EPA CLEAN SCHOOL BUS

2022 EPA Clean School Bus Rebate Forms:
Close Out Form User Guide

September 2023

United States Environmental Protection Agency

Table of Contents

Before You Begin

This guide will walk you through the steps needed to create, edit, submit, and view the Close Out Form for your 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. **Plan to spend 4 or more hours** to complete the Close Out Form. However, you don't need to complete it in one session. You may save the form and come back at any time.

Follow these steps to prepare for completing the Close Out Form:

1. **Review the glossary of terms** (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 Close Out Form is registered as a designated 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 Close Out Form from the system. Additionally, please verify that the SAM.gov account associated with your CSB Rebate has an active registration.

4. **Check your browser version.** Before filling out the Close Out Form, 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 Close Out Form screen sequence.

1. Sign In/Register

Use your existing SAM.gov credentials to log in to your account. If you are unable to sign in, please click here to refer to the instructions in the application form User Guide.

2. Application Information

2.1 Start a New Close Out Form

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

Select the "New Close Out" button to begin.

Note: We recommend clicking "Save" prior to exiting the form and before a system time out would occur. Your connection to the Close Out 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.

2.2 Welcome Screen

Clean School Bus Rebate Forms

- Clean School Bus Rebate Program
- Online Rebate Application Information

☰ Your Rebate Forms   ⊕ New Application   eben.bathalon@erg.com   Sign out ⊑→

Edit Your Close Out

🏷 **Rebate ID:** 017019

1 of 8 **Welcome**

Close Out Form – Basic Information

As a rebate recipient, you must submit an online Close Out Form that verifies you have met the Clean School Bus Rebate Program requirements. Program requirements includes providing information on:

- School bus(es) you scrapped, sold or donated,
- New clean school bus(es) you purchased and were delivered, and
- Infrastructure you purchased, delivered, and installed.

This form must be completed by **October 31, 2024** unless an extension has been approved by EPA.

The following information will help you complete this Close Out 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, 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:

- The primary and alternate (if applicable) contact information for your organization
- Contact information for the following organizations:
  - Organization(s) where each old bus from your application or identified on this form was scrapped, donated or sold.
  - All Old Bus Owners (e.g. district, private fleet)
  - All New Bus Owners (e.g. district, private fleet)
  - All Infrastructure Owners of electric bus charging equipment (e.g. district, private fleet)
  - All Infrastructure suppliers from which charging equipment was purchased
  - All other suppliers for eligible infrastructure installation (e.g. contractors performing trenching, electrical, wiring, engineering, design services, charger installation)
- Current fleet size and number of electric school buses in current fleet
- Old Bus idling hours and odometer reading
- Proof of old bus scrappage (destroyed engine and chassis rail with VIN number, and letter from scrap yard/entity that scrapped buses)
- Final invoices and proof of delivery for all new buses and infrastructure
- New Bus specifications and costs. Specifications include new vehicle VIN, new bus EPA vehicle family, fuel type, model and model year, date bus delivered, GVWR, new bus annual mileage estimate, annual idling hours (propane or CNG) electric vehicle (EV) range/fuel consumption, EV capacity for bidirectional charging, EV battery capacity, and auxiliary heater type
- New EV Bus battery and powertrain warranty information
- Photo of New Bus showing VIN number
- Non-EPA clean school bus funding information including type, funding source and dollar amount (if applicable)
- Electric bus charger information (type, manufacturer, model, maximum output power, year of manufacture, number of plugs, bidirectional charging capability)
- All costs associated with infrastructure including charger purchase and installation, and other eligible infrastructure costs
- Address where infrastructure was installed
- Photo of each installed charging pedestal or equipment
- Non-EPA clean school bus infrastructure funding information including type, funding source and dollar amount (if applicable)

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 Close Out Form without losing information. Additionally, if you're on a page that has a "Complete" button, you must first select the "Complete" button and then the "Save" or "Next" to save information.

To submit your Close Out Form to EPA, complete all pages, 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 Close Out 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 or edit information provided in the Close Out Form. If, upon review, the Close Out Form is accurate and includes all required information, EPA will notify you that your Clean School Bus Program Close Out Form is complete.

ⓘ   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

Review the text on the "Welcome" screen to determine what information you will need and how to complete the Close Out Form and select "Next" to proceed.

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

2.3 Information Icons

Hover your mouse over the information icons, found throughout the Close Out Form screens, for additional information regarding specific fields that may not be covered in this user guide.

School District Prioritized?   Yes

School District Name ❓ ◀ This is the school district name that corresponds to the NCES District ID that was submitted on the application form.

National Center for Education Statistics (NCES) District ID ❓   5900183

2.4   Application Information

High level application information, and the Primary and Alternate Contact information fields will prepopulate with information from the associated Payment Request Form. Double-check that your Primary and Alternate Contact information is correct. The information can be edited if necessary. Select "Next" to continue.

Clean School Bus Rebate Forms

- Clean School Bus Rebate Program
- Online Rebate Application Information

| ≡ Your Rebate Forms | ⊕ New Application | | eben.bathalon@erg.com | Sign out ⤴ |

Edit Your Close Out

🏷 **Rebate ID:** 016390

2 of 8   **Application Info**

* denotes required field

Applicant Organization Name	EBEN BATHALON INC.
School District Prioritized?	Yes
School District Name ❓	Wounded Knee District School
National Center for Education Statistics (NCES) District ID ❓	5900183
Total Rebate Funds Requested In Application ❓	$655,000.00
Total Rebate Funds Received from Payment Request ❓	$350,000.00

Applicant Primary Contact

NOTE - Update contact information if it has changed.

Primary Contact First Name ❓ *
Joan

Primary Contact Last Name ❓ *
Smith

Primary Contact Title ❓ *
Director

Primary Contact Business Phone Number ❓ *
(230) 439-4030

Primary Contact Business Email ❓ *
primary@email.com

Applicant Alternate Contact

NOTE - Update contact information if it has changed.

Alternate Contact First Name ❓
Mike

Alternate Contact Last Name ❓
Doe

Alternate Contact Title ❓
Assistant to the Regional Manager

Alternate Contact Business Phone Number ❓
(342) 342-3432

Alternate Contact Business Email ❓
alternate@email.com

ℹ 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 |

2.5 Save and Next Buttons

When you press the save or next buttons, a box will pop up in the top right corner of your screen confirming your information has been saved.

Note: The save and next buttons are the only buttons that save entered information. The "Previous", "Complete", and "Return to..." navigation buttons do not save entered information.
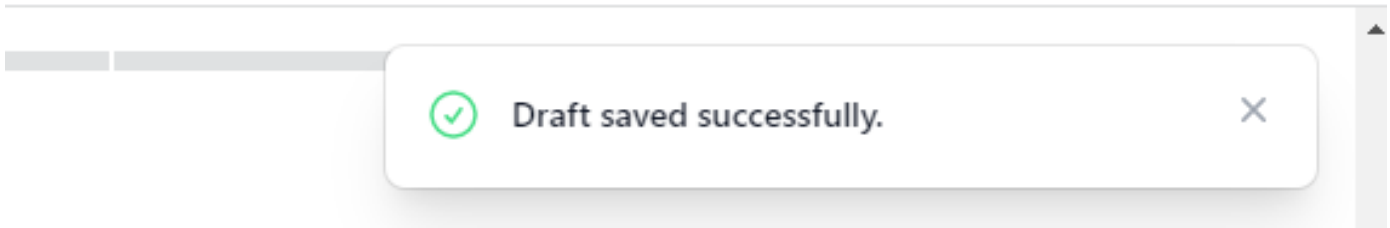
2.6 Add Organizations

Review the information on this screen to understand the types of organizations for which you will need to provide information, then select "+ Add Organization" to proceed. Required organizations include the entity(ies) that took control of the old bus(es), the owner(s) of the new bus(es) and/or electric bus charging infrastructure, and the infrastructure supplier(s).

Edit Your Close Out

Rebate ID: 017019
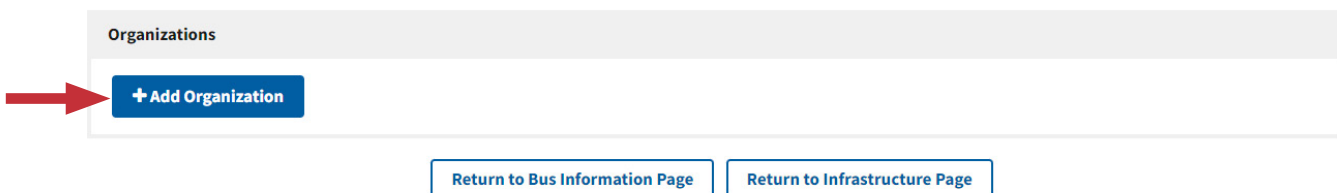
3 of 8 **Organizations**

This page is for adding organization information for old buses, new buses and infrastructure. For each organization that you add by selecting the "+Add Organization" blue box, you'll need to first select the organization type(s) and then enter the contact and address information for the organization. Information for each organization only needs to be entered once, even if the organization applies to multiple buses or infrastructure, or multiple organization types. It is recommended that you add all the organizations that were associated with this rebate at this time to avoid having to return to this page later. If needed before completing this page, you can view key old bus, new bus, and infrastructure information you submitted with your payment request form by selecting either the "Return the Bus Information Page", or the "Return to Infrastructure Page" button below.

The following organization types need to be entered on this page:

- **Scrap Yard, Donee, and Purchaser**: Organization(s) where each old bus from your application or identified in this Close Out Form was scrapped (Scrap Yard), donated (Donee) or sold (Purchaser).
  Old Bus Owner: All old bus owners. If the old bus owner is the applicant, the school district that the new buses will serve, or the old bus private fleet identified in your application, then you do not have to enter old bus owner information as it's already included within this form.
- **New Bus Owner**: All new bus owners (e.g. district, nonprofit, private fleet, tribes). If the new bus owner is the applicant, the school district that the new buses will serve, or the old bus private fleet identified in your application, then you do not have to enter new bus owner information as it's already included within this form.
- **Infrastructure Owner (electric bus charging)**: All infrastructure owners (e.g. district, private fleet) of the electric bus charging equipment need to be identified. If the infrastructure owner is the applicant, the school district that the new buses will serve, or the old bus private fleet identified in your application, then you do not have to enter new bus owner information as it's already included within this form.
- **Infrastructure Supplier (charging equipment only)**: All infrastructure suppliers from which charging equipment was purchased.
- **Other Infrastructure Organization**: All other eligible Infrastructure organizations (e.g., performing trenching and wiring, project management, charger installation

On the bus and infrastructure (if applicable) pages you will be selecting organizations you entered here or in your application for each bus and infrastructure owner or supplier.

denotes required field

Organizations

+ Add Organization

Return to Bus Information Page   Return to Infrastructure Page

2.7 Organizations Information

Select an organization type by checking the appropriate box. Each organization only needs to be entered once, even if the organization is associated with multiple buses or infrastructure purchases, or multiple organization types. If the old or new bus owner is the applicant, the school district that the new buses will serve, or the old bus private fleet identified in your application, then you do not have to enter owner information as it's already included within the form. Once you select an organization type, enter the organization's name, contact information and address. When all fields have been entered for the organization select the "Complete" button. **Note this button does not save your form, and you must select the "Save" or "Next" button to save your information.**

Add another organization by selecting "+ Add Organization" at the bottom of the screen. You may add as many organizations as needed and delete or edit them at any time. Deleting an organization is permanent, so do not do so unless you are sure it is necessary. You must select the "Complete" button at the bottom of the Organizations screen before moving on.

