully charge a vehicle from empty between 3 and 7 hours, depending on the size of your EV's battery and power rating of the charger.

Networked L2 or “Smart Charger”: These chargers can connect to the internet (via Wi-Fi or cellular connection) and can be controlled, generally, through a mobile app.

Non-Networked L2: These chargers don't connect to the internet (via Wi-Fi or cellular connection) but do charge a vehicle as quickly as a Networked L2.

Managed Charging: this is also known as “smart charging” where utilities or other third-parties are able to coordinate with Participants in a Managed Charging Program to start, stop, or slow down charging during times of high stress on the utility system. This can be done either by sending signals to Participants to remind them to control their charging themselves, or it can be done by the utility sending direct load control signals to the EV or EV charger during those times of stress. This Program uses both approaches. Managed Charging allows the utilities to adequately integrate the growing, new demand on their systems from EVs, and allows utilities to use the flexibility of EVs to reduce costs.

Managed Charging Platform: this is the behind-the-scenes software platform that allows your utility to coordinate charging among all Program Participants and supports implementation of this Managed Charging Program. Depending on if you are an Eversource or UI customer, you will have different approaches to interacting with this platform, but there will be customer-facing elements that allow you to set your preferences and control your charging to participate in the requirements of the tier of participation you opt for.

Off-Peak: For the purpose of this program off-peak charging is charging your vehicle outside of the hours of 3pm to 9pm on weekdays and is one of the requirements for achieving participation incentives. **Off-Peak in this document is not related to the off-peak Time of Use (TOU) rates that UI offers which pertains to the hours of noon to 8pm.**

Technology Partners: utilities have many technology partners that assist in delivering programs like this one to customers. In this program guide we often refer to our “Technology Partner”, which is a third-party contractor that provides analytics, communication, and reporting to assist utilities in delivering value-added programs and a great customer experience.

Telematics: Like many of the appliances, communications, and entertainment systems we use today, vehicles have also become “connected devices”. Telematics is the capability of a vehicle to wirelessly communicate with other systems like those used to administer the Program. This communication allows important vehicle and charging data to be shared with our technology partners and can be used to enable control signals that can slow the rate of charge or turn the EV charging station on or off as needed by the grid during Demand Response Events.

Section 3: Program Description

The Program offers rebates to eligible customers to reduce the cost of installing new, qualified Smart Chargers and wiring upgrades. The Program also provides ongoing incentives to promote consistent participation in Managed Charging over time. Participants are rewarded for charging their vehicles during off-peak periods throughout the year and for participating in load control events from June through September. Participants use their EV and/or EV charging station to respond to signals from their utility as the utility continually monitors the electric grid. Utilities will occasionally initiate a reduction in power, or in some cases completely stop power, to the participant's EV under times of high energy cost or electric grid stress. Customers can set their own charging schedules or have the utilities set their charging schedules for them to avoid charging during those times. Participants always have the option to opt out of any charging curtailment if it is necessary for them to charge during that time. To receive rebates and incentives, customers must agree to participate in one of the two tiers of participation and adhere to the requirements of that tier.

These incentive dollars are available to EV owners who agree to participate in one of two tiers of participation which correspond to different levels of incentives and customer responsibilities. There is the Baseline Tier and the Advanced Tier.

The **Baseline Tier** is the fundamental managed charging tier where participants are rewarded for shifting a large majority of their charging to off-peak periods. There are also optional Demand Response Events ("Events"), which help the utility grid respond to changing conditions like electricity cost and congestion by curtailing EV charging at very specific times of the year and times of day. Participation in these Events is optional, but if participants do adhere to these charging curtailments, they will be rewarded for their participation.

The **Advanced Tier** is a more sophisticated managed charging tier where participants are rewarded for partnering with the utility to coordinate charging such that EV charging is optimized on the utility system. This optimization helps the utilities operate a more cost-efficient and flexible grid. This tier requires more coordination between the participant and the utility than the Baseline Tier and therefore the utilities offer more incentives for customers participating at this level. In this tier, participants will create a charging schedule for themselves, and the utilities will coordinate and optimize the charging schedules of all EVs in the Advanced Tier to drive better outcomes for their grid systems. Participants are required to keep a schedule and do their best to not override this schedule.

In both tiers, participants are rewarded monthly for meeting the relevant requirements of each tier. Please see **Section 7** for more details regarding these tiers, their differences, and requirements for full participation in the Program.

Section 4: Rebates & Incentives

Incentives in this Program fall into a few categories that we will explain in more detail below. There are upfront incentives, like rebates for equipment and electrical work, and Enrollment Incentives to encourage customers to sign up for the Program. Then, there are ongoing incentives for continued, consistent participation in either the Baseline or Advanced Tiers, awarded twice per year for Eversource participants and quarterly for UI participants after verification that participants have achieved the minimum level of participation.

Participants must apply for upfront incentives as part of their application and enrollment process, and these will be distributed after the application is approved. Participants will be required to show documentation of installation and receipts of purchase. Below is more detail on what you can expect from these incentives and how to qualify.

