



# OptimizEV⚡

Power up your home EV charging routine



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# 1. Introduction to OptimizEV

## Welcome to OptimizEV—we're excited you're here!

By participating in the program, you'll help to create a more sustainable future and earn incentives, simply by adopting a smart EV charging routine that shifts the bulk of your charging to off-peak times.

Charging your EV during off-peak hours helps reduce strain on the electrical grid. By spreading out the demand for electricity, we can reduce the need for new power plants and other infrastructure, which can drive down energy rates and reduce carbon emissions.

**By participating in OptimizEV, you'll do your part to reduce your environmental footprint while earning upfront and ongoing incentives.** Whatever your motivation, we welcome your participation and look forward to supporting you.



## 2. Definitions

Please read these definitions that clarify terms and concepts used throughout this guide.

- **Electric Vehicle (EV):** A type of vehicle that is powered entirely or in part by electricity stored in a battery.
  - **Battery Electric Vehicle (BEV):** A fully electric vehicle that relies solely on a battery for power and does not have an internal combustion engine.
  - **Plug-in Hybrid Electric Vehicle (PHEV):** A vehicle that has both a battery and an internal combustion engine and runs on both electricity and combustible fuel.
- **Electric Vehicle Supply Equipment (EVSE):** Devices used to supply EVs with electricity, more commonly known as “EV chargers”. Residential EVSE devices generally fall into two categories, Level 1 and Level 2.
  - **Level 1 (L1) Charger:** The lowest speed charger. An L1 Charger plugs into an average 3-prong 120V plug and is provided standard with most EVs. These plugs charge an EV very slowly, and the time required varies depending on the size of the battery. **At this time, L1 chargers are not eligible to participate in the OptimizEV program.**
  - **Level 2 (L2) Charger:** Generally, the most powerful charger available in residential settings. L2 Chargers plug into a 240V outlet or are hardwired directly and usually require an electrician to install a new outlet where you charge your EV. L2 chargers are usually purchased separately from your EV, though a small number of EVs do include these chargers with the purchase of an EV. L2 Chargers are available in several different power ratings and can fully charge an EV in 3 to 7 hours, depending on battery size and power level.
    - **Networked L2 or “Smart Charger”:** These chargers connect to the internet via Wi-Fi or cellular connection and can be controlled, generally, through a mobile app.
    - **Non-Networked L2:** These chargers don’t connect to the internet but do charge a vehicle as quickly as a networked L2.
- **Electricity Rate:** The cost of electricity measured in kilowatt-hours (kWh). Electricity rates for this program are structured into Standard Rates and Time-of-Use Rates.
  - **Standard Rate:** A pricing structure that charges a fixed rate per unit of electricity consumed, regardless of the time of day.
  - **Time-of-Use (TOU) Rate:** A pricing structure that charges different rates for electricity consumption based on the time of day. Electricity rates are typically highest during on-peak hours when demand for electricity is high, and lowest during off-peak hours when demand is low. For this program, NYSEG’s off-peak hours are 11:30 p.m. - 7 a.m. EST; 12:30 a.m. - 8 a.m. EDT.
- **Participant:** A residential NYSEG customer who owns or leases a BEV or PHEV with an L2 home charger, uses the mobile app or web portal to enroll an eligible EV or EV charger, and commits to participating in OptimizEV for a minimum of 12 months.





- **Smart Charging:** Also known as “managed charging”, Smart Charging refers to actions taken by NYSEG, in coordination with the Participant, to start, stop or slow down the Participant’s EV charging, to help balance the electrical grid. Smart Charging allows NYSEG to efficiently integrate the growing, new demand from EVs on their electrical grids, and to use the flexibility of EVs to reduce energy costs.
- **Telematics:** The capability of an EV to wirelessly communicate with NYSEG. This communication allows important vehicle and charging data to be shared with NYSEG and can be used to enable managed charging control signals as needed to balance the grid.

## 3. Program Overview

**OptimizEV is designed to reward you for consistently charging your EV during off-peak times.** Charging off-peak over time reduces strain on the grid, lowers electricity rates, and promotes the integration of renewable energy sources.

OptimizEV offers two tiers of participation, so you can select the option that best suits your home EV charging routine.

