



## Transportation Electrification Program

# Policies and Procedures Handbook

## *Home Electric Vehicle Charger Rebates*

Program Launch date: June 1, 2024



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

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## WELCOME & OVERVIEW

Welcome to the PNM Transportation Electrification Program. You are joining a growing number of New Mexicans committed to a sustainable and clean energy environment and for that we thank you!

PNM has you in mind as we work together to increase the adoption of EVs throughout our communities and provides financial support to offset the cost(s) of purchasing and installing an EV charger for your home.

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 a qualifying home charger plus up to \$1,500 to offset the cost of installation. Income qualified applicants are eligible for a rebate up to \$750 toward the purchase of qualifying EV charging equipment plus up to \$3,500 to offset the cost of installation. Customers may apply for up to two (2) charger rebates and one (1) installation rebate per service address performed on or after 6/1/2024.

Residential EV Charger Rebate Applications are reviewed and approved on a first-come, first-served basis, until funds are exhausted. Home charger rebates are limited to two per service address and the installation rebate is limited to one per service address.

*Note: In addition to the required documents listed in this handbook, for your Final Application, a copy of the electrical permit for work performed is required for all rebate applications in which you apply for the installation rebate.*

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 NM automotive dealer that has entered into agreement with PNM to provide point-of-sale rebates to income-qualified customers.

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

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

**Electrical Permit:** [New Mexico Administrative Code](#) Section 14.5.2.8 requires that all electrical wiring work be permitted, and a permit can only be pulled by an electrician with the requisite licensing. Some municipalities issue and inspect electrical work in their areas; for municipalities who do not have a permitting and inspection department, permit issuance and post-installation inspections are deferred to RLD's Construction Industries Division.

[Construction Industries - New Mexico Regulation and Licensing Department \(nm.gov\)](#)

**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.

**Program Authorized Contractor ("PAC"):** Industry professional who received Program training and who has agreed to follow the policies and procedures of the PNM Transportation Electrification Program.

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

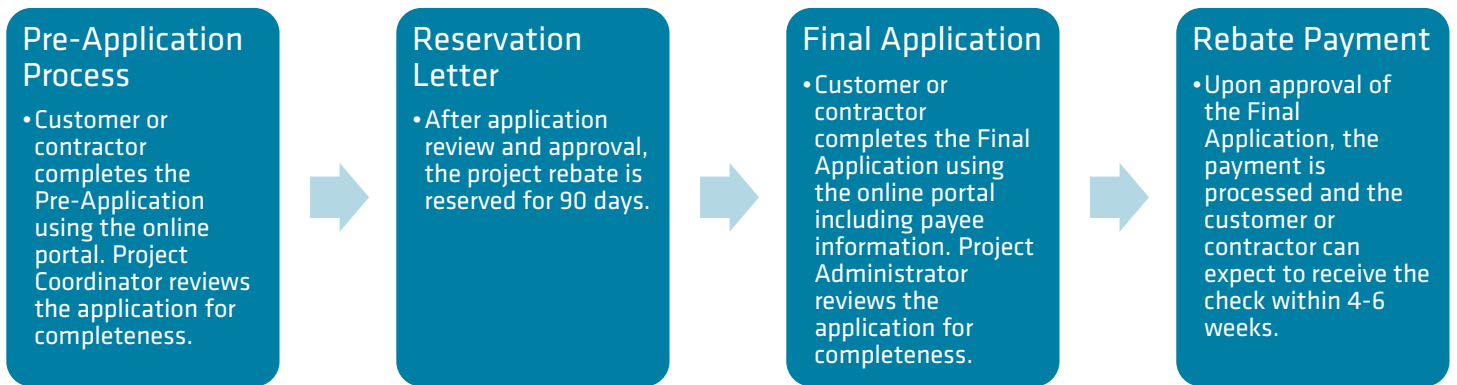
**Public Service Company of New Mexico:** Referred to as the Company or PNM.

**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

Home EV Charger Rebate Applications are accepted through the online application portal: <https://evready.pnm.com/apply/pnm>. You may submit a Final Application without prior reservation of rebate funds, however, remember that program funds are subject to availability and no guarantee of funds is made. 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, if applicable. If you do not submit a complete Final Application by the expiration date listed on the reservation, your reservation is forfeited and ineligible for the rebate payment. In the event a reservation is forfeited, you may reapply, pending eligibility of funds.

Figure 1. Typical Rebate Application Process



You may use your 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 a project. A Pre-Application is strongly 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

If your home service is on residential power rates 1A or 1B, you are eligible to apply. No single service address shall qualify for more than two home charger rebates and one installation rebate. To qualify, you must consent to share EV charging data with PNM; agree to be automatically enrolled in the Whole Home EV (“WHEV”) rate; and you or your installation contractor must provide proof of purchase and a charger data sheet showing that the charger meets all of the following criteria:

- Is a Level 2 home charger from the Qualified Product List.
- Is listed by a Nationally Recognized Testing Laboratory (“NRTL”)
- Has smart charging capabilities to program charging windows and respond to external signals through Open ADR or OCPP communications protocol.
- Can connect to WIFI or cellular connection (Income-qualified customers who do not have WIFI already available at their home are not required to obtain WIFI to qualify for the rebate.)
- Charger was purchased and installed after the implementation date of the 2024-2026 Transportation Electrification Program, which is June 1, 2024.