❖ Upfront Rebates & Incentives:

- **Wiring Upgrade Rebate:** For participants needing electrical upgrades for their home to participate in the Program, up to \$500 will be available for qualifying work (for example, adding a sub panel, increasing main panel amperage, installing conduit runs, wiring a 240V plug). This incentive is only available for those purchasing a new Networked L2 charger (“Smart Charger”) or those participating with qualifying EV with Telematics.
- **Smart Charger Rebate:** For participants purchasing and installing a Qualifying Networked L2 charger for use in this program, there is up to \$500 available to participants who provide proof of purchase and installation. Only new Smart Chargers purchased on or after January 1, 2023 and listed in the Qualified Products List (“QPL”) are eligible (see **Section 6**) for this incentive. Rebates for qualifying chargers purchased in 2023 are eligible to apply to the program until March 31, 2024.
- **Enrollment Incentive:** For those customers who participate through Telematics, Networked L2 chargers (purchased prior to January 1, 2023), or AMI Disaggregation, a one-time \$100 Enrollment Incentive is available. Participants must enroll using eligible devices and/or methods of connection (see **Section 6** for the list of eligible technologies) and successfully set up their technology.
- *Above incentives to be paid via mailed check after the application is approved.*

Table 1: Upfront Incentives for Equipment & Enrollment

Customer Scenario		Smart Charger Rebate (up to)	Wiring Upgrade Rebate (up to)	One-Time Enrollment Incentive
New Networked L2 Charger	<i>Needs 240v Outlet †</i>	\$500	\$500	\$0
	<i>Has 240v Outlet †</i>	\$500	\$0	\$0
Existing Networked L2 Charger (purchased & installed prior to 01/01/23)	<i>Already Installed</i>	\$0	\$0	\$100
Telematics with Non-Networked L2 Charger	<i>Needs 240v Outlet †</i>	\$0	\$500	\$100
	<i>Has 240v Outlet †</i>	\$0	\$0	\$100
All Other L2 Chargers (UI only)	<i>No Wiring Rebate</i>	\$0	\$0	\$100

† 240v Outlet refers to the electrical circuit and receptacle needed for level 2 charging.

❖ **Ongoing Incentives:**

Both participation tiers have ongoing incentives for meeting the performance requirements of the given tier on a monthly basis. The Baseline Tier requires less of the participant than the Advanced Tier. The Advanced Tier participants allow the utility more potential for optimization and cost-efficiency on the system, so participants in this tier are entitled to more incentives; their actions improve the performance of the utility system to a higher degree than Baseline Tier participants.

Baseline Tier Ongoing Incentives:

There are ongoing monthly incentives capped at \$200 per year for full participation in the Baseline Tier. If a participant, in a given month, times their charging such that 80% or more of the charging happens during the off-peak period (3pm to 9pm on non-holiday weekdays, the customer will earn a \$10 incentive for that month which is a potential earning of \$120 annually.

Also, there are incentives available for participating in optional Demand Response Events. These events can happen between June and September and only occur on non-holiday weekdays. The participant must participate in all optional events in order to receive the \$20 incentive for a given month in the Demand Response Season. For full participation in all four months of the Demand Response Season, the participant could earn up to \$80.

Finally, in order to receive any incentives in this tier, the participating EV or EV charger must also be used at least once in the month.

Participants achieving 80% or greater off-peak charging and responding to each Demand Response Event could, therefore, earn \$200 annually for their participation.

Advanced Tier Ongoing Incentives:

There are ongoing monthly incentives capped at \$300 per year for full participation in the Advanced Tier. The participant and utility coordinate charging by having the participant set a daily charging schedule and adhere to this schedule as closely as they can on a monthly basis. The participant is responsible for not overriding this schedule and, if successful, will earn a \$25 incentive for a given month. Participants must also

agree to participate in occasional EV charging curtailments during times of high stress on the utility system. These are rare and generally occur during the periods where charging will be curtailed anyway, but the utilities reserve the ability to curtail EV charging when it is most critical to the utility system.

Finally, in order to receive any incentives in this tier, the participating EV or EV charger must also be used at least twice in the month.

Utilities and their Technology Partners will inform customers monthly about their accumulated credit or any lost incentives due to too many opt-outs. Ongoing Incentives are paid via e-gift card or check and sent directly to the participant.

More specific details on how to successfully participate in both the Baseline and Advanced Tiers can be found in **Section 7** below.

Section 5: Eligibility & Enrollment

The Program is open to all residential UI and Eversource customers in Connecticut with an active account. Residential customers are defined as existing UI or Eversource customers, in Connecticut, living in a single-family home or a multi-unit dwelling (“MUD”), with four or fewer units on the property. To be eligible, each unit of an MUD must be separately metered with its own utility account.

