# **2022 EPA Clean School Bus Rebate Forms**

**Application User Guide** 

May 20, 2022



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# **Before You Begin**

This guide will walk you through the steps needed to create, edit, submit, and view your 2022 Clean School Bus rebate application online. 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.

Follow these steps to prepare for completing the application:

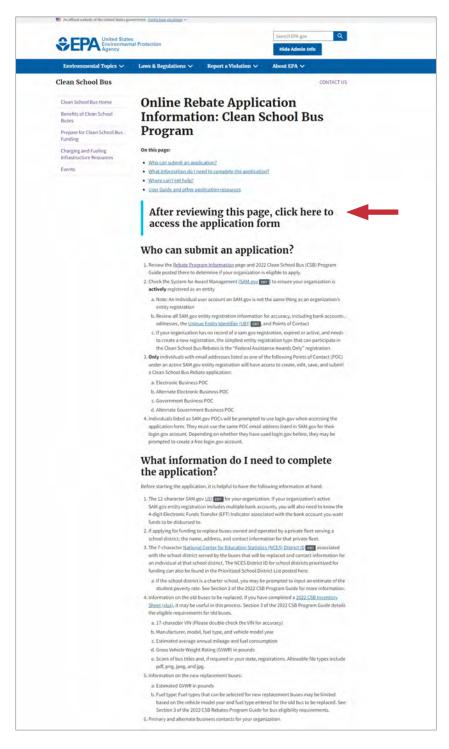
- 1. **Confirm SAM.gov Points of Contact.** Confirm that the email of the person completing the application is registered as a designated Point of Contact (POC) in your organization's active SAM.gov entity registration. Otherwise, the person will not be able to use the rebate application system. Click <a href="here">here</a> for more information on SAM.gov POCs.
- 2. Review the glossary of terms used in the rebate application (see Appendix A).
- 3. Compile all required data. Appendix B provides a printable list of all necessary data fields.
- **4. Check browser version.** Before filling out the rebate application, make sure the web browser version meets or exceeds the following versions:
  - Chrome 38
  - Safari 7.1
  - Internet Explorer 11
  - Firefox 13

**Note:** The heading numbers on the following pages correspond to the application screen sequence.

# 1. Sign In/Register

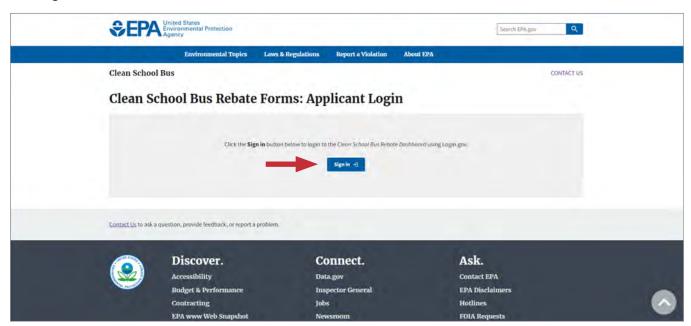
## 1.1 Online Rebate Application Information

Access the online rebate application from the Clean School Bus Program online rebate application information page.



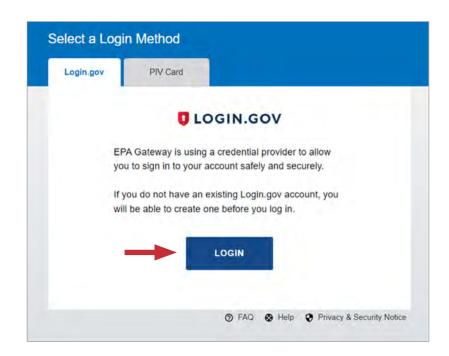
# 1.2 Applicant Login

Select "Sign in".



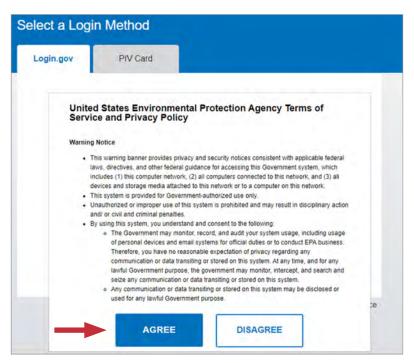
# 1.3 Login.gov

Select "Login".



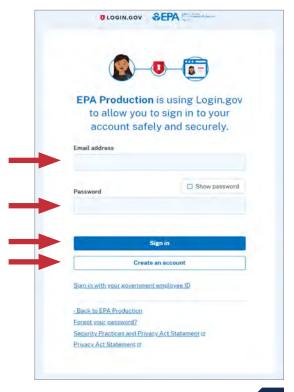
## 1.4 Terms of Service and Privacy Policy

Select "Agree" to continue.



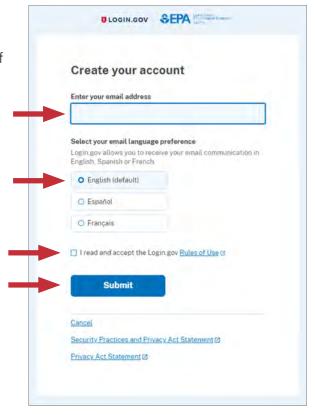
# 1.5 Login.gov Account

If you have a Login.gov account with a POC email address listed in your organization's SAM.gov entity registration, enter that email address and password and select "Sign in", then skip to <a href="Step 2">Step 2</a> <a href="Create/Edit a New Application">Create/Edit a New Application</a>. Otherwise, select "Create an account".



