

Energy Saving Trust chargepoint funding – guidance document for installers

Energy Saving Trust is being funded by the Scottish Government to provide grant support to individuals and organisations wishing to install electric vehicle chargepoints at their home or their business premises to facilitate their operation of electric vehicles.

In previous years, Energy Saving Trust funding has been provided alongside UK Government funding via the Office for Zero Emission Vehicles (OZEV) as part of its electric vehicle homecharge scheme (EVHS) and its workplace charging scheme (WCS). Energy Saving Trust's rules of eligibility mirrored those of OZEV for its respective schemes.

This year 2023/2024, OZEV schemes differ to Energy Saving Trust schemes and, in some cases, only Energy Saving Trust funding will be available to an individual or an organisation, with no financial support from OZEV. For more information about Energy Saving Trust funding, please visit our website [here](#) for domestic installations and [here](#) for business installations.

Similar to OZEV, Energy Saving Trust will have two separate lists of approved installers; one for those installers accredited for domestic installations and the other for those accredited for business installations. These lists will be provided to applicants as appropriate, depending on the nature of the install in question.

Due to the large number of organisations anticipated to be registered on Energy Saving Trust's lists of approved chargepoint installers (both domestic and business), it is necessary to have clear, standardised processes in place for all installers to ensure effective and efficient management of the funding scheme. All approved installers must therefore comply with the processes and requirements as laid out herein and the flow diagrams in Annexes A and B at the foot of this document which illustrate the installation journeys.

1. Accreditation requirements and checks

- a. The installer must be accredited by OZEV as part of its EVHS and/or WCS.
- b. The installer can only supply units accredited by OZEV as part of EVHS or WCS, as applicable.
- c. As part of our onboarding process, we may perform due diligence around the financial health of an organisation through a credit check.
- d. We will also check the latest status of the business on Companies House (if applicable).

2. Installation specifications

- a. For reasons of future proofing, an untethered chargepoint should be quoted for in the first instance.
- b. A 32A (7kW) chargepoint should be quoted for where supply is sufficient to accommodate it. For business installations, subject to supply being sufficient, 64A (22Kw) chargepoints may be quoted for.

3. Format of installer documents provided to applicants

During the application and installation process, the installer will be required to issue the applicant with (in order):

- a quote
- an invoice
- a paid invoice
- an electrical installation certificate (EIC)

For Energy Saving Trust's verification requirements, please provide a 'mock-up' example of the above three documents to Energy Saving Trust for review and approval. Examples of the suggested format and content of these documents are appended at the bottom of this document. These must contain the following:

- a. The name and address of a fictitious example applicant as well as the name, address, and logo of your organisation. Quotes and invoices must be itemised, making clear the following:
 - i. chargepoint model as it appears on either the [EVHS](#) or [WCS](#) list
 - ii. chargepoint power rating
 - iii. whether chargepoint is tethered/untethered
 - iv. whether chargepoint is single/double-outlet
 - v. that the unit to be installed is a smart chargepoint
 - vi. details of civils work involved, and additional materials required
 - vii. warranty and maintenance costs, as applicable*
 - viii. data/SIM card costs, as applicable*
 - ix. bay marking costs, as applicable*
 - x. back-office commissioning costs, as applicable*
 - xi. both exclusive and inclusive of VAT totals

Note: *Items 7-10 are only required if the quote is for a business installation.

- b. Paid invoices must have a clear and consistent means of denoting that the invoice has been settled in the form of a 'PAID' stamp, or text stating 'amount due £0.00' or an equivalent – a handwritten note would not be acceptable.
- c. Invoices must correspond to the quote – where there is a discrepancy between the final invoice and the original quote, the installer must make Energy Saving Trust aware of the reasons for this as soon as possible, otherwise the funding may be withdrawn.
- d. Energy Saving Trust must be advised immediately when any change to your business details is made such as change of email address.