2.8   Complete Organizations

Once you have added all your organizations, select "Next" to continue.

2.9   Saving and Editing Your Information

You can save your work while filling out the Close Out 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.

Note: When editing an organization or providing bus information, you must select the "Complete" button prior to "Save" or the data will be lost.

2.10 Add Documents

Select "+ Add Document" to add the required files, including a final invoice and proof of delivery for each bus.

Note: Infrastructure documentation is only required for charging infrastructure purchased for electric buses under this funding opportunity.

Clean School Bus Rebate Forms

- Clean School Bus Rebate Program
- Online Rebate Application Information

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Edit Your Close Out

🏷 **Rebate ID:** 016390

4 of 8 **Documents**

On this screen you will need to enter a description of and upload the following documents:

- **Final invoices** for all new buses and infrastructure. For each invoice, indicate whether it includes bus(es), electric bus charging infrastructure, or both by clicking on the checkboxes under Document Purpose.
- **Proof of delivery** for all new buses and infrastructure (e.g., dated bill of lading). DO NOT upload photos showing old bus scrappage, new buses, or charging pedestals here as those should be uploaded on the Bus and/or Infrastructure pages of this form.

* denotes required field

Documents

+ Add Document

| Return to Bus Information Page | Return to Infrastructure Page |

ⓘ 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

2.11 Add Document Information

Select a document type, either final invoice or proof of delivery, using the drop-down menu. Next, select the document purpose by checking the box(es) that apply. Then enter the document name which will be used to reference this document within the form. Please make the names unique to each document. If you would like, you may enter a description of the document. Lastly, attach a PDF or image of the document. 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, select the "Complete" button for the document. **Note this button does not save your form, and you must select the "Save" or "Next" button to save your information.**

You may add another document by selecting "+ Add Document" at the bottom of the screen. You may add as many documents as needed and delete or edit them at any time. Deleting a document is permanent, so please do not do so unless you are sure it is necessary. You must select the "Complete" button at the bottom of the screen before moving on.

Note: Scrappage documentation will be uploaded in the Buses section of the form.

2.12 Complete Documents

Once you have added all your documents, select "Next" to continue.

Clean School Bus Rebate Forms

- Clean School Bus Rebate Program
- Online Rebate Application Information

≡ Dashboard   eben.bathalon@erg.com   **Sign out ⟶**

Edit Your Close Out

🏷 **Rebate ID:** 017019

④ of 8 **Documents**

On this page you will need to enter a description of and upload the following documents:

- **Final invoices** for all new buses and infrastructure. For each invoice, indicate whether it includes bus(es), electric bus charging infrastructure, or both by clicking on the checkboxes under Document Purpose.
- **Proof of delivery** for all new buses and infrastructure (e.g., bill of lading with delivery date). DO NOT upload photos showing old bus scrappage, new buses, or charging pedestals here as those should be uploaded on the Bus and/or Infrastructure pages of this form.

* denotes required field

Documents			
Edit	**Document 1**	**Type**: Final Invoice **Purpose**: Bus **Name**: Manufacturer Final Invoice **Note**: Final invoice provided by manufacturer on 05/23	**Delete**
Edit	**Document 2**	**Type**: Final Invoice **Purpose**: Infrastructure **Name**: Trenching Invoice **Note**: Invoice for trenching and conduit installation of the charging pedestals.	**Delete**
Edit	**Document 3**	**Type**: Proof of Delivery **Purpose**: Bus **Name**: Bus Bill of Lading **Note**: Bill of lading for bus delivery on 05/16	**Delete**
Edit	**Document 4**	**Type**: Final Invoice **Purpose**: Infrastructure **Name**: Pedestal Invoice **Note**: Invoice for charging pedestals and installation/electrical work.	**Delete**
Edit	**Document 5**	**Type**: Proof of Delivery **Purpose**: Infrastructure **Name**: Delivery Documents for Chargers **Note**: Bill of lading for chargers and associated wiring equipment.	**Delete**

+ Add Document

Return to Bus Information Page   **Return to Infrastructure Page**

ⓘ 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**

2.13 Complete Bus Information

Enter the total number of school buses in your fleet as well as the total number of electric school buses. The list of buses under "Bus Information" are the Old Buses that were entered on your application form. Edit information for each old bus and corresponding replacement bus by completing the mandatory fields and as needed the non-mandatory fields. If the bus information is incomplete, you will see a message in red next to the bus number.

2.14 New Bus Information

The data fields associated with old and new buses are presented below, with required data fields marked with an asterisk. Enter the required information then select "Complete." See Sections 2.15 and 2.16 of this user guide for information on Swapping or Excluding a Bus.

1. The **Old Bus VIN** is prepopulated from the information in the Payment Request Form and is not editable.

2. **Old Bus Fuel Type** is prepopulated from the information in the Payment Request Form and is not editable.

3. **Estimated Remaining Life (years)** is prepopulated from the information in the Payment Request Form and is not editable.

4. Old Bus **Model Year** is prepopulated from the information in the Payment Request Form and is not editable.

5. The **Old Bus NCES District ID** field is prepopulated with the School District ID from the Payment Request Form and is not editable.

6. The **Old Bus Owner*** field requires you to choose the organization who owned the bus before replacement from the drop-down menu. If you don't see the owner, select "Back to Organization Entry" to add them.

7. Enter the estimated annual idling hours for the old bus in the **Old Bus Annual Idling Hours*** field.

8. The **Old Bus Odometer (miles)*** field needs to be populated with the odometer reading of the old bus at the time of scrappage, donation, or sale. If the exact reading is unknown, provide an estimate.

9. The **Replacement Process*** field requires you to specify how the old bus was replaced (scrapped, sold, or donated). 2010 and older buses can only be scrapped. 2011 and newer buses can be scrapped, sold, or donated. If you enter an invalid replacement process, a warning message will appear that says the disposal method is not valid. You can proceed with completing the form, but this will need to be addressed during the review process.

*Please note that fields 10-12 will show depending on what is selected in the Replacement Process drop-down.

Replacement Process ❓ *

| Scrapped | × ▼ |

10 Scrap Yard Organization ❓

| Organization #: 2 | Organization Name: Ted's Scrap Yard | Contact Name: Ted M... | × ▼ |

This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

11 Old Bus Proof of Scrappage ❓ *

File Name	Size
✖ CSB-PRF-Pass.pdf	24.57 kB

☁ Drop files to attach, or browse

Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

10. Select the **Scrap Yard Organization** from the drop-down. If the organization does not appear in the drop-down, first complete the remainder of the Old Bus and New Bus fields, select the complete and save buttons, return to the Organizations screen by selecting "Back to Organization Entry", and enter the required information.

11. Upload the **Old Bus Proof of Scrappage** by attaching photos and letter. Attach photos of the old bus destroyed engine and chassis that shows or indicates what the last 4 digits of the bus VIN are as proof of old bus scrappage. Attach a letter signed by a representative of the scrap yard/entity that performed the scrappage.

Replacement Process ❓ *

| Sold | × ▼ |

12 Old Bus Sold To ❓

| Organization #: 3 | Organization Name: Bus Acquisitions Inc. | Contact Name: M... | × ▼ |

This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

12. The **Old Bus Sold To/Donated To*** field requires you to select the organization that the old bus was sold/donated to. If the organization does not appear in the drop-down, first complete the remainder of the Old Bus and New Bus fields, select the complete and save buttons, return to the Organizations screen by selecting "Back to Organization Entry", and enter the required information.

New Bus Information

13 New Bus Dealer ⊘

Ted's Bus Emporium

14 New Bus Owner ⊘

| **Organization #:** 1 | **Organization Name:** Fleet Outsourcing Inc. | **Contact Name:** Joan Smith | ✕ ▾ |

This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

15 Final Invoice ⊘

| **Document #:** 1 | **Document Name:** Lion Final Invoice
Document Description: Final invoice provided by Lion on 05/23 | ✕ ▾ |

This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

16 Proof of Delivery ⊘

| **Document #:** 3 | **Document Name:** Bus Bill of Lading
Document Description: Bill of lading for bus delivery on 05/16 | ✕ ▾ |

This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

13. **New Bus Dealer** is prepopulated from the information in the Payment Request Form and is not editable.

14. The options for **New Bus Owner*** are generated from the entries in the Organization page with an Organization Type of "New Bus Owner". If the organization does not appear in the drop-down, first complete the remainder of the Old Bus and New Bus fields, select the complete and save buttons, return to the Organizations screen by selecting "Back to Organization Entry", and enter the required information.

15. The options for **Final Invoice*** are generated from the entries in the Documents page with a Document Type of "Final Invoice" and a Document Purpose of "Bus". If the document does not appear in the drop-down menu, first complete the remainder of the Old Bus and New Bus fields, select the complete and save buttons, return to the Documents screen by selecting "Back to Document Entry", and enter the required information.

16. The options for **Proof of Delivery*** are generated from the entries in the Documents page with a Document Type of "Proof of Delivery" and a Document Purpose of "Bus". If the document does not appear in the drop-down menu, first complete the remainder of the Old Bus and New Bus fields, select the complete and save buttons, return to the Documents screen by selecting "Back to Document Entry", and enter the required information.

17. Enter the 17-digit Vehicle Identification Numbers (VINs) for the bus(es) delivered for **New Bus VIN***.

18. **New Bus EPA Vehicle Family** field requires you to enter the 12 character alphanumeric EPA Vehicle Family. The EPA Vehicle Family can be found on the Vehicle Emission Control Information (VECI) label. The VECI label is usually on/near a door pillar or on the engine compartment sheet metal. If the bus is not an EPA certified vehicle, please enter the CARB Executive Order ID. If the vehicle does not have EPA or CARB certification, then please contact the CSB helpdesk.

