HVIP Voucher Processing – Outline

• Voucher Processing Timing
• Signing into Dealer Home
• Submitting a Voucher Request
• Confirming a Voucher
• Requirements of an Approved Voucher
HVIP Voucher Processing – Outline
Let’s review the voucher statuses and the gates between

• Voucher Processing Timing
  – A voucher request is Pending Review immediately after submission
  – Once the request information and uploaded PO are checked the voucher is Accepted – Pending Signed Forms
  – Once the signed Voucher Request Form is received it is moved to Accepted – Pending Confirmation Form
  – A voucher will be approved when both the confirmation and signed forms are completed. A voucher may be remain in “approved” status for many months during the vehicle build, please make sure to re-confirm every three months
  – Move the voucher to Redemption Processing once the vehicle is delivered, begin to supply redemption documents as they become available
  – Redemption will be approved only after all redemption documentation is received and approved
  – Vouchers will be Completed / Paid within 7 days of redemption approval

• Signing into Dealer Home

• Submitting a Voucher Request

• Confirming a Voucher

• Requirements of an Approved Voucher
HVIP Voucher Processing – Voucher Processing Timing

- Voucher request should be submitted as soon as a purchase order, signed by the purchaser and noting the HVIP voucher value, is at hand. The voucher request must be submitted prior to vehicle delivery to customer.

- Voucher(s) reviewed immediately after submission

- Signed forms (Purchase Order, Purchaser’s Driver License/ID and Voucher Request Form) are due within 14 days of request

- The VIN or serial number and expected delivery date must be submitted within 30 days of electronic voucher request submission

- Once approved, the voucher must be renewed every three months for up to 365 days

- Submit redemption data to move to Redemption Processing upon delivery
  - Redemption Requirements

- All redemption documents are due within 60 days of vehicle delivery

- Vouchers will be paid within 7 days of redemption approval
  - Reporting Requirements

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HVIP Voucher Processing – Outline
To start, you must sign into the secure section of the HVIP website

- **Voucher Processing Timing**
- **Signing into Dealer Home**
  - Voucher requests are made from your dealer account on the online Voucher Processing Center (VPC)
  - Your vouchers will only be visible from the requesting dealer’s account going forward
  - For multiple dealers at one dealership or within one company, it is up to you if you want to work with one or multiple accounts.
  - It is forbidden for an account to be shared between an individual who received HVIP dealer training and an untrained colleague
  - Contact the HVIP Administrative Team if a HVIP-trained dealer leaves the company or if you forget your password

- **Submitting a Voucher Request**
- **Confirming a Voucher**
- **Requirements of an Approved Voucher**
HVIP Voucher Processing – Signing into Dealer Home

First, following the links to sign in to the Dealer Account Home page

➢ To Begin, Select the VPC Log In link from the homepage

- Google Chrome is the best browser to access the VPC from
- Contact hotline with questions
  - 1-888-457-4847
  - info@californiahvip.org

Click Here to View the FY17-18 HVIP Implementation Manual

**Click Here to View Changes to HVIP for FY18-19**

Click Here to View FY18-18 Voucher Tables – October 2018
Follow the links to sign in to the Dealer Account Home page:

- First Firewall: Pop-up will require you to enter the username: Dealer and Password: hvipdealer1
- Be sure to check your junk folder for the automatically generated email with your login information
- If you have completed your dealer training and cannot locate your login, contact Hannah Hamilton (Hhamilton@CALSTART.org)
HVIP Voucher Processing – Signing into Dealer Home

Follow the links to sign in to the Dealer Account Home page

➢ You will land on this page after clearing the first firewall
➢ From here, select one of the Log In links from the page
HVIP Voucher Processing – Signing into Dealer Home

Landing page allows for login to secure areas of the website

- Second Firewall: Enter your personal username and password here
- Be sure to check your junk folder for the automatically generated email with your login information

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HVIP Voucher Processing – Signing into Dealer Home

Dealer Account Home page is where you will start all voucher processing

➢ This page serves as a hub for dealers to manage their open voucher requests, submit voucher processing documents, etc.