- f. Installers must not issue the applicant with any invoices or arrange for the works to take place prior to the applicant receiving their grant offer letter from Energy Saving Trust, which will contain a grant reference number in the format **EVSSE#####** for domestic installations and **EVR/EVT#####** for business installations. Once the installer is in possession of this reference number, they may schedule the works with the applicant. The grant offer will expire three months from the date issued for domestic installations and six months for business installations. Energy Saving Trust should be notified at the earliest opportunity of any delays to the applicant's chargepoint installation beyond this expiry date. Where these delays are justifiable, Energy Saving Trust may be able to offer an extension to the grant deadline.
- g. The following statement must be added to all your quotes and invoices: "Eligible for Energy Saving Trust – chargepoint grant".
- h. All documentation submitted must be in PDF format. We cannot accept links to documents.

4. Processes and timescales

Please refer to the schematic in the installer journey flow charts in Annexes A and B at the foot of this document to further assist understanding of processes.

- a. Following initial contact with the applicant, the installer carries out a site survey and issues a quote to the applicant for the proposed works. Once an applicant makes contact with an installer it is the responsibility of the installer to ensure that the applicant is made aware of the available funding streams and if the applicant is intending to utilise one of these streams.
- b. The applicant submits an application via Energy Saving Trust's online portal at cpsgrants.est.org.uk for domestic installations, or via our email address (electricvehiclelesscotland@est.org.uk) for business installations.
- c. Energy Saving Trust reviews the applicant's submission and issues the applicant a formal offer of grant funding. **Installations must not go ahead prior to a formal offer of grant funding being issued to the applicant.** The Installer must therefore request confirmation from the applicant of the Energy Saving Trust grant reference number (included within the grant offer letter) prior to any arrangements being made for the works to take place. This grant reference number will take the form **EVSSE#####** for domestic installations and **EVR/EVT#####** for business installations.
- d. Once the installation has taken place, an electrical installation certificate must be issued to the applicant within five working days of works completion. The electrical installation certificate must be twice dated.

e.e. A paid invoice must be issued to the applicant within five working days of receipt of payment for the works.

e.f. Where a warranty for the chargepoint must be provided to the applicant a copy of this warranty must be retained by the installer.

N.B. In cases where there are essential additional works that must be carried out to enable an installation to go ahead, but that are not within the remit of the installer, Energy Saving Trust must be made aware of this immediately, as it may impact on the grant offer letter value.

5. Performance monitoring

Approved installers' performances will be tracked on an on-going basis to ensure that processes defined herein are adhered to, and more generally that all installers' conduct remains of an exemplary standard throughout all projects. Should any given installer's performance be found to be of an unacceptable standard, Energy Saving Trust reserves the right to remove them from our list(s) of approved installers. Examples of what may be considered to constitute an unacceptable level of performance include, but are not limited to, the following:

- Installer's consistent failure to abide by Energy Saving Trust's processes and timescales, as outlined herein.
- Installer consistently charging considerably higher rates than other installers without good reason. For this reason please ensure that you inform us immediately of any change in contact information.
- Repeated failure to respond in a timely manner to queries from applicants or Energy Saving Trust.
- Repeated failure to demonstrate a high level of aftercare subsequent to job completion, not responding promptly or not providing appropriate assistance should there be any issues with the chargepoint(s) subsequent to installation.
- Quoting and invoicing inconsistencies against each other and their original agreed upon submissions, as per section 3.
- Installer subject to repeated negative applicant/customer feedback.

- Installer evidenced to have committed an act of gross negligence/incompetence.
- Installer installing units not in the quote.
- Repeatedly missing agreed installation dates
- Feedback from applicants stating that installer installed a chargepoint before a grant offer letter was issued.

Further to the above, any organisation interested in being added to one or both of Energy Saving Trust's lists of approved installers must be able to demonstrate a historic record of service of a suitably high standard. Should Energy Saving Trust have reason to believe that the organisation in question, or an employee of said organisation, has operated in a manner that is not in keeping with the standard of conduct demanded by Energy Saving Trust, Energy Saving Trust reserves the right to refuse to include said organisation on either of its approved lists of installers. Energy Saving Trust may also at its own discretion exclude an organisation from one or both of its approved installer lists should historic performance failings only become known to Energy Saving Trust subsequent to said organisation's appointment to said list(s).