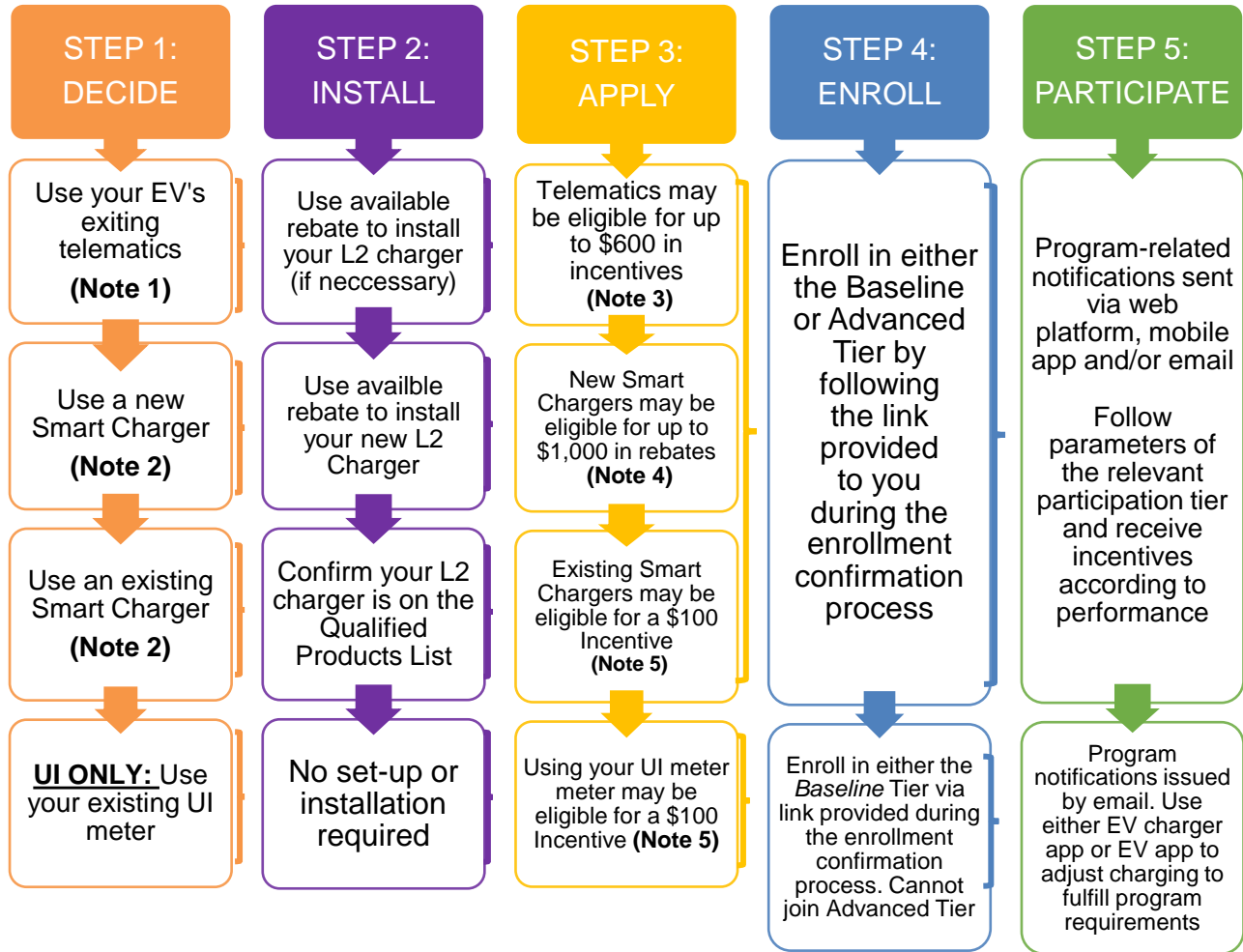
Participation in the Program requires that a participant’s EV charger, EV, and/or combination of technologies meet certain criteria. Below is an outline of setups that can qualify and how each setup must enroll. **Section 6** contains a list of eligible devices called the Qualified Products List (“QPL”).

Connecting via Telematics can be a convenient option for many participants. Telematics provides a one-time “set it and forget it” experience and, if participants prefer connecting with a non-Networked L2 charger or a Smart Charger not on the QPL, it’s possible to connect using the vehicle’s Telematics built into their vehicle. See **Section 6** for the QPL to understand which vehicles and EVSEs can participate. *Note: this list is constantly growing as our Technology Partners integrate with more vehicle and EV charger manufacturers, so check back regularly.*

A Note for UI Customers: Participating Through Your AMI Meter

Due to the AMI metering infrastructure built in UI territory, UI offers another option to participate in the Program for those who don’t have access to other options. If you cannot purchase and/or install a Networked L2 charger on the QPL and your vehicle doesn’t allow Telematics, you can choose to participate using any L2 charger and UI will verify participation in Events using AMI Disaggregation.

The following figure provides an overview of the Program process and the different methods of participation:



Note 1: Not all vehicle makes are eligible for the Program. See **Section 6** for a list of compatible vehicle makes. If your EV is not compatible you can participate via another method.

Note 2: Not all Smart Chargers are eligible for the Program. See **Section 6** for a QPL of eligible Smart Chargers. If your Smart Charger is not compatible, you can participate via another method.

Note 3: Compatible Telematics are eligible for up to a \$500 Wiring Upgrade rebate and a \$100 Enrollment Incentive. See **Section 4** for more information on Rebates and Incentives.

Note 4: New, eligible Smart Chargers can receive up to a \$500 Smart Charger rebate and up to a \$500 wiring upgrade rebate. See **Section 4** for more information on rebates and incentives.

Note 5: Existing Smart Chargers purchased & installed before 1/1/23 (**for UI customers:** participation through your existing UI meter is eligible for a \$100 Enrollment Incentive.) See **Section 4** for more information on rebates and incentives.

After you choose the technology that makes sense for you, it's time to enroll your system! Customer eligibility will be confirmed during the application process.

Program Application

The Program offers an easy online process to provide secure and reliable processing of applications.

Eversource: Please visit the Residential Section of the [Eversource website](#) to access the application portal.

