



EPA CLEAN SCHOOL BUS

2022 EPA Clean School Bus Rebate Forms: Payment Request User Guide

November 2022



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Before You Begin

This guide will walk you through the steps needed to create, edit, submit, and view an online payment request form for a Clean School Bus rebate application when you have been selected for an award. This guide also includes detailed definitions of key fields found in the online form and a printable list of all fields required in the form. **Plan to spend approximately an hour** completing the payment request form, depending on the number of buses and purchase orders you need to enter.

Follow these steps to prepare for completing the payment request form:

- 1. Review the glossary of terms** used in the payment request form (see [Appendix A](#)).
- 2. Compile all required data.** [Appendix B](#) provides a printable list of all necessary data fields.
- 3. Confirm the Point of Contact.** Confirm the email of the person completing the payment request form is registered as a designated Primary or Alternate Government Point of Contact, or Primary or Alternate Electronic Point of Contact in your entity's SAM.gov account by logging on to SAM.gov. Otherwise, the person will not be able to log into the payment request form from the system.
- 4. Check your browser version.** Before filling out the payment request form, make sure your web browser version meets or exceeds the following versions:
 - Chrome 38
 - Safari 7.1
 - Internet Explorer 11
 - Firefox 13

Note: The following pages correspond to the payment request form screen sequence.

1. Sign In/Register

Use your existing SAM.gov credentials to log in to your applicant dashboard. If you are unable to sign in, please [click here](#) to refer to the instructions in the rebate application User Guide.

2. Create/Edit a New Payment Request Form

If you plan to replace old buses other than those identified in your original application, you will need to ask EPA to re-open your application before starting your payment request form. EPA will only allow this on a case-by-case basis, as changes can impact funding level and eligibility. To re-open your application, contact the help desk at cleanschoolbus@epa.gov detailing the request. Be sure to provide the Rebate ID, applicant name, and school district name. Once you have edited the application, please resubmit and EPA will re-review for errors and completeness. Once EPA has re-approved the edited application, you can start the payment request form.

Note: Your connection to the payment request form system will time out unless you interact with the screen at least once every 15 minutes. “Interacting” can mean entering or deleting information, or even moving your cursor on the screen. If your connection times out, you risk losing data entered since the last save.

2.1 Start a New Payment Request Form

After signing in using your Login.gov account, you will see the **Clean School Bus Rebate Forms** screen.

The screenshot shows the EPA Clean School Bus Rebate Forms interface. At the top, there is a red banner with the text "EPA development environment: The content on this page is not production data and this site is being used for development and/or testing purposes only." Below this is the EPA logo and a search bar. The main navigation bar includes "Environmental Topics", "Laws & Regulations", "Report a Violation", and "About EPA". The page title is "Clean School Bus Rebate Forms".

Below the title, there are links for "Clean School Bus Rebate Program" and "Online Rebate Application Information". A user profile bar shows "csb-test@erg.com" and a "Sign out" button. The main section is titled "Your Rebate Forms" and includes a "New Payment Request" button highlighted by a red arrow.

| Rebate ID | Form Type | UEI | Applicant | Updated By |
|-----------|------------------------------|----------------------|---|-------------------------------|
| 010716 | Application Selected | 123456000007 1234 | CSB TESTER INC. Wounded Knee District | csb-test@erg.com 10/6/2022 |
| 010649 | Application Selected | 123456000011 1234 | CSB TESTER INC. Wounded Knee District | csb-test@erg.com 8/23/2022 |
| | Payment Request Draft | | | csb-test@erg.com 11/4/2022 |
| 010651 | Application Selected | 123456000011 1234 | CSB TESTER INC. Winslow Residential Hall | csb-test@erg.com 8/23/2022 |
| | Payment Request Submitted | | | csb-test@erg.com 11/4/2022 |

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Expiration Date: 8/31/2025

Contact Us to ask a question, provide feedback, or report a problem.

Select the "New Payment Request" button to begin.

Note: If you opened a new payment request form and then asked EPA to re-open your application to make edits, that form will be deleted from the Clean School Bus Rebate Forms screen and you will need to start a new payment request form once the edited application has been re-approved.

2.2 Welcome Screen

Review the text on the Welcome screen and select “Next” to proceed.

Note: Use of the browser’s back, forward, or refresh buttons while in the payment request form will result in loss of work. Please navigate using the “Next,” “Previous,” and “Save” buttons on the screen.

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Clean School Bus Rebate Forms

- Clean School Bus Rebate Program
- Online Rebate Application Information

Your Rebate Forms | New application | Helpdesk | csb-test@epa.com | Sign out

Edit Your Payment Request

Rebate ID: 010716

1 of 6 **Welcome**

Payment Request Form – Basic Information

As a rebate application award selectee, you must submit an online Payment Request Form that includes an attached scan of the purchase order(s) for the new school buses and eligible charging infrastructure by April 28, 2023.

The following information will help you complete this Payment Request Form accurately and efficiently.

- In-form help text is provided below the data entry fields and in the “?” next to the field names.
- For additional assistance, please refer to the Program Guide and supporting documents at [School Bus Rebates: Clean School Bus Program](#), or contact the help desk at cleanschoolbus@epa.gov (include the Applicant Name, Payment Request Form ID, the Rebate ID, Unique Entity Identifier (UEI), Electronic Funds Transfer (EFT) Indicator, and the School District Name).