• This funding ticker is broken, and will not be fixed ahead of the launch of an all new VPC in Q4 2019.

• To find an accurate account of available HVIP funding, check the main California HVIP website.

• Dealer Account Management allows for confirmation and changes to account
  – Update email address
  – Change password
  – View mailing address
    ▪ Check will be mailed to this address
    ▪ Address change requests should be sent via email to Hhamilton@CALSTART.org

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HVIP Voucher Processing – Outline
Submit a voucher request when you have a real order for an eligible vehicle

- Voucher Processing Timing
- Signing into Dealer Home
- Submitting a Voucher Request
  - First you will select a funding pot if more than one is available at the time of the request
  - Then you identify the eligible vehicle for the voucher request through a series of pull-downs
  - The purchaser and fleet location is then selected from your saved contacts or you can enter new information
  - A Purchase Order in electronic format is required to complete the voucher request
  - Once a request is submitted, money is assigned to the voucher and you are officially “in line” for those funds
- Confirming a Voucher
- Requirements of an Approved Voucher
HVIP Voucher Processing – Submitting a Voucher Request
Let’s start with submitting a voucher request from Dealer Home

➢ Click Submit a New Voucher Request link to begin voucher request process

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HVIP Voucher Processing – Submitting a Voucher Request

At times, more than one funding source will be available

➢ Click on FY 2014, the only listed funding bucket. This feature will not be fixed until an all new VPC is launched, expected by 2019Q4.

• Some sources may be low on money but still accept voucher requests to form a waitlist
  – Funding source amounts will go negative to indicate the backlog of orders
  – Waitlist voucher still require a PO, but will not need a factory confirmation (VIN or serial no.) until voucher is funded
  – Voucher Processing Center will notify you when the voucher is moved off the waitlist – or – if the waitlist is going away

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HVIP Voucher Processing – Submitting a Voucher Request

Step 1 of the Voucher Request is the selection of the eligible vehicle

➢ Use the series of pull-down menus to properly identify the vehicle

• Please remember that voucher requests are for a specific vehicle and specific customer. Changes that occur to these items will require a new request.
  – Make sure that vehicle and engine model years are properly selected.
  – GVWR selection will determine voucher amount and must be identified on the Purchase Order (PO) when a chassis can be ordered in different weights.
  – If you do not see a listing for a vehicle that you believe to be HVIP-eligible, send an email detailing the issue to Hhamilton@CALSTART.org and Priscilla.Barragan@tetratech.com

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HVIP Voucher Processing – Submitting a Voucher Request
Once complete, check the dialog box to make sure everything is correct

➢ Vehicle information including preliminary voucher amount is shown to you. Please double check this information before moving to Step 2

• The preliminary voucher amount will not include any voucher enhancements
  – This is manually added after confirmation of new purchaser
  – The Voucher Request Form will have the preliminary voucher amount, please don’t worry if the voucher amount will be higher once enhancements are applied – sign and send them in
  – Check the system once the voucher is approved to make sure amount is correct
• Once complete, hit the Next button
HVIP Voucher Processing – Submitting a Voucher Request
Step 2 of the Voucher Request is the selection of the customer & fleet location

➢ Click Select Existing Purchaser to see purchaser records in your dealer file

• **PLEASE** utilize the Existing Purchaser information when available
  – Otherwise, a new purchaser record is created with each request and this lengthens processing
  – Processing center will often correct inaccurate or incomplete records

• If no Existing Purchaser record exists for your customer, please fill in the Purchaser Information
  • Please take care with capitalization
  • Include “, Inc.”, “LLC”, etc.
HVIP Voucher Processing – Submitting a Voucher Request

To complete Step 2, select fleet location and identify the number of vehicles:

- Click Select Existing Operator to see operator records in your dealer file.
- **PLEASE** utilize the Existing Purchaser information when available.
- If no Existing Purchaser record exists for your customer, please fill in the Purchaser Information.
- Now enter the Quantity of vouchers you are requesting for this location. Note that the vehicle description, purchaser, and fleet location must be the same to request multiple vouchers at a time.
- Hit the Next button when complete.
HVIP Voucher Processing – Submitting a Voucher Request