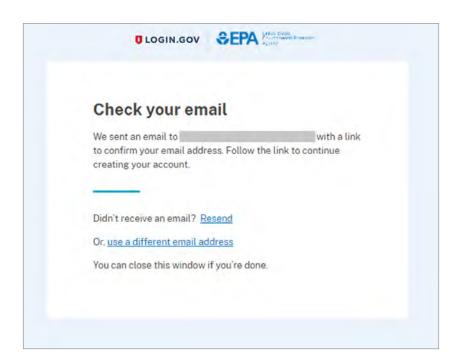
### 1.6 Create Your Account

Enter your SAM.gov POC email address, select your language preference, select the checkbox to accept the Login.gov rules of use after reading, and select "Submit".



### 1.7 Email Confirmation

Check your email.

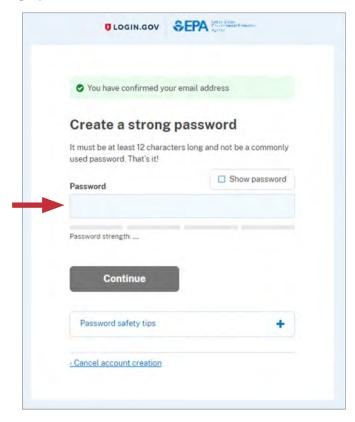


### 1.8 Confirm Email Address

Open the confirmation email from Login.gov and select "Confirm email address".

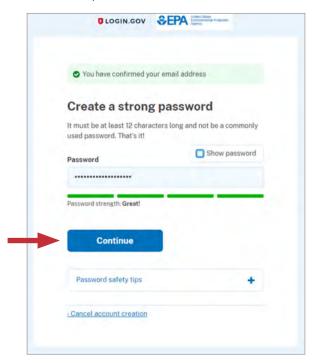


### 1.9 Create a Password



### 1.10 Continue Once Password Created

Select "Continue" once you have entered a password.



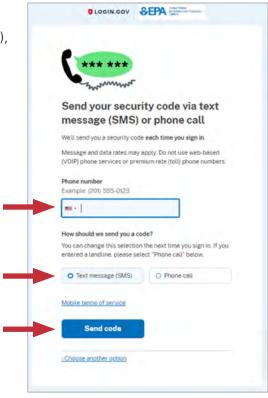
### 1.11 Authentication Methods

Select one of the five authentication methods, then select "Continue". The following steps in this guide will only walk through the "Text or Voice Message" option, but you can use the option that best suits your needs.



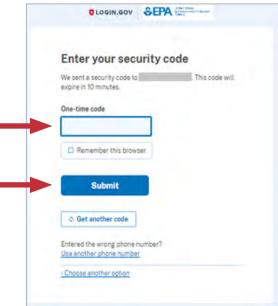
### 1.12 Authentication: Phone Number

Enter a phone number, select a preferred delivery method (text or call), and select "Send code".



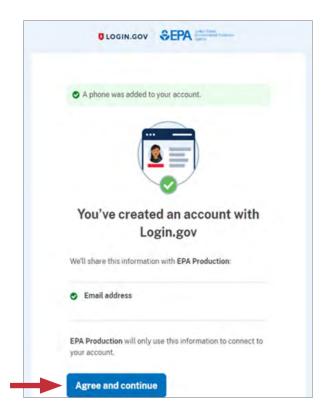
# 1.13 Authentication: Security Code

Enter the security code you receive and select "Submit". Select "Remember this browser" if you do not want to enter a security code again.



# 1.14 Login.gov Account Created

Select "Agree and continue".



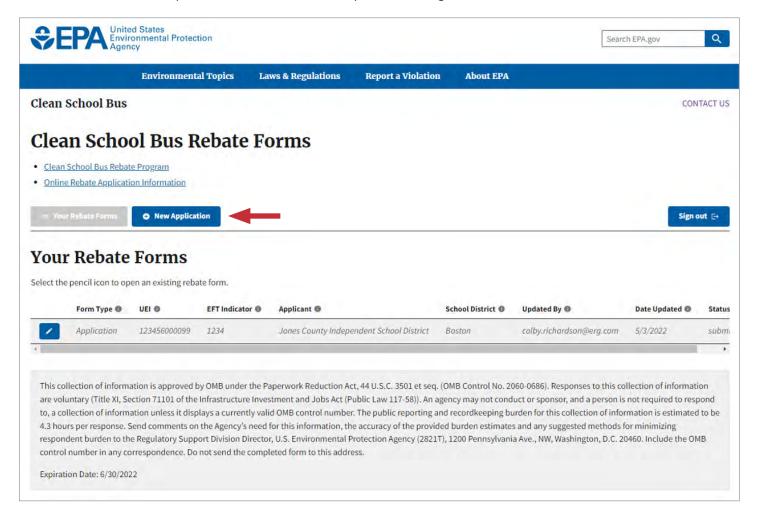
# 2. Create/Edit a New Application

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

# 2.1 Start a New Application

Select the "New Application" button to begin.