Proof of completed installation of your home charger is required. At final rebate application, you will need to submit

proof of your EV ownership via vehicle registration at your PNM service address. Please refer to section 9.2 for a complete list of documents required to be submitted with your final application.

Please note – payment cannot be issued for completed final rebate applications until the Program Team can confirm registration of your charger with your data service provider network and charging data flow is successful.

### 3.2 Income-qualified customer eligibility

Customers who fall at or below 200% of the federal poverty level based on their adjusted gross income (AGI) can qualify for additional rebates for their home charger and installation. You can easily self-identify for these home charger and installation rebates by comparing your household occupancy and income in the table below.

**Table 1. 2024 Poverty Guidelines: 48 Contiguous States (all states except Alaska and Hawaii) – Effective Jan. 1, 2024**

Household/ Family Size	200% of Poverty Guideline
1	\$30,120.00
2	\$40,880.00
3	\$51,640.00
4	\$62,400.00
5	\$73,160.00
6	\$83,920.00
7	\$94,680.00
8	\$105,440.00
9	\$116,200.00
10	\$126,960.00
11	\$137,720.00
12	\$148,480.00
13	\$159,240.00
14	\$170,000.00

For more information about the poverty guidelines visit: <http://aspe.hhs.gov/poverty>.  
 Source: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation.

You must also meet the following criteria:

- Install a qualified Level 2 home charger as described in Section 3.1.
- Self-identify as meeting the income qualifications.
- Provide proof that installation was completed on or after June 1, 2024, which is the implementation date of the 2024-2026 Transportation Electrification Program.
- Proof of completed installation (such as a signed statement or post installation photos) is required.

Please refer to section 9.2 for a complete list of documents required to be submitted with your final application.

## 4 PROGRAM AUTHORIZED CONTRACTORS

To create a positive customer experience and to ensure that program funds are being administered correctly and accurately, PNM offers a Program Authorized Contractor network to take the guesswork out of choosing and installing your qualified home charger. You are encouraged, but not required, to select a network contractor; you may engage an out of network service provider of your choice. The benefit of selecting a Program Authorized Contractor is that they must adhere to standards of acceptable behavior and performance. This includes, but is not limited to:

- Complete and accurate program application submittals.
- 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

Contractors who meet certain training and program participation standards are given the Program Authorized Contractor status and appear on the contractor search tool. Inclusion in this network is designed to provide you with a turnkey solution to purchasing and installing qualified home charging equipment and complete the rebate application for you. 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 Authorized Contractor, all the following requirements must be met:

- Submit a signed PNM Transportation Electrification Program Authorized Contractor 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 or GB-98 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 and agree to attend any other annual mandatory Program Authorized Contractor network meetings.
- Submit at least one paid Application per program year.

Once a contractor completes these requirements, they will be granted Program Authorized Contractor ("PAC") 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 Program Authorized Contractor has access to certain aspects of the program that are not available to all contractors, such as:

- Listing in our online TEP Authorized Contractor 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 Program Authorized Contractor.

## 5 THIRD PARTY PAYMENT AUTHORIZATION

Rebate application 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 Authorized Contractor

You may choose to have the rebate paid directly to you in a check via USPS, or you may choose to direct the payment of your rebate to your Program Authorized Contractor, who will reduce your final invoice by the amount of the rebate, providing an instant discount on your purchase.

If you assign payment of Application rebates directly to the contractor you hired to perform work included in that Application, the following eligibility requirements and procedures are met:

- To receive third-party payment, the contractor must provide you 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 Program Authorized Contractor network, 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 your qualifying EV home charger plus up to \$1,500 to offset the cost of charger installation. The rebate is capped at the cost of the EV charger or \$500, whichever is less, and the charger installation rebate is capped at the cost of installation or \$1,500, whichever is less. Applications are reviewed and processed on a first-come, first-served basis until funds are exhausted. Please refer to section 9.2 for a complete list of documents required to be submitted with your final application

Income-qualified applicants can receive up to \$750 for the cost of the EV charger plus up to \$3,500 toward the installation cost of the EV charging equipment. The rebate is capped at the cost of the EV charger or \$750, whichever



is less, and the charger installation rebate is capped at the cost of installation or \$3,500, whichever is less. Applications are reviewed and approved on a first-come, first-served basis until funds are exhausted. Please refer to section 9.2 for a complete list of documents required to be submitted with your final application.

Rebates in excess of \$600 annually may be considered taxable income. If rebates or incentives received from PNM are in excess of \$600, this information may be reported to the IRS, and the customer may receive a Form 1099.