UI: For more Program information visit our [EV Programs for Your Home](#) site to access the application portal. For those who prefer a paper application, this site also has a fillable PDF application for you to download, fill out, and collect relevant documents listed below. You can then submit the application and relevant documents to UIEVApplications@clearResult.com.

In the application, there are clear steps to follow, terms and conditions for the Program that you must accept, and guidance on how to activate your device. Along the way you will need a few items:

1. *Receipts and invoices related to the purchase and/or installation of a Networked L2 charger, labeled as paid*
 - a. *Installation information must include date of installation, installer/contractor name, equipment cost, total installation cost, and town/ city building permit*
2. *Customer's utility account number, service address, and billing address*
3. *EV and EVSE information: make, model, year, serial number, EV Charger Unit Number/ MAC ID*

If you are having trouble with your application, please contact your utility by emailing HomeEV@uinet.com for UI or EversourceEVSUPPORT@clearResult.com for ES, or by using the contact information provided in **Section 8** of this guide. A Program associate will support you and/or may provide an alternate application method.

Errors in your application may lead to delay or cancellation of your application. Upon identifying any such issues, the Program team will attempt to contact you using the information supplied in the application. If we are unable to reach you or you do not respond with the information needed to correct the application, your application will be cancelled.

Device Activation

All devices must be activated in the Program and any delay in activating your device may lead to delay or cancellation of your incentive payment. The activation process varies by device type and vendor. You will receive activation instructions that are specific to your chosen device in the confirmation email that you receive when you submit your Program application. Follow instructions carefully and use the contact information in the email for support if you experience any difficulties.

Enrollment Incentive

Customers will receive their Enrollment Incentive in the form of a check mailed to the address listed on the application. These incentives are paid to the utility account holder

associated with the application unless the customer designates an alternate payee when submitting the application. Payments that are sent via US Postal Service require several more days for delivery.

❖ **Additional Eligibility Requirements:**

The following requirements apply to all participants regardless of method of participation they chosen:

- Participants must remain in the Program for a period of not less than 24 months from the date of incentive payment.
- Participants who leave the Program before the 24-month period ends will be required to pay back a prorated portion of the upfront incentives they received as part of this Program.
- Incentives are limited to the stated incentive amount listed above or the documented project cost, whichever is less. For the Smart Charger rebate, any other applicable grants, rebates, incentives or credits the customer may receive from another source will be deducted from the total documented device cost.
- Only new Smart Chargers listed in the Program's QPL are eligible for incentives.
- Electrical work must be completed by a qualified professional, in full compliance with laws and regulations.
- Participants are required to share the EV charging data with their utility. Please refer to the Terms and Conditions included with the Program application.

❖ **Data Sharing and Privacy:**

Utilities will collect information on your EV charging behavior, such as when and how often you charge and how much energy you use each time you charge. Your utility may share this information with third parties for the purposes of evaluating the Program. **All EV charging data will be aggregated, anonymized, or otherwise encrypted if/when disclosed publicly.**

Section 6:

Qualified Product List (EVSE) & Eligible EVs (Telematics)

To participate, users must follow requirements for enrollment that may include Networked L2 Smart Chargers, non-Networked L2 chargers, or vehicle Telematics. Only applications including eligible devices that are listed on the Program's QPL will be accepted by the Program. For the QPL, please visit UI's EV Programs for Your Home landing page found [here](#) or Eversource's Program landing page found [here](#). Please note that this list will regularly be updated as new manufacturers will be added on an ongoing basis.

Eligible Devices

It is the customer's responsibility to select an eligible device. The Program attempts to include a range of eligible device options to meet different customer needs. General information about the different device types is provided on the Program website, with additional product-specific information listed in the QPL. The vendors will differ on charger models, software, costs, and manufacturer details. Utilities do not offer

preferences or recommendations for any approved Program vendors, and Program participants are responsible for determining suitability of products and services.

New Smart Charger

If you decide to install an eligible Smart Charger, you may purchase a new charger from any source you prefer. Please save the receipt to include in the Program application. The charger must be installed and operational before submitting your Program application and **the application must be submitted within 90 days of purchase**. Please ensure you schedule your installation when you purchase your Smart Charger so you can complete your application within that timeframe.

Smart Chargers incentivized by the Program must connect to the vendor's online network. Often this connection is enabled locally by connecting the Smart Charger to your Wi-Fi network. Depending on where your router is located relative to the Smart Charger, you may need to install a Wi-Fi signal booster to achieve a reliable connection. Please ensure that your Smart Charger is connected to the network before submitting your Program application. If you do not have access to a reliable internet connection, we recommend enrolling using your existing AMI meter (UI customers only).

Wiring Upgrade

L2 chargers require a 240V outlet. If you need to install a new, dedicated electrical circuit and outlet to support your EV charger, you may use any licensed electrical contractor. The Program offers up to \$500 in a Wiring Upgrade rebate to cover eligible costs necessary to support your L2 charger. Please be sure to obtain an itemized invoice that clearly shows the cost of the EV charging circuit separate from any other electrical work with invoices showing they were paid. The work must be completed before submitting an application and **the application must be submitted within 90-days of the invoice date**.