**Participating in OptimizEV is easy.** Schedule customized off-peak charging sessions and, in some cases, allow us to actively manage the amount of electricity your EV receives during those sessions for maximum benefit to the grid. Simply stick to your scheduled off-peak charging sessions to meet your tier’s monthly goals and earn incentives.

**You always retain complete control over your EV charging,** and can opt out of your smart charging session at any time. However, charging on-peak too much may make you ineligible to earn that month’s incentives.

### Baseline Tier

In the Baseline Tier, you will receive a one-time enrollment incentive of \$25 for activating an eligible L2 charger or EV telematics in our mobile app or web portal and agreeing to participate in the program tier for a minimum of one year.

From there, you’ll set and stick to a charging schedule that shifts your home EV charging to off-peak time periods (11:30 p.m. - 7 a.m. EST; 12:30 a.m. - 8 a.m. EDT) as much as possible. As a Baseline Tier participant, **you’ll earn incentives each month 80% or more of your total home EV charging is off-peak.**

After reaching the 80% benchmark, any additional off-peak charging that takes place increases your monthly incentives. The Baseline Tier is flexible, allowing Participants to maintain control over their own EV charging while still earning monthly incentives.

Participants who do not achieve the 80% threshold in any given month do not earn an incentive for that month but do not lose their ability to earn incentives in subsequent months of the year.







### Advanced Tier

In the Advanced Tier, you'll receive a one-time enrollment incentive of \$150 for activating an eligible L2 Charger or EV Telematics in our mobile app or web portal and agreeing to participate in the program for a minimum of one year.

**By participating in the Advanced Tier, you agree to allow us to actively manage the amount of electricity your EV receives during your scheduled smart charging sessions for maximum benefit to the grid.**

To make sure your EV is charged and ready when you need it, you'll use the mobile app or web portal to let us know how much charge you need by setting a "Maximum Charge Limit" and when you need it by setting a "Ready by Time". We'll then use those requirements to smart charge your EV during off-peak times as much as possible.

To receive monthly incentives, Participants must not override their home EV smart charging session resulting in an on-peak charging event greater than 15 minutes, more than 3 times per month. Participants are not limited to the number of times they may opt out of their smart charging sessions, and do not risk meeting their monthly goal, so long as on-peak charging does not occur.



Like Baseline Tier Participants, **your monthly incentive amount increases with the amount of off-peak smart charging you do.** While the Advanced Tier requires you to share some control of your EV charging, it ensures that you earn the maximum incentive amount possible.

Advanced Tier Participants who are not eligible to receive an incentive for a given month do not lose their ability to earn incentives in other months of the year.



## Incentives

As discussed on page 3, Baseline Tier Participants earn a one-time enrollment incentive of \$25, and Advance Tier Participants earn a one-time incentive of \$150. These incentives are distributed within 30 days of enrollment via a preferred payment method you select in the mobile app or web portal.

When you meet your tier's monthly thresholds **your incentive will be based on your home EV off-peak charging accumulated kWh consumption for that month multiplied by the cost difference between the Standard and TOU Rates for the same month.** Incentives will vary based on kWh rates and consumption amounts, but an example calculation is illustrated below.



Let's assume you charged your EV at home off-peak 90% of the time, resulting in a total amount of **225 kWh**. Let's also assume the difference between Standard and TOU Rates that month was **\$0.032**. You would **receive \$0.032 for each of your 225kWh charged**, earning you a monthly incentive of **\$7.20**.

**225kWh\***

Home EV Off-Peak Charging

x

**\$0.085\***

Standard Rate

—

**\$0.053\***

TOU Rate

=

**\$0.032\***


=

**\$7.20\***

Monthly Incentive

\* Example only. Actual monthly incentives will vary based on electricity rates and kWh consumption amounts.

Accumulated monthly incentives are paid out quarterly via a preferred payment method you select in the mobile app or web portal.



**By participating, you'll earn upfront and ongoing incentives while doing your part to reduce your environmental footprint.**



## 4. Eligibility

OptimizEV is offered to residential single-family NYSEG customers who own or lease a BEV or PHEV with an L2 Home Charger. Participants must enroll an eligible EV or EV charger ([see the Qualified Products List on the OptimizEV website](#)) and commit to participating in the program for a minimum of 12 months.