19. **New Bus Manufacturer*** is prepopulated from the information in the Payment Request Form and is editable. If the new bus make has changed, update the name of the manufacturer. The drop-down menu provides a list of bus manufacturers to choose from. Manufacturers in the drop-down list are: All American, Blue Bird Corporation, BYD, Collins Bus Corporation, Greenpower Motor Company, IC Bus (Navistar), Lion Electric Company, Micro Bird (Girardin), Roush Cleantech, Starcraft Bus, Thomas Built Buses, Titan Bus, Trans Tech, and Van-Con, Inc. 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. If the new bus has changed, the field is editable.

20. **New Bus Purchase Price*** is the purchase price of the ordered replacement 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.

21. **New Bus Fuel Type*** is prepopulated from the information in the Payment Request Form.

22. **New Bus Model*** is prepopulated from the information in the Payment Request Form. If the new bus has changed, the field is editable.

23. The **Eligible Funding from Close Out** field is read-only. If the actual bus cost from the final invoice (New Bus Purchase Price), is greater than or equal to the rebate amount from the Payment Request, then this field will display the rebate amount from the Payment Request. If the actual bus cost is less than the rebate amount from the Payment Request, this will display the actual bus cost.

24. **New Bus Model Year*** is prepopulated from the information in the Payment Request Form. If the new bus has changed, the field is editable.

25. The **New Bus GVWR*** is prepopulated from the information in the Payment Request Form. If the new bus has changed, the field is editable.

26. The **Applicant Bus Cost Responsibility** field is read-only and displays the amount that the applicant is responsible for paying, based on the difference between the New Bus Purchase Price and the Eligible Funding from Close Out fields.

27. The **New Bus Delivery Date*** field is the date the bus was actually delivered.

28. **Reason For Change of Bus Information** field is required if at least one of the new bus fields has changed from the new bus information entered in the Payment Request. Please provide an explanation for the change(s) in this field.

29. The **New Bus Estimated Annual Mileage*** field requires you to enter the estimated annual miles the new bus will travel.

30. The **Estimated EV Bus Range*** field requires you to enter the manufacturer's estimated range in miles for the new bus. This field is only visible if the New Bus Fuel Type is electric.

    The **New Bus estimated fuel consumption (gallons)** field requires you to enter the estimated annual fuel consumption for new propane (gallons) or CNG (lbs) buses. This field is only visible if the New Bus Fuel Type is CNG or propane.

31. The **Capable of Bidirectional Charging*** field appears with the New Bus Fuel Type is electric and prompts you to select yes or no from the drop-down menu. Select "yes" if the charger is capable of bidirectional charging (i.e., the EVSE can both receive energy and provide energy to an external load, such as vehicle-to-grid charging, which supplies energy back to the electrical grid).

32. **EV Battery Capacity (kWh)** is only visible if the New Bus Fuel Type is electric. Enter the rated battery capacity of the bus in kWhs.

33. The **Equipped with Auxiliary Heater?*** field prompts you to select yes or no from the drop-down menu. Select "yes" if the New Bus is equipped with an auxiliary heater. This field is only visible if the New Bus Fuel Type is electric.

34. **Auxiliary Heater Fuel Type** is only visible if the bus is equipped with an auxiliary heater. Select the auxiliary heater fuel type from the drop-down menu.

35. **Auxiliary Heater Fuel Type (Other)** is only visible if the auxiliary heater fuel type is "other".

36. The **Photo of New Bus and VIN Documentation*** field requires you to attach an image of the new bus with the VIN number displayed. The image file size must be between 1KB and 5MB. Accepted file types include .pdf, .png, .jpeg, and .jpg.

37. **Battery Warranty Included?** Select "Yes" from the drop-down menu if the New Bus has a battery warranty.

38. The **Number of Years Covered** field allows you to enter the length of the battery warranty in years. This field is only visible if Battery Warranty Included? Is "Yes". Leave this field blank if it does not apply to your bus warranty.

39. The **Miles Covered** field allows you to enter the miles covered by the battery warranty. This field is only visible if the Battery Warranty Included selection is "Yes". Leave this field blank if it does not apply to your bus warranty.

40. **kWh of Gross Discharge Throughput** field allows you to enter the total kWh of throughput covered by

the battery warranty. This field is only visible if the Battery Warranty Included selection is "Yes." Leave this field blank if it does not apply to your bus warranty.

41. The **Battery Warranty Documents** field allows you to attach a file or scan of the battery warranty for the bus. The image file size must be between 1KB and 5MB. Accepted file types include .pdf, .png, .jpeg, and .jpg. This field is only visible if the Battery Warranty Included selection is "Yes". Leave this field blank if it does not apply to your bus warranty.

Powertrain Warranty

(42) Powertrain Warranty Included? ❓

| Yes | × ▾ |

(43) Number of Years Covered ❓   (44) Miles Covered ❓

| 10 | | 100,000 |

Powertrain Warranty Documents ❓

File Name	**Size**

☁ Drop files to attach, or browse

Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

42. **Powertrain Warranty Included?** Select "Yes" from the drop-down menu if the New Bus has a powertrain warranty. Leave this field blank if it does not apply to your bus warranty.

43. The **Years Covered** field allows you to enter the length of powertrain warranty in years. This field is only visible if the Powertrain Warranty Included selection is "Yes". Leave this field blank if it does not apply to your bus warranty.

44. The **Miles Covered** field allows you to enter the miles covered by powertrain warranty. This field is only visible if the Powertrain Warranty Included selection is "Yes". Leave this field blank if it does not apply to your bus warranty.

Note: Once you have completed the fields above you must select the "Complete" button at the bottom of the screen before moving on. You must fill out all required information for every bus in your fleet.

2.15 Excluding a Bus

At this point, you can swap out old buses or exclude buses from your fleet. If you choose to exclude a bus, EPA must be reimbursed for the amount you received for that bus. A warning will pop up with the amount of money you owe to EPA. The Bus Rebate Owed Back to EPA field is the amount by which your rebate exceeded your cost for the bus. You must refund this amount back to EPA.

Note: If you accidentally select "Swap Old Bus" or "Exclude Bus", select "Cancel" and your data will be restored.

Note: When EPA completes the review of your Close Out Form, you will receive confirmation that a rebate is needed and EPA RTP Finance Center will provide you with a direct link to pay your bill.

2.16 Swapping Out an Old Bus

If you choose to swap out an old bus for a different old bus, you will need to choose the Old Bus Owner from the drop-down list. If you don't see the owner, select "Back to Organization Entry" to add them. Then, you need to select a reason for swapping the old bus from the drop-down menu. If you select "other" you will need to provide a reason for swapping out the old bus. Then, you will need to complete the New Bus information and Old Bus information presented in Section 2.13.

Bus Information

Please correct invalid rows before proceeding.

Bus # ❓
1

Old Bus Information

☑ Swap Old Bus ❓   ☐ Exclude Bus ❓

Old Bus Owner *

Reason for Swapping Old Bus *

| Old Bus VIN ❓ * | Old Bus Manufacturer ❓ * | Old Bus Average Annual Mileage ❓ * |

| Old Bus Fuel Type ❓ * | Old Bus Model ❓ * | Old Bus Average Annual Fuel Consumption (gallons) ❓ * |

Old Bus GVWR ❓ *   Old Bus Model Year ❓ *

Old Bus NCES District ID ❓ *

5900183

Estimated Remaining Life (years) ❓ *

Old Bus Title and Registration ❓ *

| **File Name** | **Size** |

☁ Drop files to attach, or browse

Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

2.17 Bus Funding Information

Once you have completed the Bus Information section, you will need to provide the funding information for non-EPA sources. Select the funding type from the drop-down menu, then add the funding source and amount. The drop-down menu will give you the following options for funding type: Federal Funding, State Funding, City Funding, Non-Profit Assistance, and Other. The funding source is the organization that provided the funding.

Note: See Program Guide regarding restrictions on the use of Federal funds.

A warning will pop up if you do not list enough funds or if you list more funds than needed to cover your cost responsibility, but you can still continue with the form.

2.18 Complete Bus Information

Please review the prepopulated Bus Cost Totals fields listed below before moving on.

1. The **Number of Buses Requested (Application)** is prepopulated from the information in your rebate application.

2. **Number of Buses Ordered (Payment Request)** is prepopulated from the information in your Payment Request Form.

3. **Number of Buses Received (Close Out)** is the sum of the number of new buses entered on this Close Out Form.

4. **Total Bus Costs from Payment Request** is the New Bus Purchase Price for all the replacement buses ordered on the Payment Request Form.

5. **Total Bus Rebate Received** is the total rebate amount received for all the buses ordered in the Payment Request Form. This does not include the infrastructure portion of the rebate (if applicable).

6. **Total Bus Cost (Actual)** is the sum of the actual costs of all buses ordered and received.

7. **Total Bus Rebate Amount Used** is the Eligible Rebate Funding based on the Close Out Form for all the replacement buses received.

8. **Total Applicant Bus Cost Responsibility** is the amount by which the total bus cost exceeds the total eligible rebate funding amount for the new replacement buses.

9. **Total Non-Program Funding Acquired** is the sum of all non-EPA funding amounts.

   Total Bus Rebate Owed Back to EPA is the amount of excess rebate funds from all buses that you must pay back to EPA. This field does not appear if there are no excess rebate funds that are due to EPA.

Once you have added all the bus information, select "Next" to continue

2.19 Infrastructure and Funding Information

Select "+ Add Infrastructure" to add information for EVSE (electric vehicle supply equipment) or other eligible infrastructure costs purchased. Select "+ Add Funding" to add non-EPA funding sources.

Edit Your Close Out

🏷️ **Rebate ID:** 017019

6 of 8 **Infrastructure**

Since you took delivery of an electric school bus(es), enter information about installed infrastructure and other eligible infrastructure costs on this screen.

The following terms appear on this screen:

- EVSE: electric vehicle supply equipment (charger)
- V2G: vehicle-to-grid charging

You will need the following information to complete the fields on this screen:

- EVSE information (type, manufacturer, model, maximum output power, year of manufacture, number of plugs, bidirectional charging capability, infrastructure owner)
- Other eligible infrastructure costs (type, description of work)
- All costs associated with EVSE installation
- Infrastructure supplier organization
- Address where EVSE or other eligible infrastructure was installed
- Photo of each installed EVSE
- Sources of non-EPA EVSE funding, funding type and amounts

* denotes required field

Infrastructure Information

Enter information for each type of EVSE that was purchased. Enter the cost of installation and any necessary electrical/construction work separately. If you don't have a breakdown of installation and EVSE cost, enter the full amount in the EVSE cost field.

