

**State of Vermont
Incentive Program for New Plug-in Electric Vehicles**

**Auto Dealership
Incentive Portal
Quick Guide**

December 6, 2023



TABLE OF CONTENTS

1	Overview.....	3
2	Dealership Portal Enrollment.....	5
3	Creating a Portal Account	7
4	Portal Dashboard Access	9
5	Adding Dealer Employees.....	11
6	Submitting Applications.....	12
7	Monitoring Applications	19

1 PORTAL OVERVIEW

The Center for Sustainable Energy (CSE) is administering the State of Vermont incentive program for new plug-in electric vehicle (EV) purchases / leases effective July 1, 2022. CSE has extensive experience administering EV incentive programs in California, Connecticut, Massachusetts, New Jersey, New York, Oregon, and other states. The Vermont Agency of Transportation (VTrans) contracted with CSE to provide this service and CSE will be working in partnership with Drive Electric Vermont (DEV) on the State EV incentive program moving forward.

CSE has developed an online application portal for the program. This Quick Guide steps through setting up and using the new system.

The new portal is only for the State of Vermont incentive program for new EVs. The [MileageSmart](#) program offering incentives to income-eligible purchasers for a used high-efficiency vehicle purchase will continue to be administered by Capstone Community Action and point-of-sale electric utility incentives offered through auto dealers will continue to be administered by Burlington Electric Department, Green Mountain Power, and VPPSA separate from the State incentive portal.

Additional details on the program requirements, including applying incentives to customer down payments, limits on participation, treatment of the vehicle purchase and use tax for incentivized vehicles among other issues are included in the program guidelines available on the Drive Electric Vermont website at the links below:

[State of Vermont Incentives](#)

[State of Vermont New EV Incentive Program Guidelines](#)










1.1 VEHICLE PRICE ELIGIBILITY REQUIREMENTS

Starting November 1, 2023, State incentives are available for All-Electric and Plug-in Hybrid Electric Vehicles sold/leased as new with a base advertised manufacturer's suggested retail price (MSRP) of \$52,500 or less. EVs sold or leased with a sale price greater than \$52,500 may be eligible for State incentives as long as the advertised MSRP for the lowest trimline of that model (base MSRP) on the automaker's website does not exceed the caps. A current listing of eligible models is available on the Drive Electric Vermont website vehicle comparison tool shown on the following page by choosing "Incentive Available" on the filter for Vermont Incentive (see highlighted circle at upper right of screen shot image).

Vehicle price cap eligibility exceptions are available for individuals with disabilities with special registration plates and/or placards as defined in 23 V.S.A §304a. For example, if someone with a wheelchair requires a van option for accessibility and would like a larger, currently ineligible vehicle then they can contact CSE's support team to get an exception to allow a State incentive on a purchase.

Plug-in Cars Available in Vermont

Vehicle Type: Electric Range[†]: All Wheel Drive: Base MSRP: Number of Seats: Vermont Incentive:

<p>Audi Q4 e-tron</p>  <p>All Electric (SUV) Electric Range: 265 miles Vermont Incentive Eligible</p> <p>+</p>	<p>BMW 330e</p>  <p>Plug-in Hybrid (Sedan) Electric Range: 23 miles Vermont Incentive Eligible</p> <p>+</p>	<p>Chevrolet Bolt EUV</p>  <p>All Electric (SUV) Electric Range: 247 miles Vermont Incentive Eligible</p> <p>+</p>
<p>Chevrolet Bolt EV</p>  <p>All Electric (Crossover) Electric Range: 259 miles Vermont Incentive Eligible</p> <p>+</p>	<p>Chrysler Pacifica Hybrid</p>  <p>Plug-in Hybrid (Minivan) Electric Range: 32 miles Vermont Incentive Eligible</p> <p>+</p>	<p>Dodge Hornet RT PHEV</p>  <p>Plug-in Hybrid (Crossover) Electric Range: 32 miles Vermont Incentive Eligible</p> <p>+</p>
<p>Ford Escape PHEV</p>  <p>Plug-in Hybrid (SUV) Electric Range: 37 miles Vermont Incentive Eligible</p> <p>+</p>	<p>Ford E-Transit Van</p>  <p>All Electric (Minivan) Electric Range: 126 miles Vermont Incentive Eligible</p> <p>+</p>	<p>Ford F-150 Lightning</p>  <p>All Electric (SUV) Electric Range: 230 miles Vermont Incentive Eligible</p> <p>+</p>