Step 3 of the Voucher Request is the upload of the Purchase Order (PO)

➢ Click Browse to open a search window in order to locate the appropriate PO
  • Navigate to where you have stored an electronic copy of the PO, in .pdf, .doc, or .jpg format
  • Select the file containing the electronic PO and then hit Open
    – File location will then appear in the box next to Browse
    – You will be unable to move forward without a PO in the correct format

➢ Hit Next when complete
  • If you don’t have the PO available at this time, select the “Save for Later” button and all previous selections will be saved
  • You can access a saved request for PO upload at a later time from Dealer Home
After checking that all the information is correct, check the box to acknowledge the Terms and Conditions of HVIP and then submit the request.

Link to Sample Terms and Conditions (T&Cs) are here for your review.

Finally, generate and print the Voucher Request Form when instructed. Sign the dealer signature box and have the purchaser sign their portion.

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As a participant in the HVIP program, the purchaser must indicate agreement with the HVIP Terms and Conditions:

1. I have read, understand and agree to all provisions within HVIP and Low NOx Engine Incentives implemented through HVIP Implementation Manual;
2. I agree to register the vehicle in California with the Department of Motor Vehicles (DMV). Military vehicles are not subject to this requirement;
3. I agree to allow CARB, Grantee, or their designee to verify the vehicle registration with the DMV;
4. I agree to maintain vehicle insurance as required by law;
5. I agree to never modify the vehicle’s emission control system, engine, or engine software calibrations;
6. I agree to ensure plug-in vehicles purchased with an HVIP voucher, including plug-in hybrid vehicles, plug-in electric vehicles, and aerial boom vehicles with zero-emission power take-off, will be plugged in regularly as recommended by the vehicle manufacturer to ensure battery durability, efficiency, and reliability;
7. I understand that I must be in compliance and remain in compliance with all applicable federal, state, and local air quality rules and regulations;
8. I agree to own/lease and operate this vehicle 100 percent in California for a minimum of three years from the date of purchase/lease unless: 1) the vehicle is an emergency response vehicle which may be deployed out of state, or 2) the vehicle address identified in this form is in a county which borders Arizona, Nevada, Oregon or Mexico. In these two cases only, the vehicle may operate outside of California for up to 25 percent of its mileage if a written request to do so is included with this voucher request form and the request is approved by CARB, Grantee, or their designee. Military vehicles are not subject to this requirement;
9. I agree to retain ownership/lease of the vehicle for at least three years from the date of purchase/lease, unless given explicit prior written approval to sell the vehicle from CARB;
10. I agree to keep written records of the vehicle or low NOx engine purchase/lease for three years after the purchase/lease date and provide CARB or its designee with these records within ten days of their request. These records include but are not limited to the vehicle invoice, proof of purchase, DMV records, vehicle payment information and related bank records, and purchaser/lessee fleet information;
11. For Low NOx Engine Incentives funded with GGRF funds through HVIP, I agree to have a renewable fuel contract using 100% renewable fuel for 3 years or more, providing fuel for new vehicles equipped with low NOx engines or existing vehicles repowered with low NOx engines. The 3 year renewable fuel D-3 contract will cover the vehicle for 3 years once the vehicle is placed into service or the repowered vehicle is placed back into service. The fuel contract will be reviewed by HVIP and Low NOx Engine Incentives Grantee to verify that the above information is included in the contract. I will completed and submit the yearly questionnaire to the Grantee;
12. I agree that the purchased/leased vehicle and emission reductions it generates shall not be used as emission reductions to comply with an enforcement obligation of any person or entity;
13. I agree to complete the annual usage survey and questionnaire for three years, as requested by CARB. Military vehicles are not subject to this requirement;
14. I agree to the Manufacturers Terms and Conditions for usage of the vehicle’s telematics device. Additionally, I agree to allow the Manufacturer to have access to the vehicle location and on/off data so the Manufacturer can report to CARB Grantee, or their designee the aggregated vehicle operation within disadvantaged communities and zip codes containing disadvantaged communities. Vehicles equipped with low NOx engines, and military vehicles are exempt from this requirement;
15. I agree to be available for a follow-up inspection by CARB, Grantee or their designee, if requested;
16. The information provided in this application is true and all supporting documentation is true and correct and meet the minimum requirements of HVIP and Low NOx Engine Incentives;
17. I have the legal authority to apply for incentive funding for the purchasing entity described in this agreement;
18. I agree that failure to comply with the terms of this agreement may result in repayment to CARB of voucher funds received; and
19. I understand that CARB reserves all rights and remedies available under the law to enforce the terms of this agreement.
HVIP Voucher Processing – Submitting a Voucher Request
Please become familiar with the voucher request T&Cs that must be signed