**Note:** Your connection to the rebate application 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.



# 2.2 Continue with New Application

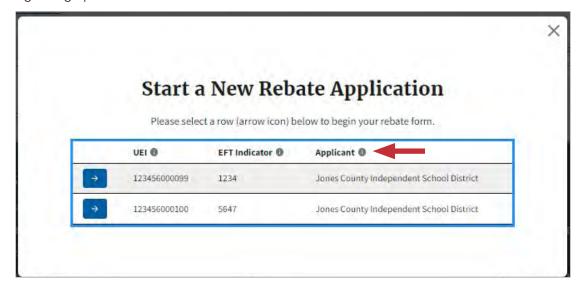
Select the specific SAM.gov account (denoted by Unique Entity Identifier (UEI), Electronic Funds Transfer (EFT) Indicator, and Applicant name) to open a new application form.

**Note:** Most organizations will only have one UEI+EFT combination, but some may have more than one account from which to choose. For example, an organization may have registered multiple bank accounts in SAM.gov, each with its own EFT Indicator, to receive different grant payments. Therefore, review the specific UEI, EFT, and applicant name options carefully before proceeding.



### 2.3 Information Icons

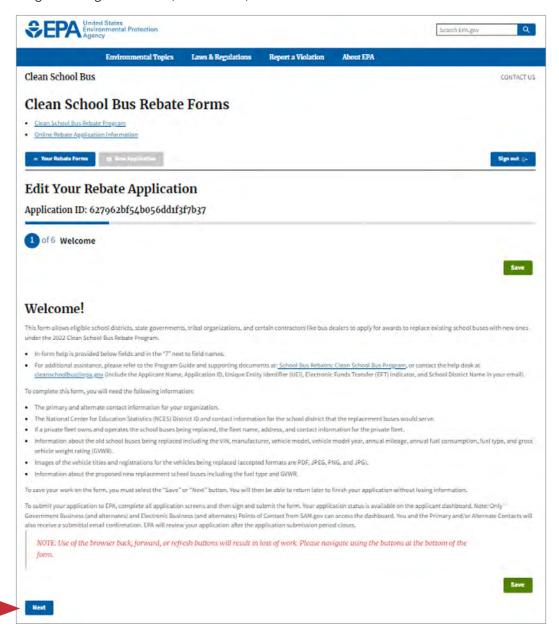
**Note:** Hover your mouse over the information icons, found throughout the application screens, for additional information regarding specific fields.



### 2.4 Welcome Screen

Review the text on the "Welcome!" screen and select "Next" to proceed.

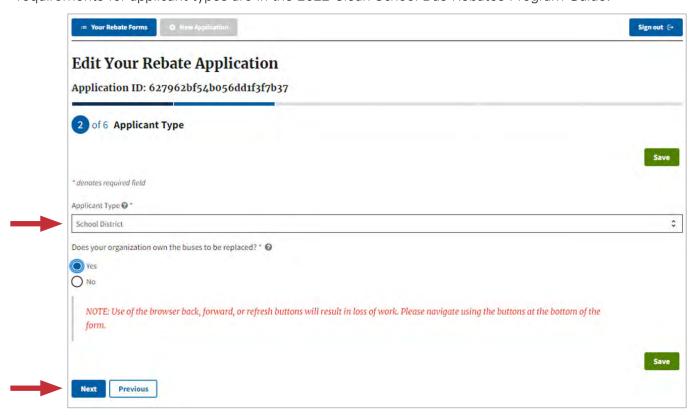
**Note:** Use of the browser back, forward, or refresh buttons while in the rebate application will result in loss of work. Please navigate using the "Next", "Previous", and "Save" buttons on the screen.



## 2.5 Applicant Type

Select the "Applicant Type" using the drop-down menu to identify the type of organization you are representing. Then provide requested information regarding bus fleet ownership and operation information.

**Note:** School Districts, State Governments, and Indian Tribes or Tribal Organizations must either apply to replace buses they own, or buses owned and operated by a private fleet. Nonprofit School Transportation Associations and Bus Dealers or Organizations that Arrange Financing for Bus Purchases must either apply to replace buses owned by a school district or buses owned and operated by a private fleet. Eligibility requirements for applicant types are in the 2022 Clean School Bus Rebates Program Guide.

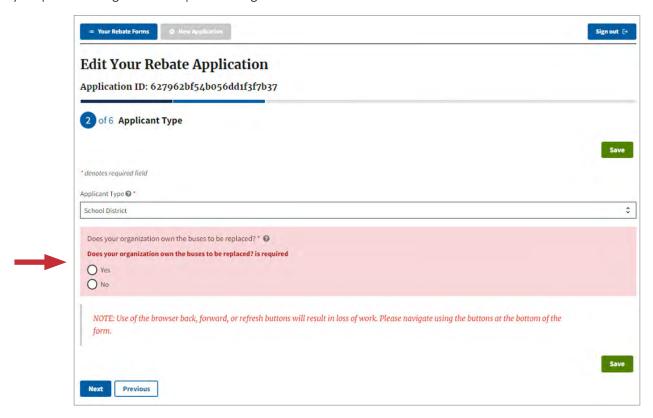


# 2.6 Correcting Errors and Saving Draft Applications

The following provides useful information about identifying and addressing data entry errors, saving and editing data, and reviewing/finalizing draft applications.