2 DEALERSHIP PORTAL ENROLLMENT


Dealer should designate a primary contact for participation in the program. This should be a General Sales Manager, Finance Manager, Owner, or other staff with signature authority for dealership business. The next steps to enroll are detailed below:

1. Dealers can enroll on the portal after providing a Participating Dealer Agreement (PDA) to CSE. Contact CSE (VermontPEV@energycenter.org) to request a PDF form of the agreement if you have not already submitted one.
2. Once dealers have confirmation from DEV a PDA is on-file they should proceed with enrollment on the online portal at the link below:
 - o https://vermont.drive-electric.org/EV_DealershipEnrollment

Dealership Enrollment

Dealership Information

*Dealership Name <input type="text" value="Enter Dealership Name"/>	*Dealership Phone Number <input type="text" value="Enter Phone Number"/>
*Street <input type="text" value="Enter Street"/>	*City <input type="text" value="Enter City"/>
*State VT <input type="button" value="v"/>	*ZIP Code <input type="text" value="Enter Zip Code"/>

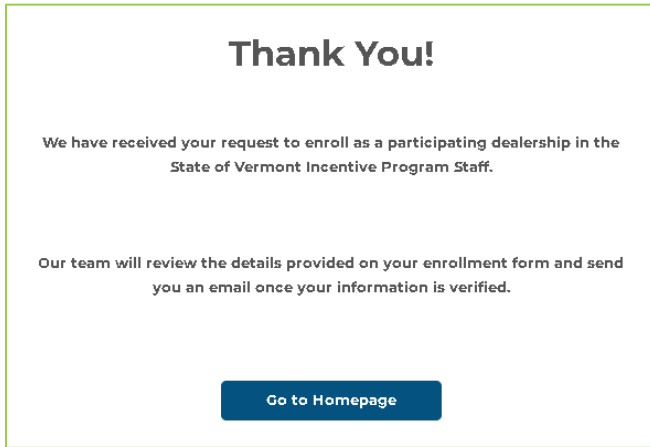
ADDRESS VALIDATION PROVIDED BY 

Dealership Primary Contact Information

The primary contact for a dealership is typically a General Sales Manager, Finance Manager or the Owner. This individual will be responsible for managing the dealership account, including supplying the dealership's banking information.

*First Name <input type="text" value="Enter First Name"/>	*Last Name <input type="text" value="Enter Last Name"/>
*Email <input type="text" value="Enter Email"/> <small>Must be a valid email address</small>	*Re-Enter Email <input type="text" value="Re-Enter Email"/>