In addition, the dealer must indicate agreement with the voucher Terms and Conditions:

1. I have read, understand and agree to all provisions within HVIP and Low NOx Engine Incentives implemented through HVIP Implementation Manual;
2. The vehicle and vehicle order information identified on this form are true and correct;
3. I understand that this HVIP or Low NOx Engine Incentives voucher request is only valid for this specific vehicle or low NOx engine purchaser/lessee and vehicle, and that any voucher provided based on this voucher request will be null and void if the purchaser/lessee and vehicle identified herein change prior to voucher redemption or for noncompliance with applicable HVIP and Low NOx Engine Incentives requirements;
4. I have the legal authority to participate in HVIP or Low NOx Engine Incentives for the Dealer described in this agreement;
5. I understand that CARB reserves all rights and remedies available under the law to enforce the terms of this agreement.
HVIP Voucher Processing – Outline

Confirmation of the voucher request helps us ensure the order is real

- Voucher Processing Timing
- Signing into Dealer Home
-Submitting a Voucher Request
- Confirming a Voucher
  - The first step to confirm a voucher is submitting the Voucher Request Form with original signatures to the voucher processing center
  - Then you will need to enter the serial number or the complete Vehicle Identification Number (VIN) into the voucher system with an anticipated delivery date
  - Next, the dealer must list all additional funding sources being leveraged for the vehicle purchase

- Requirements of an Approved Voucher
HVIP Voucher Processing – Confirming a Voucher

There are two more steps to be completed to get an Approved voucher

➢ Voucher Request Form must be signed by Purchaser and Dealer and submitted to the Voucher Processing Center within 14 days
  – Please make sure the individuals that are indicated on the voucher are the people signing the forms
  – We must have a copy of an issued ID (government or company) for Purchaser. ID should show the purchaser’s signature.
  – Send signed forms to:
    HVIP Voucher Processing
    c/o TetraTech
    249 E. Ocean Blvd. Suite 325
    Long Beach, CA 90802
  – Once completed, the voucher will be moved from Accepted – Pending Signed Forms status to Accepted – Pending Confirmation status

➢ Voucher Confirmation Form must be completed within 30 days of the request
  – Voucher confirmation form is found within voucher management system
  – To complete form, you will need the vehicle’s serial number or VIN and an Anticipated Delivery Date
  – Please identify any additional incentive funds that will be applied to the vehicle purchase
  – Finally, select Vocational Use
  – Once complete, the voucher will be moved to Approved status
HVIP Voucher Processing – Confirming a Voucher
Submit the voucher confirmation data within 30 days of the request

➢ Click Voucher Query/Search to locate existing voucher requests

- All requests will have individual voucher numbers and each will need confirmation data entered to secure a voucher. Here is what you will need:
  - VIN from manufacturer
  - Anticipated Delivery Date
  - Additional sources of incentive funding
    - Please take time to complete this as accurately as possible, otherwise the redemption of vouchers will be delayed
    - If you are not sure if other funding sources qualifies as an incentive, please list and let’s discuss
  - Vocation of vehicle

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First filter option is to view vouchers by status

- When entering confirmation data, vouchers will be in either:
  - Accepted – Pending Signed Forms
  - Accepted – Pending Confirmation Form

Instead of using a Filter, you can sort on the column headings by clicking the heading

- The sort feature allows you to view all vouchers, but sorted as you wish
- Clicking the column heading a second time resorts the list in reverse order
HVIP Voucher Processing – Confirming a Voucher

Once you locate your voucher, click to open and process it.