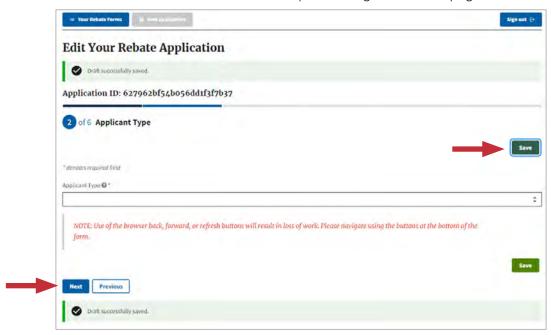
### 2.6.1 Data Entry Errors

If data entry errors are detected (e.g., missing required fields), they will be highlighted for your attention. Make any required changes before proceeding.



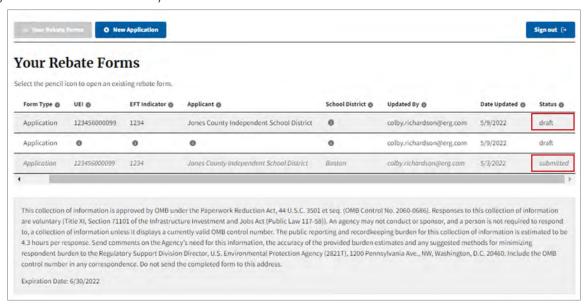
### 2.6.2 Saving and Editing Your Information

You can save your work while filling out the rebate application 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.



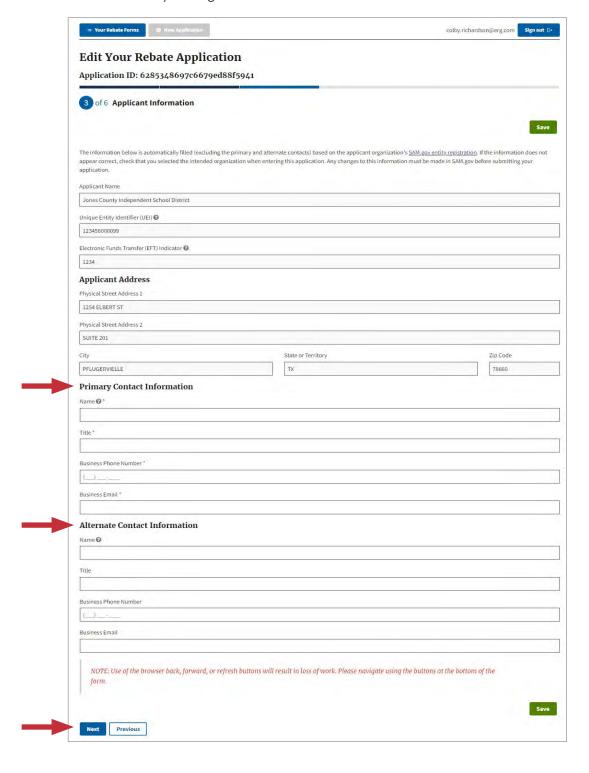
## 2.6.3 View Draft and Submitted Applications

After saving and exiting the application, you can return to the "Clean School Bus Rebate Forms" screen later, open the draft application, and navigate where you left off. Selecting applications with a "submitted" status will allow you to view but not edit your entries.



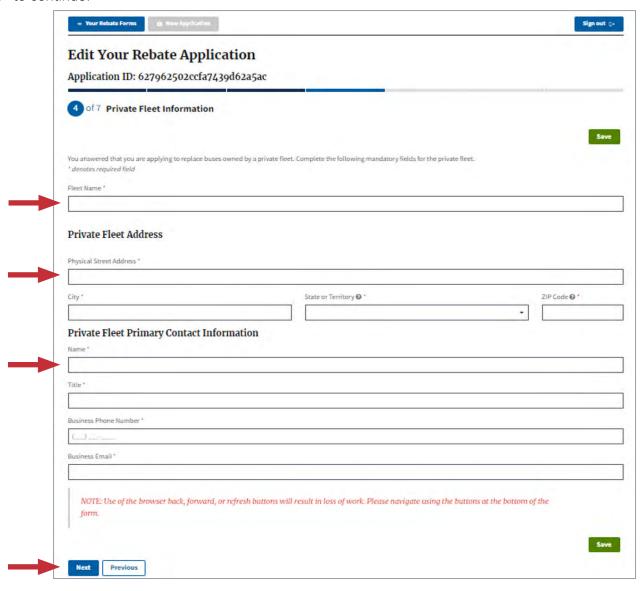
# 2.7 Applicant Information

The Applicant Name, UEI, EFT, and address will be autofilled from SAM.gov data. Enter a primary and optionally an alternate contact for your organization. Select "Next" to continue.