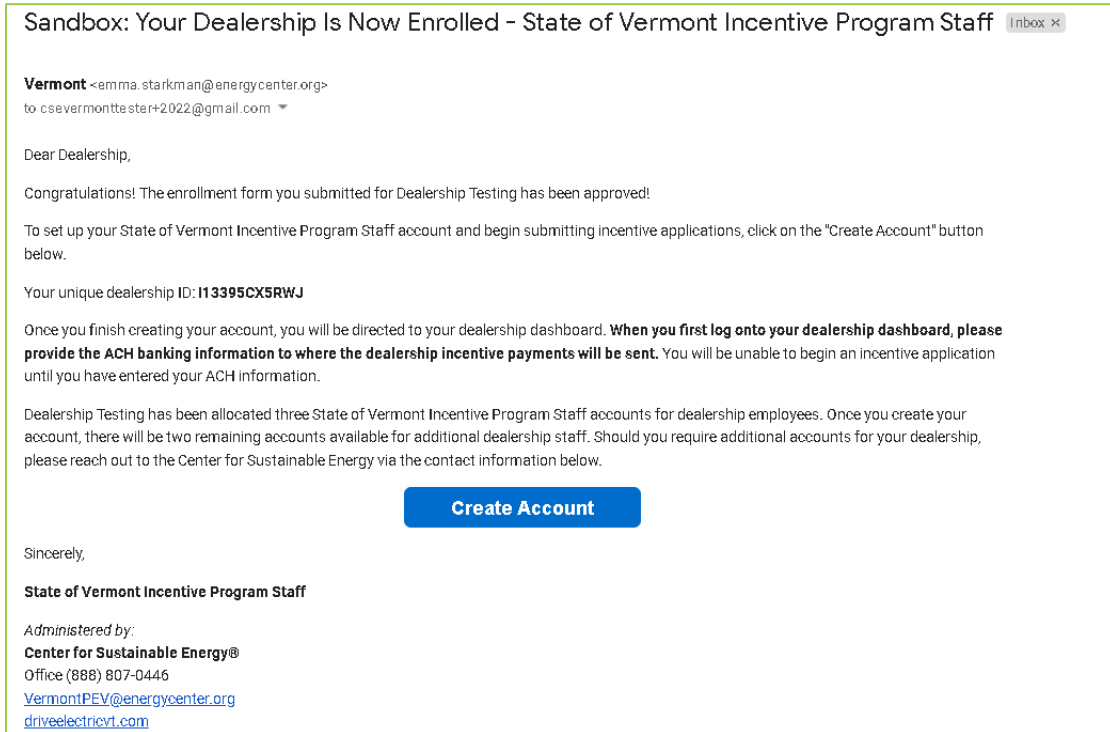
3. After submitting enrollment form above, dealerships will **not** get an immediate email, but will see the image below on their screen



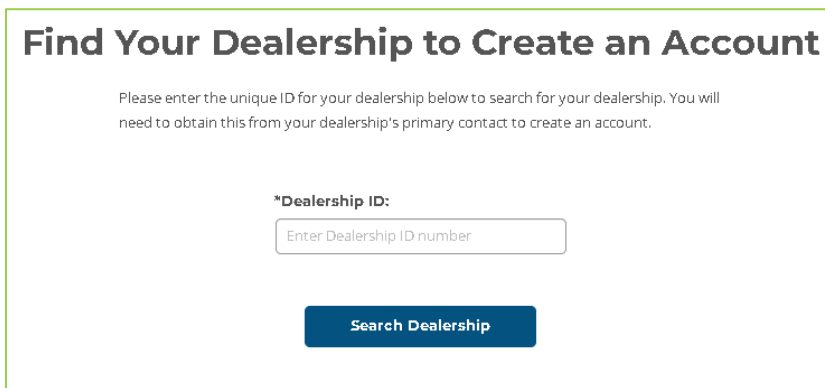
4. CSE will be notified of a new enrollment and will verify a signed PDA is on file.
5. Once verified, dealerships will receive an email from CSE with a Unique Dealership ID. Dealerships will use this unique ID to Create an Account (screenshots & information following).

3 CREATING A PORTAL ACCOUNT

1. Once enrollment is verified by CSE, the dealership primary contact will receive an email with their unique dealership ID, prompting them to create an account



2. To create an account, dealerships will select the “Create Account” button in the email
3. Dealerships enter the Dealership ID number found in the email



4. Dealerships then create an account to begin accessing their dealership’s application portal (screenshot below). Whoever creates this account is the primary account holder and has access to add/remove employees and provide bank ACH payment information for State incentive reimbursements.

Create Account to Access Your Dealer Dashboard

Please provide your information below to create an account that is associated with your dealership.

Dealership Account Information

*First Name Enter First Name	*Last Name Enter Last Name
*Email Enter Email <small>Must be a valid email address</small>	*Re-Enter Email Re-Enter Email
*Password Enter Password	*Re-Enter Password Re-Enter Password

Submit

5. Once an account is created, dealerships will be directed to their dashboard.

4 PORTAL DASHBOARD ACCESS

1. Dealerships can directly access their dashboard by visiting the application portal link at <https://vermont.drive-electric.org> and entering a registered user's email & password to login (see screenshot below).