- Click the voucher number to enter the View Voucher Page for processing.
  - Note that the Admin Updated column can be selected to view the vouchers that were “last touched” by the processing center.
    - While useful in the early stages of the voucher, this sorting becomes important when processing redemptions of vouchers as there may be a lot of back and forth between you and the processing center.
    - Dealer Updated column sorting is useful when more than one person is utilizing a dealer account.

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The first paragraph on this page reviews the status of the voucher and the requirements to move forward:

- Note any timing requirements that appear in this paragraph and communicate with the processing center if behind schedule.
- Voucher processing will update this language for further clarification or changing requirements as needed.

Take time to note the Redemption Documentation table:

- All documents are required for redemption of vouchers, start collecting them ASAP.
- Clicking the document type will show notes on requirements for each.
Enter all the confirmation data and then hit Update Voucher

- Anticipated Vehicle Delivery Date is the best approximation of delivery you can make at this time, you will have opportunities to update
- VIN or Serial # will be locked into the voucher once entered
- Please communicate with the purchaser and get the required information on any additional funding sources
- Last, please select the Vocational Use of the vehicle to the best of your ability

Once Confirmation Data is reviewed, the voucher will be Approved
Voucher Processing Timing

Signing into Dealer Home

Submitting a Voucher Request

Confirming a Voucher

Approved Voucher Requirements

– An approved voucher will expire after three months of inactivity
– Vouchers can be continually updated to extend the expiration date by three months each time, for up to 365 days from the request date.
– Requests for extensions greater than one year are handled by CARB on a case-by-case basis
– Please take the time to review redemption requirements and start gathering the required documentation as soon as it is available, waiting to figure it all out once vehicle is delivered will result in payment delays
– If there is a need to cancel an approved voucher, we will need a cancellation request in writing (email is OK) from either you or the purchaser
The Confirmation tab will remain active on Approved vouchers for updates or confirmation on the Anticipated Vehicle Delivery Date

- You are required to update this date every three months
  - This signals that the order is still in process and will extend the voucher expiration date
  - The data is used to align resources required to redeem your voucher in a timely manner
  - Vouchers extensions beyond a year will require review by CARB on a case-by-case basis, so automated extensions through the system will not work

- Make sure to hit Update Voucher button after entering a new date or to confirm the previously entered date
The Redemption tab appears once the voucher is Approved and will need to be completed to move to Redemption Processing status.

- While you can upload redemption documentation while Approved, those documents will not be processed until you are in Redemption Processing.
- Please provide the following data upon delivery of the vehicle to the customer:
  - VIN, if it wasn’t already provided during confirmation
  - Title Transfer Date – the date you anticipate the vehicle being delivered, registered, and paid for (all three completed)
  - Delivered Price of the vehicle, without taking into account the voucher amount
- Make sure to hit Update Voucher button after entering data

HVIP Voucher Processing – Approved Voucher Requirements
Please complete the Redemption tab once the vehicle is delivered.

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HVIP Voucher Processing – Approved Voucher Requirements

Use the links in the Document Type table to get ready for redemption

➢ Click a document link to get the Document Status page for each document

- The Voucher PDF button will produce a PDF document of your approved voucher
- The Print View button will give a printer-friendly View Voucher page
HVIP Voucher Processing – Approved Voucher Requirements
Please take the time to learn the requirements and communicate any issues

➢ Each Document Status page will include a paragraph on the requirements of the document
  • Note the specific information that is required, notify the processing center if you believe there will be an issue meeting these requirements
  • Voucher processing will update this language for further clarification or changing requirements as needed

➢ The Upload Document feature is available once the voucher is Approved
  • Documents will remain Under Review (yellow light) until the voucher is moved to Redemption Processing