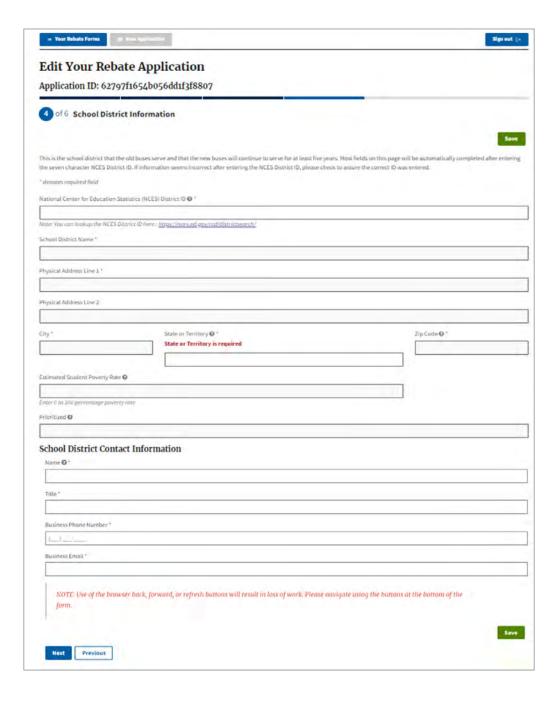
### 2.8 Private Fleet Information

If you answered "Yes" to the earlier prompt, "Are you applying to replace buses owned and operated by a private bus fleet?", you will be asked to fill in "Private Fleet Information". Enter the required data fields. Select "Next" to continue.



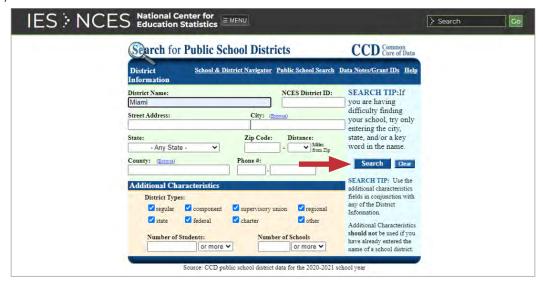
#### 2.9 School District Information

This page of the application collects information on the school district the old buses currently serve and that the new replacement buses will continue to serve. Most of the school district information will be autofilled after entering the National Center for Education Statistics (NCES) District ID.



#### 2.10 NCES District ID

You can look up your NCES District ID here: <a href="https://nces.ed.gov/ccd/districtsearch/">https://nces.ed.gov/ccd/districtsearch/</a>. Enter one or more identifiers for your district and select "Search".



#### 2.11 NCES District ID: School District Selection

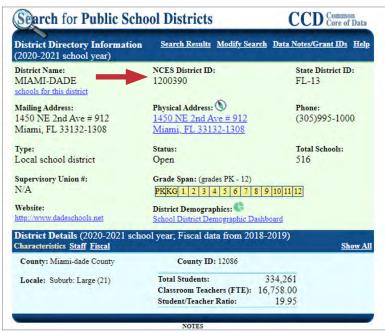
Select the correct school district.



#### 2.12 NCES District ID: Seven Character Number

Your seven character NCES District ID will be displayed at the top of the district information summary screen.

Return to the rebate form and enter your NCES District ID. Most of the school district information will then be autofilled. In some cases, you may need to fill in information because it is not available from NCES. The form will highlight any required fields that are not filled out.



# 2.13 Estimated Student Poverty Rate

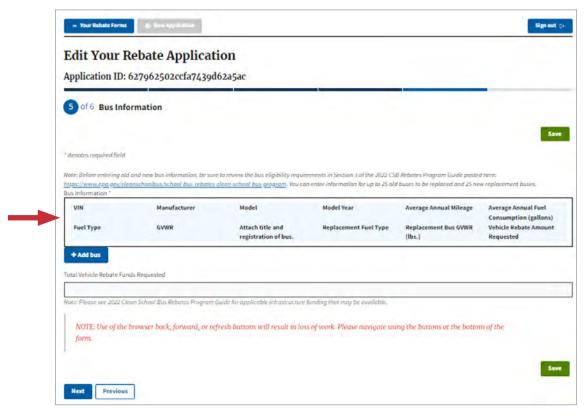
Most school districts will be automatically identified with their prioritization status as "Yes" or "No" in the "Prioritized" field. However, in some cases, as seen in the screenshot below, the "Prioritized" field will display "Self-Certify". If this displays, the applicant must input an "Estimated Student Poverty Rate". See Section 2 of the 2022 CSB Rebates Program Guide for more information on prioritization and estimating the student poverty rate.



Complete the School District Information screen by entering contact information for a representative of the school district and selecting "Next" to continue.

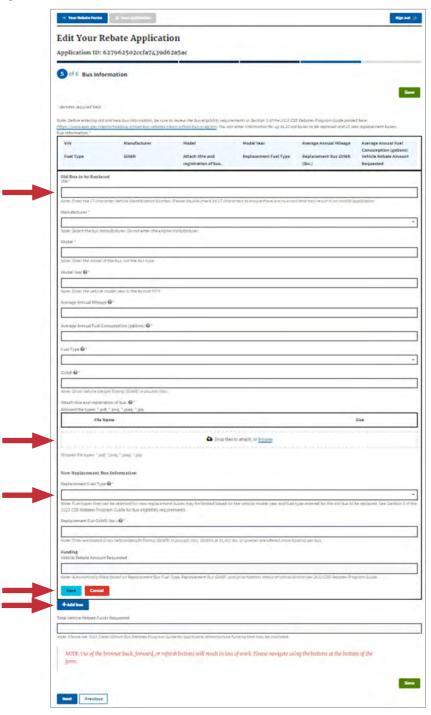
## 2.14 Bus Information

Use this screen to enter the information on the old and new buses. Select the "Add Bus" button to begin.