To complete this form, you will need the following information:

- Review your submitted application (access it from the Applicant Dashboard) to confirm what buses are associated with purchase orders you will add to this form.
- The primary contact information for your organization
- Purchase Order number and date
- Purchaser information including name, address and phone number
- Vehicle/equipment vendor information including name, address and phone number
- New bus information including make, model, model year, gross vehicle weight rating (GVWR), estimated delivery date, and purchase price
- Electric bus charging infrastructure information (if applicable), including number of Level 2 chargers and hardware costs, number of DC Fast chargers and hardware costs, and other eligible charging infrastructure costs
- File(s) containing image of the purchase order on vendor letterhead. Acceptable file formats include .pdf, .png, .jpeg, and .jpg.

To save your work on the form, you must select the “Save” or “Next” button. You will be able to return later to finish your payment request form without losing information.

To submit your payment request form to EPA, complete all screens and then sign and submit the form. Make sure to provide a complete signature and check the “I confirm I have provided my signature above” box before selecting the “Submit Form” button. Your payment request form status will then be displayed on the dashboard.

Note: only Government Business (and alternate) and Electronic Business (and alternate) Points of Contact from SAM.gov can access the dashboard. The Government Business (and alternate) and Electronic Business (and alternate) Points of Contact, and the Primary and/or Alternate Contacts will also receive a submittal email confirmation.

EPA or its authorized representatives may contact selectees to clarify any information provided in the Payment Request Form. If, upon review, the Payment Request Form is accurate and includes all required information, EPA will issue the rebate payment to the bank account associated with the SAM.gov Unique Entity Identifier (UEI) and Electronic Funds Transfer (EFT) Indicator associated with the application. EPA anticipates disbursing funds within approximately 60 days of the submission of a complete Payment Request Form.

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

Next **Save**

[Contact Us](#) to ask a question, provide feedback, or report a problem.

2.3 Information Icons

Hover your mouse over the information icons, found throughout the payment request form screens, for additional information regarding specific fields.

| | |
|---|-----------------------|
| Applicant Name | CSB TESTER |
| School District Prioritized? | Yes |
| School District Name ? | Wounded Knee District |
| National Center for Education Statistics (NCES) District ID ? | BIE0013 |
| Total Rebate Funds Requested In Application ? | \$700,000.00 |



2.4 Application Information

The Primary and Alternate Contact information fields will pre-populate with information from the associated Application. Double-check that your Primary and Alternate Contact information is correct. The information can be edited if changes are necessary. Select “Next” to continue.

Clean School Bus Rebate Forms

- [Clean School Bus Rebate Program](#)
- [Online Rebate Application Information](#)

csb-test@erg.com [Sign out](#)

Edit Your Payment Request

Rebate ID: 010716

2 of 6 Application Info

* denotes required field

| | |
|---|-----------------------|
| Applicant Name | CSB TESTER |
| School District Prioritized? | Yes |
| School District Name ? | Wounded Knee District |
| National Center for Education Statistics (NCES) District ID ? | BIE0013 |
| Total Rebate Funds Requested In Application ? | \$700,000.00 |

Applicant Primary Contact

NOTE - Update contact information if it has changed.

Name ? *

Title ? *

Business Phone Number ? *

Business Email ? *

Applicant Alternate Contact

NOTE - Update contact information if it has changed.

Name ?

Title ?

Business Phone Number ?

Business Email ?

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

[Previous](#) [Next](#) [Save](#)

[Contact Us](#) to ask a question, provide feedback, or report a problem.



2.5 Saving and Editing Your Information

You can save your work while filling out the payment request form and return to it later to finish and submit. Data entered on each screen will be saved automatically when the “Next” button is selected. In addition, you can use the “Save” buttons to save information before proceeding to the next page.

The screenshot shows a form with two input fields for "Business Email". The first field contains "primary@email.com" and the second contains "alternate@email.com". Below the fields is a blue-bordered note: "NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form." At the bottom of the form, there are three buttons: "Previous" (white), "Next" (blue), and "Save" (green). Red arrows point to the "Next" and "Save" buttons. At the very bottom of the page, there is a link: "[Contact Us](#) to ask a question, provide feedback, or report a problem."

Note: Use of the browser’s back, forward, or refresh buttons while in the payment request form will result in loss of work. Please navigate using the “Next,” “Previous,” and “Save” buttons on the screen.

After saving and exiting the payment request form, you can return to the Clean School Bus Rebate Forms screen later, open the draft form by selecting the “Edit” button, and proceed by navigating to where you left off. Selecting forms with a “Submitted” or “Selected” status will allow you to view, but not edit, your entries.

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- [Online Rebate Application Information](#)

View Rebate Forms New Application Helpdesk csb-test@erg.com Sign out

Your Rebate Forms

Select a button below to *Edit* or *View* an existing rebate form.

| Rebate ID | Form Type Form Status | UEI EFT Indicator | Applicant School District | Updated By Date Updated |
|-------------------------------------|------------------------------|----------------------|---|-------------------------------|
| View 010716 | Application Selected | 123456000007 1234 | CSB TESTER INC. Wounded Knee District | csb-test@erg.com 10/6/2022 |
| New Payment Request | | | | |
| View 010649 | Application Selected | 123456000011 1234 | CSB TESTER INC. Wounded Knee District | csb-test@erg.com 8/23/2022 |
| Edit | Payment Request Draft | | | csb-test@erg.com 11/4/2022 |
| View 010651 | Application Selected | 123456000011 1234 | CSB TESTER INC. Winslow Residential Hall | csb-test@erg.com 8/23/2022 |
| View | Payment Request Submitted | | | csb-test@erg.com 11/4/2022 |

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Expiration Date: 8/31/2025

Contact Us to ask a question, provide feedback, or report a problem.