Vehicle Connections (Telematics)

Telematics is a system embedded in many EVs that enables more control by users over their EV by making smart decisions about energy use, connect to nationwide charger networks, and other innovative actions. If your EV has Telematics, you likely have access to additional insights and functionality that can give you more control of your EV that might save energy. To receive an upfront Enrollment Incentive for participating with Telematics, you must activate a qualified vehicle model with Telematics in the Program for a period of not less than two years. You will receive activation instructions that are specific to your chosen vehicle in the confirmation email that you receive when you submit your Program application.

Please note that you cannot receive both a Smart Charger Rebate and an Enrollment Incentive. You can, however, combine a Wiring Upgrade rebate with a Smart Charger rebate or Enrollment Incentive.

❖ A Note to EVSE Vendors Interested in Being Added to the QPL:

Eligible devices are selected via a request for qualifications ("RFQ") that is hosted periodically by the utilities. Vendors who wish to qualify devices for the Program should register their interest by sending an email to HomeEV@uinet.com for UI or

CTEVcharging@eversource.com for Eversource with the subject line “EV Charging Vendor Qualification” and your firm will be notified of the next qualification cycle.

The RFQ includes evaluation of vendor and device capabilities, including but not limited to product safety, environmental suitability, network communications, and data collection and reporting. Vendors with qualifying devices must accept the Program vendor agreement prior to devices being added to the QPL.

Section 7: Participation in Baseline & Advanced Tiers

The Connecticut EV Charging Program is designed to help customers outfit their homes with the necessary equipment to charge their EVs and to help the utilities reduce the stress on their systems. This Program is intended to be mutually beneficial between the utility customer and the utility such that the customer is aided in their EV journey and the utility is able to orchestrate the charging of large numbers of EVs on the system which ensures system reliability and lower costs for all utility customers. The utilities provide **two tiers** of participation which correspond to different levels of participant responsibility, incentives, and of benefit to the utility system. The **Baseline** and **Advanced Tiers** both require the participant to adjust their charging to benefit the utility system, but differ in their approach. This Section defines and explains the two tiers, specifically how the customer must participate in each tier in order to earn incentives.

Baseline Tier

The Baseline Tier aims to be simple and easy to understand such that the participant can “set and forget” an EV charging schedule and shift their charging from times that cause more stress to the utility system to times that cause less stress. The participant always retains control over their charging, scheduling when they would like to charge or not, and receives incentives based on their performance. The fundamental structure of the Baseline Tier is as a **Passive Managed Charging** program where the customer sets a simple schedule, and the utility simply observes performance. There is also the potential for participants to earn more incentives by participating in **Demand Response Events** during the summer months where the utility grid is most stressed.

❖ **Passive Managed Charging (Required):**

The Baseline Tier is designed as a Passive Managed Charging tier where customers simply set a schedule around a given window of time and avoid charging during that time for the majority of each month. In this way, participants are able to simply set a default schedule and let the Managed Charging Platform stop charging as necessary while preserving the participant’s ability to charge when needed.

Participants must use their relevant utility Managed Charging Platform to charge their EV outside of a specific window of time during the week and coordinate their charging such that 80% or more of their charging time occurs outside of this window. The window is 3pm to 9pm on non-holiday weekdays.

In a given month, if a participant avoids charging between 3pm to 9pm on non-holiday weekdays, then they will earn \$10 for that month's performance. For a full year of successful performance, a participant could earn up to \$120.

The utilities will observe each participant's charging patterns on an ongoing basis and provide updates on their performance and incentive earnings within their relevant utility Managed Charging Platform so that the participant can keep track of their progress each month and adjust their habits accordingly.

Participants must also charge at least one time for 15 minutes per month. This is to ensure that the participant is actually using the charger and that charging is theoretically being avoided, as the value to the utility system is in avoiding charging during stressful times on the system.

❖ **Demand Response Events** (*Optional*):

The Program is managed with consideration of the operating conditions of the electric power system. Demand Response Events are called to assist in controlling the system at key times, as these Events are a way for the utilities to harness the collective electric load of EVs on the utility system and to stop charging for very specific hours when the system's stress is at its maximum. The utilities will call an event and the EVs participating in the Program will have their charging halted for the specific hours of high stress on the grid. Events most commonly occur on hot summer afternoons or early evenings and will last a few hours or less. These periods of high energy demand are called "on-peak" periods. For this Program, Events will be set during the peak season which is June through September during the times of 3pm-9pm.

Participants will, in most cases, be notified well in advance of an Event so there is plenty of time to plan ahead. For most EV drivers, charging occurs during periods of low energy demand, or "off-peak" periods, for example in the evening while they sleep. During these times, there is usually no need for Events, so participants experience very little impact if any on their vehicle's availability and owners of L2 chargers will generally have adequate charge in the morning when participating in Events.

During Events, participants have the option to participate or opt-out if it is necessary for them to charge during that time. This way, participants always retain control over the use of their vehicle but can earn incentives for being flexible when they charge their vehicle.

As mentioned in **Section 4**, participants in the Baseline Tier are able to earn an additional \$20 per month during the Demand Response Season which is four months. Therefore, participants could earn up to \$80 in additional incentives by participating in optional Demand Response Events.

To receive these optional Event incentives, customers must participate in all Events scheduled in a given month. Participants may opt-out of any event during the four-month Demand Response season, but will forfeit their eligibility for any Event-related incentive in that month. Forfeiting the incentive in one month does

not impact the potential incentive in any other month, so participants are able to participate when they can and be rewarded accordingly.