Login Create Account

*Email
Enter Email

*Password
Enter Password

[Forgot your password?](#)

Login

VERMONT

Primary Contact Logout

ACH information must be provided by the primary contact prior to submitting an application.

Dealership Testing's Dealership Dashboard

Account Details

First Name Primary
Last Name Contact
Email csevermonttester+2022@gmail.com

[Change Password](#)

Contact CSE to change account details.

Dealership Details

Unique ID I13395CX5RWJ
Name Dealership Testing
Address 115 State St
Montpelier, VT 05633
Phone (888) 888-8888

[Edit Dealership ACH](#)

Contact CSE to change dealership details.

Employee(s)

Primary Primary Contact

[Manage Employees](#)

[New Application](#)

Application ID	Applicant Name	Dealer Name	Date Started	VIN	Rebate Amount	Application Status	Rebate Status
You have no applications yet.							

2. Dealerships must enter their bank ACH information by selecting “Edit Dealership ACH.” before being able to submit incentive applications. This should be the responsibility of the dealer’s primary contact.
3. In the Dealership Portal screenshot above, you will see the note that “ACH Information must be provided.....”, and that the “New Application” button is grey. Once ACH information is provided, this button will be available.

Edit your ACH

Payment Information

Please provide banking details for ACH direct payment of the rebate into your bank account. Payee is responsible for the accuracy and completeness of the data entered.

***Account Type**

Select ▼

***Bank Routing Number (or Wire Number)**

More Information

Enter Bank Routing Number

***Re-Enter Bank Routing Number (or Wire Number)**

Re-Enter Bank Routing Number

***Bank Account Number**

More Information

Enter Bank Account Number

***Re-Enter Bank Account Number**

Re-Enter Bank Account Number

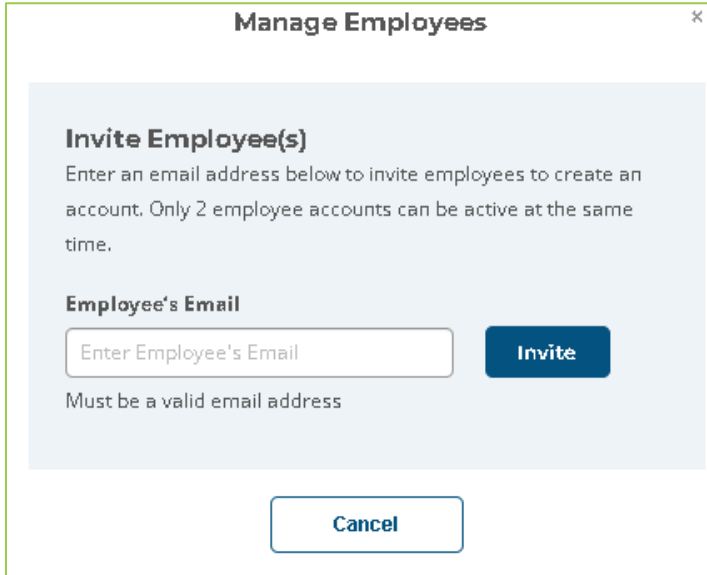
Cancel

Save Changes

5 ADDING DEALER EMPLOYEES

The dealership's primary contact can add up to two *additional* employees to submit application materials through the dashboard. These employees will NOT have access to ACH information or to manage other employees.

1. Invite employees by clicking on the “Manage Employees” button on the dashboard.



Manage Employees ✕

Invite Employee(s)
Enter an email address below to invite employees to create an account. Only 2 employee accounts can be active at the same time.