2.6 Add Purchase Orders

Select “+ Add a Purchase Order” to add a purchase order. A purchase order contains the information and specifications for bus and/or electric bus charging infrastructure procured from a single vendor. Multiple purchase orders can be added on this screen for additional vendors, for additional buses, or for electric bus charging infrastructure.

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Edit Your Payment Request

Rebate ID: 010716

3 of 6 **Purchase Orders**

Add purchase order information and upload purchase orders for new buses and infrastructure (if applicable) on this screen.

** denotes required field*

+ Add a Purchase Order

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

Previous Next Save

[Contact Us](#) to ask a question, provide feedback, or report a problem.

2.7 Purchase Order Information

Fill in the number and date for the purchase order. Select a purchase order purpose by checking the box for “Bus” and/or “Electric Bus Charging Infrastructure.” Then select the “Purchaser Name” using the drop-down menu. If your purchaser’s name is not listed, select “Other” from the drop-down menu and fill in the appropriate information. Then enter the required data fields with the information for the purchaser and vendor. Lastly, attach a PDF or image of the purchase order. The image file size must be between 1KB and 5MB. Accepted file types include .pdf, .png, .jpeg, and .jpg. **When all fields have been entered, click the “Complete” button for the purchase order. Note that this button does not save your form, and you must click the “Save” or “Next” button to save your information.**

Add another purchase order by selecting “+ Add a Purchase Order” at the bottom of the screen. You may add as many purchase orders as you need and delete or edit them at any time. Deleting a purchase order is permanent, so please do not do so unless you are sure it is necessary. We encourage you to delete purchase orders that are not used to document new buses or electric bus charging infrastructure to eliminate unneeded information. You must click the “Complete” button at the bottom of the purchase order before moving on.

The “Cancel” button should be used to revert back to the previously saved purchase order if changes were made (and the “Complete” button was not selected), or to review what you entered for a saved purchase order.

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2.8 Complete a Purchase Order

Once you have completed your purchase orders, select “Next” to continue.

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Edit Your Payment Request

Rebate ID: 010716

3 of 6 Purchase Orders

Add purchase order information and upload purchase orders for new buses and infrastructure (if applicable) on this screen.
** denotes required field*

| | | | |
|----------------------|---------------------|--|------------------------|
| Edit | Purchase Order 1 | Applicant Purchase Order Number: 1111111 Purchase Order Date: 2022-11-16 Vendor Name: 123 <i>Note: This bus Purchase Order (PO) has not yet been assigned to a New Bus. You can assign POs to buses on the next screen (4) of this form. Delete this PO if not planning to use.</i> | Delete |
| Edit | Purchase Order 2 | Applicant Purchase Order Number: 2222222 Purchase Order Date: 2022-11-24 Vendor Name: 234 | Delete |

[+ Add a Purchase Order](#)

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

[Previous](#) [Next](#) [Save](#)

[Contact Us](#) to ask a question, provide feedback, or report a problem.

2.9 New Bus Information

Select "Edit" to complete the required Bus Information for each bus from your application.

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Edit Your Payment Request

Rebate ID: 010716

4 of 6 Buses

This screen shows the buses that were submitted in your rebate application. Update Old Bus information and add New Replacement Bus information here.

** denotes required field*

| | | | |
|--|-----------------|--|---|
| Edit | Bus Number 1 | Old Bus VIN: 34534534534534534 Old Bus Fuel Type: Diesel New Bus Fuel Type: Electric | New Bus Information is Incomplete Click the "Edit" button for this row, and complete all included fields. |
|  Edit | Bus Number 2 | Old Bus VIN: 34545345345343453 Old Bus Fuel Type: CNG New Bus Fuel Type: Electric | New Bus Information is Incomplete Click the "Edit" button for this row, and complete all included fields. |

| | | | |
|--|---|--|---------|
| Number of Buses Requested From Application | 2 | Total Purchase Price for All Replacement Buses | \$0.00 |
| Number of Buses Ordered | 2 | Total Bus Rebate Amount | -\$0.00 |
| | | Total Applicant Bus Cost Responsibility | \$0.00 |

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

[Previous](#) [Next](#) [Save](#)

[Contact Us](#) to ask a question, provide feedback, or report a problem.

2.10 Add New Bus Information

The data fields associated with old and new buses are shown in the list below, with required data fields marked with an asterisk. Enter the required information then click “Complete.”

1. The bus **VIN** is prepopulated from the information in the Application and is not editable. See the [Create/Edit a New Payment Request Form](#) if you need to change information for an old bus to be replaced.
2. **Old Bus Fuel Type** is prepopulated from the information in the Application and is not editable. See the [Create/Edit a New Payment Request Form](#) section if you need to change information for an old bus to be replaced.
3. See information on **Excluding a Bus** in Section 2.11. If a bus is to be excluded, entering the remaining bus information fields for this bus is not needed.
4. Bus **Model Year** is prepopulated from the information in the Application and is not editable. See the [Create/Edit a New Payment Request Form](#) section if you need to change information for an old bus to be replaced.
5. The **Old Bus NCES District ID*** field will prepopulate with the School District ID from the application, but you may change the value if the old bus served a different school district than the district listed on your application. The new replacement bus must serve the school district that was listed on your application. Changing the Old Bus NCES ID from the default value will require you to confirm that the new value is accurate. If you need to look up an NCES ID, please [click here](#) to refer to the instructions in Section 2.10 of the rebate application User Guide.