The Demand Response Cycle

Demand Response follows a regular pattern of **Notification, Event & Opting Out, and Results:**

❖ **Notification**

Participants will, in most cases, be notified well in advance of an Event so there is plenty of time to plan ahead. There may be rare occasions where the utility will call an Emergency Event with less than 24 hours of advance notice. Please refer to the Events & Opting Out section below for more information.

Notifications providing a schedule for an upcoming Event are issued to participants through the participant's preferred means of contact, determined during the application process (e.g. email and/or via the Program's mobile app and/or web platform provided by utility's respective Technology Partner.)

After an Event ends, the participant will receive a notification alerting them that the Event has ended.

❖ **Events & Opting Out**

Demand Response Events may occur in June, July, August, and/or September, on weekdays and/or weekends (not including holidays). A typical Event may be up to 3 hours in duration and occur between the hours of 3pm—9pm. During Events, EV charging will be curtailed.

Once a notification has been received, participants have the option of:

1. Participating in the Event (Default), or
2. Opting out of the Event, meaning their charging device will be unaffected by the Event.

During the Event, the power delivered to any device that has not opted out will be reduced or suspended. Opting out can be completed on the Program application portal or, if applicable, via the Program's mobile app and/or web platform, and customers may opt out of any Event at any time.

At the end of the Event, power delivery should resume at its normal level. In some cases, devices fail to return to their normal operating mode at the end of an Event. We therefore recommend that participants check the status of their device after receiving the end of Event notification.

Customers are considered as participating in the Event if they do not opt out through the platform or are not charging during the Event. For example, if a customer is not home during the Event or not plugged in, but did not opt out, they will be considered as participating in the Event.

❖ **Emergency Demand Response Events**

If required to maintain the safety and reliability of the grid, utilities may issue Emergency Demand Response Events without prior notice. Critical system events that impact system voltage levels, system stability and safety, or distribution system events that are considered emergencies by utilities may require override of a customer's EV charger. While such conditions are rare, utilities will attempt to provide advance notification whenever possible, dependent on the nature of the event. Participants do retain the right to opt out of these types of Events, but the above rules on opting out of no more than two Events per month still apply.

As a summary of the Baseline Tier, Participants are able to earn \$10 per month for simply setting a charging schedule that avoids charging during the highest stress periods on a daily basis and sticking to that schedule at least 80% of the time. Participants are also able to earn \$20 per month between June and September if they do not opt out of occasional Demand Response Events. These events generally occur during the same window that the charging schedule set by the participant avoids. Using a passive "set and forget" schedule, a participant could earn up to \$200 annually for participating in the Baseline Tier.

Advanced Tier

The Advanced Tier is a step up from the Baseline Tier in a number of ways, particularly in the benefits to the participant and the utility system, as well as in the role that the participant plays in shifting their EV charging. While there still is a lot of automation that can allow a participant to "set and forget" their charging, the participant may find that they need to keep a more active eye on their charging compared to the Baseline Tier.

In this participation tier, participants are required to set a schedule of charging using two inputs: the **State of Charge (SOC)** they need in a given day, and their **Time the Charge is Needed (TCIN)**. The participant must always have these two inputs selected, but can change them at any time. In this way, it is possible to "set and forget" these two inputs, but the participant may find that differences in daily routine might require different inputs.

These inputs are then aggregated with all other participants in the Advanced Tier by the utility's Technology Partner who then uses their advanced managed charging algorithms to coordinate charging to lessen the load on the utility system while delivering the participant's required charging by the time they need it.

As an illustrative example, Participant A generally starts work at 9am, but leaves home at 8:30am. He sets the default inputs to make sure he always has a full battery in time for his commute. Therefore, he sets the default SOC to 100% and the TCIN to 8:30am. These default inputs will resume every day until he needs to adjust them. For example, the same Participant A now has an appointment at 9am on Wednesday morning an hour and a half away from his home. He knows he needs almost a full battery for the round trip, and he needs it ready by the time he leaves at 7:00am to give himself a bit of extra time so he's not rushing. On Tuesday night when he's planning for the next day, he sets the SOC to 100% and the TCIN to 7:00am in order to be sure there is a full charge by the time he needs to leave for his appointment. After the appointment, he

then resets his inputs back to the default and resumes as normal until he must adjust his SOC and/or TCIN to accommodate variations in his routine.

The utilities will observe each participant's charging patterns on an ongoing basis and provide updates within their relevant utility Managed Charging Platform so that the participant can keep track of their progress each month and adjust their habits accordingly.

Participants must also charge at least twice for 15 minutes per month. This is to ensure that the participant is actually using the charger and that charging is theoretically being avoided, as the value to the utility system is in avoiding charging during stressful times on the system.

Participation Results & Distribution of Incentives

The utilities are able to observe the performance of all participants in order to evaluate each participant's adherence to the requirements of the relevant tier and to determine the amount of incentives to which each participant is entitled. Participants will be provided their individual results on their dashboard in the online application portal or through their respective utility's Managed Charging Platform throughout their participation in the Program, so they may track their progress each month. Participants are distributed incentives based on their performance in this Program. If you have questions about your participation results, please reach out to HomeEv@uinet.com for UI and EversourceEVSsupport@clearesult.com for Eversource.