6. Essential documents

Energy Saving Trust must receive each of the following before an organisation can be added to our approved list(s) of non-public chargepoint installers:

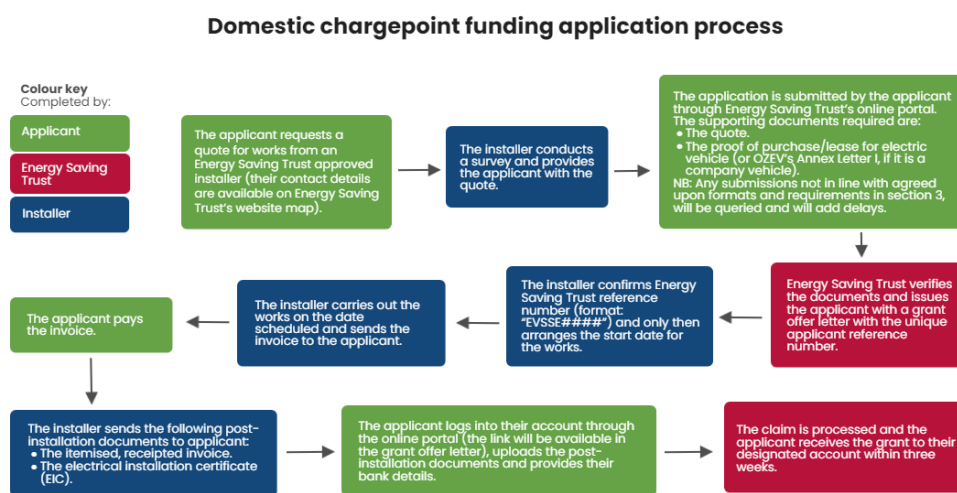
- a. A fully completed 'Energy Saving Trust prospective installer details' form, which will be attached alongside this guidance document.
- b. Evidence of accreditation for the OZEV's EVHS and/or WCS, as applicable.
- c. Mock up examples of each of the following documents*:
 - i. quote
 - ii. invoice
 - iii. paid invoice

*Please refer to section 3 of this document for a specification of the information that the quote, invoice and paid invoice should contain, and Appendix C for an example copy.