## 2.15 Bus Information: Data Entry

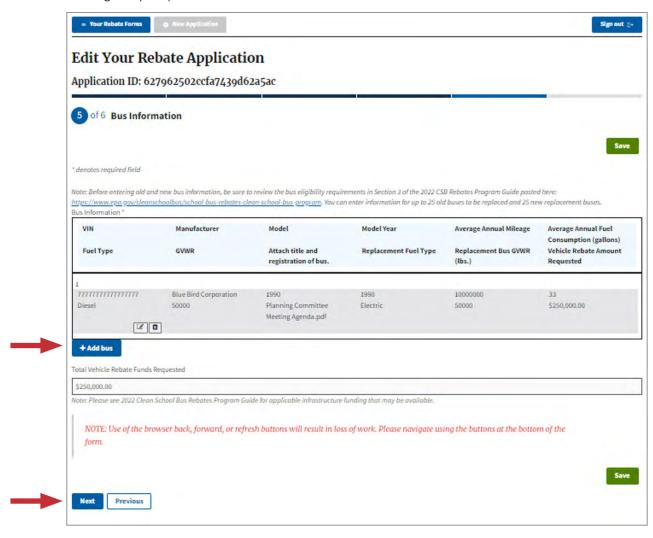
Provide the requested information for each bus using the data entry boxes and drop-down menus. Make sure the Vehicle Identification Number (VIN) has exactly 17 alphanumeric characters and is accurate. Attach a file with a scan of the title and registration (if required in your state or territory) for each old bus using the drag-and-drop feature or "browse" link. Allowable file types include pdf, png, jpeg, and jpg. Files must be 5MB or smaller to upload. Then select the fuel type and GVWR of the corresponding replacement bus. The vehicle rebate funding amount will be filled automatically. Select the "Save" button above the "Add Bus" button to save the information for each individual bus replacement.



## 2.16 Enter Multiple Buses

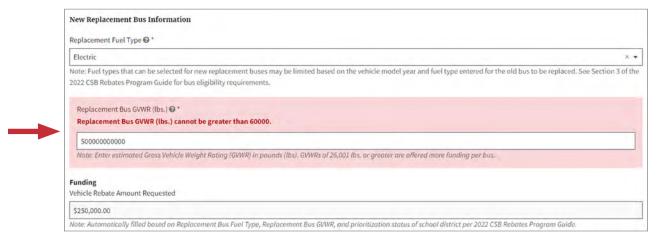
You may select "Add Bus" to continue entering information for another vehicle. You may enter information for up to 25 old buses and their corresponding new replacement buses. Click "Next" to continue. The Total Vehicle Rebate Funds Requested field is automatically calculated based on the sum total of funds requested for each bus. Please see the 2022 Clean School Bus Rebates Program Guide for applicable infrastructure funding that may be available.

**Note:** Fuel types that can be selected for new replacement buses may be limited based on the vehicle model year and fuel type entered for the old bus to be replaced. See Section 3 of the 2022 CSB Rebates Program Guide for bus eligibility requirements.



# 2.17 Value Ranges

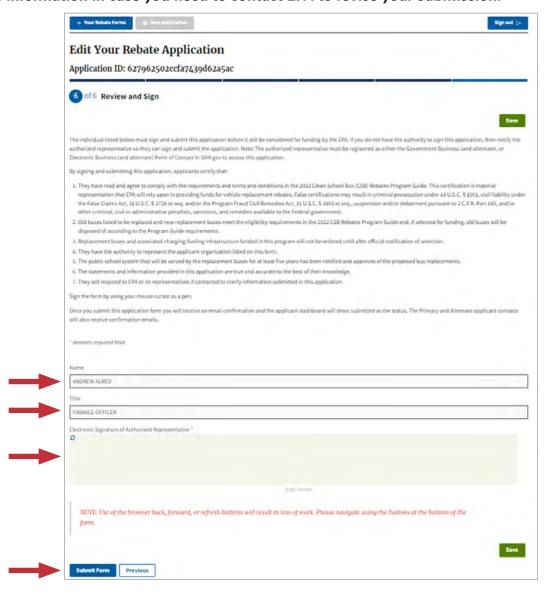
If missing or out of range values are detected, they will be highlighted for your attention. Make any required changes and select "Save" before proceeding.



## 2.18 Review and Sign Application

To complete your application, you must read and agree to the certification statement on this page, sign, and click "Submit Form". You may want to use the "Previous" button to review the entirety of the application before proceeding with submission. The "Name" and "Title" fields on this page are autofilled for the individual that initiated the form based on their SAM.gov POC information. If a different user wants to sign and submit the form, they must also be a SAM.gov POC for your organization and will need to use login.gov to enter the Clean School Bus Rebate Forms site to complete the application that was saved as a draft. In this scenario, they must edit the "Name" and "Title" fields to show their own full name and title before signing and submitting.