+ Add Infrastructure

[Return to Organization Entry]   [Return to Document Entry]

Non-EPA Clean School Bus Infrastructure Funding Information

Enter all sources of non-EPA funding that were used to purchase and/or construct infrastructure to support electric buses.

Note: The total of eligible funding for infrastructure rebates from this form and other eligible external funds used to meet the applicant infrastructure cost responsibility should not exceed the total cost of the charging infrastructure.

+ Add Funding

Non-EPA Infrastructure Funding Not Accounted For ❓
$0.00

2.20 Add Infrastructure – Level 2 / DC Fast Chargers

Note: You only have to complete the Infrastructure Information section for electric buses. Select the infrastructure type by using the drop-down menu. The data fields associated with Level 2 and DC fast chargers are described below, with required fields marked with an asterisk.

1. The **Infrastructure Type*** field requires you to select a charging infrastructure type from the drop-down menu. You must specify all infrastructure items purchased with rebate funds. The options are Level 2 Charger, DC Fast Charger, and Other Eligible Infrastructure Costs.

2. The **Infrastructure Quantity*** field needs to be populated with the number of chargers purchased. If multiple types of chargers were purchased, each type must be entered separately. Also, if the purchase price varied for the same type of charger, then the chargers should be entered separately.

3. The **EVSE Maximum Output Power (kW)*** field requires you to enter the rated maximum output power of the charger (in kilowatts)

4. Enter the price per charger in the I**nfrastructure Cost Per Charger (Actual)*** field.

5. Select the **EVSE Manufacturer*** from the dropdown list. If the manufacturer is not listed, select "Other" and enter the manufacturer in the EVSE Manufacturer (Other) field below.

6. The **Infrastructure Subtotal** field is read only and displays the subtotal for each infrastructure line item.

7. The **EVSE Model*** is the model of the infrastructure hardware purchased.

8. The **Cost Includes Installation** box should be selected if the Infrastructure Cost includes installation.

9. Select the **Infrastructure Supplier*** from the drop-down menu. If the name doesn't appear on the list, complete the Infrastructure Information for this infrastructure type, the Installation/Construction Address fields, select the Complete and Save buttons, and select the "Back to Organization Entry" button to enter the supplier's information.

Infrastructure #
4

Infrastructure Information

Infrastructure Type ❓ *

| Level 2 Charger | × ▾ |

EVSE Maximum Output Power (kW) ❓ *

EVSE Manufacturer ❓ *

▾

EVSE Model ❓ *

10 EVSE Manufacture Year ❓ *

11 Number of Plugs on EVSE ❓ *

12 ☐ EVSE Capable of Bidirectional Charging? ❓

Infrastructure Quantity ❓ *

Infrastructure Cost Per Charger (Actual) ❓ *

Infrastructure Subtotal

$0.00

☐ Cost Includes Installation ❓

Infrastructure Supplier ❓

▾

This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

10. Enter the **EVSE Manufacture Year.*** The year must not be before 2005 or after 2031.

11. Enter the number of plugs per charger for the **Number of Plugs on EVSE*** field.

12. **EVSE Capable of Bidirectional Charging?** Check this box if the charger is capable of bidirectional charging (i.e., the EVSE can both receive energy and provide energy to an external load, such as vehicle-to-grid charging, which supplies energy back to the electrical grid).

The **Bus and EVSE to be Used for V2G** field is visible if both the charging equipment and bus are capable of bidirectional charging (EVSE Capable of Bidirectional Charging? checkbox is selected). Please enter whether or not this equipment will be used in a vehicle to grid application.

Infrastructure Owner ❓

▾

This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

Next, select the infrastructure owner from the drop-down menu. If you don't see the owner, complete the Installation/Construction Address fields, select the Complete and Save buttons, and select "Back to Organization Entry" to add them.

Documents and Photos

Final Invoice ⓘ

This field is mandatory to complete the Close Out form but is not required to complete and save the infrastructure information.

Proof of Delivery ⓘ

This field is mandatory to complete the Close Out form but is not required to complete and save the infrastructure information.

Photo of Charging Equipment ⓘ *

File Name	**Size**

☁ Drop files to attach, or browse

Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

Complete   Cancel

Next, add a final invoice and proof of delivery using the drop-down menus. If you don't see the documents required, select the Complete and Save buttons, and then the "Back to Document Entry" button to add them.

Finally, add an image of the charging equipment after installation. The image file size must be between 1KB and 5MB. Accepted file types include .pdf, .png, .jpeg, and .jpg.

Once the required information is entered, select "Complete."

Note: If a final invoice lists all the equipment on one invoice with different prices, and the total tax (if included) is listed for all the equipment, you need to apportion the total tax for each piece of equipment.

2.21 Add Infrastructure – Other Eligible Infrastructure Costs

Infrastructure Information

1 Infrastructure Type ❓ *

Other Eligible Infrastructure Costs

2 Other Eligible Infrastructure Cost (Actual) ❓ *

3 Infrastructure Type (Other) ❓ *

4 Other Infrastructure Organization ❓

This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

5 Description of Work ❓ *

Infrastructure Owner ❓

This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

Note: You only have to complete the Infrastructure Information section for electric buses.

Select the infrastructure type using the drop-down menu. The data fields associated with "Other Eligible Infrastructure Costs" are shown below, with required fields marked with an asterisk. Other Eligible Infrastructure Costs include construction, electrical work, site preparation, etc.

1. The **Infrastructure Type*** field requires you to select a charging infrastructure type from the drop-down menu. In this case select Other Eligible Infrastructure Costs. Do not enter other eligible infrastructure costs that were included in the purchase price of the EVSE as that should already be accounted for when you entered EVSE costs.

2. The **Other Infrastructure Organization Cost (Actual)*** field must be populated with the total of all Other Eligible Infrastructure Costs, including construction, electrical work, site preparation, etc.

3. Indicate the **Infrastructure Type (Other)*** that you are referring to (e.g., construction, electrical work, site preparation, etc.).

4. Select the **Other Infrastructure Organization*** from the drop-down menu. If the name doesn't appear on the list complete the Infrastructure Information for this infrastructure type, the Installation/ Construction Address fields, and select the Complete and Save buttons and then the "Back to Organization Entry" button to enter the supplier's information.

5. Provide a detailed description of the infrastructure-related work entered in the "Other Eligible Infrastructure Costs" field for the **Description of Work**.

Installation/Construction Address

Infrastructure Owner ❓

This field is mandatory to complete the Close Out form but is not required to complete and save the infrastructure information.

Street Address ❓   State or Territory ❓ *

City ❓   County ❓ *

                                          Zip ❓ *
                                          _____-____

Documents and Photos

Final Invoice ❓

This field is mandatory to complete the Close Out form but is not required to complete and save the infrastructure information.

[Complete] [Cancel]

[➕ Add Infrastructure]

Next, select the infrastructure owner from the drop-down menu. If you don't see the owner, complete the Installation/Construction Address fields, select the Complete and Save buttons, and select "Back to Organization Entry" to add them. Then, add the address where the charger is installed.

Then, add a final invoice for the associated cost using the drop-down menu. If you don't see the document required, select the Complete and Save buttons, and then the "Back to Document Entry" button to add them.

Once the required information is entered, select "Complete."

Continue to add infrastructure until you have added all items that were purchased.

2.22 Funding Information

Select the funding type, and add the source and amount for each non-EPA funding source. Once the required information is entered for each source, select "Complete." Repeat the process until all funding sources have been added. The fields associated with funding information are listed below:

1. Select a **Funding Type*** from the drop-down menu. The options are Federal Funding, State Funding, City Funding, Utility Make-Ready Funding, Non-Profit Assistance, and Other.

2. The **Funding Source*** field requires you to enter the name of the organization that provided funding.

3. The **Funding Amount*** field must be populated with the amount of funding received.

   Once you have added all infrastructure and funding source information, you will see the total costs for your infrastructure at the bottom of the page. Please review the prepopulated Infrastructure Cost Totals fields listed below before moving on.

   If your rebate does not cover the full cost of infrastructure, you will see how much you will need to pay to cover the costs under "Applicant Infrastructure Cost Responsibility (Actual)." If you owe money back to EPA, a warning will pop up letting you know the amount to be reimbursed.

Infrastructure Totals

1	Level 2 Charger Costs from Payment Request	$10,000.00	**4**	Level 2 Charger Costs (Actual) ❓	$7,000.00
2	DC Fast Charger Costs from Payment Request	$20,000.00	**5**	DC Fast Charger Costs (Actual) ❓	$2,340.00
3	Other Infrastructure Costs from Payment Request	$30,000.00	**6**	Other Infrastructure Costs (Actual) ❓	$25,000.00
7	Total Infrastructure Costs from Payment Request ❓	$60,000.00	**9**	Total Infrastructure Costs (Actual) ❓	$34,340.00
8	Total Infrastructure Rebate Received ❓	$20,000.00	**10**	Total Eligible Rebate (Actual) ❓	$20,000.00
			11	Total Infrastructure Rebate Used (Actual) ❓	$20,000.00
			12	Applicant Infrastructure Cost Responsibility (Actual) ❓	$14,340.00
			13	Total Non-Program Funding Acquired ❓	$14,340.00

1. **Level 2 Charger Costs from Payment Request** are the costs listed on the Payment Request Form that were itemized on an infrastructure Purchase Order and is not editable.

2. **DC Fast Charger Costs from Payment Request** are the costs listed on the Payment Request Form that were itemized on an infrastructure Purchase Order and is not editable.

3. **Other Infrastructure Costs from Payment Request** are the costs listed on the Payment Request Form that were itemized on an infrastructure Purchase Order and is not editable.

4. **Level 2 Charger Costs (Actual)** is based on the sum of all Level 2 charger costs and is not editable.

5. **DC Fast Charger Costs (Actual)** is based on the sum of all DC fast charger costs and is not editable.

6. **Other Infrastructure Costs (Actual)** is based on the sum of all other eligible infrastructure costs and is not editable.

7. **Total Infrastructure Costs from Payment Request** is prepopulated with the sum of the infrastructure costs entered on the Payment Request Form and is not editable.

8. **Total Infrastructure Rebate Received** is prepopulated with the total infrastructure rebate you received based on your Payment Request Form and is not editable.

9. **Total Infrastructure Costs (Actual)** is based on the sum of the actual Level 2, DC fast charger and other eligible infrastructure costs and is not editable.

10. **Total Eligible Rebate (Actual)** is prepopulated with the total infrastructure funding you are eligible for based on the number of replacement electric school bus(es) received and the prioritization level of the school district that the buses will serve and is not editable.

11. The **Total Infrastructure Rebate Used (Actual)** value is the amount of the actual total eligible funding that you used for all the charging infrastructure received and installed as well as any other eligible infrastructure costs and is not editable.