### Eligible Rates

NYSEG offers an alternate EV rate structure that applies a TOU Rate to a customers' entire household, commonly referred to as the EV TOU Rate. This rate is Service Classification No. 8 – Residential Service – Day/Night Rate Special Provision Plug-in Electric Vehicle (SC-8 PEV). Customers enrolled in the EV TOU Rate are not eligible to participate in OptimizEV. If you are unsure of your specific rate, please check a recent NYSEG bill or contact customer service at 800.572.1111.

### Data Collection

As part of OptimizEV, we need to collect information on your charging behavior, including your charging history and how much energy you use during charging sessions. We may share this information with third parties for the purposes of evaluating the program. All EV charging data will be aggregated, anonymized, or otherwise encrypted if/when disclosed publicly.







## Compatible Equipment

To participate in OptimizEV, we need to be able to connect to either your EV or EV charger (L2 EVSE). In the Advanced Tier, we need to be able to actively manage your EV charging, which requires a higher level of integration. Please refer to the [Qualifying Products List](#) on the [OptimizEV website](#) to make sure we have the capability of connecting to your EV or EV charger and what level of integration is possible.

## EV Ownership and EV Charger Information

If you haven't purchased an EV yet and are looking for more information, check out our [Choose EV website](#) to [learn more about the different types of EVs, the benefits of owning an EV, and much more](#). If you're looking to purchase an eligible L2 EVSE for your home, consider the models provided through our [web store](#). For EVSE installation options, view the [Joint Utilities of NY Contractor List](#).

## Terms and Conditions

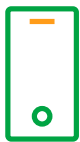
For full program eligibility requirements, please view the [Terms and Conditions](#) on the [OptimizEV website](#). You'll be required to view and accept these as part of the enrollment process.



# 5. How to Participate in OptimizEV

[So how does OptimizEV work?](#) You'll enroll, participate and receive updates and insightful feedback via our free, easy-to-use mobile app or web portal, hosted by our technology partner [ev.energy](#).

## Enrollment and Setup



### 1. Download the Free Mobile App or Access the Web Portal

You can access the [web portal](#) by visiting the [OptimizEV website](#). The website also contains links to download the free [ev.energy mobile app](#) from the [Apple App Store](#) or [Google Play Store](#).

### 2. Create Account

When you open the mobile app or enter the web portal for the first time, you'll be prompted to create an account by entering your [full name, email address and an account password](#).



### 3. Set Your Charger Location and Home Address

You'll next [input your home address/charger location](#). It's important for us to know when you're charging at home so we can accurately reward you for your smart charging.

## 4. Select and Connect Your Equipment

You'll next **select and connect your EV and EV charger**. In order to complete the connection process, you may be required to enter your EV or EV charger-specific login credentials or other equipment information, so be sure to have that handy. This is also a good time to review the Qualifying Products List on the [OptimizEV website](#) to make sure we have the capability of connecting to your EV or EV charger and what tier level (Baseline or Advanced) of integration is possible.



## 5. Confirm Your NYSEG Account and Rate

The next step will be to select NYSEG as your utility and validate your NYSEG account using your account number.

[ev.energy](#) will also ask you which electricity rate you're enrolled in so they can best estimate how much money you're spending when you charge your EV, and potential cost-savings for charging during off-peak times.

As a reminder, **customers enrolled in the EV TOU Rate are not eligible to participate in OptimizEV**. If you are unsure of your specific rate, please check a recent NYSEG bill or contact customer service at 800.572.1111.

## 6. Choose Your Participation Tier

Finally, you'll **select which tier (Baseline or Advanced) you'd like to participate in**. A detailed description of both tiers is included above in the description of both tiers is included in the Program Overview section on page 3.

## Optimize Your EV Charging and Earn Rewards



### 1. Schedule Off-Peak Charging Sessions

Once enrolled, you'll need to schedule off-peak charging sessions to meet your tier's monthly thresholds and earn ongoing incentives.

**In the Baseline Tier**, you can manually manage your off-peak charging, use your EV-specific app to set an off-peak charging schedule, or click on the "Smart Charge" icon in the ev.energy mobile app or web portal to set a customized off-peak charging schedule.

**In the Advanced Tier**, navigate to the smart charging screen by clicking the "Smart Charge" icon in the ev.energy mobile app or web portal. From there, simply let us know how much charge you need by setting a "Maximum Charge Limit" and when you need it by setting a "Ready by Time". We'll then use those requirements to smart charge your EV during off-peak times as much as possible.