The submitter will receive an email confirming receipt of the submission with an application number. *Please* save this information in case you need to contact EPA to revise your submission.



### 3. Submission and Review Process

Once you submit your rebate application, a record summarizing application details will appear on the "Clean School Bus Rebate Forms" screen including applicant name, school district, the email of the last person that edited/submitted the form, the date of the last update, and the submission status (draft or submitted). Draft applications can be re-opened, edited, and completed by a SAM.gov POC by selecting the pencil icon. Submitted applications cannot be edited but may be viewed by selecting the pencil icon on the left side of the screen.

If, after submission, you identify errors or other information in your application that requires changes, contact the Clean School Bus Program Help Desk at <u>cleanschoolbus@epa.gov</u> for assistance. Make sure to provide your application ID included in your confirmation email and an explanation of the issue.

**Note:** The Help Desk may not be able to respond to all requests to edit a submitted application in a timely manner, particularly requests that come close to the application deadline. Applicants should thoroughly review their initial application submission for accuracy to avoid missing any submission deadlines.

If the Help Desk does allow you to edit a submitted application, you will be notified when your application's status is changed back to "draft," at which time an approved POC may open, edit, and resubmit the application.

After submission, EPA will review your application and may contact you for additional information. Final award decisions will take approximately 60 days from the application deadline. If you are contacted for clarifications or corrections, you may be asked to revise your application and resubmit it.

# Appendix A—Glossary

The following provides definitions of terms and abbreviations used throughout the rebate application forms and system screens.

#### Clean School Bus Rebate Forms Dashboard 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 served by the buses
- Updated by—Last person to update the form
- Date Updated—Last date this form was updated
- Status—Submitted or Draft

#### **Rebate Application Screens: Definitions and Help**

#### Applicant Type Screen

- Applicant Type Select one of the options from the dropdown menu. For more information on organization types refer to the 2022 CSB Rebates Program Guide.
- Does your organization own the buses to be replaced?—If you answer that your organization is a 'Bus dealer or organization that arranges financing for bus purchase,' or 'Nonprofit school transportation association,' then this question is skipped and an answer of 'no' is recorded in your application.
- Are you applying to replace buses owned and operated by a private bus fleet?—School Districts, State Governments, and Indian Tribes or Tribal Organizations must either apply to replace buses they own or buses owned and operated by a private fleet. Nonprofit School Transportation Associations and Bus Dealers or Organizations that Arrange Financing for Bus Purchases must either apply to replace buses owned by a school district or buses owned and operated by a private fleet. Eligibility requirements for applicant types are in the 2022 Clean School Bus Rebates Program Guide.

#### Applicant Information Screen

- Unique Entity Identifier (UEI) —This is your applicant organization's SAM.gov Unique Entity Identifier (UEI) and is automatically filled based on the organization selected when starting this application.
- Electronic Funds Transfer (EFT) Indicator—This is your SAM.gov EFT Indicator and is automatically filled based on the organization selected when starting this application.
- Primary Contact Name Enter the primary contact for the applicant. The primary contact may or may not be someone different than the Government Business (or alternate), or the Electronic Business (or alternate) contact.
- Alternate Contact Information—Optionally enter the alternate contact for the applicant. The alternate contact may or may not be someone different than the Government Business (or alternate), or the Electronic Business (or alternate) contact.

#### School District Information Screen

- National Center for Education Statistics (NCES) District ID—Enter the seven-character NCDES District ID. If you don't have a NCES District ID, contact the Help Desk at <a href="mailto:cleanschoolbus@epa.gov">cleanschoolbus@epa.gov</a>.
- State or Territory Enter the state or territory postal abbreviation for the school district.
- Zip Code—Enter the 5 digit zip code or the 5 digit plus 4 (e.g., NNNNN-NNNN) for the school district.
- Estimated Student Poverty Rate If you need to self-certify the student poverty rate, this question will be editable. This question will not be editable and will be blank if EPA has already determined whether the school district is prioritized for funding.
- Prioritized—Automatically filled either 'yes' or 'no' based on whether the school district meets the prioritization criteria. If "Self-Certify" is displayed, enter the "Estimated Student Poverty Rate" in the above field to determine if your school district is prioritized.
- Name—Enter the contact name for the school district. This may be different than the applicant contacts.