All incentives earned by a participant in either the Baseline or Advanced Tier are paid on either a semi-annual basis (Eversource participants) or a quarterly basis (UI participants), based on that participant's performance during each month of the preceding time period. The payment will be distributed via prepaid e-gift card.

Moving or Ending Participation

All enrolled participants are required to remain in the Program for a period of not less than two years from the date the participant's application is approved. After two years, participation continues until the participant submits a request to disenroll or until the Program is discontinued.

In the event a participant moves within the utility's territory, they are required to continue their participation at the new service address. Customers can move the location of their participation by logging into the application portal, opening a Request Support form, and submitting the required information.

Customers can request to disenroll by logging into the application portal, opening a Request Support form, and submitting with the required information. A participant moving outside of the utility's territory shall be an approved reason for ending participation before completing two years.

Participants that leave the Program before the 24-month period ends will be required to pay back a prorated portion of the upfront incentives they received as part of this Program.

Section 8: Program Support

For application or rebate support, customers can contact Program staff for questions using the contact information below. Please allow two business days for a response to your email or voicemail.

Phone: (888) 978-1440

Hours of availability: 8:30am–5:00pm, Monday–Friday excluding holidays

Emails:

Eversource: EversourceEVSupport@clearesult.com

UI: UIEVSupport@clearesult.com

For UI customers seeking device setup and/or Program support, please email UI at HomeEV@uinet.com. An Energy Specialist will contact you within two business days.

Section 9: Frequently Asked Questions (FAQs)

The following are a list of Frequently Asked Questions for this Residential Managed Charging Program provided by United Illuminating (UI) and Eversource.

What are the benefits of this program?

By participating, you can earn upfront rebates and enrollment incentives, as well as ongoing participation incentives. These rebates and incentives help offset the cost of EV charging, including the cost of outfitting your home with a Smart Charger. There are also ongoing incentives available for Managed Charging participation over time. Participation in Managed Charging helps reduce your carbon footprint.

Who is eligible to participate in this program?

Residential UI and Eversource customers living in single-family dwellings (four units or fewer) who meet the technical requirements, specified in this Program Participant Guide, may enroll in the Managed Charging Program. Participation in Managed Charging is required to take advantage of utility rebates for the purchase and installation of a new Smart Charger or enrollment incentives for participation using an EV's onboard telematics system. In addition, residential customers with an existing Level 2 Smart Charger can participate in the program.

What is Managed Charging?

Managed charging programs provide incentives to customers who adjust or permit their utility to adjust the timing of their EV charging. Managed charging helps minimize energy consumption during times of peak demand, or stress, on the utility grid. In doing so, the utilities avoid using more expensive and carbon-intensive electricity, which reduces our region's electricity cost and carbon footprint. Presently, managed charging functions in two ways: through demand response events and off-peak charging.

Demand Response for EVs is a type of Managed Charging where signals are sent from the utility to the EV owner and their EV or Smart Charger. These are called “Events,” and during these Events, the participant allows the utility to curtail, or turn off, charging for the duration of an event, usually 2-3 hours.

Off-peak charging allows participants to manage their own charging schedule and be incentivized for charging at times that are beneficial for their utility. The goal of off-peak charging is to have a high portion of charging take place during off-peak times when there is less demand on the electric grid. Off-peak charging times include any time outside of 3:00 p.m. to 9:00 p.m. on non-holiday weekdays.

What are my responsibilities for participation in this program?

To receive incentives within this program, customers must participate in Managed Charging, which provides rewards for helping UI and Eversource reduce strain on their electric systems. Depending on which level of participation to which you apply, your participation will require different actions from you:

Baseline Tier of Participation:

- 1.) You control your energy usage by scheduling your charging during off-peak hours at least 80% of the time. Off-Peak hours are non-holiday weekdays anytime outside of 3:00 p.m. to 9:00 p.m. This simple action can earn you incentives of up to \$120 per year when you’re enrolled in the Baseline Tier of Managed Charging.
- 2.) During specific times of peak energy demand and stress on the system, the utilities adjust the time and speed of charging using what are known as “Demand Response Events.” These Events only happen during the summer months between June and September and will only occur at times of high stress on the utility grid. Participating in these Events can help minimize more expensive and more polluting power generation. You can participate either through a vehicle with eligible telematics or a qualified Level 2 Smart Charger. Participating in these Events is optional, but you can earn incentives of \$20 per summer month (\$80 per year) for participating in all events in each summer month when enrolled in the Baseline Tier.

Advanced Tier of Participation:

- 3.) Finally, there is an Advanced Tier of Managed Charging which steps up the responsibilities of the participant, but, in turn, rewards the participant significantly more. Whereas it is possible to earn \$200 annually in the Baseline Tier (\$120 for off-peak charging plus \$80 for participating in all Demand Response Events), participants in the Advanced Tier can earn up to \$300. In this tier, the participant is required to maintain a charging schedule on a daily basis by coordinating with the utility. The participant, using a web portal and/or mobile app, must input the level of charging they need the next day and at what time they need it. The utility does the rest, coordinating charging of all participants at once and ensuring that each participant has the amount of charging they need, when they need it. This does require

participants in the Advanced Tier to keep a closer eye on their charging, but this extra effort is rewarded!

Please take some time to learn about the difference between, and the requirements of each participant within, the two tiers of participation. There are more details on participation that are not explained above and the utilities have developed helpful guides and documentation which can be found on either the [UI Managed Charging page](#) or the [Eversource Managed Charging page](#).