Old Bus Information

| | | |
|----------------|----------------------------|--|
| 1 VIN | 2 Old Bus Fuel Type | 3 <input type="checkbox"/> Exclude Bus |
| 34534534534534 | Diesel | |
| 4 Model Year | 5 Old Bus NCES District ID | 6 Estimated Remaining Life (years) |
| 2012 | BDE012 | 2 |

New Bus Information

| | |
|---|-----------------------|
| 7 Purchase Order Listing New Bus | 8 Max. Rebate Amount |
| PO#: 1111111 PO Date: 2022-11-10 Vendor Name: Electric Bus Emporium | \$285,000.00 |
| 9 New Bus Fuel Type | 10 New Bus Make |
| Electric | Lion Electric Company |
| 11 New Bus Purchase Price | |
| \$350,000.00 | |
| 12 New Bus Model Year | 13 New Bus Model |
| 2022 | Yellow |
| 14 Bus Rebate Amount | |
| \$285,000.00 | |
| 15 New Bus Estimated Delivery Date | 16 New Bus GVWR |
| 11/19/2025 | 25,000 |
| 17 Applicant Bus Cost Responsibility | |
| \$65,000.00 | |

Summary Table:

| Field | Value | Field | Value |
|--|-------|--|--------------|
| Number of Buses Requested From Application | 2 | Total Purchase Price for All Replacement Buses | \$350,000.00 |
| Number of Buses Ordered | 1 | Total Bus Rebate Amount | \$285,000.00 |
| | | Total Applicant Bus Cost Responsibility | \$65,000.00 |

6. The **Estimated Remaining Life*** field is for your best estimate of the years of remaining operational life of the old bus starting from the time of application submittal. This figure should be inclusive of the years of operation the bus may have had if not for the scrappage requirements and the years of operation the bus may have had even if it were sold to another fleet.
7. **Purchase Order Listing New Bus*** In this field, select the purchase order that is associated with this new bus from the purchase orders entered on Screen 3 with a **Purchase Order Purpose** of "Bus." If you don't see the purchase order associated with this new bus, go back to Screen 3 and enter the purchase order, or make sure you selected a Purchase Order Purpose of "Bus" if it is a purchase order that contains new buses.
8. The **Max. Rebate Amount** field is read-only and displays the applicable rebate amount for this bus. If a GVWR is provided that would reduce the awarded rebate amount, the updated value will display here. The maximum rebate cannot increase based on information in the Payment Request Form, but it may decrease due to a lower GVWR as noted.
9. **New Bus Fuel Type** is prepopulated from the information in the Application and is not editable.
10. **New Bus Make*** provides a list of bus manufacturers to choose from. If the manufacturer of your new bus is not shown, choose the "Other" option and an additional field will appear allowing you to enter the make of your new bus.
11. **New Bus Purchase Price*** should include the total price of the new bus and must be between \$30,000 and \$700,000. The total purchase price of the ordered replacement school bus should include tax and any eligible training/consulting/warranty line-item expenses associated with the individual bus in the purchase order. Do not include charging infrastructure costs here.
12. **New Bus Model Year*** is the manufacturing year of the new bus, which must be 2021 or later.
13. **New Bus Model*** is the model name (not the bus type) of the new bus.
14. The **Bus Rebate Amount** field is read-only and displays the amount of the designated rebate for this bus, based on the **Max. Rebate Amount** and the **New Bus Purchase Price**.
15. The **New Bus Estimated Delivery Date*** field is for the best estimate of the bus delivery date provided by the vendor. If the delivery date is past 10/31/2024, the form will let you know that an extension is required, although this will not prevent you from submitting your payment request form. EPA's payment request form reviewer will reach out to you to request documentation for a delivery date extension if needed.
16. The **New Bus GVWR*** field is for the bus gross vehicle weight rating in pounds. The form will provide a notice if a value entered warrants a lower rebate value. This could happen if the Rebate Application had a GVWR of >26,000 lbs. for this bus, but the bus is actually <=26,000 lbs.
17. The **Applicant Bus Cost Responsibility** field is read-only and displays the amount that the applicant will be responsible for paying, based on the **Max. Rebate Amount** and the **New Bus Purchase Price**.

When editing a purchase order or providing bus information, **you must click the “Complete” button (shown below) prior to “Save” or the data will be lost.** The “Cancel” button, next to the “Complete” button, should be used to revert back to the previously saved bus information if changes were made (and the “Complete” button was not selected), or to review what you entered for a saved purchase order.

Bus #
Old Bus Information

1 VIN

4 Model Year

2 Old Bus Fuel Type

5 Old Bus NCES District ID

The District ID above is inconsistent with application District ID. If this is intentional, please verify with the [NCES district search tool](#).

Confirm the above NCES District ID change above is accurate *

3 Exclude Bus

6 Estimated Remaining Life (years)

New Bus Information

7 Purchase Order Listing New Bus

9 New Bus Fuel Type

12 New Bus Model Year

15 New Bus Estimated Delivery Date

The **New Bus Est. Delivery Date** is beyond 10/31/24 and will require an extension.

10 New Bus Make

13 New Bus Model

16 New Bus GVWR

The GVWR entered has changed the **Maximum Rebate Amount** due a change in weight class for this bus from what was entered in the application.

8 Max. Rebate Amount

11 New Bus Purchase Price

14 Bus Rebate Amount

17 Applicant Bus Cost Responsibility

Complete
Cancel

Edit

Bus Number

2

Old Bus VIN: 34545345345343453

Old Bus Fuel Type: CNG

New Bus Fuel Type: Electric

Bus Excluded from Rebate

16

2.11 Exclude a Bus

If a bus that was previously entered in the Rebate Application will not be included in your Payment Request Form, you can select the **Exclude Bus** checkbox at the upper right of the **Old Bus Information** screen. No further information will be required for this bus, and the costs and awards for this bus and any associated electric charging infrastructure will not be included in totals presented elsewhere on the form.