12. **Applicant Infrastructure Cost Responsibility (Actual)** shows the amount of money that the applicant will be responsible to pay after the rebate based on the costs provided in this form and is not editable.

13. **Total Non-Program Funding Acquired** is prepopulated with the sum of all non-EPA funding received and associated infrastructure for your new buses and is not editable.

Infrastructure Rebate Owed Back to EPA shows the amount of excess rebate funds from all infrastructure that you must pay back to EPA and is not editable. This field does not appear if there are no excess rebate funds that are due to EPA.

2.23 Complete Infrastructure and Funding

Once you have added all infrastructure and funding source information, you will see the total costs for your infrastructure at the bottom of the page. If your rebate does not cover the full cost of infrastructure, you will see how much you owe under "Applicant Infrastructure Cost Responsibility (Actual)". If you owe money back to EPA, a warning will pop up letting you know the amount to be reimbursed.

Select "Next" when you are finished.

Note: You will be able to continue with the form even if you need to reimburse EPA.

2.24 Telematics Information

If you are willing to share your telematics-related information with EPA, select the Telematics Data check box. Next, select the appropriate contact information.

2.25 Telematics Contact Information

If you would like to provide separate contact information from your primary or alternate contact, select "Provide Separate Telematic Contact" and fill in the required information. Select "Next" to proceed.

Edit Your Close Out

🏷️ **Rebate ID:** 017019

This page highlights the value of telematics, asks whether you are interested in EPA contacting you about research opportunities to provide telematics data, and if so, who the contact is for telematics information.

Most of today's school buses are equipped with sophisticated fleet management systems, known as "telematics", to improve the safety and efficiency of the bus fleet. Telematics systems may provide data on bus speed, location, and engine status to allow real-time tracking of routes, monitor compliance with safety requirements, and pinpoint maintenance issues as they arise. These data can also serve as an important resource for districts looking to improve efficiency and reduce emissions. As electric vehicles enter the school bus fleet, telematics can contribute to their successful implementation by providing data on bus range, battery performance, charging efficiency and other metrics for a variety of locations and operating conditions.

Participating in EPA research opportunities by providing telematics data could: help improve the national roll-out of electric school buses, allow operators to benchmark their fleet performance, and identify additional opportunities to improve efficiency and lower costs. Note, all telematics data received will comply with applicable Federal privacy requirements.

Telematics Data

☑ EPA or its partners may contact me about participating in research opportunities to provide bus or EVSE telematics data that could inform future transportation work.

Contact Information

Provide the contact for telematics data below by selecting one of the contacts below. If the Primary Contact or Alternate Contact for the applicant is not the best person to contact for Telematic data, select "Provide Separate Telematic Contact" and fill in the fields below with the appropriate contact information.

* denotes required field

Telematic Contact Selection *

🔘 Use Primary Contact ⚪ Use Alternate Contact ⚪ Provide Separate Telematic Contact

Primary Contact Information

Primary Contact First Name	Joan	Primary Contact Title	Director
Primary Contact Last Name	Smith	Primary Contact Business Phone Number	(230) 439-4030
Primary Contact Business Email	primary@email.com		

ℹ️ 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

2.26 Signature

Signature and Certification

The individual listed below is the person that logged into this form. The authorized representative must sign and submit this Close Out Form before EPA can review it for completeness and approve this rebate project for Close Out. If you do not have the authority to sign this Close Out, then notify the authorized representative so they can sign and submit the Close Out form. 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 and sign this Close Out. Note: In the case where updated SAM.gov information for the authorized representative is not yet available for them to login to this form, the name and title fields are editable; however, the authorized representative must sign the form.

By signing and submitting this Close Out Form, the applicant authorized representative certifies that:

1. 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 assuring that this rebate project is closed out. 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.
2. Old buses replaced and new replacement buses meet the eligibility requirements in the 2022 CSB Rebates Program Guide and, old buses were disposed of according to the Program Guide requirements.
3. New replacement buses are not manufactured or retrofitted with, or otherwise have installed, a power unit or other technology that creates air pollution within the school bus, such as an unvented diesel passenger heater.
4. Eligible charging equipment or other eligible infrastructure expenses meet the requirements in the 2022 CSB Rebates Program Guide.
5. They have the authority to represent the applicant organization listed on this form.
6. The public school system that will be served by the replacement buses for at least five years has been notified and approves of the bus replacements.
7. The statements and information provided in this Close Out Form are true and accurate to the best of their knowledge.
8. They will respond to EPA or its representatives if contacted to clarify information submitted in this Close Out Form.

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

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

Name ❔ *

EBEN BATHALON

Title ❔ *

MANAGER

Electronic Signature of Authorized Representative *

Sign above

☑ I confirm I have provided my signature above *

ℹ 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]

Please review the summary cost information provided at the top of the screen before you sign the Close Out Form. Summary information includes Total Bus and Infrastructure Rebate Amount Paid, the Total Bus and Infrastructure Eligible Rebate Amount, the Total Bus and Infrastructure Costs (actual), and the Total Non-EPA Funding Acquired. If you owe any money back to EPA, a warning will pop up letting you know the total amount.

To complete your Close Out Form, you must read and certify to the items listed in the Signature and Certification section, sign, confirm signature, and select "Submit Form". The "Name" and "Title" fields on this page are prepopulated based on who is logged into this form. If you are the authorized representative, confirm your title in the 'Title' field, update if needed. If you do not have the authority to sign this Close Out Form, then notify the authorized representative so they can sign and submit the Close Out Form.

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

If a different user needs 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 Close Out Form (saved as a draft). In this case, they must edit the "Name" and "Title" fields on this screen to show their full name and title before signing and submitting.

2.27 Missing Document and/or Organization Information

⚠ Warning - Missing Document and/or Organization Information

There is missing Document and/or Organization information in this Close Out Form. Please see the list below. Providing information in these fields is mandatory before your Close Out Form can be submitted.

All Bus Information Complete is required

☐ All Bus Information Complete *

Bus Information

The following fields are missing. Please complete before submitting the Close Out Form.

- BUS #3 New Bus Owner, New Bus Final Invoice, New Bus Proof of Delivery

Back to Bus Information Entry

All Infrastructure Information Complete is required

☐ All Infrastructure Information Complete *

Infrastructure Information

The following fields are missing. Please complete before submitting the Close Out Form.

- INFRASTRUCTURE #1 Infrastructure Owner, Final Invoice

Back to Infrastructure Information Entry

If there is any missing information, a warning will pop up indicating what is lacking. Select "Back to Bus Information Entry" if you have any bus information missing, and "Back to Infrastructure Information Entry" if you have any missing infrastructure information. Once you add all missing information, return to the signature page to sign and submit the Close Out Form.

3. Next Steps

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

Appendix A. Glossary

The following provides definitions of terms and field labels used throughout the Close Out Form and system screens.

Your Rebate Applications 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 or draft

Close Out Form Screens: Definitions

- Alternate Contact Business Email – Please verify that the alternate contact business email for your organization is correct. If not, update it with the current alternate contact business email. If this field is blank, enter an alternate contact business email if you have one.
- Alternate Contact Business Phone Number – Please verify that the alternate contact business phone number for your organization is correct. If not, update it with the current alternate contact business phone number. If this field is blank, enter an alternate contact business phone number if you have one.
- Alternate Contact First Name – Please verify that the alternate contact first name for your organization is correct. If not, update it with the current alternate contact first name. If this field is blank, enter an alternate organization contact first name if you have one.
- Alternate Contact Last Name – Please verify that the alternate contact last name for your organization is correct. If not, update it with the current alternate contact last name. If this field is blank, enter an alternate organization contact last name if you have one.
- Alternate Contact Title – Please verify that the alternate contact title for your organization is correct. If not, update it with the current alternate contact title. If this field is blank, enter an alternate contact title if you have one.
- Applicant Bus Cost Responsibility – This calculated value is the portion of the bus cost that exceeds the rebate amount.
- Applicant Infrastructure Cost Responsibility (Actual) – This calculated value is the amount that is the responsibility of the applicant to pay for infrastructure. It is the sum of the Level 2 Charger Costs (Actual), the DC Fast Charger Costs (Actual) and Other Eligible Infrastructure Cost (Actual) field amounts that exceeds the total rebate amount received for infrastructure.
- Auxiliary Heater Fuel Type – Select the auxiliary heater fuel type from the dropdown menu. If the auxiliary heater fuel type is not listed, select "Other" and enter the type in the Auxiliary Heater Fuel Type (Other) field.

- Auxiliary Heater Fuel Type (Other)–Enter the auxiliary heater fuel type.

- Battery Warranty Documents–Attach a file or scan of the battery warranty for the bus.

  Allowed file types: *.pdf, *.png, *.jpeg, *.jpg

  Minimum file size: 1KB

  Maximum file size: 5MB

- Battery Warranty Included?–Select "Yes" from the dropdown menu if the New Bus has a battery warranty, or "No" if there is no battery warranty.

- Bus #–This value is imported from your Payment Request.

- Bus and EVSE to be Used for V2G?–Select from the dropdown list to indicate if the bus and EVSE are going to be used for Vehicle to Grid charging.

- Bus Rebate Received–The is the rebate you received for this new bus and is prefilled from your Payment Request.

- Bus Reimbursement Owed to EPA–This is the amount by which your rebate exceeded your cost for this bus. You must refund this amount back to EPA.

- Capable of Bidirectional Charging–Select "yes" if the charger is capable of two-way charging (e.g., grid-to-vehicle and vehicle-to-grid). Select "no" if the charger can only charge grid-to-vehicle.

- City–Enter the city where the infrastructure (charger and other eligible infrastructure) was installed.

- Cost Includes Installation–Check this box if the cost listed in the Infrastructure Cost Per Charger field includes installation.

- County–Enter the county where the infrastructure (charger and other eligible infrastructure) was installed.

- DC Fast Charger Costs (Actual)–This is the sum of all DC fast charger costs entered on this Close Out Form.

- DC Fast Charger Costs from Payment Request–These are the costs listed on the Payment Request Form that were itemized on an infrastructure Purchase Order.

- Description of Work–Provide a detailed description of the infrastructure-related work entered in the "Other Eligible Infrastructure Cost" field.

- Document Description–This optional field can be used to enter any additional information about the document and is limited to 250 characters.

- Document Name–Enter a name for the document (may be different than the filename). Used to reference this document within the form. Please keep these names unique to each document.

- Document Purpose–Indicate the purpose for this Document (bus, electric charging infrastructure, or both). **Note:** Documents for any propane and CNG infrastructure are not needed as this infrastructure was not eligible to receive rebate funding.