#### **Bus Information Screen**

- VIN—Enter the 17-character Vehicle Identification Number. Please double-check all 17 characters to ensure there are no errors that may result in an invalid application.
- Manufacturer—Select the bus manufacturer. Do not enter the engine manufacturer.
- Model—Enter the model of the bus, not the bus type.
- Model Year Enter the vehicle model year in the format YYYY. Generally, 2010 or older diesel powered school buses are eligible for replacement; however, see the 2022 CSB Rebates Program Guide for exceptions.
- Average Annual Mileage Enter the estimated average annual mileage of the old bus to be replaced over the life of the bus.
- Average Annual Fuel Consumption (gallons) Enter the estimated average annual fuel used by the old bus to be replaced over its life. For CNG buses, use diesel gallon equivalents.
- Fuel Type Select the bus fuel type from the dropdown list.
- GVWR—Gross Vehicle Weight Rating (GVWR) in pounds (lbs). The GVWR is typically found on the bus VIN plate.
- Attach title and registration of the bus—Allowed file types: \*.pdf, \*.png, \*.jpeg, \*jpg. Provide the title for this bus and if required in your state or territory, supply the bus registration. File size: 5 MB and below.
- Replacement Fuel Type—Fuel types that can be selected for new replacement buses may be limited based on the vehicle model year and fuel type entered for the old bus to be replaced. See Section 3 of the 2022 CSB Rebates Program Guide for bus eligibility requirements. Select the replacement bus fuel type from the dropdown menu.

- Replacement Bus GVWR—Enter estimated Gross Vehicle Weight Rating (GVWR) in pounds (lbs). GVWRs of 26,001 lbs. or greater are offered more funding per bus. School bus manufacturers or dealers may be able to assist in providing a GVWR for new replacement buses.
- Vehicle Rebate Amount Requested—Automatically filled based on Replacement Bus Fuel Type, Replacement Bus GVWR, and prioritization status of school district per 2022 the Clean School Bus Rebates Program Guide.
- Total Vehicle Rebate Funds Requested—Please see 2022 Clean School Bus Rebates Program Guide for applicable infrastructure funding that may be available.

# **Appendix B—Printable List of Fields**

The rebate application requires some or all of the following information.

### **Applicant Information:**

### **Applicant Type:**

City

- School District
- State Government
- Nonprofit School Transportation Association
- Indian Tribe or Tribal Organization (not a School District)
- Bus dealer or Organization that Arranges Financing for Bus Purchases

Does your organization own the buses to be replaced? (Yes/No)

State or Territory

Are you applying to replace buses owned and operated by a private bus fleet? (Yes/No)

### **Applicant Primary Contact Information:**

| Name                       |                  | Title |  |
|----------------------------|------------------|-------|--|
| Business Phone Number      | Business email   |       |  |
| Applicant Alternate Conta  | act Information: |       |  |
| Name                       |                  | Title |  |
| Business Phone Number      | Business email   |       |  |
| Private Fleet Information: |                  |       |  |
| Fleet Name                 |                  |       |  |
| Private Fleet Address:     |                  |       |  |

Zip Code

| Name  | Title   |
|---|---|
| Business Phone Numbe  | er Business email                                       |
| chool District Inforn   | nation:   |
| NCES District ID  | School District Name*                                   |
| Physical Street Address   | *   |
| City*   | State or Territory* Zip Code*                           |
| Estimated Student Pove  | erty Rate   |
| Prioritized*  |   |
|   |   |
| ŕ   |   |
| chool District Conta  | act Information:  Title                                 |
| hool District Conta   | act Information: Title                                  |
| Name Business Phone Number  | act Information: Title                                  |
| Name Business Phone Numbers Information:  | er Business email                                       |
| Name  Business Phone Numbers Information:  ake copies for addition  | er Business email                                       |
| Name  Business Phone Number Is Information: ake copies for addition Id Bus  | Title  Business email                                   |
| Name  Business Phone Number Is Information: ake copies for addition In Indiana Is Information: A Bus  Vehicle Identification Number Is Information: | Title  Business email  nal buses if needed              |
| Name  Business Phone Number as Information: ake copies for addition d Bus   | Title  Business email  nal buses if needed  umber (VIN) |
| Name  Business Phone Number  us Information: ake copies for addition  Id Bus  Vehicle Identification Number  Manufacturer                           | Title  Business email  nal buses if needed  umber (VIN) |
| Name  Business Phone Number  us Information: ake copies for addition  Id Bus  Vehicle Identification Number  Manufacturer  Model  Model Year        | Title  Business email  nal buses if needed  umber (VIN) |

| _   |  |              |                                |          |            |  |  |
|-----|--|--------------|--------------------------------|----------|------------|--|--|
| Fu  | uel Type:  | Diesel       | Gasoline                       | CNG      | Propane    |  |  |
| Gr  | ross Vehicle   | Weight Rat   | ting (GVWR) _                  |          | (lbs)      |  |  |
| At  | Attach title and registration of bus—Drop files to attach, or browse |              |                                |          |            |  |  |
| Ve  | Vehicle Rebate Amount Requested*                                     |              |                                |          |            |  |  |
|     |  | •            | ed on Replace<br>bates Progran |          | Fuel Type, | Replacement Bus GVWR, and prioritization status of schoo |  |
| New | v Bus  |              |                                |          |            |  |  |
| Re  | eplacement   | Fuel Type (d | circle one):                   | Electric | CNG        | Propane  |  |
| Re  | eplacement   | Bus GVWR     | R                              | (lbs)    |            |  |  |
| Ve  | ehicle Rebat   | e Amount F   | Requested*                     |          |            |  |  |

<sup>\*</sup>Automatically filled based on Replacement Bus Fuel Type, Replacement Bus GVWR, and prioritization status of school district per 2022 CSB Rebates Program Guide.