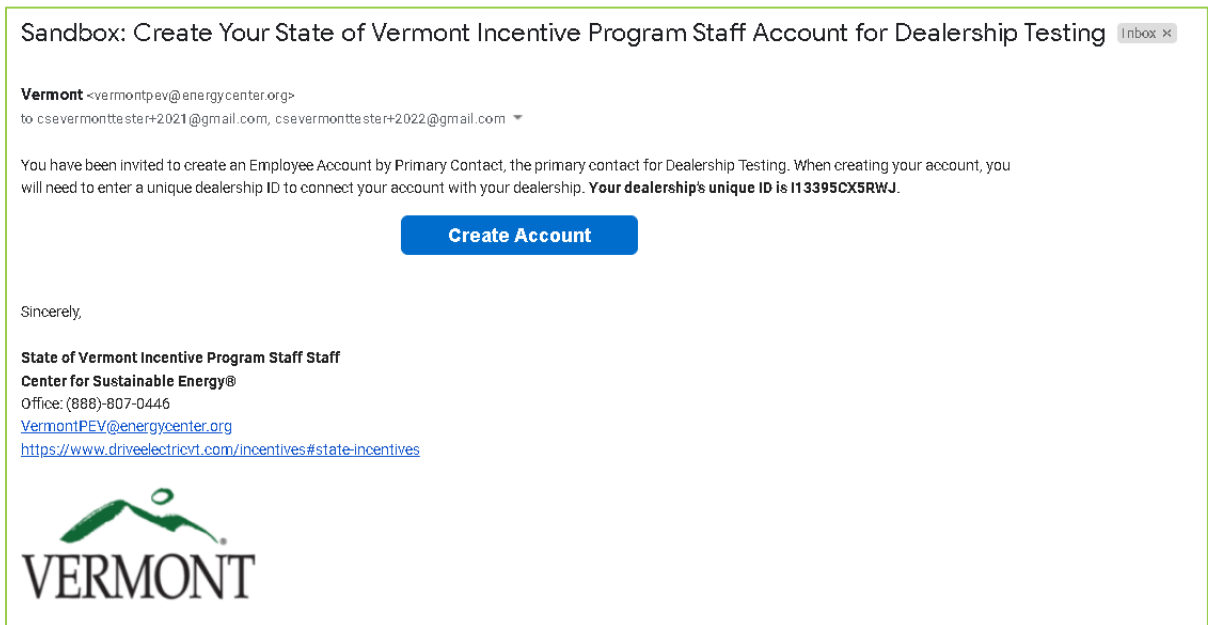
Employee's Email

Enter Employee's Email **Invite**

Must be a valid email address

Cancel

2. Employees will get an email prompting them to create an account with the dealership's unique ID



Sandbox: Create Your State of Vermont Incentive Program Staff Account for Dealership Testing Inbox ✕


Vermont <vermontpev@energycenter.org>
to csevermonttester+2021@gmail.com, csevermonttester+2022@gmail.com

You have been invited to create an Employee Account by Primary Contact, the primary contact for Dealership Testing. When creating your account, you will need to enter a unique dealership ID to connect your account with your dealership. **Your dealership's unique ID is 113395CX5RWJ.**