**Want to make sure you're earning the maximum incentive amount possible?** Toggle the "Only charge off-peak" switch under "Smart Settings". Keep in mind that with this feature on, your maximum charge limit and ready by time requirements may not be met.

We understand that sometimes you can't avoid charging during on-peak time periods, which is why, if you're using the mobile app or web portal, we've made it easy to **opt out of your charging session at any time by clicking the "Boost" button** on the mobile app

or web portal dashboard. Keep in mind that opting out may make you ineligible to earn any ongoing incentives that month but does not affect your ability to earn in incentives in future months.

## 2. Track Your EV Charging History

The mobile app and web portal dashboards track and display all of your EV charging history in chronological order, listing what type of charging was done (fast or smart charging), where it was done (home or away), and how much energy was used (kWhs) for each charge.

The “Statistics” page uses the electricity rate you selected during setup to estimate your **energy usage and cost of charging your EV over time**. Depending on the electricity rate you’re on, the page may also display costs savings from charging your EV off-peak. Please note that the charging costs and cost savings listed on the “Statistics” page are not related to monthly incentives earned through OptimizEV. For more details on how monthly incentives are calculated, view the Incentives section on page 5.



## 3. Watch Your Rewards Add Up

Under the “Rewards” tab, you can **track your progress towards reaching your monthly incentives**. For the Baseline Tier, this means monitoring your at-home charging off-peak percentages to make sure they’re above the 80% threshold. For the Advanced Tier, this means tracking the number of times you’ve “opted out” of your smart charging sessions, resulting in on-peak charging. As a reminder, you’re eligible to earn incentives if this occurs 3 times or less per month.

The “Rewards” tab is also where you can **track your at-home charging kWh amounts and watch your monthly earnings add up**. This is also where you’ll link your PayPal or Venmo account to receive incentive payouts.



## 4. Get Customized Reports and Insightful Feedback

We’ll occasionally send you notifications through the mobile app or web portal to remind you of important participation requirements and other updates.

You’ll also receive monthly emailed reports on your charging activity. We’ll let you know whether you reached your monthly tier goal, and if so, tell you how much money you earned. Either way, **we’ll analyze your EV charging history** and will **provide valuable insights** into your charging habits to help optimize your charging routine and maximize your incentives.



## 6. Program Support

Our team is dedicated to providing you with the support and resources you need to successfully participate in OptimizEV.



### Disputes or Problems

We strive to provide you with a transparent program that fairly awards you for the load shifting potential you provide. If you disagree with your reported charging or incentive amounts, we encourage you to promptly reach out via email to our support staff at [HomeEV@nyseg.com](mailto:HomeEV@nyseg.com).

Depending on the specific nature of the dispute, you may be required to provide documentation of your charging behavior over the disputed time period. Program support staff will compare your evidence against backend charging data and come to a prompt resolution.



### Unenrolling

When enrolling in OptimizEV, you agree to participate in the program for a period of one year. After one year, you may unenroll without penalty at any time by submitting a request to [HomeEV@nyseg.com](mailto:HomeEV@nyseg.com).

If you fail to participate in OptimizEV for 6 consecutive months or unenroll from the program prior to 12 months, you may be required to pay back a prorated portion of the upfront enrollment incentive you received.

If you are moving or your circumstances change and you are no longer able to participate in OptimizEV, please contact [HomeEV@nyseg.com](mailto:HomeEV@nyseg.com) to discuss your options.



### General Questions and Program Support

We can help you understand how Smart Charging works, how to optimize your home EV charging, and how to maximize the benefits of the program. Whether you are a new or experienced EV owner, **we are here to assist you every step of the way.**

Don't hesitate to contact us if you have any questions or need support, contact [HomeEV@nyseg.com](mailto:HomeEV@nyseg.com).



### Mobile App and Web Portal Questions and Support

If you run have questions regarding the mobile app or web portal, please send an email to our technology partner [ev.energy](mailto:ev.energy) for assistance at [NYSEG@ev.energy](mailto:NYSEG@ev.energy).

**Thank you for your interest in OptimizEV! We're excited to work with you to power up your home EV charging routine.**