## 7 RATES

As a condition of receiving a charger rebate, customers are automatically enrolled in the Whole-Home EV (WHEV) Pilot Rate. See the table below for a description of the Whole Home Electric Vehicle (WHEV) rate as it would apply to customers. The rate is periodically updated by order of the NM PRC, and the most current rate is available at [www.pnm.com/rates](http://www.pnm.com/rates) under the 1A Residential Service Rate Tariff.

Table 2. WHEV Rate

Time period		WHEV \$/kWh (June, July, Aug) Rate	WHEV \$/kWh (All other months) Rate
5:00 am-10:00 pm electricity usage	Block 1	\$0.0748255 / kWh	\$0.0748255 / kWh
	Block 2	\$0.1240339 / kWh	\$0.1070240 / kWh
	Block 3	\$0.1664298 / kWh	\$0.1408090 / kWh
WHEV electricity usage (10:00 pm- 5:00 am)		\$0.0315696 / kWh	\$0.0315696 / kWh

In exchange for receiving the rebate, you consent to enrollment in the WHEV. With this pilot rate you can enjoy charging your EV at the base electricity rate of approximately \$.03 per kilowatt hour from 10:00PM to 5:00AM. The added bonus is that any electricity used in your home during this period is at this low rate. After your final application is processed for payment, PNM will contact you about next steps to exchange your meter to accommodate the Whole Home EV rate.

## 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 you purchase or install your home charger prior to obtaining a notice of reservation, this is acceptable if purchased after the launch date of June 1, 2024.

### 8.1 Online Pre-Application Submittal

Pre-Applications can be submitted directly through the web-based application portal. To begin the online application process, you must first register for an online account. When your account has been confirmed, your application process may begin. Duplicate applications or multiple submissions for the same project will be rejected. Program 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 you, reserving funds for 90 days. Applications are reviewed within 15 calendar days, excluding holidays, to confirm your eligibility and that all of the required documents are provided. Communications about your application will be sent by email to you. Please ensure that you provide accurate email addresses and phone numbers in your application.

### 8.2 Required Pre-Application Documentation

Your Pre-Application must include the following:

- Completed and signed Terms and Conditions.

*Pre Applications for home charger rebates are not required but are recommended to reserve funds.*

## 8.3 Rebate Reservation

For your correct and complete Pre-Application that is approved, you will receive a Rebate Reservation Letter that will include the following information: application project number, application type, residence address, date of reservation, expiration date of reservation, and maximum eligible rebate payment. This reservation of funds does not represent a guarantee of payment. You may change your 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 your Reservation Letter will not be revised. The terms of your original Reservation Letter would apply to the new residence location. You may withdraw your reservation at any time by submitting a written request to PNM. A reservation extension may be requested via email stating the reason(s) for the extension needed. PNM has the right to deny or grant any extension request.

## 8.4 Pre-Application Changes

If your Application is deemed incomplete or lacking documentation, the reviewer will request application corrections to be submitted. You 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 your notification 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 the installation of your qualified home charger is complete (“Straight to Final”). Final Applications are to be submitted within 20 days of charging equipment installation. If you did not submit a Pre-Application, to begin your Final Application you must register for an online account. When your 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 15 calendar days, excluding holidays, to confirm customer program eligibility and that the required documents are provided. Communications will be sent by email to you about your application. Please ensure that you provide accurate email addresses and phone numbers in your application.

## 9.2 Required Final Application Documentation

Your Final Application must include the following:

- Charger Purchase Receipt showing pre-tax cost of the equipment.
- Data/specification sheet of the EV charger installed.
- Proof of current registration for your electric vehicle matching your home service address within PNM service territory.
- Your itemized and detailed installation invoices should include:
  - Description of work performed
  - Cost of labor
  - Cost of materials
  - Permit fee

- Other appropriate and applicable detailed line items related to the project.
- Copy of the electrical permit for work performed (when installation rebate is selected in application).
- Post installation photos of equipment in place.
  - A clear photo of the charging equipment in place
  - A close-up photo of the equipment Serial Number
- When you're submitting a Final Application from your original Pre-Application, remember to edit the Final Application with any changes in project information, scope of work, documentation, or pre-tax project cost before submitting.
- Submit all pages of your completed and signed Application Agreement.

If your application is incomplete or lacking documentation, the Program Team will ask you for those application corrections or documentation items to be submitted by you via the online application process. You must resubmit the application with corrections within 20 business days for re-review by our Program Team to avoid the cancellation of your rebate application and forfeiture of those funds.

## 10 REBATE PAYMENT

Once the Program Team processes and accepts your Final Application, the project may be subject to engineering review and may be inspected. A Program Team member will contact you by phone or email if an inspection of your home charger installation is necessary. After Final Application Approval and confirmation of charging from your data service provider, 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

You may cancel or withdraw your rebate application upon your written request to PNM at [tep@pnm.com](mailto:tep@pnm.com).

Your Final Application could be 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. You 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



### PNM Transportation Electrification Program

c/o DNV Energy Services, USA Inc.  
 320 Gold Ave. SW, Suite 500  
 Albuquerque, NM 87102  
 Phone # (505)355-6286 or toll free (888)-505-1873  
 Email Address: [TEP@pnm.com](mailto:TEP@pnm.com)