Create Account

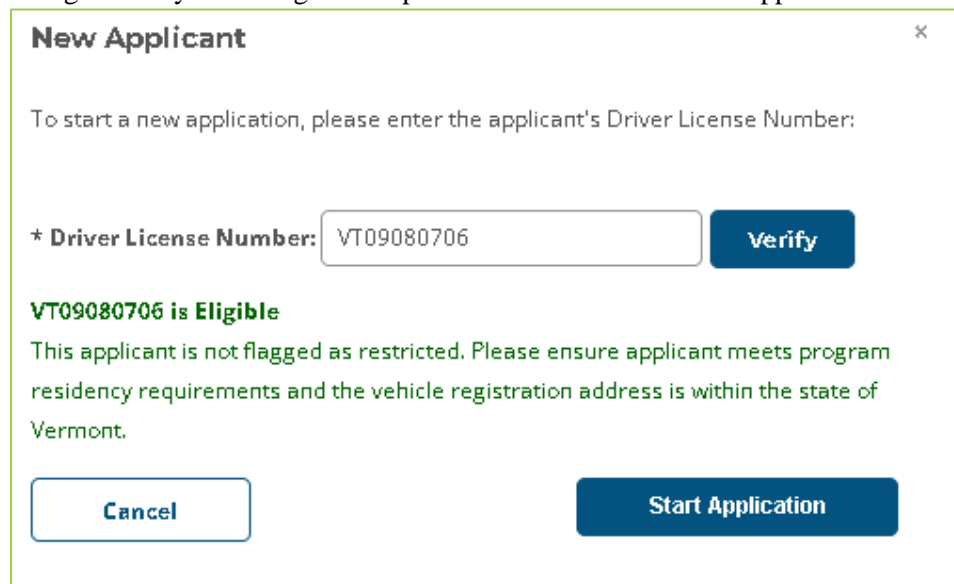
Sincerely,

State of Vermont Incentive Program Staff Staff
Center for Sustainable Energy®
Office: (888)-807-0446
VermontPEV@energycenter.org
<https://www.driveelectricvt.com/incentives#state-incentives>


VERMONT

6 SUBMITTING APPLICATIONS

1. Dealerships should begin applications while the customer is in-store to confirm the customer is eligible (based on Vermont Driver's License number) AND all required paperwork (especially the [Consumer Attestation Form](#)) is complete.
2. Select the Start Application button in the portal. You will be prompted to enter the unique identifier of the consumer (Driver License number).
 - If eligible: they will see green help text and be able to start the application.



New Applicant ×

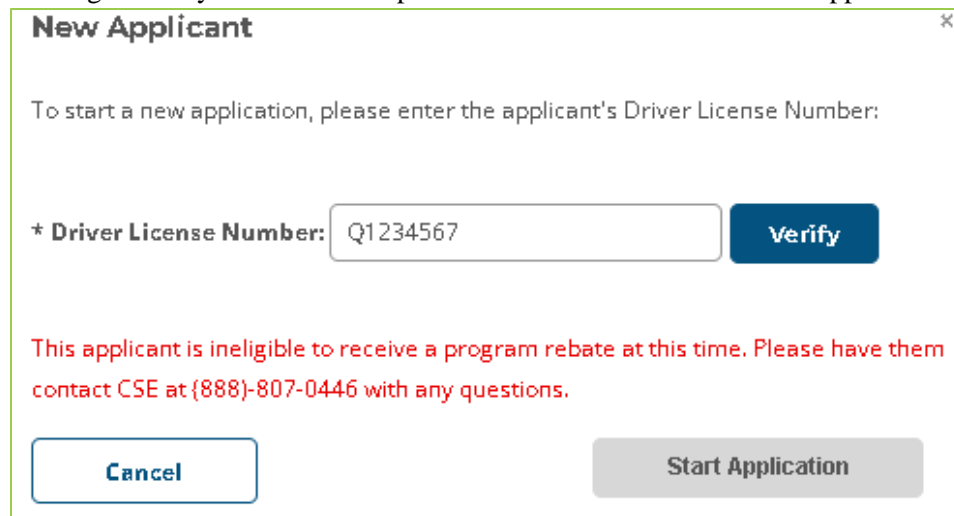
To start a new application, please enter the applicant's Driver License Number:

* Driver License Number:

VT09080706 is Eligible

This applicant is not flagged as restricted. Please ensure applicant meets program residency requirements and the vehicle registration address is within the state of Vermont.

- If ineligible: they will see red help text and will be unable to start an application



New Applicant ×

To start a new application, please enter the applicant's Driver License Number:

* Driver License Number:

This applicant is ineligible to receive a program rebate at this time. Please have them contact CSE at (888)-807-0446 with any questions.

3. If eligible, move through the following pages. Based on Signed Consumer Attestation Form, select if the rebate is for an Enhanced Rebate or a Standard Rebate. If there is a Replace Your Ride (RZR) eligible vehicle to be scrapped, then answer yes to this question and the additional required documents for RZR will be listed.

The screenshot shows the top navigation bar with the Vermont logo on the left and a user profile for 'Verm Ont Manager' with a 'Logout' button on the right. The main heading is 'What are you applying for?'. Below this, there are three sections:

- *Applicant is a(n):** A dropdown menu with 'Individual' selected.
- Do you want to apply for the Enhanced rebate?** A dropdown menu with 'Yes' selected. Below it is a note: 'Income qualifications required, [click here](#) for more information.'
- *Is the applicant applying for Replace Your Ride?** A dropdown menu with 'Yes' selected. Below it is a note: 'Vehicle must meet eligibility requirements, [click here](#) for more information.'