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Clean School Bus Rebate Forms

- Clean School Bus Rebate Program
- Online Rebate Application Information

Your Rebate Forms | New Application | Helpdesk csb-test@erg.com | Sign out

Edit Your Payment Request

Rebate ID: 010716

4 of 6 Buses

This screen shows the buses that were submitted in your rebate application. Update Old Bus information and add New Replacement Bus information here.

** denotes required field*

| | | | |
|-------------|------------------------|---|---|
| Edit | Bus Number 1 | Old Bus VIN: 34534534534534534 Old Bus Fuel Type: Diesel New Bus Fuel Type: Electric | New Bus Rebate Amount: \$285,000 New Bus Purchase Price: \$350,000 |
|-------------|------------------------|---|---|

| | | | |
|-------------------|---------------------------------|--|--|
| Bus # 2 | Old Bus Information | Old Bus Fuel Type CNG | <input checked="" type="checkbox"/> Exclude Bus |
| | VIN 34545345345343453 | Old Bus NCES District ID BIE0013 | |
| | Model Year 1985 | | |

Complete **Cancel**

| | | | |
|--|---|--|--------------|
| Number of Buses Requested From Application | 2 | Total Purchase Price for All Replacement Buses | \$350,000.00 |
| Number of Buses Ordered | 2 | Total Bus Rebate Amount | \$285,000.00 |
| | | Total Applicant Bus Cost Responsibility | \$65,000.00 |

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

Previous **Next** **Save**

[Contact Us](#) to ask a question, provide feedback, or report a problem.

2.12 Complete Bus Information

Once information has been entered completely for the buses, the fields at the bottom of the page will calculate totals based on this information. This information includes the total number buses from the application and the number ordered, in case a bus(es) is excluded. The total price of all buses, the total rebate amount for all buses, and the total applicant cost responsibility (if the total price is higher than the rebate amount) are also presented.

Once your new bus information has been entered, select “Next” to continue.

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Edit Your Payment Request

Rebate ID: 010716

4 of 6 Buses

This screen shows the buses that were submitted in your rebate application. Update Old Bus information and add New Replacement Bus information here.
** denotes required field*

| | | | |
|----------------------|-----------------|--|---|
| Edit | Bus Number 1 | Old Bus VIN: 34534534534543534 Old Bus Fuel Type: Diesel New Bus Fuel Type: Electric | New Bus Rebate Amount: \$285,000 New Bus Purchase Price: \$350,000 |
| Edit | Bus Number 2 | Old Bus VIN: 34545345345343453 Old Bus Fuel Type: CNG New Bus Fuel Type: Electric | Bus Excluded from Rebate |

| | | | |
|--|---|--|--------------|
| Number of Buses Requested From Application | 2 | Total Purchase Price for All Replacement Buses | \$350,000.00 |
| Number of Buses Ordered | 1 | Total Bus Rebate Amount | \$285,000.00 |
| | | Total Applicant Bus Cost Responsibility | \$65,000.00 |

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

[Previous](#) [Next](#) [Save](#)

[Contact Us](#) to ask a question, provide feedback, or report a problem.

2.13 Infrastructure Information

If any of the replacement buses have a **New Bus Fuel Type** of “Electric,” the Infrastructure step will be included in the Payment Request form. Enter the applicable data fields for Level 2 or DC Fast Charging systems, as well as other eligible costs related to charging infrastructure. Level 2 charging infrastructure must be [Energy Star®](#) certified, and EPA encourages DC fast chargers to be listed by a Nationally Recognized Testing Laboratory. The form will then display the following fields to provide totals based on the information entered:

- **Maximum Infrastructure Rebate Funds Based on Application** – Prefilled based on information from the Application, and not editable. If you excluded an old bus associated with new electric replacement bus infrastructure rebate funds, that amount will be deducted from the Maximum Infrastructure Rebate Funds Based on Application field.
- **Total of All Eligible Charging Infrastructure Costs** – Calculated field summarizing the three “Cost” fields above.
- **Total Infrastructure Rebate Amount** – The amount of the rebate that will be utilized, based on the entered costs.
- **Applicant Infrastructure Cost Responsibility** – The amount that the applicant will be responsible for paying, based on the **Total of All Eligible Charging Infrastructure Costs** and the **Maximum Infrastructure Rebate Funds Based on Application**.

Select “Next” to continue.

If infrastructure costs are entered, you must confirm that purchase orders have been entered in the Payment Request Form to account for those costs. If there are infrastructure costs, at least one Electric Bus Charging Infrastructure purchase order is required.

Any purchase order indicated with a “Purchase Order Purpose” of “Electric Bus Charging Infrastructure” will be listed on this screen for your reference. If there is a problem, such as a purchase order that was not entered, or a purchase order that needs the “Purchase Order Purpose” corrected, select “Back to PO Entry.”

Edit Your Payment Request
Rebate ID: 010716

5 of 6 Infrastructure

Enter eligible electric bus charging infrastructure information below.
* denotes required field

| | |
|--|--|
| Number of Level 2 Chargers <input type="text"/> | Total of Level 2 Charger Pedestal Costs <input type="text"/> |
| <small>Level 2 chargers must be Energy Star Certified.</small> | |
| Number of DC Fast Chargers <input type="text"/> | Total of DC Fast Charger Pedestal Costs <input type="text"/> |
| | Total of Other Eligible Charging Infrastructure Costs <input type="text"/> |

Infrastructure Purchase Orders

Purchase Orders (PO) listed below were identified on the PO entry [Screen 3] as including “Electric Bus Charging Infrastructure”.

| PO Number | PO Date | Vendor Name |
|-----------|------------|------------------|
| 2222222 | 2022-11-24 | Charger Emporium |

| | |
|---|-------------|
| Maximum Infrastructure Rebate Funds Based on Application <input type="text"/> | \$40,000.00 |
| Total of All Eligible Charging Infrastructure Costs <input type="text"/> | \$0.00 |
| Total Infrastructure Rebate Amount <input type="text"/> | \$0.00 |
| Applicant Infrastructure Cost Responsibility <input type="text"/> | \$0.00 |

I confirm that expenses entered above, if any, are accurate. *

Select the “Back to PO Entry” button below, if other PO’s need to be entered for the infrastructure listed above on this screen.