- Document Type–Select the document type from dropdown menu. Both a final invoice and proof of delivery must be entered for each new bus receiving funding; however you may combine multiple buses or infrastructure elements, if clearly delineated, on a single invoice and a single proof of delivery document if desired.

- Document Upload—Final Invoices and Proof of Delivery – Attach a file or scan of the relevant document.

  Allowed file types: *.pdf, *.png, *.jpeg, *.jpg

  Minimum file size: 1KB

  Maximum file size: 5MB

- Eligible Funding From Close Out—This calculated value is the eligible funding for this bus based on the new bus information entered in the Close Out. This amount can be the same (if no changes from the Payment Request), or less than the Bus Rebate Received (if New Bus Purchase Price is less than the Bus Rebate Received). The amount cannot be more than the Bus Rebate Received even if the New Bus Purchase Price is greater than the Bus Rebate Received.

- EPA Vehicle Family—Please enter the 12-character alphanumeric EPA Vehicle Family. The EPA Vehicle Family can be found on the Vehicle Emission Control Information (VECI) label. The VECI label is usually on/near a door pillar or on the engine compartment sheet metal. If the bus is not an EPA certified vehicle, please enter the CARB Executive Order ID. If the vehicle does not have EPA or CARB certification, then please contact the CSB helpdesk.

- Equipped with Auxiliary Heater?—Select "Yes" from the dropdown menu if the New Bus is equipped with an auxiliary heater. Select "No" if the bus is not equipped with an auxiliary heater.

- Estimated Annual Idling Hours—Enter the estimated annual idling hours for the new bus.

- Estimated EV Bus Range (mi)—Enter the manufacturer's estimated range in miles for the new bus.

- Estimated Remaining Life (years)—This value is imported from your Payment Request. If "Swap Old Bus" is checked, estimate the remaining service life (in years) of the different Old Bus that was replaced.

- EV Battery Capacity (kWh)—Enter the rated battery capacity of the bus in kilowatt-hours (kWh).

- EVSE Capable of Bidirectional Charging?—Check this box if the charger is capable of bidirectional charging (i.e., the EVSE can both receive energy and provide energy to an external load, such as vehicle-to-grid charging, which supplies energy back to the electrical grid).

- EVSE Manufacture Year—The manufacturer year must not be before 2005 or after 2031.

- EVSE Manufacturer—Select the EVSE manufacturer from the dropdown list. If the manufacturer is not listed, select "Other" at the bottom of the list, and then enter the manufacturer in the EVSE Manufacturer (Other) field below this field.

- EVSE Manufacturer (Other)—Enter the EVSE manufacturer that was not listed in the dropdown in the EVSE Manufacturer field.

- EVSE Maximum Output Power (kW)—Enter the rated maximum output power of the charger (in kilowatts).

- EVSE Model—The model of the infrastructure hardware purchased.

- Exclude Bus—Exclude this bus and its replacement bus rebate from this rebate request. If you want to replace a different old bus rather than excluding this bus and its replacement, select the "Swap Bus" checkbox instead. If you want to replace a different old bus rather than excluding this bus and its replacement, select the "Swap Bus" checkbox instead.

- **Final Invoice** – Select the final invoice for the bus listed in the New Bus fields below. If the final invoice does not appear in the dropdown, complete the following steps:

    1. Complete the remainder of the Old Bus and New Bus fields
    2. Click the "Complete" button
    3. Click "Save" button at the bottom right of the screen
    4. Click "Back to Document Entry" to enter the Final Invoice for this bus
    5. Click "Return to Bus Information Page"
    6. Select "Edit" for this bus
    7. Select the document from the dropdown

- **Infrastructure Cost Per Charger (Actual)** – Enter the unit cost for each charger (plus installation costs if not reported separately). If you have multiple chargers at different costs, a separate Infrastructure Item needs to be entered for each (click the blue "Add Infrastructure" box).

- **Infrastructure Owner** – Select the infrastructure owner or organization that did other eligible infrastructure work from the dropdown list. If you don't see the organization in the dropdown do the following:

    1. Complete the Installation/Construction Address fields
    2. Click the "Complete" button
    3. Click the "Save" button at the bottom right of the screen
    4. Click "Return to Organization Entry" to enter the organization information
    5. Click "Return to Infrastructure Page"
    6. Select "Edit" for this Infrastructure Type
    7. Select the organization from the dropdown

- **Infrastructure Quantity** – Enter the number of chargers purchased at the same price. If multiple types of chargers were purchased, each type must be entered individually. Additionally, if multiple chargers of the same type were purchased at different costs, then the chargers need to be entered as separate infrastructure items.

- **Infrastructure Reimbursement Owed to EPA** – Amount of excess rebate funds received for all infrastructure, that you may need to pay back to EPA based on this Close Out Form.

- **Infrastructure Supplier** – Select the supplier from the dropdown list. If you don't see the organization in the dropdown do the following:

    1. Complete the Infrastructure Information for this infrastructure type, and the Installation/Construction Address fields
    2. Click the "Complete" button
    3. Click the "Save" button at the bottom right of the screen
    4. Click "Return to Organization Entry" to enter the organization information
    5. Click "Return to Infrastructure Page"
    6. Select "Edit" for this Infrastructure Type
    7. Select the organization from the dropdown

- Infrastructure Type – Select the charging infrastructure type from the dropdown menu. Add all that were purchased with rebate funds. Level 2 Charger and DC Fast Charger refer to the actual chargers and pedestals. Other Eligible Infrastructure Costs include construction, electrical work, site preparation, design and engineering, labor and permitting etc.

- Infrastructure Type (Other) – Enter the type of other eligible infrastructure costs. Other Eligible Infrastructure Costs include construction, electrical work, site preparation, design and engineering, labor and permitting etc.

- Level 2 Charger Costs from Payment Request – The costs listed on the Payment Request Form that were itemized on an infrastructure Purchase Order.

- Level 2 Charger Costs (Actual) – This is the sum of all Level 2 charger costs entered on this Close Out Form.

- Miles Covered [battery] – Enter total miles covered by battery warranty.

- Miles Covered [powertrain] – Enter total miles covered by powertrain warranty.

- Name [signature] – The authorized representative's name is automatically filled from SAM.gov information in this field, based on who is logged-in to this form. If you are the authorized representative, confirm your title in the 'Title' field, update if needed and sign the form below. If you do not have the authority to sign this Close Out Form, then notify the authorized representative so they can sign and submit the Close Out Form.

- National Center for Education Statistics (NCES) District ID – This is the NCES District ID that was entered on your application form for the school district listed above that new buses will serve for at least five years. You may have updated this ID on the Payment Request Form for specific buses.

- New Bus Dealer – This is the bus seller from the Purchase Order that was entered into the Payment Request Form.

- New Bus Delivery Date – Enter date in the format MM/DD/YYYY.

- New Bus Estimated Annual Mileage – Enter the estimated annual miles the new bus will travel.

- New Bus Estimated Fuel Consumption (gallons) – Enter the estimated annual fuel consumption for the new propane (gallons) or CNG (lbs) bus.

- New Bus Fuel Type – This is prefilled from what you entered in your Application form. If the new bus fuel type has changed, update it from the dropdown menu and provide a reason why the bus fuel type has changed in the Reason For Change of Bus Information field.

- New Bus GVWR – This is prefilled from what you entered in your Payment Request Form. If the new bus Gross Vehicle Weight Rating (GVWR) has changed, update it and provide a reason why the GVWR of the bus has changed in the Reason For Change of Bus Information field.

- New Bus Manufacturer – This is prefilled from what you entered in your Payment Request Form. If the new bus make has changed, update name of manufacturer and provide a reason why the make of the bus has changed in the Reason For Change of Bus Information field.

- New Bus Manufacturer (Other) – This is prefilled from what you entered in your Payment Request Form. If the new bus manufacturer has changed, update name of manufacturer and provide a reason why the make of the bus has changed in the Reason For Change of Bus Information field.

- New Bus Model – This is prefilled from what you entered in your Payment Request Form. If the new bus model has changed, update it and provide a reason why the model of the bus has changed in the Reason For Change of Bus Information field.

- New Bus Model Year – This is prefilled from what you entered in your Payment Request Form. If the new bus model year has changed, update it and provide a reason why the model year of the bus has changed in the Reason For Change of Bus Information field.

- New Bus Owner – Select the name of the Organization that owns the new bus listed in the New Bus fields below. If the organization does not appear in the dropdown, complete the following steps:

  1. Complete the remainder of the Old Bus and New Bus fields
  2. Click the "Complete" button
  3. Click the "Save" button at the bottom right of the screen
  4. Click "Back to Organization Entry" to enter the New Bus Owner for this bus
  5. Click "Return to Bus Information Page"
  6. Select "Edit" for this bus
  7. Select the organization from the dropdown

- New Bus Purchase Price – Enter the purchase price of the new replacement school bus received 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.

- New Bus VIN – Enter the 17-digit Vehicle Identification Number (VIN) for the new bus delivered.

- Non-EPA Funding Amount [bus] – Enter the amount of bus funding received from this source.

- Non-EPA Funding Amount [infrastructure] – Enter the amount of infrastructure funding received from this source.

- Non-EPA Funding Source [infrastructure] – Enter the name of the organization that provided infrastructure funding.

- Non-EPA Funding Source [bus] – Enter the name of the organization that provided bus funding.

- Non-EPA Funding Type [bus] – Select non-EPA new bus funding source type from the dropdown menu.

- Non-EPA Funding Type [infrastructure] – Select the non-EPA infrastructure funding source type from dropdown menu.

- Non-EPA Infrastructure Funding Not Accounted For – This calculated number shows the amount of non-EPA funding that is the applicant's responsibility which is not yet accounted for in the list of funding source amounts you entered above. When all funding source amounts are accounted for, this number will be '$0.00. If too much is accounted for, this number will be negative, and if not all funding source amounts have been accounted for, this number will be positive.

- Number of Buses Ordered (Payment Request) – This field is autofilled from your Payment Request Form.

- Number of Buses Received (Close Out) – This value is the sum of the number of new buses entered on this form. If this number is less than the Number of Buses Ordered (Payment Request) field, you excluded a replacement bus from this Close Out.

- Number of Buses Requested (Application) – This field is autofilled from your Application form.

- Number of Electric School Buses in Current Fleet – Enter the total number of electric buses in your current fleet.

- Number of Plugs on EVSE – Enter the number of plugs on each charger.

- Number of School Buses in Current Fleet – Enter the total number of buses in your current fleet.

- Number of Years Covered [battery] — Enter the length of the battery warranty in years.

- Number of Years Covered [powertrain] — Enter the length of the powertrain warranty in years.

- Old Bus Annual Idling Hours — Enter the estimated annual idling hours for the old bus.