Submission documents if answering Yes to RZR application:

This screenshot shows the document upload requirements for a 'Yes' answer to the RZR question. It features a dropdown menu with 'Yes' selected and a heading: 'Please have these documents ready to upload when you fill out your application:'. Below this heading is a list of eight document types, each in a separate box:

- Proof of Vermont Residency (Driver License)
- Purchase or Lease Agreement
- Proof of Vermont Vehicle Registration
- Consumer Attestation Form
- Replaced Vehicle Attestation Form
- Replaced Vehicle Bill of Sale
- Replaced Vehicle Registration
- Replaced Vehicle Title

At the bottom of the page, there are two buttons: 'Cancel' on the left and 'Apply' on the right.

Submission documents if answering No to RYR application:

***Is the applicant applying for Replace Your Ride?**
Vehicle must meet eligibility requirements, [click here](#) for more information.

No

Please have these documents ready to upload when you fill out your application:

Consumer Attestation Form
Purchase or Lease Agreement
Proof of Vermont Vehicle Registration
Proof of Vermont Residency (Driver License)

4. Select Apply, and move to Terms & Conditions Page
 - o Check box to agree to T&Cs

1 Accept Terms In Progress

2 Applicant Information INCOMPLETE

3 Vehicle Information INCOMPLETE

4 Upload Documents INCOMPLETE

Terms and Conditions

I have read and agree to the [Terms and Conditions](#)

5. Move to next page to enter applicant information

1
Accept Terms
(Completed)

2
Applicant Information
In Progress

3
Vehicle Information
INCOMPLETE

4
Upload Documents
INCOMPLETE

Applicant Information

The name must match the name on the registration and purchase or lease agreement. Participants who submit an application with the incorrect name will need to re-apply.

<p>*First Name (as shown on vehicle registration)</p> <input type="text" value="Vernon"/>	<p>*Last Name (as shown on vehicle registration)</p> <input type="text" value="Tezer"/>
<p>*Phone Number</p> <input type="text" value="8888888888"/>	<p>*Email</p> <input type="text" value="casevermonteazer-2020@gmail.com"/>
<p>*Driver License</p> <input type="text" value="A1234567"/>	

Residential Address

Please enter your address where you resided at the time of purchase or lease of your vehicle. If you have moved, please provide your current address as the mailing address.

<p>*Street</p> <input type="text" value="100 Main St"/>
<p>*City</p> <input type="text" value="Hyde Park"/>
<p>*State</p> <input type="text" value="VT"/>
<p>*Zip Code</p> <input type="text" value="05655"/>

Check if mailing address is different

ADDRESS VALIDATION PROVIDED BY SmartyStreets

6. Move to next page to enter vehicle information
 - o Submission must be within 15 days after the DOP/L (date of purchase/lease)

The screenshot shows a progress bar at the top with four steps: 1. Accept Terms (Completed), 2. Applicant Information (Completed), 3. Vehicle Information (In Progress), and 4. Upload Documents (INCOMPLETE). Below the progress bar is the title "Vehicle Information" and a paragraph of instructions. The form contains the following fields:

- *VIN:** X9876543212345678
- *Make:** Chevrolet
- *Model:** Bolt
- *Year:** 2022
- *Purchased or Leased?:** Purchased
- *Date of Purchase:** 05/31/2022

At the bottom of the form are three buttons: "Cancel", "Save", and "Continue".

7. Move to next page to submit supporting documents (this is shown in 2 screenshots below)
 - o Prompts to upload supporting documents & review application
 - o If a customer does not have an email address, you can enter the dealership email
 - o Dealers can go back and make edits if needed
 - o Upload PDFs or image files of required documents:
 - [Consumer Attestation Form](#)
 - Dealership Point-of-Sale Incentive should be checked under Incentive Claim Option for dealer incentives
 - Incentive Amount – only one check box checked
 - Incentive Attestation – all three statements checked by customer
 - Signed and dated by customer
 - Purchase or Lease Agreement
 - Proof of Vermont Vehicle Registration
 - Proof of Vermont Residency (Vermont Driver’s License)
 - If the Replace Your Ride incentive option is selected, then there will also be four additional forms related to scrappage of the replaced vehicle.