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

Contact Us to ask a question, provide feedback, or report a problem.

2.14 Signature

To complete your payment request form, you must read and agree to the “Total Bus and Infrastructure Rebate Amount” and the “Total Applicant Bus and Infrastructure Cost Responsibility” shown at the top of the screen as well as certify to the items listed on this page by signing, confirming your signature, and clicking “Submit Form.” The “Name” and “Title” fields on this page are auto-filled for the individual that initiated the form based on their SAM.gov Point of Contact information.

If you sign and confirm your signature, but then return to a previous screen to make edits, you will need to repeat the signature and confirmation steps.

If a different user wishes to sign and submit the form, they must also be a SAM.gov point of contact for your organization and will need to use Login.gov to enter the Clean School Bus Rebate Forms site to complete the payment request form (saved as a draft). **In this case, they must edit the “Name” and “Title” fields to show their full name and title before signing and submitting.**

Once you submit the payment request form, the Primary and Alternate SAM.gov Government and Electronic Points of Contact, and the Primary and Alternate Applicant Contacts will receive an email confirmation that the form has been submitted. Additionally, the applicant dashboard for this payment request form will show the form as “Submitted.”

If you submit the payment request form and then later need to edit the form before review has started, contact the help desk at cleanschoolbus@epa.gov and include the Applicant Name, Rebate ID, Unique Entity Identifier (UEI), Electronic Funds Transfer (EFT) Indicator, and School District Name.

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Your Rebate Forms | My Account | HelpDesk

csb-test@epa.gov | Sign out

Edit Your Payment Request

Rebate ID: 010716

6 of 6 Signature

* denotes required field

Summary

| | | | |
|--|--------------|--|-------------|
| Total Bus and Infrastructure Rebate Amount | \$325,000.00 | Total Applicant Bus and Infrastructure Cost Responsibility | \$80,000.00 |
|--|--------------|--|-------------|

Signature and Certification

The individual listed below must sign and submit this payment request before it will be considered for funding by the EPA. If you do not have the authority to sign this payment request, then notify the authorized representative so they can sign and submit the payment request. Note: The authorized representative must be registered as either the Government Business (and alternate), or Electronic Business (and alternate) Point of Contact in SAM.gov to access this payment request.

By signing and submitting this payment request, applicants certify that:

- They have read and agree to comply with the requirements and terms and conditions in the 2022 Clean School Bus (CSB) Rebates Program Guide. This certification is material representation that EPA will rely upon in providing funds for vehicle replacement rebates. False certifications may result in criminal prosecution under 18 U.S.C. § 1001, civil liability under the False Claims Act, 31 U.S.C. § 3729 et seq. and/or the Program Fraud Civil Remedies Act, 31 U.S.C. § 3801 et seq., suspension and/or debarment pursuant to 2 C.F.R. Part 180, and/or other criminal, civil or administrative penalties, sanctions, and remedies available to the Federal government.
- Old buses listed to be replaced and new replacement buses must meet the eligibility requirements in the 2022 CSB Rebates Program Guide and, if selected for funding, old buses will be disposed of according to the Program Guide requirements.
- Replacement buses and associated charging/fueling infrastructure funded in this program was not ordered until after official notification of selection.
- They have the authority to represent the applicant organization listed on this form.
- The public school system that will be served by the replacement buses for at least five years has been notified and approves of the proposed bus replacements.
- The statements and information provided in this application are true and accurate to the best of their knowledge.
- They will respond to EPA or its representatives if contacted to clarify information submitted in this payment request.

Sign the form by using your mouse cursor as a pen.

Once this payment request form is submitted, you, the other SAM.gov points of contact listed in the first paragraph on this screen, and the Primary and Alternate applicant contacts will receive an email confirmation. The applicant dashboard will show **submitted** as the status.

Name: CSB TESTER | Title: MANAGER

Electronic Signature of Authorized Representative: [Handwritten Signature]

I confirm I have provided my signature above*

NOTE: Use of the browser back, forward, or refresh buttons will result in loss of work. Please navigate using the buttons at the bottom of the form.

Previous | Submit Form

Contact Us to ask a question, provide feedback, or report a problem.

2.15 Next Steps

EPA will review submissions for completeness and accuracy and follow up with questions as needed.

If EPA needs clarification or needs you to edit your payment request form during the review process, the Primary and Alternate SAM.gov Government and Electronic Points of Contact and the Primary and Alternate Applicant Contacts will be notified by email.

If edits are requested, when you login to the applicant dashboard, the status of your payment request form will either be "Draft" or "Edits Requested." These statuses will allow you to go back into your form and make additions and edits as needed.

If your payment request form has a status of "Submitted" or "Needs Clarification" on the applicant dashboard, you will be able to view but not edit the form. In the latter case, you will be instructed to provide clarifications by email.

Appendix A. Glossary

The following provides definitions of terms and abbreviations used throughout the payment request form and system screens.