- Old Bus Average Annual Fuel Consumption (gallons) — If the Swap Old Bus box is checked, enter the estimated annual fuel consumption of the different old bus that was replaced.

- Old Bus Average Annual Mileage — If the Swap Old Bus box is checked, enter the estimated average annual mileage for the different old bus that was replaced.

- Old Bus Donated To — Select the organization that the old bus was donated to. If the organization does not appear in the dropdown, complete the following steps:
    1. Complete the remainder of the Old Bus and New Bus fields
    2. Click the "Complete" button
    3. Click the "Save" button at the bottom right of the screen
    4. Click "Back to Organization Entry" to enter the Donee for this bus
    5. Click "Return to Bus Information Page"
    6. Select "Edit" for this bus
    7. Select the organization from the dropdown

- Old Bus Fuel Type — This value is imported from your Payment Request. If the Swap Old Bus box is checked, enter the fuel type of the different old bus that was replaced.

- Old Bus GVWR — If the Swap Old Bus box is checked, enter the Gross Vehicle Weight Rating of the different old bus that was replaced.

- Old Bus Manufacturer — If the Swap Old Bus box is checked, select the manufacturer's name of the different old bus that was replaced.

- Old Bus Manufacturer (Other) — If the Swap Old Bus box is checked, enter the manufacturer name of the different old bus that was replaced if it doesn't appear in the selection.

- Old Bus Model — If the Swap Old Bus box is checked, enter the manufacturer name of the different old bus that was replaced.

- Old Bus Model Year — This value is imported from your Payment Request. If the Swap Old Bus box is checked, enter the model year of the different old bus that was replaced.

- Old Bus NCES District ID — This value is imported from your Payment Request. If the Swap Old Bus box is checked, enter the 7-character NCES District ID for the school district the different old bus primarily served during the 2021-2022 school year.

- Old Bus Odometer (miles) — Enter odometer reading of the old bus at time of scrappage, donation or sale. If exact reading is unknown, provide an estimate.

- Old Bus Owner — Select the old bus owner from the dropdown. If the old bus owner is not listed in the dropdown, you need to go back to the Organizations screen to enter the old bus owner organization, so complete the following steps:
    1. Click "Back to Organization Entry"
    2. Enter the old bus owner organization information,
    3. Select the "Return to Bus Information Page"

4. Select "Edit" for this bus

5. Select the organization from the dropdown

■ Old Bus Proof of Scrappage – Attach photos of the old bus destroyed engine and chassis that shows or indicates what the last 4 digits of the bus VIN are as proof of old bus scrappage. Attach a letter signed by a representative of the scrap yard/entity the performed the scrappage. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Minimum file size: 1KB. Maximum file size: 5MB

■ Old Bus Sold To – Select the organization that the old bus was sold to. If the organization does not appear in the dropdown, complete the following steps:

1. Complete the remainder of the Old Bus and New Bus fields

2. Click the "Complete" button

3. Click the "Save" button at the bottom right of the screen

4. Click "Back to Organization Entry" to enter the Purchaser for this bus

5. Click "Return to Bus Information Page"

6. Select "Edit" for this bus

7. Select the organization from the dropdown

■ Old Bus Title and Registration – Attach a file or scan of the Title and Registration for the different old bus. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Minimum file size: 1KB. Maximum file size: 5MB.

■ Old Bus VIN – This value is imported from your Payment Request and is the Vehicle Identification Number (VIN). If the Swap Old Bus box is checked, enter the 17-digit Vehicle Identification Number (VIN) of the different old bus that was replaced.

■ Organization Address – Enter the street address of the organization.

■ Organization City – Enter the city where the organization is located.

■ Organization Contact Business Email – Enter the business email of the contact person entered for this organization.

■ Organization Contact Business Phone Number – Enter the business phone number of the contact person entered for this organization.

■ Organization Contact First Name – Enter the first name of the contact person for the organization.

■ Organization Contact Last Name – Enter the last name of the contact person for the organization.

■ Organization County – Enter the county where the organization is located.

■ Organization Name – Enter the name of the organization.

■ Organization State or Territory – Search for or select the state or territory where the organization is located from the dropdown list.

■ Organization Type – For the organization you are adding, select the appropriate checkboxes for this organization's type(s). See text at top of the page explaining the different organization types.

■ Organization Zip – Enter the 5 digit zip code, or the 5 digit zip plus 4 (e.g. NNNNN-NNNN) for the organization.

■ Other Eligible Infrastructure Cost (Actual) – Enter the total of Other Eligible Infrastructure Costs for this infrastructure type (other). The costs for this infrastructure type (for example, design and engineering) are reflected on the final invoice that you received for this work.

- Other Infrastructure Organization – Select the organization from the dropdown that performed the other eligble infrastructure installation or services (construction, electrical work, site preparation, design and engineering, labor and permitting, charger installation) if not included in final invoice for charger purchase etc. If you don't see the organization in the dropdown do the following:
    1. Complete the Infrastructure Information for this infrastructure type, and the Installation/ Construction Address fields
    2. Click the "Complete" button
    3. Click the "Save" button at the bottom right of the screen
    4. Click "Return to Organization Entry" to enter the organization information
    5. Click "Return to Infrastructure Page"
    6. Select "Edit" for this Infrastructure Type
    7. Select the organization from the dropdown

- Other Eligible Infrastructure Organization Supplier – Select the organization from the dropdown that performed the other eligble infrastructure installation or services (construction, electrical work, site preparation, design and engineering, labor and permitting, charger installation) if not included in final invoice for charger purchase etc. If you don't see the organization in the dropdown do the following:
    1. Complete the Infrastructure Information for this infrastructure type, and the Installation/ Construction Address fields
    2. Click the "Complete" button
    3. Click the "Save" button at the bottom right of the screen
    4. Click "Return to Organization Entry" to enter the organization information
    5. Click "Return to Infrastructure Page"
    6. Select "Edit" for this Infrastructure Type
    7. Select the organization from the dropdown

- Other Infrastructure Costs (Actual) – This is the sum of all other eligible infrastructure costs entered on this Close Out Form.

- Other Infrastructure Costs from Payment Request – The costs listed on the Payment Request Form that were itemized on an infrastructure Purchase Order.

- Photo of Charging Equipment – Attach a photo of the installed EVSE. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Minimum file size: 1KB. Maximum file size: 5MB.

- Photo of New Bus and VIN Documentation – Attach a photo of the new bus that includes or indicates the VIN number. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Minimum file size: 1KB. Maximum file size: 5MB.

- Powertrain Warranty Included? – Select "Yes" from the dropdown menu if the New Bus has a powertrain warranty, or "No" if it doesn't.

- Powertrain Warranty Documents – Attach a file or scan of the powertrain warranty for the bus if applicable. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Minimum file size: 1KB. Maximum file size: 5MB.

- Primary Contact Business Email [your organization] – Please verify that the primary contact business email for your organization is correct. If not, update it with the current primary contact business email.

- Primary Contact Business Email [telematics organization]—Please verify that the primary contact business email for the telematics organization is correct. If not, update it with the current primary contact business email.

- Primary Contact Business Phone Number [your organization contact]—Please verify that the primary contact business phone number for your organization is correct. If not, update it with the current primary contact business phone number.

- Primary Contact Business Phone Number [telematics organization]—Please verify that the primary contact business phone number for the telematics organization is correct. If not, update it with the current primary contact business phone number.

- Primary Contact First Name [your organization]—Please verify that the primary contact first name for your organization is correct. If not, update it with the current primary contact first name.

- Primary Contact First Name [telematics organization]—Please verify that the primary contact first name for the telematics organization is correct. If not, update it with the current primary contact first name.

- Primary Contact Last Name [your organization]—Please verify that the primary contact last name for your organization is correct. If not, update it with the current primary contact last name.

- Primary Contact Last Name [telematics organization]—Please verify that the primary contact last name for the telematics organization is correct. If not, update it with the current primary contact last name.

- Primary Contact Title [your organization]—Please verify that the primary contact title for your organization is correct. If not, update it with the current primary contact title.

- Primary Contact Title [telematics organization]—Please verify that the primary contact title for the telematics organization is correct. If not, update it with the current primary contact title.

- Private Fleet Name—This is the private fleet that was listed on your application form. If the private fleet supplying buses or service to the school district has changed, enter new private fleet information on the Organizations page of this form.

- Proof of Delivery [new bus]—Select the proof of delivery (e.g. bill of lading) for the bus listed in the New Bus fields. If the proof of delivery does not appear in the dropdown, complete the following steps:

  1. Complete the remainder of the Old Bus and New Bus fields
  2. Click the "Complete" button
  3. Click the "Save" button at the bottom right of the screen
  4. Click "Back to Document Entry" to enter the Proof of delivery for this bus
  5. Click "Return to Bus Information Page"
  6. Select "Edit" for this bus
  7. Select the document from the dropdown

- Proof of Delivery [infrastructure]—Select the proof of delivery document for this infrastructure type item from the dropdown. If the proof of delivery does not appear in the dropdown, complete the following steps:

  1. Click the "Complete" button
  2. Click the "Save" button at the bottom right of the screen
  3. Click 'Back to Document Entry' to enter the Proof of Delivery document for this infrastructure

4. Click "Return to Infrastructure Page"

5. Select "Edit" for this infrastructure type item

6. Select the document from the dropdown

- Reason for Change of Bus Information—This field displays if at least one of the new bus fields has changed from the new bus information entered in the Payment Request or Application. Explain the change(s) in this field.

- Reason for Swapping Old Bus—Select the reason for swapping the old bus from the dropdown menu.

- Reason for Swapping Old Bus (Other)—If you have a reason that isn't listed for swapping an old bus, provide the reason here.

- Replacement Process—Select how the different old bus was replaced. 2010 and older buses can only be scrapped. 2011 and newer buses can be scrapped, sold, or donated.

- School District Name—This is the school district name that corresponds to the NCES District ID that was submitted on the application form.

- Scrap Yard Organization—Select the scrap yard where the old bus was scrapped from the dropdown list. If the organization does not appear in the dropdown, complete the following steps:

  1. Complete the remainder of the Old Bus and New Bus fields

  2. Click the "Complete" button

  3. Click the "Save" button at the bottom right of the screen

  4. Click "Back to Organization Entry" to enter the Scrap Yard for this bus

  5. Click "Return to Bus Information Page"

  6. Select "Edit" for this bus

  7. Select the organization from the dropdown

- State or Territory—Select the state or territory from the dropdown list.

- Street Address—Enter the street address where the charger is installed, or where the other eligble infrastructure work was done.

- Swap Old Bus—Check this box if you want to scrap, donate or sell a different Old Bus from what was entered in your Application and complete the fields for the different old bus.