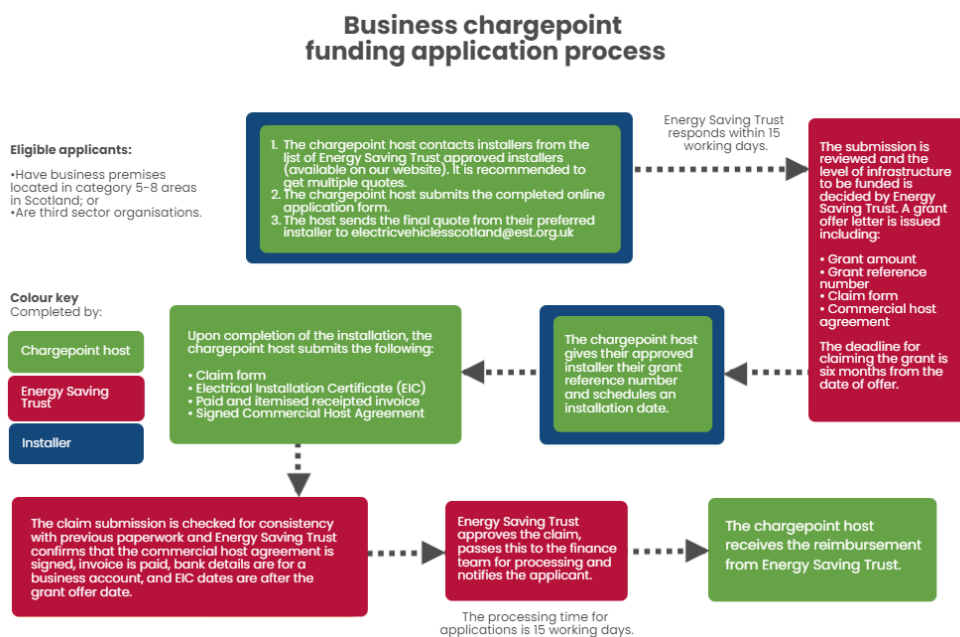
7. Sub-contractors

Should an organisation intend to sub-contract any or all of their works to a third party, Energy Saving Trust must receive all information provided in 7. for the sub-contractor(s) in question. Sub-contractors will be treated as an extension of the sub-contracting organisation; it is the sub-contracting organisation that will therefore be liable for any issues related to the performance of the sub-contractor(s)

Annex A: Domestic chargepoint grant funding process



Annex B: Business chargepoint grant funding process



Appendix C. Example quotes and invoices

Contents:

- a. example quotation
- b. example customer invoice
- c. example paid/receipted invoice

Example quote

Please include in your own quote all details pertaining to the items and figures in bold, as well as any other details as applicable. Using your own format is fine but please make sure the invoice is very clear.

Date: 01/01/2021
Project: (Name of applicant's organisation)
Compiled by: Installer's staff member

Installer LOGO

Customer address
Customer Road
G0 000

Installer address
Installer Road
EH0 000

Dear Mr/Ms _____

RE: Quotation for Electric Vehicle Charging Point

Some information is to be included about the installation(s).

Item number	Description	QTY	Total Cost
1	Name and brief but comprehensive description of unit to be installed (1 row per unit) as per section 3		£xx.xx
2	Additional items – list individually (eg additional cabling and civil works)		£xx.xx
3	Labour costs		£xx.xx
	Site total		£XX.XX
	Project Total excl. VAT		£XX.XX
	Project Total incl. VAT		£XX.XX

Please include any additional information that you would usually include with such a quote, for example a description of maintenance contract, terms and conditions of sale etc.

Example invoice

Please include in your own invoice all details pertaining to the items and figures in bold, as well as any other details as applicable. Using your own format is fine but please make sure the invoice is very clear.

Invoice number: **00012345**

Date: **01/01/2021**

Installer LOGO

Customer address
 Customer Road
 G0 000

Installer address
 Installer Road
 EH0 000

Item number	Description	QTY	Total Cost
1	Name and brief but comprehensive description of unit to be installed (1 row per unit) as per section 3.b.		£XX.XX
2	Additional items – list individually (eg additional cabling and civil works)		£XX.XX
3	Labour costs		£XX.XX
	Site total		£XX.XX
	Project Total excl. VAT		£XX.XX
	Project Total incl. VAT		£XX.XX

Your company VAT number
 Your company registration number
 Additional company details here

Your company contact details
 Information on how to pay

Subtotal: £XX.XX
 VAT: £XX.XX
 Total to pay: £XX.XX

Example paid invoice

Please include in your own receipted invoice all details pertaining to the items and figures in bold, as well as any other details as applicable. Using your own format is fine but please make sure the invoice is very clear.

Invoice number: 00012345
Date: 12/12/2019

Installer LOGO

Customer address
Customer Road
G0 000

Installer address
Installer Road
EH0 000

Item number	Description	QTY	Total Cost
1	Name and brief but comprehensive description of unit to be installed (1 row per unit) as per section 3.b.		£xx.xx
2	Additional items – list individually (eg additional cabling and civil works)		£xx.xx
3	Labour costs		£xx.xx
	Site total		£XX.XX
	Project Total excl. VAT		£XX.XX
	Project Total incl. VAT		£XX.XX

Your company VAT number
Your company registration number
Additional company details here

Your company contact details

Subtotal: £XX.XX
VAT: £XX.XX
Total to pay: £XX.XX
Total to pay: £0.00

Please clearly indicate that the customer has paid, with either a £0 balance or a dated paid stamp.

Please send your documents to our email address here:
electricvehiclesscotland@est.org.uk