Your Rebate Forms Screen: Definitions

- Form Type—Application, Payment Request, or Close-Out Form.
- UEI—Unique Entity ID from SAM.gov.
- EFT Indicator—Electronic Funds Transfer Indicator for the associated bank account from SAM.gov.
- Applicant—Legal Business Name from SAM.gov for this UEI.
- School District—School District represented by the applicant.
- Updated by—Last person to update the form.
- Date Updated—Last date this form was updated.
- Status—submitted, draft, needs clarification, edits requested, or withdrawn.

Payment Request Form Screens: Definitions

- Applicant Bus Cost Responsibility – Auto-filled with the calculated value, based on the cost of the bus, that the applicant will be responsible to pay for that exceeds the rebate.
- Applicant Infrastructure Cost Responsibility – This number represents the amount, based on the costs provided in this form, that the applicant will be responsible to pay after the rebate.
- Applicant Name – Name auto-filled from the previously submitted application form.
- Attach Purchase Order – Attach a file or scan of the purchase order for the bus and/or eligible charging infrastructure. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. The maximum file size is 5MB and the minimum file size is 1KB.
- Bus Rebate Amount – This field will be auto-filled with the rebate dollar amount. If the actual bus cost from the purchase order is greater than or equal to the rebate amount from the application, then this will display the rebate amount from the application. If the actual bus cost is less than the rebate amount from the application, this will display the actual bus cost.
- Bus # – Incremental bus identifier auto-filled for this form.
- Business Email (Primary and Alternate) – Verify that the Primary and Alternate Contact business emails for your organization are correct. If not, update them with the current business emails.
- Business Phone Number (Primary and Alternate) – Verify that the Primary and Alternate Contact business phone numbers for your organization are correct. If not, update them with the current business phone numbers.
- Electronic Signature of Authorized Representative – Sign the form by using your mouse cursor as a pen.

- Estimated Remaining Life (years) – Provide your best estimate of the years of remaining operational life of the old bus starting from the time of application submittal. This figure should be inclusive of the years of operation the bus may have had if not for the scrappage requirements and the years of operation the bus may have had even if it were sold to other fleets.
- Exclude Bus – Check the box if you want to exclude the bus and its replacement bus rebate from this payment request form.
- Max Rebate Amount – Auto-filled with the maximum rebate amount for the replacement bus, as determined by the GVWR, fuel type, and school district priority.
- Maximum Infrastructure Rebate Funds Based on Application – Total of infrastructure funding available for all requested electric school bus replacements based on the number of electric buses ordered and the prioritization of the school district that the buses will serve. If you excluded an old bus associated with new electric replacement bus infrastructure rebate funds, that amount will be deducted from the Maximum Infrastructure Rebate Funds Based on Application field.
- Name (Primary and Alternate) – Verify that the Primary and Alternate Contact names for your organization are correct. If not, update them with the current names.
- Name, Title – The name and title of the authorized representative are automatically filled in from SAM.gov information.
- National Center for Education Statistics (NCES) District ID – The seven-character NCDES District ID that was entered for this school district in the application. Auto-filled from the previously submitted application form.
- New Bus Estimated Delivery Date – Enter the date of your estimated delivery date from the purchase order in the format of MM/DD/YYYY.
- New Bus Fuel Type – Auto-filled with the replacement bus fuel type selected in your application.
- New Bus GVWR – Enter the gross vehicle weight rating (GVWR) in pounds for the ordered replacement bus.
- New Bus Make – Select or enter the manufacturer of the ordered replacement bus.
- New Bus Model – Enter the model (not the bus type) of the ordered replacement bus.
- New Bus Model Year – Enter the vehicle model year of the ordered replacement bus.
- New Bus Purchase Price – Enter the purchase price of the ordered replacement school bus, including tax and any eligible training/consulting/warranty line-item expenses associated with the individual bus in the purchase order. Do not include charging infrastructure costs here.
- Number of Buses Requested from Application – The number is automatically filled from your application.
- Number of DC Fast Chargers – Enter the number of DC Fast chargers ordered based on the number of bus charging plugs. A DC charger with two plugs would be considered two chargers.
- Number of Level 2 Chargers – Enter the number of Level 2 AC chargers ordered based on the number of bus charging plugs. A Level 2 charger with two plugs would be considered two chargers.

- Number of Replacement Buses Ordered – The number is automatically filled from your application.
- Old Bus Fuel Type – Auto-filled from the application with the fuel type of the bus to be replaced.
- Old Bus Model Year – Auto-filled from the application with the vehicle model year of the bus to be replaced.
- Old Bus NCES District ID – Auto-filled with the NCES ID from the application.
- Old Bus VIN – Auto-filled with the vehicle identification number (VIN) of the bus to be replaced from the application.
- Private Fleet Name – Name auto-filled from the previously submitted application form.
- Purchase Order Date – Enter the purchase order date displayed on your purchase order in the format of MM/DD/YYYY.
- Purchase Order Number – Enter the purchase order number that appears on this purchase order.
- Purchase Order Purpose – Indicate the purpose for this purchase order (bus, electric charging infrastructure, or both). Note that propane and CNG vehicles are not eligible for an infrastructure rebate.
- Purchaser Address – Enter the street address of the purchaser.
- Purchaser Business Phone Number – Enter the business phone number of the bus purchaser.
- Purchaser City – Enter the city of the purchaser.
- Purchaser Name – Select the organization from your application that is purchasing the new bus or select “Other” and manually fill in the purchaser organization information.
- Purchaser State or Territory – Enter the state or territory from the drop-down list for the purchaser.
- Purchaser Zip – Enter the five-digit zip code or the five-digit zip plus 4 (e.g., NNNNN-NNNN) for the purchaser.
- Rebate ID – This number is a unique identifier that was automatically generated when you submitted your rebate application and is used to track all required forms for this rebate.
- School District Name – Name auto-filled from the previously submitted application form. This is the school district name that corresponds to the NCES District ID that was submitted for this application.
- School District Prioritization – Priority level auto-filled from the application.
- School District Prioritized? – “Yes/No” value auto-filled from the previously submitted application form.
- Title (Primary and Alternate) – Verify that the Primary and Alternate Contact titles for your organization are correct. If not, update them with the current titles.
- Total Applicant Bus and Infrastructure Cost Responsibility – This field is automatically filled with a number that represents the dollar amount, based on the costs provided in this form, that the applicant will be responsible to finance after the rebate.
- Total Applicant Bus Cost Responsibility – Auto-filled with the calculated dollar value, based on the costs provided in this form, that the applicant will be responsible to pay for that exceeds the rebate.