- Telematic Contact Selection—Select the type of contact for the telematics organization using the dropdown menu.

- Telematic Contact First Name—If you selected a "Separate Telematic Contact" in the Telematic Contact Selection dropdown, provide the first name of the separate contact.

- Telematic Contact Last Name—If you selected a "Separate Telematic Contact" in the Telematic Contact Selection dropdown, provide the last name of the separate contact.

- Telematic Contact Title—If you selected a "Separate Telematic Contact" in the Telematic Contact Selection dropdown, provide the title of the separate contact.

- Telematic Contact Business Phone Number—If you selected a "Separate Telematic Contact" in the Telematic Contact Selection dropdown, provide the business phone number of the separate contact.

- Telematic Contact Business Email—If you selected a "Separate Telematic Contact" in the Telematic Contact Selection dropdown, provide the email of the separate contact.

- Title–The authorized representative's title is automatically filled from SAM.gov information in this field, based on who is logged-in to this form. If you are the authorized representative, confirm your title, update if needed, and sign the form below. If you do not have the authority to sign this Close Out Form, then notify the authorized representative so they can sign and submit the Close Out Form.

- Total Applicant Bus Cost Responsibility–This calculated value is the amount that is the responsibility of the applicant to pay. It is the difference between the New Bus Purchase Price for all the replacement buses and the total eligible rebate funding amount for the new replacement buses.

- Total Bus and Infrastructure Costs (Actual)–This is the sum of bus and infrastructure costs entered on this form.

- Total Bus and Infrastructure Eligible Rebate Amount– This is the sum of the 'Total Bus Rebate Amount Used' and 'Total Infrastructure Rebate Used (Actual)' fields.

- Total Bus Cost (Actual)–This calculated value is the New Bus Purchase Price for all the replacement buses received and included in the Close Out.

- Total Bus Costs from Payment Request–This calculated value from the Payment Request Form is the New Bus Purchase Price for all the replacement buses ordered.

- Total Bus Rebate Amount Used–This calculated value is the Eligible Funding from this Close Out Form for all the replacement buses received and included in the Close Out.

- Total Bus Rebate Received–This calculated value is the total rebate amount received for all the buses ordered in the Payment Request Form. This does not include the infrastructure portion of the rebate (if applicable).

- Total Bus Reimbursement Owed to EPA–Amount of excess rebate funds received for all buses that you need to pay back to EPA based on this Close Out Form.

- Total Infrastructure Costs (Actual)–This is the total costs entered on this Close Out Form for Level 2 and DC Fast Chargers as well as any other eligible infrastructure costs.

- Total Infrastructure Costs from Payment Request–This is the sum of the infrastructure costs entered on your Payment Request.

- Total Infrastructure Rebate Received–This is the total infrastructure rebate you received based on your Payment Request.

- Total Infrastructure Rebate Used (Actual)–This calculated value is the amount of the actual eligible funding from this Close Out Form that you used for all the charging infrastructure received and installed as well as any other eligible infrastructure costs.

- Total Non-EPA Program Funding Acquired–This is the sum of all non-EPA funding received for new replacement buses and associated infrastructure.

- Total Non-Program Funding Acquired [bus]–The sum of all non-EPA funding amounts entered in the Non-EPA Clean School Bus Funding Information section of the page.

- Total Non-Program Funding Acquired [infrastructure]–The sum of all non-EPA funding amounts entered in the Non-EPA Clean School Bus Infrastructure Funding Information section of this screen.

- Total Owed Back to EPA–This is the amount by which your Total Bus and infrastructure Rebate Amount Paid exceeds your Total Bus and Infrastructure Eligible Rebate Amount. You must refund this amount back to EPA.

- Total Rebate Funds Received from Payment Request – This the total bus and insfrastructure rebate payment you received based on your approved Payment Request Form.

- Total Rebate Funds Requested In Application – This is the total bus and infrastructure (if applicable) funding requested based on your application.

Appendix B. Printable List of Fields

The Close Out Form requires some or all of the following information. Fields with an asterisk are automatically prepopulated based on Replacement Bus Fuel Type, Replacement Bus GVWR, and the prioritization status of the school district per the 2022 CSB Rebates Program Guide.

SAM.gov credentials

Applicant Type

- ☐ *Applicant Name
- ☐ *School District Prioritized
- ☐ *School District Name
- ☐ *National Center for Education Statistics (NCES) District ID
- ☐ *Total Rebate Funds Requested in the Application

Application Info (Screen 2)

_____   _____
*Applicant   *School District Prioritized?

_____   _____
*School District Name   *NCES District ID

_____   _____
*Total Rebate Funds Requested in the Application   *Total Rebate Funds Received from Payment Request

Applicant Primary Contact Information

_____   _____
*Primary Contact First Name   *Primary Contact Business Phone Number

_____   _____
*Primary Contact Last Name   *Primary Contact Business email

_____
*Primary Contact Title

Applicant Alternate Contact Information

_____   _____
Alternate Contact First Name   Alternate Contact Business Phone Number

_____   _____
Alternate Contact Last Name   Alternate Contact Business email

_____
Alternate Contact Title

Organizations (Screen 3)

General Information

*Organization Type

__ Scrap Yard (old bus)

__ Donee (old bus)

__ Purchaser (old bus)

__ Old Bus Owner

__ New Bus Owner

__ Infrastructure Owner (electric bus charging)

__ Infrastructure Supplier (charging equipment only)

__ Other Infrastructure Organization

_____

*Organization Name

Contact Information

_____
*Organization Contact First Name

_____
*Organization Contact Last Name

_____
*Organization Contact Business Email

_____
*Organization Contact Business Phone Number

Address

_____
*Organization Address

_____
*Organization City

_____
*Organization Zip

_____
*Organization County

_____
*Organization State or Territory

Documents (Screen 4)

<u>Document Information</u>

Make copies for additional documents

_____
*Document Type

*Document Purpose

__ Bus

__ Electric Bus Charging Infrastructure

*Document Upload – Final Invoices and Proof of Delivery. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Max file size 1KN, min file size 5 MB

_____
*Document Name

_____
*Document Description

Buses (Screen 5)

General Information:

_____
*Number of School Buses in Current Fleet

_____
*Number of Electric School Buses in Current Fleet

<u>Old Bus</u>

_____
*Old Bus Owner

_____
*Old Bus Annual Idling Hours

_____
*Old Bus Odometer (miles)

_____
*Replacement Process

*Filet Upload – Old Bus Proof of Scrappage.
Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Max file size 1KN, min file size 5 MB

_____
*Scrap Yard Organization (if scrapped)

_____
*Old Bus Sold To (if sold)

_____
*Old Bus Donated To (if donated)

Note: If you choose to swap out old buses designated in your payment request with different eligible old buses you will need to complete additional fields including the reason for the swap and updates to the following Old Bus fields: VIN, Manufacturer, Average Annual Mileage, Fuel Type, Model, Average Annual Fuel Consumption, GVWR, Model Year, NCES District ID, and Estimated Remaining Life. You will also need to upload proof of title and registration.

New Bus

_____
*New Bus Owner

_____
*Final Invoice

_____
*Proof of Delivery

_____   _____
*New Bus VIN   *Bus Rebate Received

_____   _____   _____
*New Bus EPA Vehicle Family   *New Bus Manufacturer   *New Bus Purchase Price

_____   _____   _____
*New Bus Fuel Type   *New Bus Model   *Eligible Funding from Close Out

_____   _____   _____
*New Bus Model Year   *New Bus GVWR   *Applicant Bus Cost Responsibility

_____
*New Bus Delivery Date

_____   _____   _____
*New Bus Estimated Annual Mileage   *Estimated EV Bus Range (mi)   *Capable of Bidirectional Charging?

_____   _____   _____
*EV Battery Capacity (kWh)   *Equipped with Auxiliary Heater?   *Auxiliary Heater Fuel Type

__ *Heater installed in accordance with the Program Guide

*Filet Upload – Photo of New Bus and VIN Documentation.
Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Max file size 1KN, min file size 5 MB

Battery Warranty:

Make copies for additional documents

_____   _____   _____
Battery Warranty Included   Number of Years Covered   Miles Covered

_____
Total kW hours of Discharge

*Battery Warranty Document Upload. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Max file size 1KN, min file size 5 MB

Powertrain Warranty:

Only include if Powertrain Warranty Included

_____   _____
Powertrain Warranty Included   Number of Years Covered

_____
Miles Covered

*Powertrain Warranty Document Upload. Allowed file types: *.pdf, *.png, *.jpeg, *.jpg. Max file size 1KN, min file size 5 MB

Non-EPA Clean School Bus Funding Information:

_____ _____ _____
*Non-EPA Funding Type   *Non-EPA Funding Source   *Non-EPA Funding Amount

_____ _____ _____
*Non-EPA Funding Type   *Non-EPA Funding Source   *Non-EPA Funding Amount

_____ _____ _____
*Non-EPA Funding Type   *Non-EPA Funding Source   *Non-EPA Funding Amount

Infrastructure (Screen 6)

Infrastructure Information (if charger):

_____   _____
*Infrastructure Type   *Infrastructure Quantity

_____   _____
*EVSE Maximum Output Power (kW)   *Infrastructure Cost Per Charger (Actual)

_____   _____
*EVSE Manufacturer   *Infrastructure Subtotal

_____   __ Cost includes Installation
* EVSE Model

_____   _____
*EVSE Manufacture Year   *Infrastructure Supplier

_____
*Number of Plugs on EVSE

__ EVSE Capable of Bidirectional Charging?

_____
*Bus and EVSE to be Used for V2G?

_____
*Infrastructure Owner

Infrastructure Information (if other):

_____
*Infrastructure Type

_____
*Infrastructure Type (Other)

_____
*Description of Work

_____
*Infrastructure Owner

_____
*Other Eligible Infrastructure Cost (Actual)

_____
*Other Infrastructure Organization

Installation/Construction Address:

_____
Street Address

_____
City

_____
*Zip

_____
*State or Territory

_____
*County

Non-EPA Clean School Bus Infrastructure Funding Information:

_____
*Non-EPA Funding Type

_____
*Non-EPA Funding Type

_____
*Non-EPA Funding Type

_____
*Source of Additional Non-EPA Funding

_____
*Source of Additional Non-EPA Funding

_____
*Source of Additional Non-EPA Funding

_____
*Non-EPA Funding Amount

_____
*Non-EPA Funding Amount

_____
*Non-EPA Funding Amount

Telematics (Screen 7)

_____
Telematic Contact First Name*

_____
Telematic Contact Last Name*

_____
Telematic Contact Email*

_____
Telematic Contact Title*

_____
Telematic Contact Business Phone Number*