Are there incentives available for participation in Managed Charging?

Yes. UI and Eversource offer monthly incentives to customers for their Managed Charging participation. The specific rewards vary depending on which participation level to which you apply. The Baseline Tier enables participants to earn up to \$200 per year, while the Advanced Tier enables participants to earn up to \$300 per year. The higher incentive levels in the Advanced Tier correspond with higher levels of responsibility.

For more details, visit the [UI Managed Charging page](#) or the [Eversource Managed Charging page](#).

If I already have a home charger, can I still receive incentives through this program?

Yes, if you've already taken the step to install an eligible charger at your home you can still be eligible for \$100 to enroll that device in the program and also be eligible for ongoing participation incentives, as long as you are willing and able to fully participate in the responsibilities of your chosen participation tier.

Why are utilities like Eversource and UI administering this program?

Managed Charging programs encourage users to charge off-peak, which helps the utilities handle times of stress on the grid which, if unmanaged, can lead to higher costs for all utility customers. It also helps the utilities avoid using more carbon-intensive electricity, which reduces our region's carbon footprint. These programs can also enable utilities to integrate more renewable energy and utilize the flexibility of EV charging to provide additional services to their territory. Utilities pass on these benefits to all customers in the form of cheaper electricity and other programs such as this.

Will participating in managed charging require me to change my charging habits?

The short answer is "yes" – the utilities provide incentives and tools to make these habit changes painless and may make charging easier and more efficient for you. The Program is intended to assist drivers in meeting their needs for charging while helping the utilities coordinate EV charging such that their systems are not impacted by the growing number of EVs in their service areas. You will always retain control of your charging while participating in the program and you will be able to set your preferences to match your needs.

The Program and associated platform provide tools that help with scheduling your charging in such a way that your charging is beneficial to you and to the utility. There

are two tiers of participation which correspond to different level of responsibilities and incentives for shifting your charging. If you are currently charging during stressful times on the utility system, this will require a habit change, but the utilities have made this as effortless and as rewarding as possible.

What are the incentives and rebates available through this program?

Below is a table outlining incentives available for different technological setups for this program.

***Note:** the amount of incentive dollars available per solution does not imply one setup is inherently better than another. Depending on the particulars of your EV and technology setup, the cheapest and best option might receive the fewest incentive dollars. Please review the remainder of this Program Participant Guide to understand which of the possible eligible technologies is best for you.*

Customer Scenario		Networked Level 2 Charger Rebate (up to)	Wiring Upgrade to 240v Rebate (up to)	One-Time Enrollment Incentive	Baseline Managed Charging Program (up to)*	Advanced Managed Charging Program (up to)*
New Networked L2 Charger	<i>Needs 240v Outlet</i>	\$500	\$500	\$0	\$200/year	\$300/year
	<i>Has 240v Outlet</i>	\$500	\$0	\$0	\$200/year	\$300/year
Telematics with Non-Networked L2 Charger	<i>Needs 240v Outlet</i>	\$0	\$500	\$100	\$200/year	\$300/year
	<i>Has 240v Outlet</i>	\$0	\$0	\$100	\$200/year	\$300/year
All Other L2 Chargers (UI ONLY)	<i>No Wiring Rebate</i>	\$0	\$0	\$100	\$200/year	Not Available

**These incentives accrue over the first year of participation in either the Baseline or Advanced Managed Charging Tiers. Participating customers are eligible for up to \$200 or \$300 respectively per year.*

When will I receive my incentives?

Upfront rebates and incentives will be distributed via check 10 business days after meeting all eligibility requirements, including proof of purchase and installation, and connecting your charger or vehicle to the utility’s Managed Charging Platform. Participants in Managed Charging will receive ongoing incentives throughout the year. Participation incentive payments will be distributed bi-annually in April and October by Eversource and quarterly by UI. Participants will be notified of their progress and performance throughout the year.

What charging technologies qualify?

There are many technologies that can participate in this program and this list is always expanding as EV manufacturers expand their capabilities and more Smart Chargers enter the market. The Program is designed to allow almost all EV owners with any level 2 charger (Networked or non-Networked) to participate, however, specific combinations of EV and EV chargers might not be eligible. Please refer to **Section 6** of this Program Participant Guide for information on eligibility and information on the types of devices and vehicles that can participate. You can find the Qualified Products List (“QPL”) on Eversource’s website [here](#) and on the UI website [here](#).

What does it typically cost to install a Level 2 EV charging station at my home?

Costs to install a Level 2 charging station vary depending on which charger you choose and how much electrical work must be done to put the station where you need it. Typically, a Networked Level 2 charger will cost \$600-700. Depending on your situation, the typical installation can cost between \$500-1200.

Are there additional incentives available if I have more than one EV in my household?

Yes, if you have more than one EV, you can apply for a second set of incentives for a smart charger and participation in Managed Charging, however this is the limit for incentives per electric account.

If I already applied and received EV charging incentives, can I apply for incentives again?

Yes, but only if you are applying for a second EV in the house. If you have a second residence that is on a separate electric meter, you can apply for this separately from your current electric account.

Is there a limit to how many incentives will be provided?

Yes, the utilities have been approved for a certain level of funding for incentives. At this time, the funds have not reached their limit and encourage you to apply.