- Total Bus and Infrastructure Funds to be Paid – This field is automatically filled from your application. This is the sum of the “Total Bus Rebate Amount” and “Total Infrastructure Funds” fields.
- Total Bus Rebate Amount – Auto-filled with the calculated dollar value that is the sum of all the Bus Rebate Amounts values for each bus ordered.
- Total Infrastructure Funds to be Paid – This field is automatically filled from your application. If total infrastructure costs from the purchase order are greater than or equal to the rebate amount from the application, then this will display the total infrastructure rebate amount from the application. If total actual infrastructure costs are less than the rebate amount from the application, this will display the total actual infrastructure costs.
- Total of All Eligible Charging Infrastructure Costs – This is the total of the purchase order costs for Level 2 and DC Fast Chargers, as well as any other eligible infrastructure costs entered in previous fields.
- Total of DC Fast Charger Pedestal Costs – Enter the total of ordered DC Fast Charger pedestal costs reflected in the purchase order(s). This total is for the pedestal hardware alone and should not include other costs like installation or running electricity to the site of the charger.
- Total of Level 2 Charge Pedestal Costs – Enter the total of ordered Level 2 charger pedestal costs reflected in the purchase order(s). This total is for the pedestal hardware alone and should not include other costs like installation or running electricity to the site of the charger.
- Total of Other Eligible Charging Infrastructure Costs – Enter the other eligible charging infrastructure costs that are reflected in the purchase order(s). Eligible infrastructure costs are limited to infrastructure from the electrical meter through the plug for the bus and can include design, engineering, and installation costs such as trenching, wiring and electrical upgrades, labor, and permitting. These costs must not include charging pedestal hardware costs that are entered elsewhere in the Payment Request Form.
- Total Purchase Price for All Replacement Buses – Auto-filled with the calculated dollar value based on the actual cost of all the buses ordered.
- Total Rebate Funds Requested in Application – This is the total bus and infrastructure (if applicable) funds requested based on your application.
- Vendor Address – Enter the street address of the vendor.
- Vendor Business Phone Number – Enter the business phone number of the vendor.
- Vendor City – Enter the city of the vendor.
- Vendor Name – Enter the name of the vendor whom the buses and equipment are being purchased from.
- Vendor State or Territory – Enter the state or territory from the drop-down list for the vendor.
- Vendor Zip – Enter the five-digit zip code or the five-digit zip plus 4 (e.g., NNNNN-NNNN) for the vendor.

Appendix B. List of Fields in

Payment Request Form

The payment request form requires some or all of the following information. Fields with an asterisk are required. Some required fields are automatically filled from information submitted in your application.

Application Info (Screen 2)

Applicant Name

School District Prioritized?

School District Name

NCES District ID

Total Rebate Funds Requested in the Application

Primary Contact Information

Name

Title

Business Phone Number

Business Email

Alternate Contact Information

Name

Title

Business Phone Number

Business Email

Purchase Orders (Screen 3)

Purchase Order Information

Purchase Order Number

Purchase Order Date

Purchase Order Purpose (circle one or both): Bus Electric Charging Infrastructure

Purchaser Information

Purchaser Organization

Purchaser Address

Purchaser Business Phone Number

Purchaser City

Purchaser State or Territory

Purchaser Zip

Vendor Information

Vendor Name

Vendor Address

Vendor Business Phone Number

Vendor City

Vendor State or Territory

Vendor Zip

Attachment of Purchase Order (.pdf, .png, .jpeg, .jpg). Minimum file size: 1KB. Maximum file size: 5MB.

Buses (Screen 4)

Bus Information:

Make copies for additional buses if needed

Old Bus

| | | |
|-----------------------------------|---|----------------------------|
| _____ VIN | _____ Model Year | _____ Old Bus Fuel Type |
| _____ Old Bus NCES District ID | _____ Estimated Remaining Life (years) | |
| Exclude Bus: Yes/No | | |

New Bus

| | | |
|--|--|-----------------------------|
| _____ Purchase Order Number | _____ Purchase Order Date | |
| _____ Vendor Name | | |
| _____ New Bus Make | _____ New Bus Model | _____ New Bus Model Year |
| _____ New Bus Purchase Price | _____ New Bus Estimated Delivery Date | _____ New Bus GVWR |
| _____ New Bus Fuel Type | _____ Max Rebate Amount | _____ Bus Rebate Amount |
| _____ Applicant Bus Cost Responsibility | | |

Infrastructure (Screen 5)

Only if any of the replacement buses have an electric fuel type

Number of Level 2 Chargers

Total of Level 2 Charger Pedestal Costs

Number of DC Fast Chargers

Total of DC Fast Charger Pedestal Costs

Total of Other Eligible Charging Infrastructure Costs

Signature (Screen 6)

Name

Title

Electronic Signature of Authorized Representative

I confirm I have provided my signature above: Yes/No