Accept Terms
(Completed)



Applicant Information
(Completed)



Vehicle Information
(Completed)



Upload Documents
In Progress

Review

Please review the information below for accuracy.

To edit your application information, use the progress bar above to return to the appropriate page.

Applicant Information	Residential Address		Mailing Address	
*First Name Vermont	*Street 100 Main St	*Street 100 Main St		
*Last Name Tester	*City Hyde Park	*City Hyde Park		
*Driver License A1234545	*State VT	*Zip Code 05655	*State VT	*Zip Code 05655
Vehicle Information				
*VIN X9876543212345678	*Year 2022	*Make Chevrolet	*Model Bolt	
*Date of Purchase 05/31/2022				

Upload Documents

Upload Documents

Instructions on how to Submit Documents

Please upload a legible and complete copy of each required document requested below in order to submit your application. **Multiple files or images can be selected for each required document.** Click on the **help icon** for additional details and examples of correct documentation.

*Consumer Attestation Form ?

*Purchase or Lease Agreement ?

*Proof of Vermont Vehicle Registration ?

*Proof of Vermont Residency (Driver License) ?

↑ Upload Document

↑ Upload Document

↑ Upload Document

↑ Upload Document

Cancel

Save

Submit

8. Once reviewed and supporting documents are uploaded hit submit!

Thank you!

Your application has been successfully submitted.

Application Number: V-UA-220051

Funds have been reserved and your application is now in our queue to be reviewed. Updates to your application will be sent via email, including requests for any additional documentation.

Please make sure to add VermontPEV@energycenter.org to your safe senders list.

Go to Dashboard

7 MONITORING APPLICATIONS

1. Dealer employees with access can visit the dashboard any time to see all applications and their status.
2. Dealers should add “@energycenter.org” to safe sender list when possible! Some emails may go to junk/promotions/etc
3. CSE will review of applications within 7 business days and approve them for payment.
4. Dealer reimbursement payments will occur monthly.
5. For the enhanced, higher value incentives, one application will have 2 lines on the dashboard. Both will have the same application ID (see example in screenshot below).

Dealership Testing's Dealership Dashboard

Account Details

First Name Primary

Last Name Contact

Email csevermonttester+2022@gmail.com

Change Password

Contact CSE to change account details.

Dealership Details

Unique ID I13395CX5RWJ

Name Dealership Testing

Address 115 State St
Montpelier, VT 05633

Phone (888) 888-8888

Edit Dealership ACH

Contact CSE to change dealership details.

Employee(s)

Primary Primary Contact

Manage Employees

Search Applications

Q

New Application

Application ID	Applicant Name	Dealer Name	Date Started	VIN	Rebate Amount	Application Status	Rebate Status
V-UA-220051 Enhanced	Vermont Tester	Primary Contact	06/15/2022	X9876543212345678	\$1,500	Submitted	Pending
V-UA-220051 Standard	Vermont Tester	Primary Contact	06/15/2022	X9876543212345678	\$2,500	Submitted	Pending

Showing 1 - 2 of 2 results
Page 1 of 1

The dashboard will also show Replace Your Ride applications associated with any new PEV incentives (RZR incentives for used EVs will not appear on the dashboard as they are filed via email).

Application ID	Applicant Name	Dealer Name	Date Started	VIN	Rebate Amount	Application Status	Rebate Status
V-UA-220104 Enhanced	Burling Toneth	Verm Ont' Manager	09/12/2022	XYZ1111111111111111	\$1,500	Submitted	Pending
V-UA-220104 RZR	Burling Toneth	Verm Ont' Manager	09/12/2022	XYZ1111111111111111	\$3,000	Submitted	Pending
V-UA-220104 Standard	Burling Toneth	Verm Ont' Manager	09/12/2022	XYZ1111111111111111	\$2,500	Submitted	Pending